Version 6.00 Release Notes

Accura 6.00 Build 2 compiled on xxnd March 2020

Accura Online 6.00 compiled on 26th February 2020

Introduction

Welcome to Accura Version 6.00

Version 6 is the latest release for the Accura MIS and introduces a unified codebase shared with the in-development SQL version. Using this new coding method should have no impact on customer systems but will significantly accelerate the new back-end version.

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** in Accura and Accura Online since the last major public releases, which were Accura 5.41 Build 8 and AccuraOnline 5.35.

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 Accura 6.00 Build 2 (xxnd March 2020)

Estimating

FIX: Estimates would only print on the default layout regardless of the chosen layout.

Orders

FIX: The View Job Sheet and Work Sheet buttons were available in the View Orders right click menu when there was not a PDF to view.

Changes in Accura 6.00 Build 1 (2nd March 2020)

General

FEATURE: Deleting a non-system tab will now offer to move or destroy data contained within that tab. Previously it was not possible to do this without manually deleting all the tab's entries.

If the user chooses to Move the data, they will be presented with a drop list of existing tabs. From this, they can choose which tab will receive the contents of the to-be-deleted tab. Once confirmed, processing will begin and the data will move from the old tab and concatenated with the contents of the re-assignee tab. **CAUTION:** If the concatenated data goes over the recipient tab's character limit (1000), data from the old tab will be lost forever.

If the user opts to Destroy the tab, all data for that tab on quotes and orders will be irrevocably destroyed.

If in any doubt on how to use this feature, contact Accura Support!

FEATURE: Tax codes now have an Is-active flag. When this checkbox is unticked, the tax code will no longer appear in tax code selections throughout the software.
FEATURE: Major browses now feature a preference setting on the Options tab where the user can specify the behaviour of the browse's Client or Supplier Type drop down. Options are Specific, Any or Last. If set to Specific, the Type drop down will be set to Specific on opening the browse, if Any it will default to Any and if Last, the user's last used Type setting will be remembered.
FEATURE: Colours can now be defined for the header box, header text and button panels. The settings for this can be found in Setup > Defaults > General.
FEATURE: The Google 'Roboto' font will be installed on all PCs where a full installer is used to install or update Accura. This is to give users the option to use Roboto as their Accura font instead of the default Segoe UI font. We feel using this font gives Accura a cleaner, more modern feel.
The font will not get installed if a workstation auto-updates after an upgrade. The font will be shipped in the installer zip package however so it can be installed from there. Alternatively, Roboto can be downloaded from Google's font page here - https://fonts.google.com/specimen/Roboto.

CHANGE: Nominal (G/L Code) description field has been increased to 255 characters.

FIX: Reports in various areas of the software were not displaying their names and applied query names correctly.

Client and Supplier

FEATURE: Contact records now feature CC and BCC email fields which will populate the corresponding fields in an email raised for that contact. This feature is useful for when other contacts need to be copied in on emails.
FEATURE: New merge tokens have been added for Client and Supplier, [ClientTermsBasis] and [SupplierTermsBasis]. These will display the text of the client or supplier's terms in a verbose manner.
FEATURE: It is now possible to batch update client mark-up profiles using the Change Account Status utility which can be accessed from the right-click menu in the View Client browse.

CHANGE: The bank account number field in clients, suppliers and offices has been extended to support up to 30 characters. This change has been made to help Xero users where the Xero contact's Batch Payment bank account number is an amalgamation of bank code and bank account number. For Xero support, only numbers should be used; spaces or hyphens should be excluded.
CHANGE: The position of a client's default carrier service has been improved.

FIX: The "Show my accounts only" checkbox would be hidden when going to the Options tab then returning to the Clients or Contacts tab in Browse Client Database.
FIX: The client "Last delivery date" was not being reliably updated.
FIX: Ticking/unticking the "Show my accounts only" filter while on the Contacts tab in Browse Client Database would change the view to the Client tab.
FIX: Selecting a carrier or driver in a client office was not being saved but would retain the original setting.
FIX: Changing a contact's name would cause some legacy records to lose the contact when opened. Now if a contact's name is changed, Accura will offer to update all their linked transactions with the change of name. This process could take some time depending on the size of the database.

