Version 5.31 Release Notes

Build 4 compiled on 18th January 2019

Introduction

Welcome to Accura Version 5.31

Version 5.31 is the latest release for the Accura MIS and the first major build since version 5.21 and features a multitude of new features and fixes to the MIS and its related applications.

All clients with a current support contract for Accura (and Accura Online if purchased) are entitled to receive and install all software releases as part of their support contract benefits. If you have not already done so, please sign up for an account on our website to access protected software downloads, user manuals and other content. Accura Online upgrades are distributed automatically when released by Accura support.

If you have any questions or queries about the new features or any other Accura related matter, please contact your Accura Support team by emailing support@accuramis.com.

About This Document

This document details all **minor features, changes and fixes** between the previous public release 5.21 Build 10 and the public release of 5.31.

If you are an end user, please refer to the **New Features** document which summarises the major new features likely to be used by end users. This can be found in the Accura help menu under **What's new**. These technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel.

Previous versions of release notes can be found in the Online Resource Area which can be accessed from the Accura Help Menu.

In the text in this document:

- **FEATURE** refers to a new feature that was not available in the last public release.
- **CHANGE** refers to a change in software behaviour from the previous public release.
- **FIX** refers to a bug present in the previous public release that has been fixed in the latest release.

Contents

Changes in 5.31 Build 4 (18th January 2019)

Estimating

FEATURE: When using the request for quote feature (RFQ), you now have the ability to pre-furnish a new RFQ with details from a previous quote or order in addition to the existing ability to use a quote template. Please see the new features document for more details.

FIX: Copied attachments were being incorrectly named when a quote was revised.

Order Processing

FEATURE: Web Id search feature added to the options tab in view orders.

CHANGE: Order point office locations now perform sync on order copy to update any changes (if any have been made) in the office.
CHANGE: ORDP: Email and ORDP:Tel were not being used in office creation when importing order points, previously CLI:Email and CLI:Tel would be used.

Purchase Ordering

FEATURE: A required at time field has been added to purchase orders. The text field HDR:RequiredAt field can be added to purchase order layouts to display this value.

Deliveries

FIX: The HDR:Description field was not being populated for delivery notes.

Invoicing

FIX: Selecting a job into a manual invoice item wasn't refreshing all the fields in the window.

CRM

FIX: In Prospect Activity Profile, you would need to click on the Client name before records would display for a selected contact.
FIX: Setting a new task/appointment in either the to do list, activity profile or directly into the CRM calendar would prompt the email and/or SMS notification twice.

Layouts

FIX: GLO:Date and LOC:Numbering fields on parcel label layouts were broken.

Accura Online

CHANGE: Proof delete webtasks now have a low priority to prevent them from clogging up the website synchronisation.

FIX: Pricelists were not working correctly if there were multiple owners of the product. The upgrade utility accupg will trigger a sync for all products to correct this.
FIX: When processing an order through the web console for a product which was stock controlled where stock = 0 or for a product which was not stock controlled, a service order could be created with an incorrect outwork/labour delivery rate.
FIX: Client force tax code would not be applied to web service orders where product re order method = WO, linked quote template tax code would be used in all instances. Now if client tax code is populated, it will be used unless the product tax code is populated. If Client tax code is forced, this will take precedence.

Changes in 5.31 Build 3 (21st December 2018)

Client & Supplier

FIX: User still had the ability to change the tax code in an order using a client with "force tax code" set in the accounts section.
FIX: Copied order with updated client would retain tax code from order, rather than use the tax code set in the client selected. This would be the case whether the client tax code was set to "force tax code" or not.
FIX: Office name search was broken, can now sort by name and use the text locator key feature to locate name.

Order Processing

FEATURE: Reset/Clear locator value button has been added to various windows in the software.

FIX: Print icon remained visible after completing output to Email/PDF options in Purchase Order/Purchase Invoice/Proof/Delivery Note /Sales Invoice.

Accura Online

CHANGE: Following on from previous web server space and load saving solutions, all Accura Online clients and accounts that have never logged in and have not activated their accounts within 90 days from receiving activation emails will have their data removed from the web server and marked as non-web-enabled in Accura. This feature is required to reduce website disk space usage and improve the overall reliability of the web server for all customers

Changes in Accura Online 5.33 (20th December 2018)

eDocBuilder

CHANGE: The red icon to remind users to edit unfinished eDocBuilder artwork now appears in the checkout in addition to the shopping basket
CHANGE: Previewing variable data eDocBuilder templates was limited to 5 rows. Now you can preview 100 rows. This change was provided in the recent eDocBuilder update

Accounts

CHANGE: There is a new action in the Settings Admin area called 'Clean-up accounts'. This fixes some data bugs in the accounts table and is required to support the inactive account and client removal feature in Accura 5.31 Build 3
CHANGE: Updated email address validation in sign-ups and account details to support new top-level domain names such as .media

FIX: Resolved issues where invalid account details could be sent to Accura after failing field validation in My Account

Quotes & Orders

CHANGE: Quote letter and Order acknowledgment PDF links are now hidden if the associated PDF files are missing

FIX: Quotes with 'Submitted' status were incorrectly labelled as 'Confirmed' in the quote form
FIX: Quote and order requests could remain visible on the website after they were processed in Web Console if there was a data sync error
FIX: Copied order requests with expired pricing linked to non-calculable quotes could trigger erroneous quantity validation
FIX: It was possible to save weight-based delivery options without thereafter rates. This could crash the website when using the delivery options in orders

