complete print management system

Version 6.03 New Features

Accura 6.03 Build 5 compiled on 12th November 2020

Accura Online 6.10 compiled on 29th October 2020

Introduction

Welcome to Accura Version 6.03

Version 6.03 is the latest release for the Accura MIS and Accura Online. We are pleased to introduce to the range of Accura products, **AccuraSync** which will revolutionise the way you interact between Accura and your accounting platform. AccuraSync is the result of many months of development and testing and provides bi-directional, real-time and secure background synchronisation of data between Accura and a range of online accounting solutions.

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. AccuraOnline upgrades are distributed automatically when released by Accura support.

A video covering the 6.03 new features can be found here.

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 **New Features** document details all the major features added to Accura and Accura Online since the last major public releases, which were Accura 5.41 Build 8 and Accura Online 5.35.

If you are an end user, please read through this document which summarises the major new features likely to be used by end users.

The technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel. These are available on request.

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

Contents

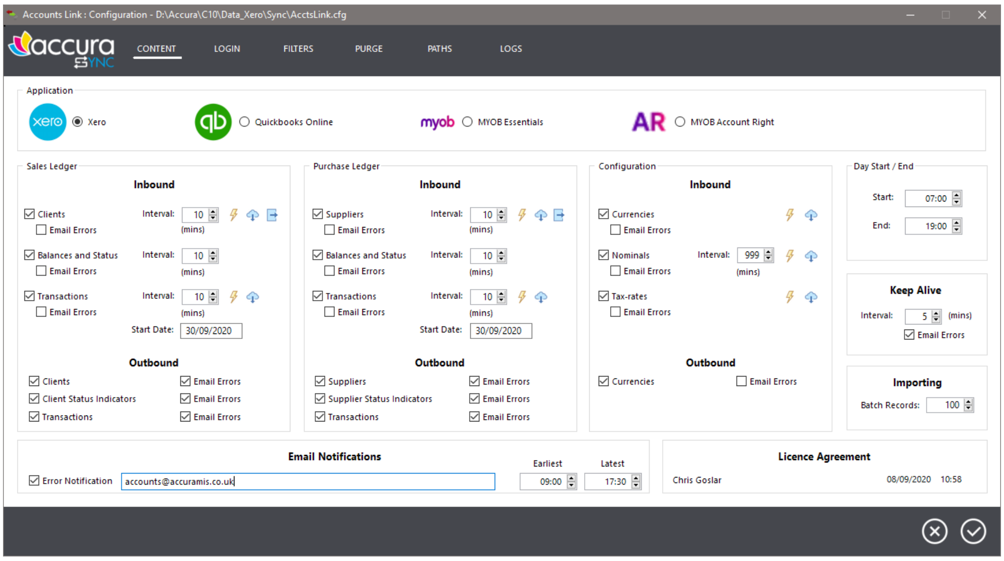
New Features in Accura 6.03

AccuraSync

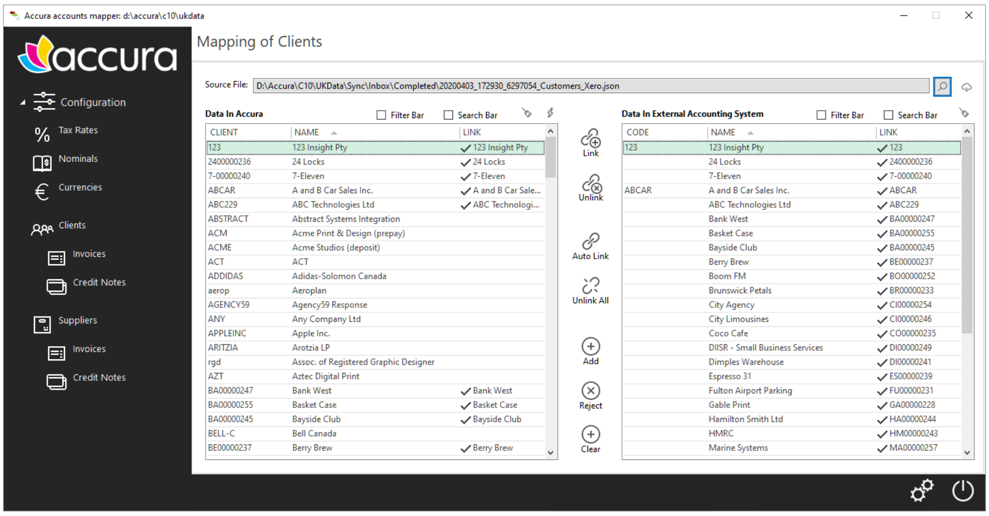
AccuraSync is a new paid for module, designed to work in conjunction with the standard Accura Invoicing module. AccuraSync will upload your clients, suppliers, invoices and credits to your accounts package and feed data back to such as client and supplier balances and transaction payment statuses. AccuraSync does away with the need to export records to CSV or proprietary file types from Accura and import them to your accounting package and does it all instantly and seamlessly.

AccuraSync comprises of three components – the **accounts configurator**, the **accounts mapper** and the **accounts monitor**.

The **accounts configurator** is where the basic settings such as which items you wish to sync, synchronisation intervals, your secure connection details and synchronisation logs reside. Once set, you will rarely, if ever, need to come back to this application.



The **accounts mapper** tool is where you initially match your Accura data with your accounts package data such as tax rates, nominals (g/l codes), currencies, clients, suppliers and invoice transactions.



Again, once set you will rarely need to come back to the mapper tool.

Accounts monitor is installed on your Accura server as a service which will run in the background and requires no interaction. The accounts monitor service is responsible for the actual syncing of data between Accura and your accounting package. It will seamlessly sync client supplier and invoice transactions out in real-time and sync external changes in at the specified intervals.