Estimating

FEATURE: When the Private tab in a quote has contents, the tab will display a notepad icon to alert the user to the presence of notes.
FEATURE: QTE:Locked is now available to use as a default field value. By giving this a value of 1, quotes will have the 'Locked for owner access flag' set to true.
FEATURE: RFQs can now be automatically previewed on save. On the RFQ options tab, there is a new "Always generate PDF preview" checkbox. When ticked, the RFQ pdf preview will automatically open when the RFQ is saved.
FEATURE: It is now possible to select a quote mark-up profile while on the General tab in addition to Analysis tab. This is so the client/job type profile can be easily changed before starting work on the quote sections and workings. This is particularly useful with the new component-based mark-up profile.
FEATURE: It is now possible to mass delete quote workings by tagging records and pressing the Delete button.

CHANGE: If a quote working has notes added to it, a notepad icon will display against that working in the Cost column of Workings to bring the user's attention to the note. If the user hovers over the Description column, a tool tip of the Notes will be displayed.
CHANGE: When ticking "Create specifications from workings" in a quote, the user will be warned that any text previously entered into the spec tabs may be overwritten.
CHANGE: All status checkboxes would need to be ticked in order to see all available records in the Quote Enquiry report. Now if none are ticked, all relevant records will be displayed.
CHANGE: Optional extras that have the same price across all quantities will display under each quantity. Previously, extras on a quote letter where all prices were the same would print only under the first quantity. This has been changed to avoid confusion in the recipients of quote letters.
CHANGE: To improve performance in View RFQs, it will longer inherit the estimating days to view default. Instead only 30 days history will show.

FIX: Calling the Send to dialog from a notepad within a quote would cause a runtime error.
FIX: RFQ quantity suffix values were not being inherited when the RFQ was processed a Manual or Quote.
FIX: Outwork per given a value of 1 when created by a tender request, regardless of per value set in the item at the point of including the entry into the workings.
FIX: Inserting a quote in View Quotes was not pulling through the client default tax code but was using the system default.
FIX: It was possible for a user to change or process an RFQ that another user was already editing or processing.
FIX: Selecting an office into a quote would not automatically populate with that office's primary contact if the office did not have its own tax code value.
FIX: Phrase selection for outwork tender options was not working correctly, duplicating entries when added from the phrase drop down.
FIX: Quotes with just one section were not calculating section costs. This would not affect the overall quote cost.
FIX: The Quote Library could take excessively long to populate on large databases across a peer to peer network.
FIX: The Quote Library browse was not filtering correctly when the Volume selector was set to "All".
FIX: Copying then cancelling a library template would remove the image from the originating quote.

Order Processing

FEATURE: When the Private tab in an order has contents, the tab will display a notepad icon to alert the user to the presence of notes.
FEATURE: Some Supplier fields such as supplier name, contact, telephone and email are now available to add to the job sheet subcon (outwork) band. These fields are prefixed with SUP and need to be added to on layout by layout basis. These fields are also available for worksheet layouts.
FEATURE: It is now possible to create an order delivery point that requires 0 quantity. By using this, a delivery note can be created for things like sending designer samples from any order overs without having to fudge the order or delivery point quantities to allow for them.
FEATURE: It is now possible to view a job sheet's PDF from View Orders via the right-click "View Job Ticket" option.

CHANGE: Order delivery address and delivery note address fields are now split into separate text fields (Address 1 to 3) rather than one text area as ad-hoc address could cause EasyPost and Detrack to fail due to invalid address formats.
CHANGE: Order contact and order delivery contact email fields (<CUSTEMAIL> and <DCUSTEMAIL> respectively) have been added to outputted order xml.
CHANGE: All status checkboxes would need to be ticked in order to see all available records in the Order Enquiry report. Now if none are ticked, all relevant records will be displayed.
CHANGE: In order to better support delivery scheduling, delivery points on copied orders will automatically generate a Ship By date. Previously, this would be left blank.
CHANGE: Order delivery points now require a due date value. This is automatically set to the same date as the order due date (subject to any amendments from the 'shipping days to allow' value).

FIX: Calling the Send to dialog from a notepad within an order would cause a runtime error.
FIX: The wrong name could be assigned to sales rep codes in the Sales report when the report was sorted by rep code.
FIX: Order points on copied orders were inheriting due dates from the old order points.
FIX: The delivery contact of an order was being set to the primary contact when the client had a specified delivery contact.