Proofs

CHANGE: Proof image downloads are now hidden if the associated proof files are missing

FIX: Proof customer notes and response buttons were enabled on all statuses of proofs. They should only be available on 'pending' proofs
FIX: Proof lists displayed broken thumbnail images for proofs that were not image or PDF based, e.g. ZIP

Technical

CHANGE: Web browser cookie expiry time has been reduced from 1 year to 7 days. Cookies will be cleared automatically the first time each account logs in successfully after this update. These changes prevent cookie data building up over time, eventually displaying a 'Bad Request' error which prevents Accura Online from running. Any end-users who are already getting the 'Bad Request' error will need to manually clear their browser cookies to resolve the error. The problem will not occur again after this
CHANGE: Optimised processing of thumbnail images for quotes, orders, proofs, templates and customer artwork to conserve disk space and improve performance
CHANGE: Minor technical and user interface improvements

Changes in 5.31 Build 2 (10th December 2018)

Client and Supplier

CHANGE: Client type radio buttons have been moved from the profiling tab into the extra tab of a client as these would not be accessible if access to CRM had been revoked in user credentials or the CRM module was not installed.

Estimating

FIX: In certain scenarios parallel folded sections within a quote could be reset upon re-entering the section
FIX: Tax code validation would be incorrectly looking at tax code rather than tax rate when adding additional items to workings so tax code substitution could potentially occur.
FIX: Optional extras that were tagged to be included in the quoted price on converting to an order where the quote price was specifically targeted would not correctly update the target price to include the tagged optional extra.

Order Processing

FIX: The view quote icon from within view orders was not illuminated therefore not working
FIX: Order image field was not working on job sheet layout in the header band.

Delivery Notes

FEATURE: "Send to" function now added to the Delivery Schedule window
FEATURE: Can now batch date schedule multi drop order points from the order > delivery > multi drop > manage window by month/week/fortnight etc and re-arrange them within the window prior to despatch.

CHANGE: Removal of the ability to deliver a works order from a stock-controlled product. Attempting to raise a delivery note (rather than correctly transferring to stock) for a works order could create tagging issues elsewhere in the software.

FIX: Update order point window was not listing a negative balance quantity when delivery quantity exceeded order quantity.
FIX: Delivery codes were not being recorded as job costing entries or extras on invoices when using the delivery schedule window or the multi drop wizard with either/both options tagged
FIX: Delivery note browse was inaccessible in RDC if stock control module not enabled on the system.

Sales Invoicing

FEATURE: Sequential ordering of invoice line items now available for summary and itemised invoices in addition to nominal invoices.

FIX: Invoicing/Delivering multiple orders for the same client when using the setting within either client or view orders window to group multiple order on 1 invoice would cause the program to hang.

Job Costing

FIX: Entering a timesheet through job costing would try to force a click charge entry regardless of whether the order had click charge order item links.

CRM

FEATURE: Can now view and amend proposals in CRM in addition to the creation feature added in 530 Build 1

FIX: Tasks now have bi directional attributes when used in CRM and the G Suite calendar

Accura Online

CHANGE: Quotes and orders no longer sync their images to the website. Quote and order images have not appeared on the website for several versions.
CHANGE: Proof note PDF files are no longer synced to the website. They have not appeared on the website for several versions.
CHANGE: Incoming website data is now checked every 3 seconds instead of 1 second to reduce the load on the Accura Online web server. This change could increase the time it takes to do a website price calculation by up to 2 seconds.
CHANGE: The list of website accounts displayed in the Users area on Web Console is now refreshed every 10 minutes instead of every minute to reduce the load on the Accura Online web server. This change means the Users area will be less accurate when displaying currently logged in users.
CHANGE: ACCUPG will delete proofs from the website where the related order was invoiced over 90 days ago. It will also delete proofs from the website that are more than 1 year old regardless of their status or order condition. This change is to reduce web server load and disk space usage. Accura will also delete proofs if they are edited and re-saved if they meet these conditions.

FIX: Web notify setting was being taken from web console on processing a new sign up for an existing customer and updating the client setting.
FIX: Making an adjustment to a product belonging to a price list where rate = discount/adjustment would cause webmon to hang.

Changes in 5.31 Build 1 (22nd November 2018)

Client and Supplier

FIX: Office primary contact field was not updated if the contact's name was changed.

Email, Fax and SMS

FEATURE: It is now possible to be able to add direct fields into an email, fax or SMS template. The syntax required for this is {fieldname}for example {CON:FirstName}. They must contain the table's prefix followed by the exact field name. In the example, CON denotes the contact table. The record does have to be in-memory at the time of the data merge; you couldn't use {SUP:Name} in a sales invoice email template for example.

Estimating

CHANGE: Additional breakpoints have been added into commissions along with a graph for a visual representation similar to that already available in mark ups, making an already versatile feature much more flexible.
CHANGE: Substrate wastage information is now available on the running sheet through the imposition window as well as the Materials step within a quote section.

Order Processing

FIX: Creating an order from a quote or ordering from the template library and choosing the option to select a custom quantity to re quote would cause the program to crash.
FIX: User tagging was broken in the commission report so other users could be seen on the report.
FIX: Could not re-order order items in a quick order like what is possible in a normal order as the sequencing controls were missing.

Proofs

FEATURE: It is now possible to populate a proof by typing or selecting the job number. Previously it was necessary to browse for the client before selecting a job number.

Delivery Notes

FEATURE: Order point delivery status indicators now follow the activity of the order point. Unfulfilled = Green, Part = Yellow, Full = Red, previously would follow status of order.
FEATURE: Delivery schedule window added, enabling users to filter order points by due date.