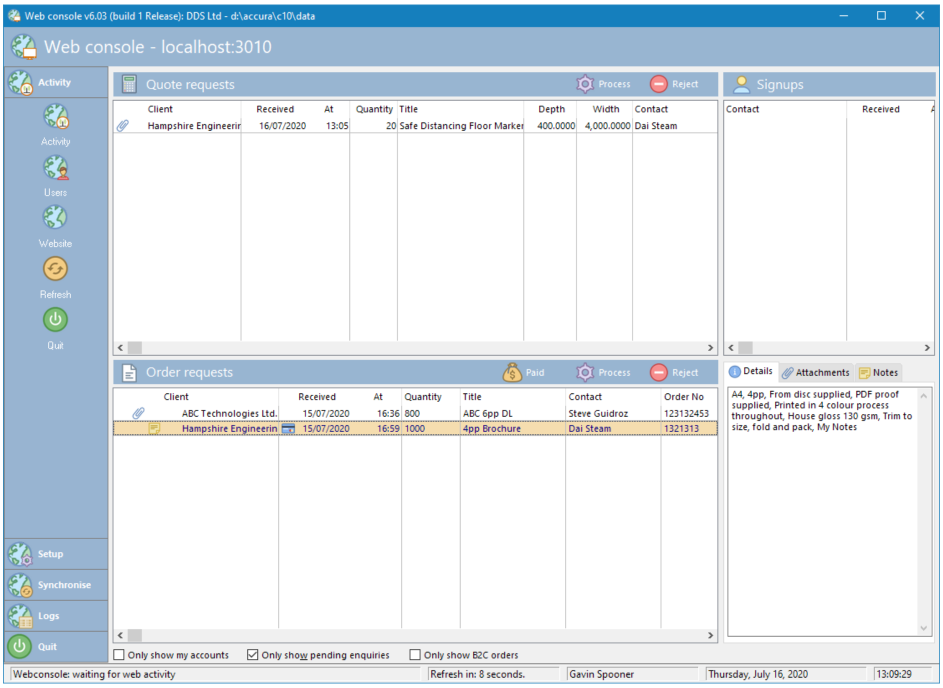
Accounts monitor is also responsible for error reporting and other activities such as putting customers on stop when they exceed their credit limit!

For more details on **AccuraSync**, you can read the datasheet here. We have also produced two demonstration videos one for the technical setup and one for the day-to-day use.

AccuraSync Version 1 provides support for Xero only but we'll be adding support for QuickBooks Online very shortly. Support for MYOB Essentials and Accounting Plus is also in the pipeline. SageOne compatibility will come later, based on demand.

Enhanced Web Console Features

Several new enhancements have been added to the **Web Console**



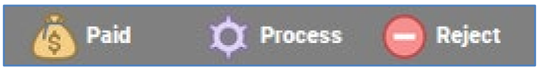
- Now it is possible to add or remove attachments to web quotes and orders *before* the are processed. This can be done by highlighting a record and going to the Attachments tab at the bottom right of Web Console. Here you can see any existing attachments and there are buttons to Add or Remove attachments. There is also a button to Open a highlighted attachment.

- Pop-up notes can also be added to web quotes and order by highlighting a record and going to the Notes tab at the bottom right of Web Console. Here you can see any existing pop-up notes and Add, Edit or Remove them.

- Web console will now warn the user when they process a prepaid web order where a payment issue has been detected. Web orders with a payment issue will be shown in the web order list with a credit card icon next to the received date.

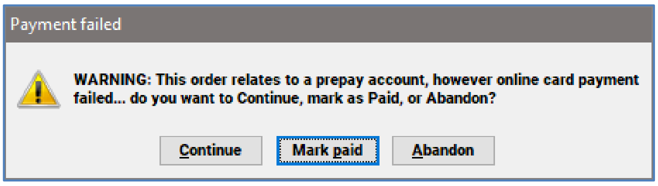
- If a prepaid order comes in with a payment issue, users with the appropriate permissions can process the order as Paid. This would be used when the user calls the customer before processing the order to query the payment issue and gets a card payment over the phone.

A pre-paid web order with a payment issue can be marked as paid by the using the Paid button that will display next to Process button



When pressed, a warning will ask the user if the really want to proceed. If they continue, a "Manual payment authorisation" pop-up note will display so they log details of the manual transaction. Once this is saved the order will be processed as normal and an invoice automatically generated.

If a payment failure web order is processed without marking it as paid, the user will be notified of the payment failure.



If they **Continue**, the order will be processed and the automatically generated invoice will have a payment status of **Pending**.

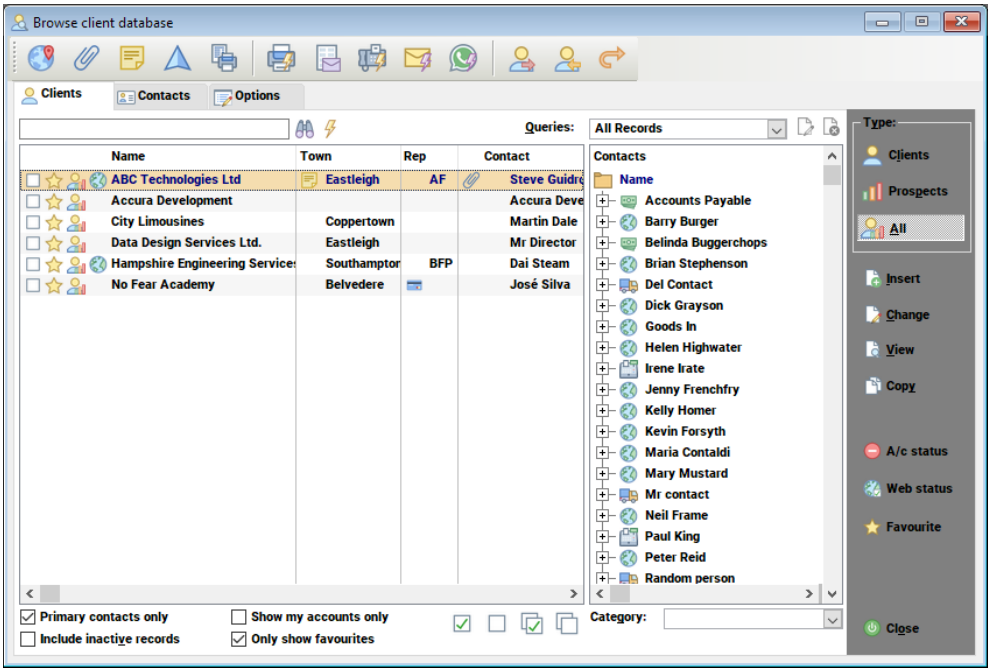
If they **Mark Paid**, the order will be processed and the auto-generated invoice will be given the payment status of **Paid**.