Proofing

FIX: Certain ASCII characters were breaking proof response email tokens. Where possible we have can handle this with URL encoding but more problematical characters will be stripped out.

Delivery Notes

FEATURE: Delivery type emails now have a "From address" field in the print dialog Options tab. When populated, delivery note and delivery notification emails will use this email address in preference to that of the logged in user.
FEATURE: Delivery notes now feature a Customs tariff field to help support international EasyPost shipments. This field is a list option so frequently used tariff harmonisation codes can be stored for easy recall.

FIX: A script error could occur when looking at an AccuraPOD delivery's Tracking tab in View Delivery Notes.
FIX: Easypost labels batch created from the delivery wizard were not being created with the correct file names, i.e. <delivery_note_number>.pdf.
FIX: Changing the shipping date of a delivery note would only update its Detrack record once. If it was changed a second time, the Detrack record would not get updated.
FIX: Outbound requests did not include an "hs_tariff" data line and value which would prevent some carriers returning results.

Stock Control

FEATURE: A summary report option has been added to the Allocations, Activity and Client Activity stock reports.

CHANGE: The raw material stock window has been redesigned to support all of the Estimating parameters.
CHANGE: A Web Price field has been added to the Pricing tab of product maintenance. This is the price displayed in the main store product lists which is taken from the highest sell price band. This field was previously used but not shown in the UI.

FIX: The Send to dialog would open behind the View Price Lists window.
FIX: It was possible to issue more material than was currently on-hand if the stock was issued through the RDC Stop Activity dialog.
FIX: The stock re-order report was not displaying materials that were within the set threshold limit.
FIX: Purchase orders with a negative quantity would disappear from view in the Stock Receipts window if the window data was refreshed by adjusting one of the browse controls.
FIX: Receiving a negative purchase order item for a stock-controlled material was adding to the on-hand value rather than subtracting.
FIX: Queries applied to the Stock Reconciliation window would return incorrect data if a material's HasLocations flag was set to 1 but had no stock balance record. This scenario was only likely to affect systems where stock had been reset.
FIX: The client activity report sort by client + contact filter option wasn't displaying the contact information.

Purchase Orders

FIX: A purchase invoice's status would not change to invoiced if its purchase invoice had a number that began with a non-numeric value.
FIX: Browsing the Select table items window and cancelling that window would remove any previously selected code in a Purchase Order item.
FIX: The Group and Subcategory filters were not working correctly for the Purchase Order enquiry report.
FIX: Material order items where not inheriting their supplier part number values from the material table. This meant material requisitions weren't using the part number in purchase orders.

Job Costing

FIX: Entries and costs would not display when changing from the Extras tab to the All tab in the View cost summary window unless the window was manually refreshed.
FIX: The list of departments and their costing breakdowns did not line up correctly in the View Variance Details window.
FIX: Costing entries for non-stock-controlled materials where the corresponding order item had a custom cost rate was instead using the default rate.

Sales Invoicing

FEATURE: A client Code column has been added to the client pane of View Sales Invoices. This will allow sorting and searching on the client code rather than name.
FEATURE: It is now possible to view order job sheet and worksheet PDFs from View Invoices by highlighting an invoice line item from the lower part of the browse and choosing the relevant option from the right-click menu.

CHANGE: Invoices containing a deposit line will now have their status automatically set to Part-paid.

FIX: Resaving an invoice with a deposit line and that had a Part-paid status would not calculate the header Paid and Balance values correctly.
FIX: Discounts were not working correctly on Nominal and Tax type invoices.
FIX: The Description search filters were not working in View Invoices.
FIX: Order extras included on nominal and tax type invoices were not calculating tax.
FIX: Invoice contact for a sub-office was being set to the sub-office primary contact when the order contact was another sub-office contact (but not an accounts-type contact).

Import/Export

FIX: INTREF and EXTREF fields in the Shireburn export format were not correctly formatted.

RDC

FIX: The Stop Activity dialog wasn't pre-populated with a Run quantity value if the activity had been started from the Unscheduled tab.
FIX: Stock level indicators were not displaying correctly in the RDC stock issue wizard.
FIX: The Reset button was not clearing values for Customer query or Milestones in the RDC Unscheduled tab.

CRM

FIX: When viewing a quote in CRM, the Expected Order date fields was seemingly available to edit. It is now greyed out to avoid confusion.
FIX: Performance for the CRM To Do list window has been significantly improved on databases with many client records.