CHANGE: Multi drop delivery window and delivery schedule window order points will now show their corresponding order point balance qty rather than the order balance quantity.
CHANGE: Delivery notification requirement optional defaults have now been added at Client and Contact-level.

FIX: Contact would be removed on delivery note if office was updated where both offices had NO linked contacts and contact had NO office link. Original contact with no office links should have remained.
FIX: Line items on a delivery note would lose sequence as soon as the scroll bar became visible, this would apply to delivery notes, invoices, purchase orders and purchase invoices.

Stock Control

FIX: Writing off a works order through Stock > Transfer or manually changing the status to "Dead" would not post a stock activity and accordingly adjust the on-order figure.
FIX: Using the order close off facility through the stock menu on already invoiced orders would change the invoiced date to the date the order was closed off and the invoice number to "1".
FIX: Using the order close off facility through the stock menu on already invoiced orders would change the invoiced date to the date the order was closed off and the invoice number to "1".
FIX: Receiving multiple stock items in one session would show an incorrect balance. This was purely a cosmetic issue.
FIX: It was possible to over issue against a stock balance record when issuing from Stock Issues and Returns window.

Job Costing

FIX: Under issuing material for an order from the RDC material wizard would no log the material cost if the user answered No to adding another issue.

CRM

FEATURE: It is now possible to create a quote proposal directly from Activity Profile by tagging the required records and clicking the proposal button in the toolbar or the context menu. The user must be granted the EST:General permission in order to access proposals.
FEATURE: Tasks are now available to be shown in the CRM calendar with defaults set in the activity types and filter options added into the calendar.
These tasks can now also be synced to the Google calendar along with appointments.

FIX: It had previously been possible to add a Client/Prospect opportunity without first adding a description, meaning a blank opportunity record could be created. The description field is now mandatory.

Accura Online

FEATURE: Added function to right click in the web console > attachments window to copy URL and also set artwork flag prior to processing without opening order.

CHANGE: For greater product pricing consistency when a product re order method=quote, the x5 sell rates are derived directly from the linked quote template.

FIX: Hot folder in web console was not depositing artwork files in specified location when using the .NET downloader.
FIX: Web console local and outwork default delivery options were using the calculation method set in their relative tables rather than using their respective rates specified online.

Changes in 5.30 Build 7 (17th October 2018)

Email, SMS and Fax

FIX: URL data type merge tokens were prefixing all URLs with 'http://'. If the full URL was entered by the user then this would end up duplicating the protocol. Now these type of merge tokens will intelligently resolve based on whether http, https or ftp and act appropriately.

Order Processing

CHANGE: Adding a new contact name to a delivery note will now prompt to save as a new contact record.

FIX: Tab text was not being correctly updated when copying an order and amending the quote text.
FIX: Raising a new order from scratch would not pull in the client preferred delivery method.

Stock Control

CHANGE: Stock batch reports will now use the item description instead of the stock activity description.

FIX: Transferring an order to a product would use the job quantity as the cost per for the stock transaction meaning that the historical average would be skewed. If the system Stock Control update cost price default was set to Average or Last, this value would also be skewed for the same reason. Now when transferring an order to a product, the cost will be derived using the product's cost per value.
FIX: Writing off a PO item in stock receipts would add the write-off amount to the Balance figure. This was purely cosmetic and the stock transaction would process the correct values.
FIX: The stock valuation report "Ignore if zero on-hand" filter was not working.

Job Costing

CHANGE: The Price column in the variance table on the Cost Analysis report would list outwork against its parent department and against the outwork row. The outwork row total has now been removed to avoid confusion.

CRM

CHANGE: Network refresh has been disabled on the Activity Profile browse as systems with many users could find a performance hit with this browse during busy periods.

FIX: Activity profile Quote-type filter on the RFQs/Quotes tab was not working and would list all types of quote regardless of the setting.
FIX: RFQs/Quotes were not filtering by selected contact in the Activity RFQs/Quotes tab

RDC

FEATURE: The Unscheduled tab now features a query wizard to enable jobs to be filtered by particular attributes such as press, paper type or ink colours so they can be started in sequence.

Technical

FIX: An internal template for debugging could randomly trigger procedure information. This has now been disabled.

Changes in 5.30 Build 6 (19th September 2018)

Estimating

FEATURE: When a material is made inactive, Accura will cross-reference it with the quote template library. If it is found to be in one or more library quotes, Accura will warn the user and display the quote reference and title. In addition, any web enable quote templates will have their web-enabled flags reset so they cannot be used in Accura Online until the situation has been resolved.

FIX: The Display linked job-types only filter would be greyed out when raising a manual quote from an RFQ meaning if the filter = true, a full list of job types would not be displayed.

Order Processing

CHANGE: Order delivery details now display the delivery contact's email address and telephone number.
CHANGE: Delivery contact email and telephone fields are now available for all order-based layouts in Report Designer.

FIX: Changing the office in an order was not pulling through the primary office contact.

Purchase Ordering

CHANGE: The ending date range in View Purchase Orders will be set to Today + 1 year so post-dated POs will be in view.
CHANGE: Writing off a purchase order receipt no longer allows editing of the quantity. If the PO item is to be part written off, a stock receipt for the required amount should be processed first, then the balance can be written off.

FIX: Purchase order item descriptions were set to read-only mode on insert and edit.