If they select **Abandon**, the order will be returned to the web console queue.

Client and Supplier Favourites

Expanding on the materials favouriting feature, we have now introduced favouriting for clients and suppliers. Client and supplier-based browses can all be filtered to **Only show favourites**.

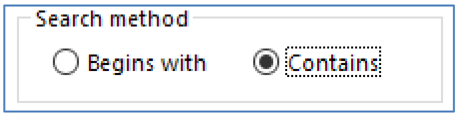
To make a client or supplier a favourite, simply click in the browse next to their tagging box. You can also mass favourite records by tagging the and using the **Favourites** button.



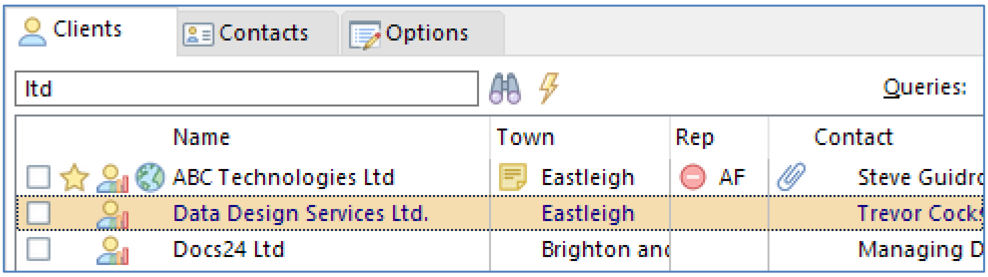
Client and Supplier Search

The main client and supplier browses now have an alternative search function to better narrow down searches if only part of a name is known.

On the Options tab, there is now a **Search Method** with the options of **Begins with** or **Contains**. Begins with is the original search method whereby when you stated typing a name in the browse, the focus would move to the name you typed in.



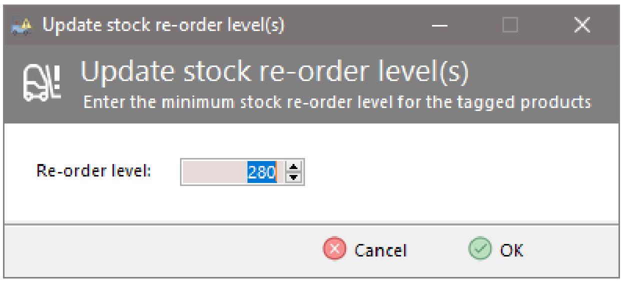
If you use **Contains**, typing the string you want will filter out of the browse all non-matches. This example shows the result for searching for names containing 'ltd'



This feature will work on whichever column the browse is sorted by and will also work in the **Contacts** tab.

Stock Reorder Adjustments

It is now easier to adjust minimum stock levels for reordering materials and products without the need to go into individual material records.



Stock material and product browses, as well as the **CRM** View Prospect Profile > Product tab, now feature a **Min-level** button.

To adjust a single material, highlight the record and press the Min-level button. You will see the dialog as shown above with the current reorder level. Change the level to the desired amount and press OK.

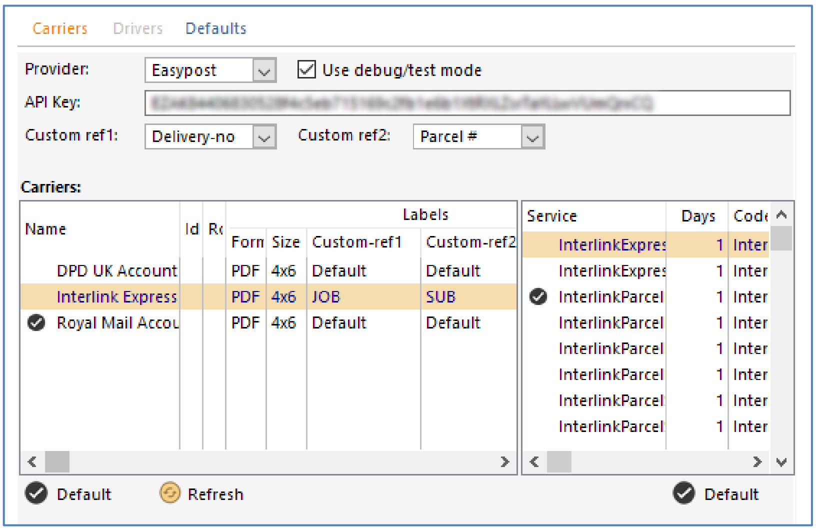
To quickly change multiple records to the same reorder level, tag your range of materials and click the Min-level button. Change the level to the desired value and click OK.

Carrier Custom Defaults

Our EasyPost export format supports two custom fields, which may or may not be supported in turn by individual carrier APIs.

In order to increase compatibility with the carrier APIs, it is now possible to select different custom values for each carrier from a range of delivery related fields.