Scheduling

CHANGE: An unscheduled task would not show on the planner when a task was specifically chosen from the RDC unscheduled task list. Accura will now attempt to reverse look-up the task with an associated resource.

Security

FEATURE: Accura users can now be flagged as inactive. Once marked as inactive, their account will be locked, they will no longer appear in the log on list or RDC. Opening and saving a client with an inactive user as account manager or rep will force the change of user (or select none). Clients that contain account managers or reps that are inactive should ideally be reassigned to a new responsible user en masse to prevent these validation problems occurring. There will be no validation on existing quotes or orders so users should make sure the correct account manager and/or rep values are selected. Again, updating clients will prevent the necessity of this.

Technical

FEATURE: A new ResourcePath entry has been added to accura.ini in preparation for future features.

CHANGE: Inbound XML will now be moved to a Processed subfolder after it has been converted to a web task instead of being instantly deleted.

Web

FIX: The .Net downloader would change newer Microsoft file formats such as .docx and .xlsx to a .zip file extension.
FIX: A client's linked domains were not available to choose in quotes, orders and quick orders.
FIX: With Product stock control=0 OR stock control=1 and not enough stock held to fulfil the order or "skip product order for single basket works order items" being enabled in the web console where Stock control = 0/1. The resultant works order created in either one of these scenarios would deduct the courier or local delivery charge from the sell price.
FIX: Commission could get applied to a web order if the client was set to never apply commission but the rep had commission codes assigned.
FIX: The supplier of the Accura Online eDoc product moved their web storage to Amazon which would break the downloader utility. This has been addressed in 6.00.
FIX: Download options for quotes and orders with custom attachments were not consistent.

Changes in AccuraOnline 6.00 (26th February 2020)

AccuraOnline 6.00 is a major functionality update, rather than a maintenance release. The vast majority of the features and changes are detailed in the Accura 6.00 New Features Document. This section will focus on technical aspects and minor changes for more advanced users or technical personnel.

Themes and User Interface

FEATURE: Added high resolution graphics to support screen scaling on high resolution displays such as mobile phones, tablets, laptops and Apple Retina. This increases website performance and appearance on such devices.

CHANGE: Theme CSS rendering has been optimised to improve the overall performance of the website.
CHANGE: Logo images now support a slightly larger resolution of 325x140 (previously 300x80).

General Changes

CHANGE: Notification messages at the top of the browser triggered by various events used to display for 5 seconds, but now remain on screen until closed so they are not missed.
CHANGE: Rejected order requests (during order approval) display rejection notes as notification messages instead of next to the Job title.
CHANGE: Login pop-up email and password errors are handled in the pop-up instead of displaying a login form in the main website area.
CHANGE: Various undocumented improvements have been applied to the behaviour and validation of products in the store.

Product Link Filters

FEATURE: Product filters applied when using 'Link to' = 'Products / Store' are automatically saved as custom URL parameters. These parameters will make AccuraOnline ignore any browser filter cookies that may exist. Advanced users can manually create links using product filter URLs and embed them anywhere on the website to filter the product list in the desired way, for example in custom page body text, news articles or email notification body text

Use the following example format if you want to manually create product filter URLs without using the built-in 'Select filter options' feature:

```
/products?filter=true&category=value&depth_and_width=value&colour=value&finish=value&group=value
```

(where 'value' is replaced by the desired value for each parameter. Use %20 for spaces in values)

Bug Fixes

FIX: Delivery charge sales tax was not included in store order and store order request tax or total price calculations
FIX: Various undocumented bug fixes in the store and other areas

Technical Changes

FEATURE: Directly after a website upgrade, an 'Upgrade database' action will appear in Admin settings. This is a one-time operation that performs required data-based changes, and will disappear once it has been run
FEATURE: Ability to set cookie prefix names in config.yml as a way of clearing all end-user browser cookies, to be used by Accura support if required
FEATURE: Added test_debug section in config.yml to enable various test and debugging functionality and hidden work-in-progress features
FEATURE: PayPal payment verification can be bypassed in the test_debug section of config.yml. This is for testing and demonstration purposes when using the PayPal Sandbox from a computer that is not directly exposed to the internet, which prevents PayPal from sending payment verifications to AccuraOnline