Changes in 5.30 Build 5 (14th September 2018)

Client and Supplier

FEATURE: The Send-to command has been added to the right click menu in many contact-based browses.
FEATURE: The change account status batch update window in client browse now includes the option to apply a commission to all/selected clients en-masse, taking precedence over a commission code set in the user maintenance or job type.
"Do not apply commission" flag has also been added to the user maintenance for added flexibility, allowing client set commissions to be applied to specific users where necessary.

FIX: Copying a client was not clearing the values for delivery and invoicing offices.

Estimating

FEATURE: A Priority field has been added to the quote window. This has been added to allow users to identify quotes that need to be acted on and followed up with a degree of urgency.
FEATURE: The View Quote Follow-ups window now has a Priority filter to support quote priorities.
FEATURE: If a quote's Expected order date <= 5 days, quote priority will automatically be set to High.
FEATURE: If a quote's Expected order date <= 5 days, Accura will override the default follow-up days value and calculate a follow-up days value approximately half the time in days between quote creation an order expected date.

FIX: Quotes were not pulling through the system default tax code if the client and/or job-type had no presiding tax code.
FIX: It was not possible to re-order quote sections.
FIX: Keyboard location was not working in View Labour unless the browse was column sorted manually.

Order Processing

FIX: The quote contact could be lost when converting the quote to an order.
FIX: Change order items would not use a departmental nominal if the order of precedence dictated it should.
FIX: The client tax code would be used in an order when the quote had a different tax code.
FIX: Summary invoice items created for orders with no quoted value did not have the Export flag set to true.

Purchase Ordering

FIX: Manually creating purchase order items for overseas suppliers would use the order item's base currency rate instead of the supplier's currency purchase rate.

CHANGE: The purchase order item Description fields has been increased in height slightly.

Job Costing

FEATURE: Timesheets now accept click charge values for face and reverse should they be different.

Stock Control

FEATURE: "Default location" has now been added to complement "default warehouse" in the default location tab within Stock > Transfers window.

FIX: Opening and confirming a new/existing price rate within a price list would erroneously call the update job type window.
FIX: Transferring to stock a product replenishment would fail to register warehouse and location if stock <unassigned>. Now processing an SR STA:Type will update the MTL:Warehouse + MTL:Location with the STA record values.
FIX: The Price list maintenance window had resizing issues.
FIX: Rate value column currency symbol was hard coded to £ in Price list maintenance.
FIX: Stock balance records could be listed multiple times, especially prevalent in <untracked> materials.
FIX: Opening two instances of the stock receipts window at once would crash Accura.

CRM

CHANGE: Quote and Quote Follow-up activities will now be created with the same priority as the parent quote.

RDC

FEATURE: RDC operators can now separately log different click charges for the face and reverse of a print operation.

Import/Export

FEATURE: It was previous not possible to update a material re-order value to 0 through a CSV import as it would be impossible to tell whether the value was not meant to be updated or really should be 0. Now if the MTL:Reorder value is -1, Accura will make the actual value 0.

Accura Online

FEATURE: It is now possible to specify when Accura Online will send order confirmation emails. This is a client-based setting found on the Web tab and can be set None, Both, Offline orders only and Online orders only

CHANGE: Accountid validation in contact.tps to maintain contact/office and office/product relationships for web orders would correctly maintain relationships for web store orders only. This behaviour has now been applied to web service orders also to encompass other areas where contact/office relationship applies including proofing, multi drop delivery, raising a works order and invoicing.
CHANGE: A stock-controlled, reorder by works order product that already had available stock would produce a service order when "skip product order single basket item works-order items" was turned on. Now in this scenario, if a product has enough available stock, it will generate a product order instead of a service order.

FIX: The Mark-up profile to use field in Web Console - Defaults would only accept a 4-character mark-up code.
FIX: Variable data eDoc attachments were being downloaded as PDF files when they should have been downloaded as ZIP files.
FIX: Orders raised from the Accura quote template library would not send a web notification.

Changes in Accura Online 5.32 (13th September 2018)

Orders

FIX: Order delivery method drop list was not working on print order requests when no delivery options existed in the Admin area

Store

FIX: Product filter values containing spaces caused the website to hang when changing pages
FIX: Products with client pricing did not display a 'thereafter' rate when their pricing unit was greater than 1
FIX: Checkout was allowing changes of product item quantity and could trigger crashes
FIX: The quote terms and conditions text appeared in the checkout instead of the store terms and conditions text

Admin Area

FIX: Re-ordering of slides in client branding did not work

Changes in 5.30 Build 4 (8th August 2018)

Estimating

FIX: If a section page format was set to Custom, it would not be possible to select colours to reverse.

Order Processing

FEATURE: In addition to the Mark-up field in an order we have now added a profit % column which will be visible in both product and service orders.

FIX: Custom email SMTP settings for proof synchronisation would not be maintained within proof status window on re opening.
FIX: Specification text on orders were not being overwritten correctly when batching.
FIX: Delivery contacts in Order - Delivery tab and the Delivery Note were not updating to the correct office contact when the office was changed.
FIX: Tab text fields in an order were not being correctly updated from a quote with a job type applied when forcing an update from linked quote.
FIX: Sales invoice header totals would not get updated correctly in Summary-type invoices where a line item was manually added.

Purchase Orders

FEATURE: Purchase order status text within the PO window has been updated from "Delivered" to "Received".

FIX: Saving a purchase order or purchase invoice with more than six-line items would endlessly process.

Stock Control

FEATURE: Profit % column has now been added to the price lists area enabling the user to see the profit detail of a product before applying the pricelist to a product order.