© Data Design Services Ltd Nov-20

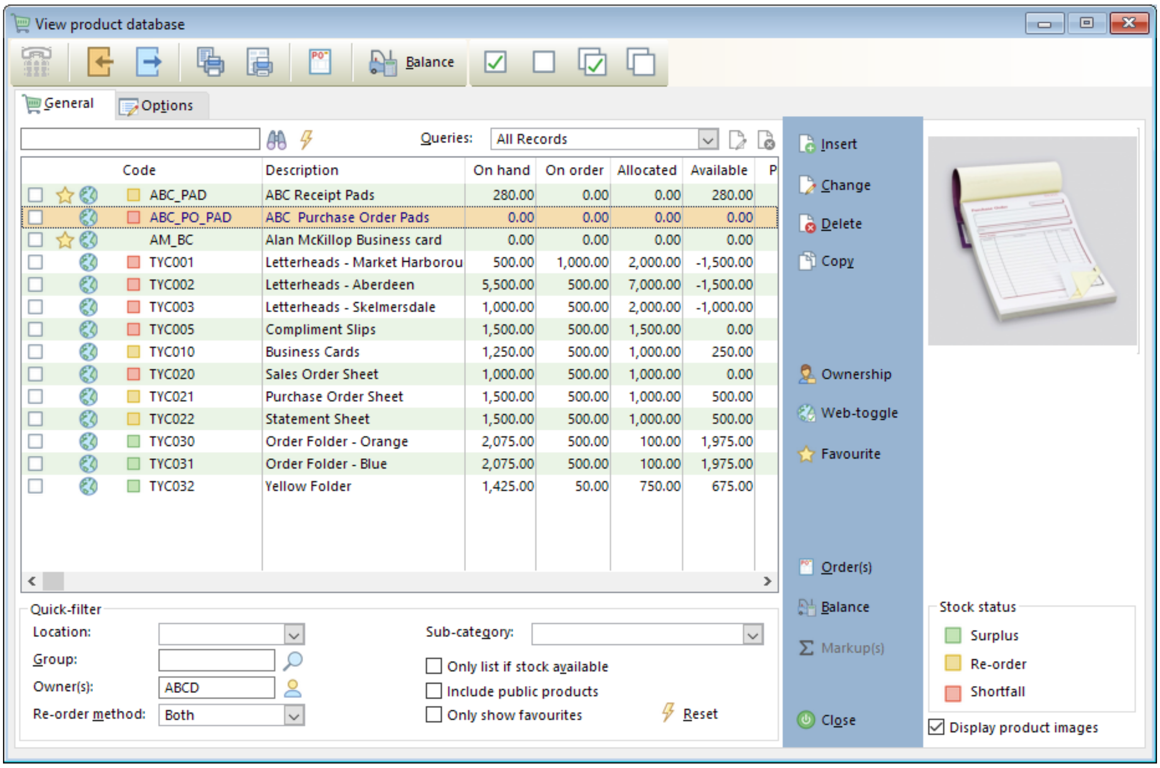


In the Carrier defaults (*Set-up* > *Defaults* > *Shipping*) The **Custom Ref** fields are set to the desired field settings. The fields available are – Delivery Number, Job Number, Order Number, Subref and Parcel Numbers.

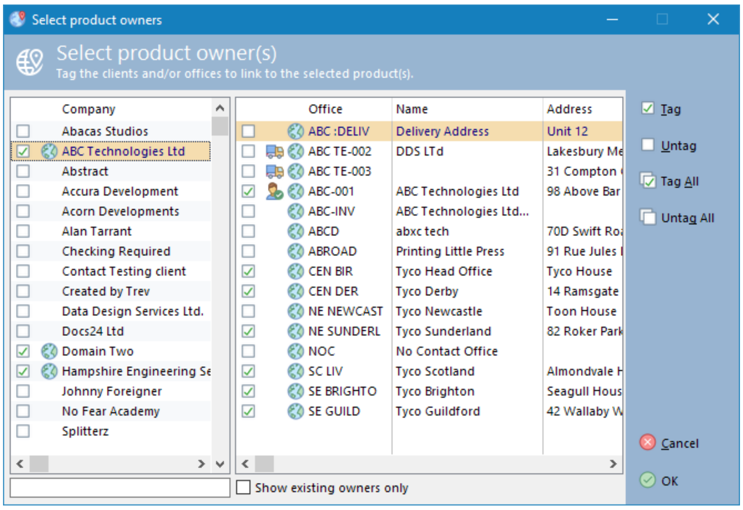
Each carrier can then have their own preference set. If the Custom fields are set to **Default**, they will inherit the shipping default field settings. Otherwise, each can be selected from the list of available fields.

Product Owner Improvements

Several changes have been made throughout Accura to improve the usability of product ownership.

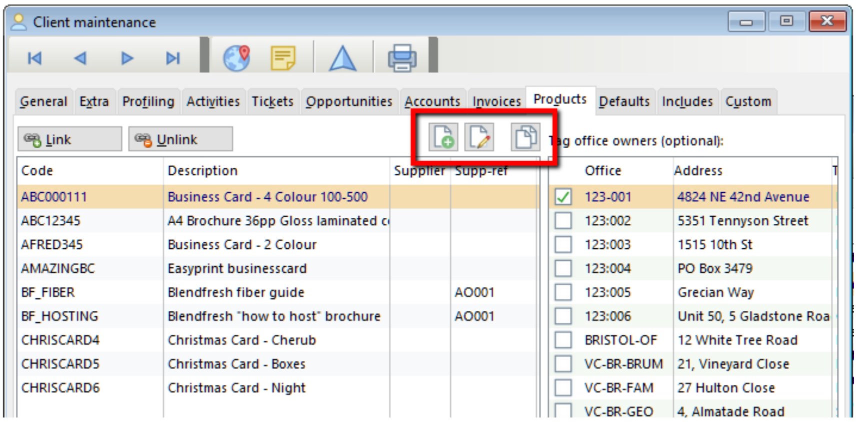


- **View Products** can now be filtered by one or more owners. Click the button next to the **Owners(s)** and select one or more clients using the CTRL/SHIFT + Click method to display on products owned by those clients. If you want to include all unowned products, tick the **Include public products** checkbox.
- You now assign client and office owners to **one or more products by tagging records** then using the **Ownership** button. This means you do not have edit each product record individually to assign owners, and instead can batch assign owners at one time.



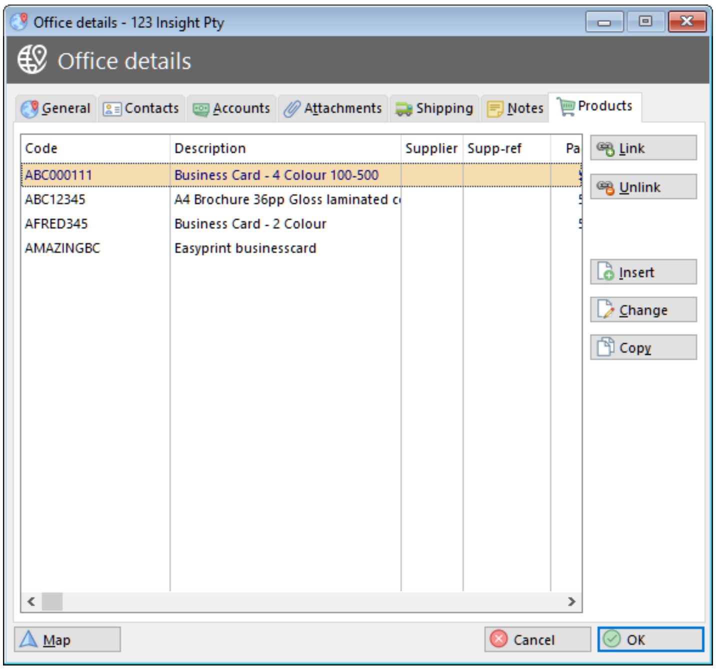
- If you select a single product from the View Products browse the existing owner tags will be shown and **can be added or removed**, however if you tag multiple products, **existing ownerships will not be shown**, but new ones can be added.