FIX: Denying access to stock journals in stock control area within user maintenance did not prevent users from using Stock journal facility in Accura. Withdrawing access to this area will now also prevent the user from the Stock/Reconcile menu.

Accura Online

FIX: A percentage discount in a price list item where there was only one price band and the thereafter had the same value would not sync the correct thereafter value if the max order quantity was set to 0.
FIX: Previously if a mismatch of office id within contact.tps was detected in the web console between a web order and Accura database then Officeid was updated to 0, making the contact available to all offices whilst preserving the contact/office relationship in Accura. In certain scenarios however, this would break office owned products in Accura. New behaviour validates on Accountid field within contact.tps maintaining contact/office and office/product relationships throughout.

Technical

FIX: The accupg utility will change merge tokens If Blank values for DEF:EmailSMTPFrom values (if present) to INI:EmailFrom during the upgrade.

Changes in Accura Online 5.31 (9th August 2018)

Admin Area

FEATURE: RGB# value selection is now included in the pop-up colour pickers used in Admin area Theme, Slides and Widgets pages. A colour can be selected from the logo or slide image, then the RGB values can be adjusted before saving
FEATURE: Added RGB HEX value validation into Admin area colour pickers

Quotes & Orders

FEATURE: Hyper-links to quotes and orders have been added to the quote, order and proof lists and detail pages

CHANGE: Quote lists now display job numbers instead of quote required dates
CHANGE: The 'Blank Quote' and 'Blank Order' menu options have been renamed to 'Request a Quote' and 'Request an Order'
CHANGE: The 'Confirmed' quote status has been renamed to 'Submitted', and quote status colours have been changed to avoid confusion between 'Confirmed' and 'Ordered' quotes

FIX: Client-owned job-types (volumes) did not display in the quote and order from template lists
FIX: Decimal places in request depth and width values (e.g. when using imperial measurements) were lost when composing the Accura size text

Address Management

CHANGE: Address formats on the address pop-up forms now include both UK and international addressing terminology to avoid confusion for international users

FIX: The pop-up delivery address form was visually corrupted when viewed in IE11 browser on Windows 7-based systems when the website was displaying the Modern or Basic theme
FIX: Resolved various issues related to delivery addresses and the entry of custom delivery addresses on order requests
FIX: Empty request addresses triggered crashes and prevented request sync back to Accura

Store

CHANGE: Products with max order quantity of zero now display as 'Unlimited'. Products with zero available stock now display as 'Out of stock'
CHANGE: Shopping basket descriptions are now editable when products support live pricing but do not have eDocBuilder artwork. Previously only eDocBuilder products allowed this

FIX: Resolved issues related to the display of stock levels, lead times and negative availability values in the store
FIX: Product quantity validation messages involving pack sizes were not worded correctly
FIX: Resolved various issues related to products linked to template quotes and/or using client-specific pricing

General

FIX: An empty proof list could crash when sorted by Job Ref or Order-no
FIX: Fixed problems with special characters in custom order delivery addresses, new addresses created in the My Account area, and shopping basket item descriptions

Changes in 5.30 Build 3 (20th July 2018)

Client and Supplier

FIX: Adding the first pop-up note to a client in View Clients did not set the correct database entries to enable the note icon to display or the note to pop-up unless the client record was opened and saved.
FIX: The Tag All button was not tagging all records in the client and supplier email broadcast windows or the SMS broadcast window.
FIX: Client table-based merge tokens were not working in delivery note email templates.

Estimating

CHANGE: Working descriptions will now wrap onto two lines on the Estimate Analysis report.

FIX: Selecting a job type in a quote would overwrite the job title.
FIX: Reel-fed quotes that use cut-offs were showing the wrong number of impressions for single and double-sided quotes.
FIX: The focus on press selections would move when saving the advanced press settings window.
FIX: Press cost and time we're not being displayed in the columns of the quote Sections tab.
FIX: The Method value in the Sections tab of a quote would not accurately reflect the print method of the section.
FIX: The run percentage was not being displayed in quote section overs breakdown if it was in the overs profile running overs thereafter value.

Order Processing

FEATURE: There is now an option not to attach a PDF copy of an order acknowledgment when an order acknowledgement email is send. This option can be found on the Options tab of the print dialog.
FEATURE: A new field, LOC:ImpositionFile has been added to the Report Designer. When added to the section header of a work sheet layout, it will print the imposition image for that section.

CHANGE: It is now possible to be able to change the tax code on individual order items.
CHANGE: It is now possible to force the order tax code to be applied to all order items. Ticking the "Force tax code" flag in an order's Invoicing tab will make all the order items tax codes match that of the order on save or, if the Calculate button is used. This change has been made to aid users who invoice service orders by nominal (G/L code) and have poorly set-up systems.
CHANGE: Deleting an order will now delete certain other records to maintain referential integrity. These are - Change orders, Proofs, Delivery notes and Parcel labels. Purchase orders, stock activities and sales invoices will remain untouched.
CHANGE: The Order status report can now be sorted by customer order number.
CHANGE: Commission code and sell price fields have been added to the Order Sales Analysis window.

FIX: The order enquiry report would list orders of all statuses regardless of the status filters selected by the user.
FIX: Commission fields were not retaining the correct position when the update order window was resized.
FIX: Invoice payment status icons were missing from invoice items viewed from an order's invoicing tab.
FIX: Processed online orders could change the main order address when reopened for editing.
FIX: If an order extra was removed from an order, various extra related fields were not being updated correctly.
FIX: Tab text fields in an order were not being correctly updated from a quote with a job type applied when forcing an update from linked quote.
FIX: It was possible for a client alias browse to be called at the wrong time in a Delivery Note.

Sales Invoicing

FEATURE: Tax rate fields –are now available to add to invoice layouts.

CHANGE: When amending the quantity in a nominal (G/L code) invoice Summary line, the price difference will be proportionately shared between the Details lines. Previously only one Detail line would have taken the entire cost burden.
CLARIFICATION – Nominal (G/L code) invoice Summary line tax is calculated by the sum of the tax applied to all Detail lines. This ensures that there are no discrepancies between the tax on the Printed and Detail tabs. On the rare occasion there is a disparity, usually due to rounding issues, one of the Detail lines should be adjusted. Moreover, the tax code used in the Summary line can be misleading if there are different tax codes applied to different Detail lines and so should only be used as a guide.
In situations where there are different tax rates used in different Detail lines, or when there is rounding, Accura has to calculate a tax-rate based on the net and tax totals of the Detail lines. This could be slightly or radically different to the rate of the tax code applied to the Summary line. Users who wish to show the rate of the tax code rather than the actual tax rate should adjust their invoice layouts accordingly

CHANGE: The tax-rate and tax fields are now greyed out in nominal (G/L code) invoices to prevent user confusion when trying to adjust these values.
CHANGE: It is now not possible to add a Detail line to a nominal (G/L code) invoice. Users wishing to add extras to a nominal (G/L code) invoice should do so through the Order - Change Orders workflow. It is still possible to add a Printed line, to add a note into the invoice for example. However, adding extras in this way is NOT advised as the nominal (G/L code) breakdown may be incorrect.
CHANGE: Any change to the Printed tab summary line quantity in a nominal (G/L code) invoice will increase the quantity in the Detail lines to match and split any difference in price. Previously any difference would only be added in price would only have adjust one detail line.
CHANGE: Nominal (G/L code) invoices will now show order extras as separate line items. This is to ensure that changes to the quantity in the Printed tab summary line are split proportionately between the Detail lines. It is not possible to automatically effect a change in any order extras by adjusting the Printed tab summary as the quantity in the extra may bear no relevance to the order quantity. If a change to an order extra is required, it should be adjusted manually prior to invoicing the order.
CHANGE: Tax codes assigned to nominals (G/L codes) will now be used in the order of precedence when determining nominal (G/L code) and tax rate.

FIX: Multiple detail lines could be added for a single nominal (G/L code) and tax code combination if the first order item with that nominal (G/L code) had a different tax code.
FIX: Nominal invoicing with unit pricing could produce inconsistent pricing between the Detailed and Printing due to rounding. To prevent this, the quantity and rate for each nominal (G/L code) split will now be shown as 1.

CRM

CHANGE: CRM Ticket attachments now use the same attachment logic and functionality that is present in other areas of Accura. This now means that when a document is attached to a ticket, a copy of the original will be saved to the Attachments\Tickets folder in the global data folder. During the upgrade, the legacy attachment records that were previously part of the CRMLinks table will be converted to records in the Attachments table. The upgrade will attempt to copy any documents to the Attachments\Tickets folder but this may not be possible due to permissions, network configuration or the file may not exist in its original location anymore. In these cases, the attachment record will show the legacy path and users must relink the attachments manually if they want them to open from the ticket.

FIX: SMS broadcast was validating on the activity Subject field when creating an activity for each user was switched off.

Stock Control

FEATURE: Product images can now be displayed in price lists.
FEATURE: Material list can now be printed from the View Stock and View Product browses. These material lists will only print stock enabled raw materials or a products-only list respectively.

CHANGE: Web enabled products will now display an icon when browsing in pricelists.

Import Export

CHANGE: It is now possible to specify the base quantity of non-paper materials via CSV import. Paper material base quantities will still be automatically set based on their cost unit.

RDC

CHANGE: The RDC tab of user maintenance has be reorganised with access to the "Allow login access to RDC only" flag no longer governed by the "User is an RDC operator" flag.

FIX: The attendance report's sort order could produce inconsistent results in certain circumstances.
FIX: Selecting an attendance code into a user profile wasn't being retained.
FIX: Users set as 'RDC only' could access Accura CRM and other Accura related applications.

Miscellaneous

CHANGE: The Sales commission report dialog now only displays users that are linked to a commission code.
CHANGE: The Sales commission report dialog now display users in first name alphabetical order to bring it in line with similar browses throughout Accura.
CHANGE: Commission based fields are now available in the quote, order and job costing report wizards.

FIX: The system Defaults window was validating unnecessarily on the SMS account field. Systems that do not use SMS should have their provider setting set to None.
FIX: The Job-type column in View Job Types did not display the full job type code if it was more than 10 characters.

Accura Online

CHANGE: If online user has been granted permission by AO admin to "View billing address in requests", "Edit billing address in requests", "Edit delivery address in requests" and "Manage addresses (offices)" then the user that this profile has been applied to has the option to change the billing and/or shipping address that they require billing/delivery to be addressed regardless of contact/office relationship in Accura.

Therefore, if an AO contact has been linked to an office in Accura and selects a billing or delivery address different to their linked office in Accura then the contact will be removed from their linked office in Accura and will become a "floating contact" making them available to all offices to maintain database integrity.

Technical

FIX: The accupg utility was not setting the client shipping bill to value to Sender on upgrade.
FIX: An automated pop-up when opening Accura, such as the access rights warning or when the licence viewer is called, would crash the software.