- Products can now be **created, changed or copied (which in turn copies ownerships)** from the **Products tab** of Clients as well as changing ownerships

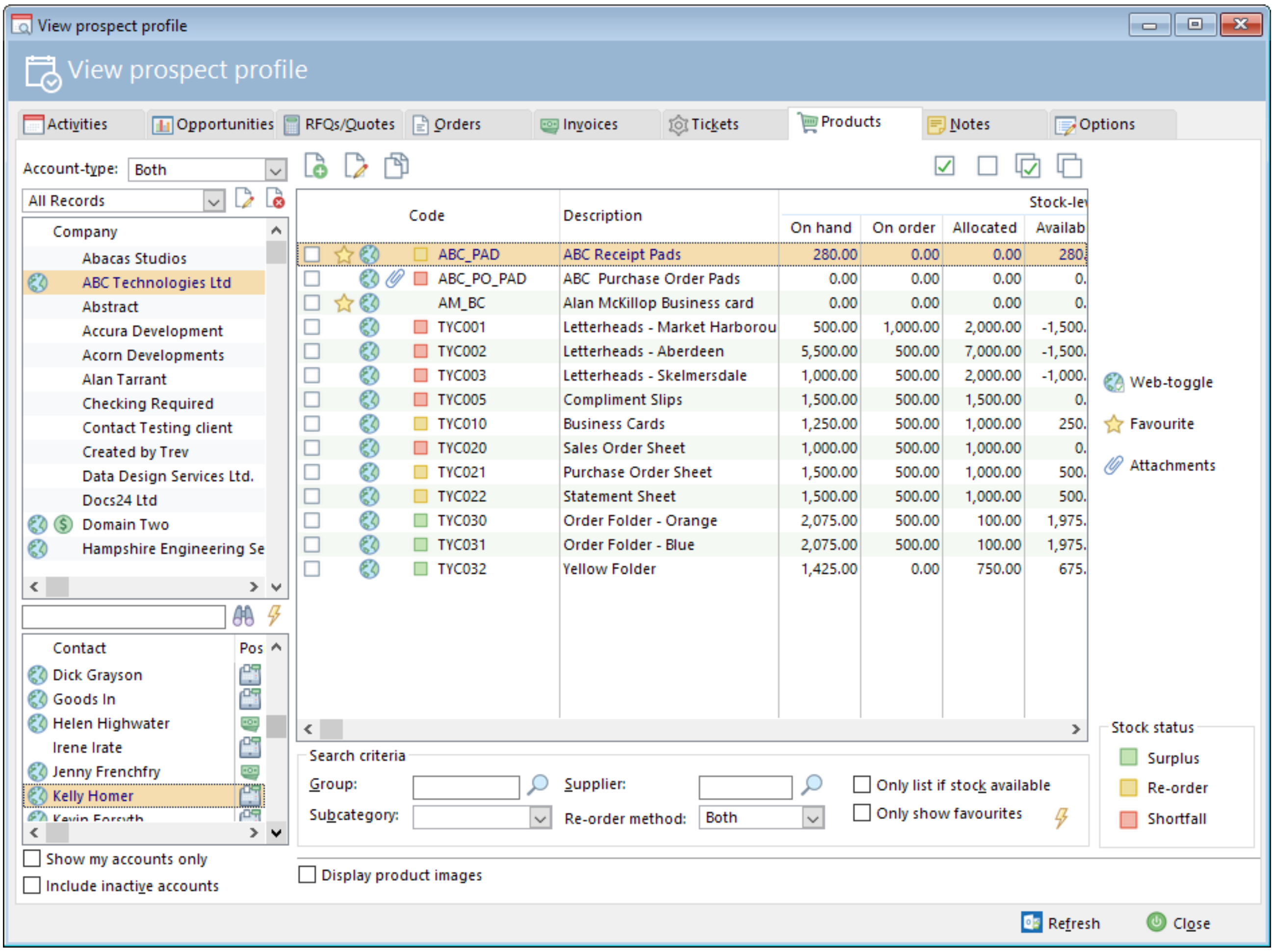


- Product ownership can now be controlled from the **Products tab** at office-level from the office record.

  This is useful where you have **multiple branches of a client which all have differing product ownerships**. Previously this could only be managed at Client or Product level, but now you can edit an office record and manage all ownerships for that office in one place. Furthermore, products can be **created, changed or copied (which in turn copies ownerships)**