Changes in 5.30 Build 2 (13th June 2018)

General

CHANGE: Quote, Order and Job Costing Specification search fields can now be limited to searching just the Title instead of the entire specification. This is controlled by a check box under the search field.

Estimating

FEATURE: It is now possible to link material, labour and outwork operations to labour, outwork and ink operations. **IMPORTANT** - care should be taken not to create circular references i.e. linking a material to a labour operation where the material already has its own link to the labour.

CHANGE: Report Designer TabText fields are now available in the Estimate Reports category of layouts

FIX: Minimising and restoring Accura could allow the Edit button to be available in Advanced material options for the base overs profile.

Order Processing

FIX: An invalid commission code could be added to a non-quoted copied order when the system had a value in DEF:DeliveryCode.
FIX: Various issues with delivery details on copied orders have been addressed.

Delivery Notes

FIX: Delivery notes raised from an order with an ad-hoc delivery address would validate on the delivery client code.

Purchase Orders

FIX: Phrase library drag and drop was not working to purchase order Notes and Delivery Notes fields.

Stock Control

CHANGE: The price list Description field has been made a required field.

FIX: Receiving stock materials on a non-tracked material system would generate a spurious duplicate key error.

Technical

FEATURE: Creating table links throughout the software have been consolidated to use one standard procedure.

Changes in 5.30 Build 1 (6th June 2018)

General

FEATURE: Report Designer tabtext fields will now work on order related header and item reports.

CHANGE: All reports when converted to Excel will now generate their temporary files in the user's Documents folder. This should prevent issues for users with locked down Windows profiles.
CHANGE: Default field values for material would previously only get applied to paper materials. They will now be applied to any material category. Due to this change, if a default field value only needs to be applied to paper materials, a CHOOSE statement should be used in the Expression field e.g. CHOOSE(MTL:Category = 'Paper'', 'My notes go here: ', '')
CHANGE: Both material and product colour list options have been expanded to support up to 25 characters.

Client and Supplier

FIX: The client 'Send order confirmation email' flag was not shown in the client maintenance UI. New contacts inherit this setting for their order confirmation preference.
FIX: Adding a supplier contact would attempt to send a fax if the system had faxing is enabled.

SMS and Email

FEATURE: It is now possible to change an SMS template in the Send SMS dialog.
FEATURE: Obfuscated passwords can now be revealed as plain text for easy verification.

CHANGE: Email password fields now support up to 128 characters.
CHANGE: The 'Setup - Email' menu item has been replaced with 'Setup - Communication' menu. The Settings sub-menu item allows users to select custom settings for both Email and SMS.
CHANGE: The Email send log has been change to being named 'Communication send log' and now logs SMS text messages as well as SMTP emails. Its location has been moved from the Setup - Email menu to the File menu.

FIX: SMS option was missing from the contact tree right-click menu in View Client and View Supplier.

Import Export

CHANGE: The 'Select fields to export' window for material export now has an Options tab. This is only enabled for stock systems using inventory tracking and enables the user to produce a summary export of materials rather than one that exports every stock balance record.

FIX: Updating paper prices via CSV import could fail when a stock enabled material was encountered in the import file.
FIX: Stock enabled material prices were not being updated by CSV imports when inventory tracking was not enabled.
FIX: Selecting a parent account for contact or office imports would open the browse behind the Select Fields to Assign window.

Estimating

FEATURE: Clients and job types have a new 'Do not apply commission on jobs' option which when enabled prevents automatic calculation of commission. For maximum flexibility, this can be manually overridden in quotes by estimators with the correct permission.

FEATURE: Four new base-quantities are now available in labour, material and outwork operations:

TWIDTH (width x job quantity)
TWIDTH2 (width x job quantity x 2)
TDEPTH (depth x job quantity)
TDEPTH2 (depth x job quantity x 2)

FEATURE: Quote Enquiry report can now be filtered by job types.

FIX: Forcing a material reselection in the section wizard could apply some characteristics of the first material listed in the material table to the currently selected material.
FIX: Tooling cylinders were displaying as Finishing materials.
FIX: MTL:Subcategory was not supporting the full 25 characters in the user interface that were available in the database structure.
FIX: To prevent issues with the section wizard, ink material codes have been restricted to 20 characters.
FIX: Linked labour prompt would not display for labour items linked to ink materials.

Order Processing

FEATURE: It is now possible to change the due date and time of orders from the right-click menu and selecting Status. This will work on just the highlighted record or a tagged selection and the order(s) must have a Movable value of Yes. **NOTE** - This will not change any current Scheduled events.
FEATURE: A query wizard has been added to the Order Status and Production reports.
FEATURE: Order Enquiry, Order Status and Production reports can now be filtered by job types.
FEATURE: The job sheet and work sheet print dialogs now contain an option to produce to Generate PDF version. This is a per computer setting and when switched on, PDF versions of job or work sheets will be automatically created. These PDFs can be found in the Accura Data folder in the jobsheets and worksheets folders.

CHANGE: ORD:Deposit and ORD:DepositPaid fields have been added to the order and job costing report wizards.

FIX: Orders and order items were not obeying the tax code order of inheritance rules. This was most evident when creating product quick orders but could also be seen in other scenarios.
FIX: Selecting a new client into an order was not updating the nominal and tax code values.
FIX: The View PDF and View buttons in an order's Invoicing tab were not validating on the presence of an associated invoice or invoice document.
FIX: Selecting a job type with its own nominal and tax code into an order was not respecting the order of precedence.
FIX: Copied orders where the tax rate differed from its parent quote would set the tax to be that of the quote rather than retain that of the original order.
FIX: Report Designer tabtext text fields were not working on order acknowledgment layouts.
FIX: Works orders that have their status automatically changed by status changes of their parent product order were not being marked as approved when changed to Invoiced. As a result, these works orders would remain on the Order Status report.
FIX: Numbering details could not be added to order or purchase order specification since tabs were separated from being contain in order records. Now if the default Printing tab is included in the specification and there is data contained in the number from, number to and number colour fields, these will be included in the printing specification entry

Delivery Notes

FEATURE: It is now possible to select a Supplier as the delivery note address. This selected in the delivery note header from the Deliver to drop-down. There is also the option for Other where one-time ad-hoc addresses can be manually entered.

Stock Control

FIX: Stock on-hand validation could be bypassed by editing a material cost entry before it was committed to the database.
FIX: Transferring non-stock code assigned order could generate an erroneous on-hand exceeded error.
FIX: Item ref was being validated when a non-assigned service order was being transferred to stock as a product.
FIX: There was no Item-ref browse in 'Transfer orders to stock' window
FIX: The Reason/description field in the Stock Journal adjustments window didn't stay relative to the top of the browse when the window was resized vertically.

Purchase Ordering

CHANGE: When receiving a tracked stock material in the stock receipts window, it is no longer necessary to enter the View Stock Balances window. The item ref, ware house and location can all be entered in the receipt line item and the stock balance record will automatically be created.

FIX: After selecting a job number into a purchase order header, the order specification would not display in any items created.
FIX: Discounts applied to purchase order items were not recalculating the currency net value.

Job Costing

FEATURE: The Profit Summary report can now be filtered by job types.

FIX: Editing a material job costing entry from Materials By Job Number would commit the transaction on save. This would mean that if the entry was subsequently deleted, the costing and stock activities would exist although the parent had been deleted. Now these changes will get reversed if the item is edited or deleted.
FIX: Adding a material entry in a costing summary where the Code field was pre-populated was not displaying that material's stock balance records.

Sales Invoicing

FEATURE: Invoice exported date, time and user fields can now be viewed on the History tab of a sales invoice.

FIX: Adding a manual item to an itemised type invoice could duplicate all the invoice items.
FIX: Invoicing a delivery note was not changing the status of the delivery note to Invoiced.
FIX: Invoice line items raised from delivery notes weren't formed correctly.
FIX: Ad-hoc invoices were not using the client's specified tax and nominal codes.

CRM

FEATURE: Activity types support reminder emails. This feature was designed to work with Appointments but can be set up on all activity types. The feature can be switched on in the Templates tab of your appointment activity type where you should also select a default email reminder template. The reminder email will then be sent out in the background at the notice period you've set.

FIX: System defined Assign-to codes were being truncated in Activity types.
FIX: Follow-on CRM activities were not including any linked campaign code.
FIX: The status field in new CRM activities would be blank.

Accura Online

FIX: Web commission rates weren't being applied to live online quote and order template calculations.
FIX: Size codes created by web monitor were being given an invalid size unit. The accupg utility will correct any incorrect size records during the upgrade.
FIX: Web-enabled quotes with an incomplete status would create erroneous web tasks.
FIX: Dead orders were generating web tasks that could never be resolved and so would remain active.
FIX: Custom delivery details in an order being processed in web console would get overwritten if the invoicing details were changed. Now the user is prompted as they would be in Accura proper.

Security

FIX: Users denied access to the SYS:File door could still edit job types when the job type browse was called from quotes, orders or the template library.

Technical

FEATURE: A new service, Alert Monitor, will be installed on the server machine. This service is responsible for posting appointment reminder SMS and emails when Accura clients are not running. One Alert Monitor service is required per database but will only be installed by default to the primary database. If other Alert Monitor services are required, Accura support should be consulted with regards to configuration.
FEATURE: The installer will now automatically install the web monitor service regardless of whether the web module is activated. On multi-company install, the web monitor service will only be installed for the primary database. If the service is required for other databases, it must be set up manually.

CHANGE: The Chilkat and Codejock code libraries no longer need to be registered in the operating system registry. They will be unregistered during the upgrade.
CHANGE: Commission related fields are now included in quote and order output XML.
CHANGE: Removing multi-company databases by running the installer will now remove any corresponding alert and web monitor services.

Changes in Accura Online 5.30 (6th June 2018)

Filtering

FEATURE: Renaming or disabling product filters will rename and/or disable the values displayed in product details in the store.

CHANGE: Size filters on quotes, orders and templates are now based on depth and width values instead of size text.
CHANGE: Colour store filter expanded to support up to 25 characters.
CHANGE: Product 'finish' expanded to support up to 25 characters.
CHANGE: Filter 'Reset' buttons are now displayed in the title of each filter instead of at the bottom of the filter entries.

FIX: Resolved various issues in website filters caused by special characters in the filter values.

Address Management

FEATURE: Account default billing address is now synced from Accura based on default invoicing office.

CHANGE: References to 'office' have been changed to 'address' throughout the website to simplify terminology.

General

CHANGE: Various minor user interface improvements.

FIX: Fixed problems with pop-up shopping basket on secondary domains when certain themes and widgets were used
FIX: Orders were displayed in the quotes area after sorting by 'required' column.
FIX: Exceptions were triggered when sorting the orders list by 'quantity' or 'price' columns.
FIX: UTF-8-character encoding at database level to resolve various display issues with special characters.
FIX: Various minor bug fixes and corrections to 'bad' legacy data that caused problems.