CRM Products

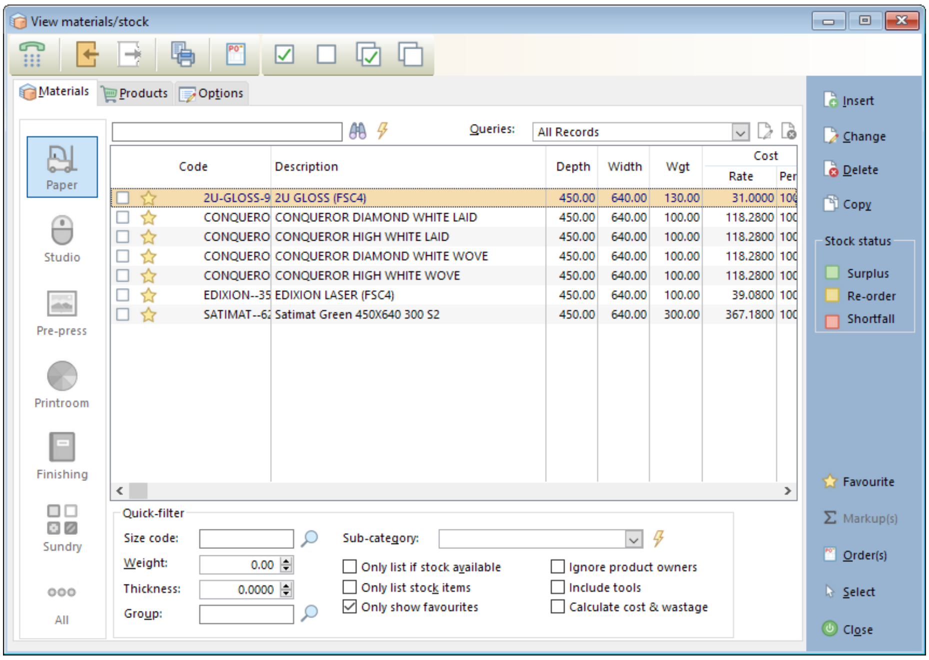


Client owned products can be viewed from the CRM **View Prospect Profile** browse enabling CSRs and Sales-reps to see stock levels for their own customers. Additionally, CRM users can open products in **view only mode, toggle web-enabled status, set favourites, and view/add product attachments.**

Accura core license users who have the appropriate (Stock update) permissions can also **create, change or copy products from this browse.**

Material Favourites

It is now possible to mark commonly used raw materials and/or products as 'favourites' and filter material-based browses accordingly. This means that commonly used items are easily accessible without scrolling through large databases.



You can assign favourites by either:

1. Click in the **column to the right of the tagging column** to toggle favourite status on/off. A Star icon indicates the record has been flagged as a favourite.
2. Select a record and click the **Favourite button** on the right-hand panel. This will toggle the favourite status on/off. The option is also available from the right-click menu.
3. **Tag one/more records** using the normal tagging methods, then click the **Favourite button** and all of the tagged records will toggle their favourite status on/off. This option is also available from the right-click menu.

To filter Materials to list favourites only, click the "Only show favourites" checkbox so that is it ticked, otherwise leave this unticked to show all records.

Quote and Order Rep Emails

If an estimator or CSR has a query about a quote or order that the client's rep can answer, they can now be emailed directly from within a quote or order by clicking the email icon next to the Rep field. The client Account manager, will automatically be CCed into these emails.

User Branches

To help customers that may have different branches and thus need different contact details for users based on those branches, we have added a **Branch** field to user profiles. These are simple list option entries that can be selected into a user but can then be evaluated by email merge tokens to change details for that user away from the standard system values.

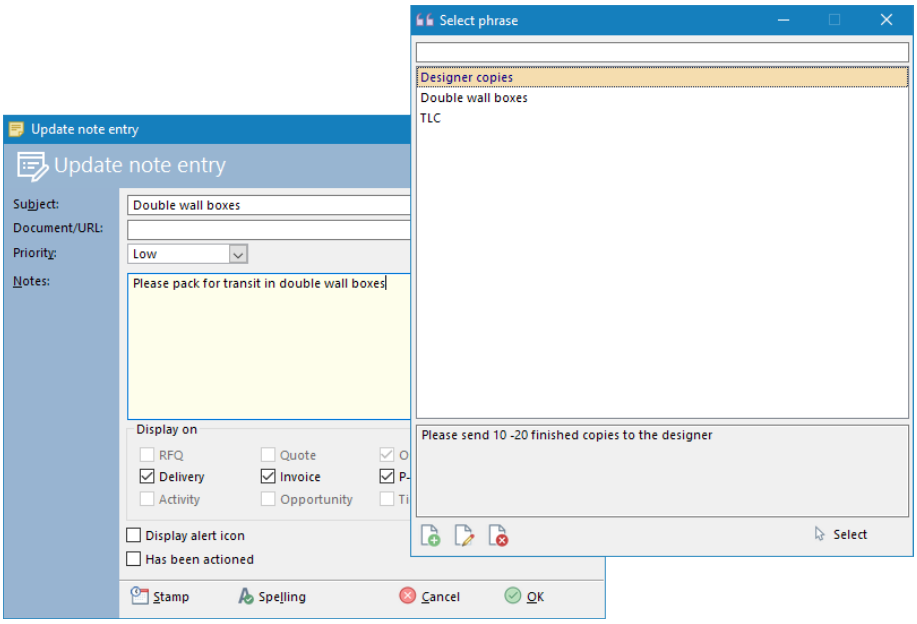
For example, the standard merge token for the company's address uses the system address, SY:Address field. By changing this to use an expression, we can evaluate the user's branch value and change details in the email accordingly.

*CHOOSE(SUser_:Branch = 'Head Office', SY:Address, '121 Branch Street,
Winchester,
Hampshire,
SO40 1PX')*

This CHOOSE expression says 'if the user's branch is Head Office then use the system address, otherwise use the html formatted Winchester address'. If you have multiple branches, you may need to use nested CHOOSE expressions. These can become very complex so it is recommended Accura support are consulted. As with all merge tokens, it is advisable to create new tokens and add them to templates rather than changing default tokens as these can be overwritten by upgrades.

Notepad Subject Phrases

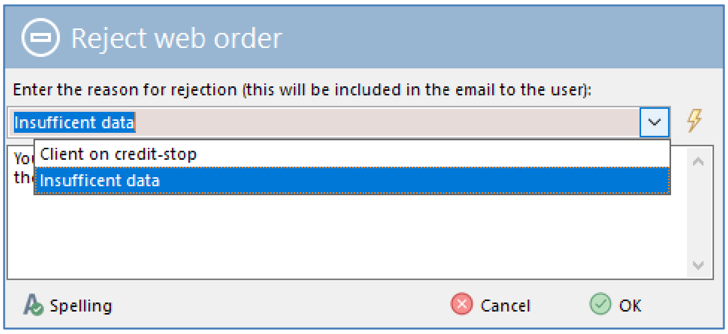
The standard Accura pop-up notepad now supports phrases maintained via the standard phrase library by filtering the Type to *Subject*.



Phrase can be selected by the browse button to the right of the subject field. Phrases can be set-up to populate both the subject line and the main notes section.

Rejection Phrases

The web order rejection dialog now supports commonly used phrases to populate the rejection text field.



Phrases are maintained via the Accura Phrase Library and can be found by filtering the Type to *Other* and the Subcategory to *Rejection*.

Commission and Job Costing

Commission rates can now be assigned an outwork code in order to properly account for commission in job costing. Codes can be assigned to individual commission rates or work with a “fall-back” code which can be entered in Job Costing default.

If a commission rate does not have a preferred outwork, the fall-back will be used. By using an outwork code, as opposed to labour, the job VA and Contribution figures remain accurate.

Commission cost will be logged automatically when certain conditions are met – if any other cost is recorded against the order, if the order approval wizard is opened or when the order is invoiced.

Costing entries are recorded with the commission beneficiary, as the operator meaning cost centres can be set up for reporting purposes

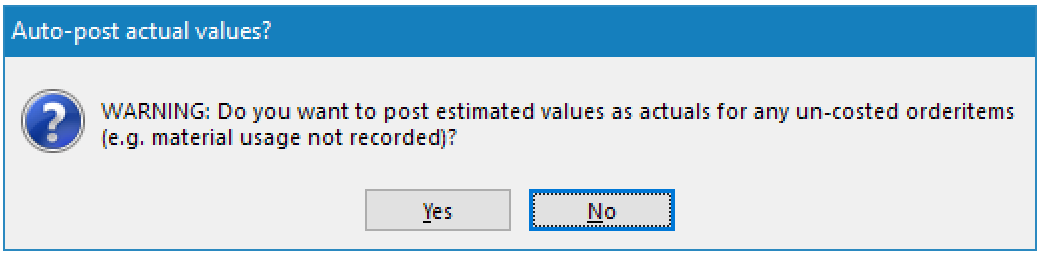
Quick Job Costing

Sometimes it can be an onerous task to log every single cost against an order or indeed get RDC users to log each ink used or every plate made. To help with this, we are introducing **quick job costing**.

We have added to certain areas the ability to automatically post estimated values against any outstanding non-costed entries. For example, a job has had all its labour and paper logged via RDC. However, the studio has not recorded the plates used, the pressman has not logged his ink usage, the bindery did not issue cartons and the van driver didn’t log his time. By using **quick job costing**, the person approving or invoicing this job can opt to automatically cost these materials and labour operations at their estimated value.

Users will be able to use quick job costing in the following areas

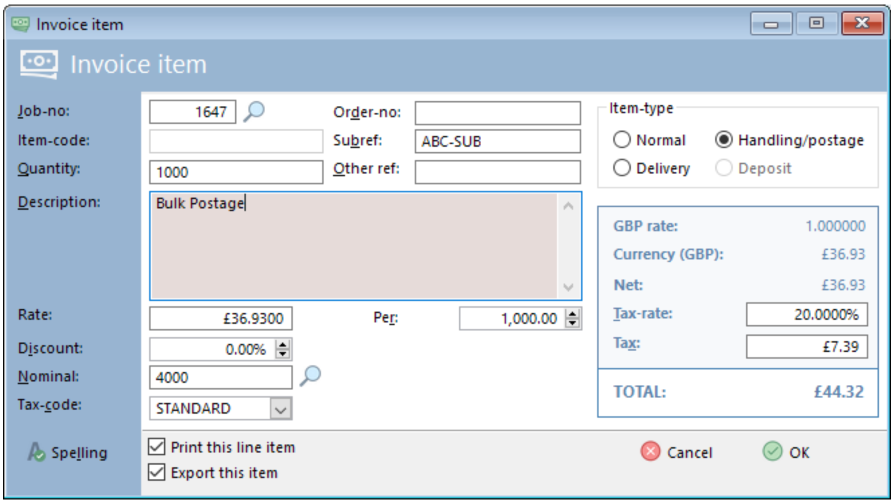
- **View cost summary –** using the **Uncosted** button at the button of the window.
- **Job approval window** – when opening an order’s Job approval window, the user will be prompted if they wish to auto-post any non-costed operations. There is also an **Uncosted** button on the second step of the approval window.
- **Sales invoice** – when a part-costed order is invoiced, a prompt will display to ask the user if they wish to auto-post estimated values against any uncosted order items. Only orders that have at least one costed item will display the prompt.



This feature is controlled by a setting in *Defaults* > *Job Costing* - "Auto-create entries for uncosted items" and this drop down has three choices

- **No** - users will not be prompted to add entries for uncosted items and they will not be added.
- **Yes** - users will not be prompted to add entries for uncosted items and they will be automatically added.
- **Prompt** - users will be prompted whether they want to add entries for uncosted items.

Invoice Item Type



Invoice items now have a **type** to allow for charges added directly to an invoice.

- **Normal** is the standard invoice item
- **Delivery** is a charge that will be included in the invoice's Shipping total
- **Handling/Postage** is for sundry charges that do not make up part of an order
- **Deposit** is the existing deposit line item.

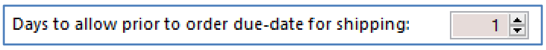
Two new fields have been made available to the invoice layout, **HDR:Handling** and **HDR:InvoiceNet**. HDR:Handling will show the total for all handling/postage items on the invoice. HDR:InvoiceNet will show the net total of all items less delivery and handling.

Net	**$**	797.00
Handling	**$**	10.00
Shipping	**$**	28.50
Tax	**$**	95.64
Total	**$**	931.14
Paid	**$**	0.00
Balance	**$**	931.14

Deliveries and Shipping.

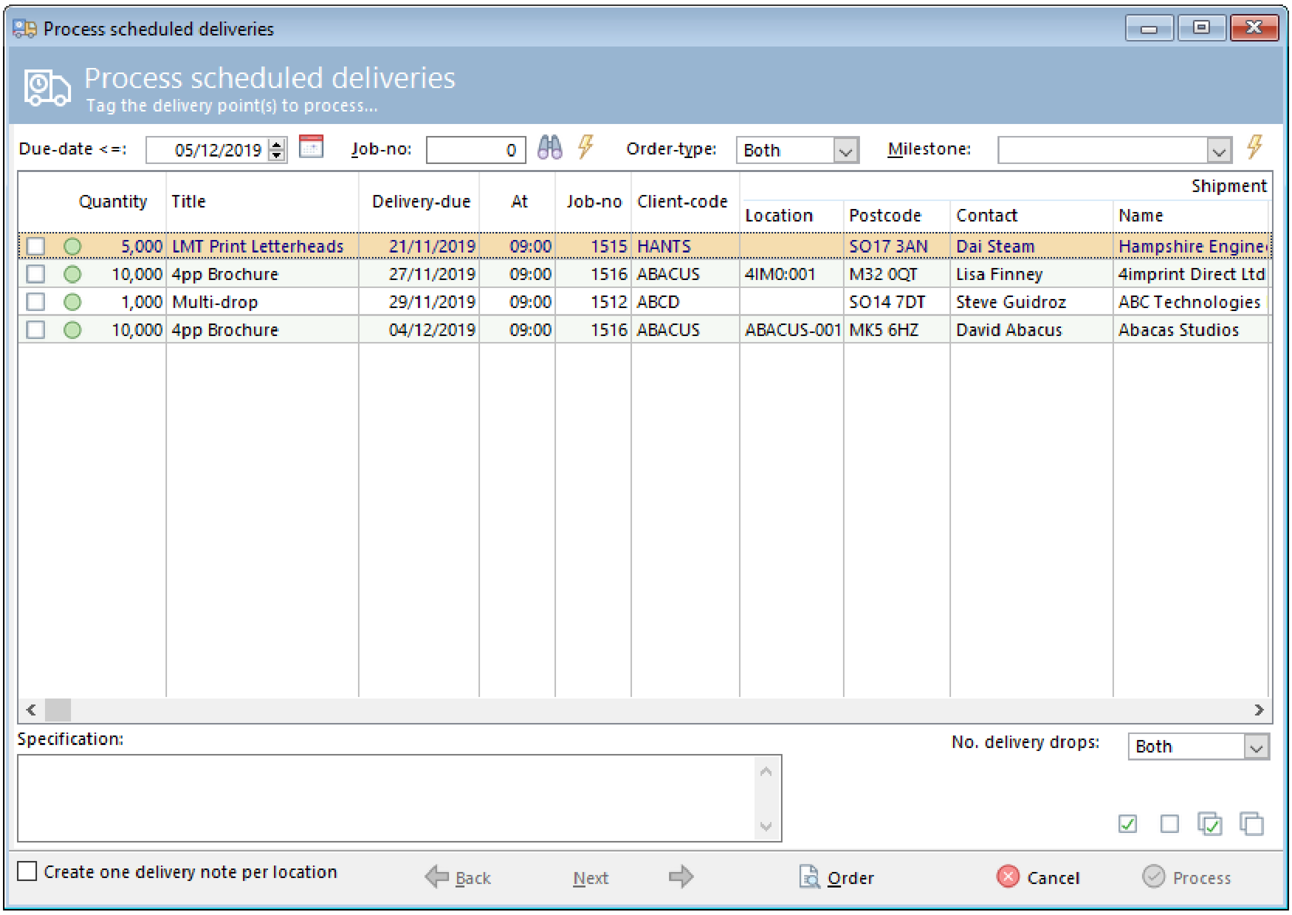
Accura 6 introduces the concept of **shipping dates**. An order has a **due date** but we as users need to know *when* our order needs to leave our factory to fulfil the due date.

Clients now have a new setting, **Days to allow prior to order due date for shipping**. This will be used to calculate an order's ship by date which is the order due date minus the days to allow. Offices also have a similar setting as it could be that to achieve the order due date for a distant office, more time is needed to allow the consignment to reach its destination.



There is a new default setting in *Setup* > *Defaults* > *Shipping* > *Defaults*, a generic setting in days for all new clients going forward.

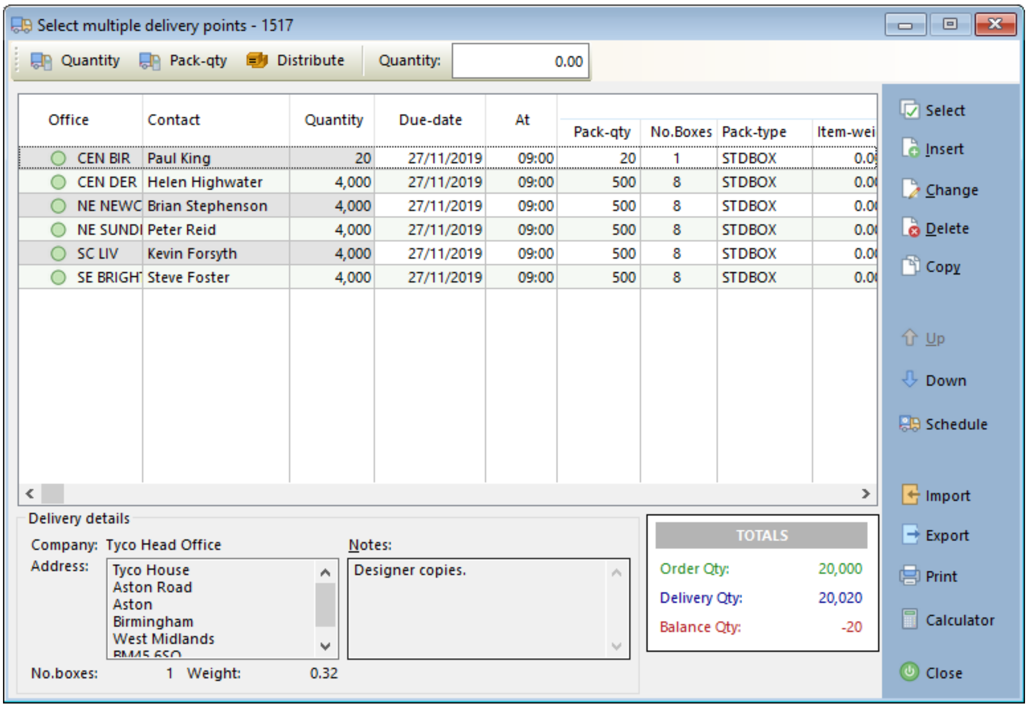
To improve usability and better support shipping dates, the Delivery Wizard and Delivery Scheduler have now been combined into one window. Now all deliveries will show in this browse on the day they are due for dispatch.



The window can be filtered by the Due date, (the date the delivery is due to ship), Order type (Service, Product or Both), Milestone and Number of Delivery Drops (Single, Multi or Both).

Multi-drop Management

In previous versions, the **Balance Quantity** for all delivery points had to add up to match the **Order Quantity**. This restriction has now been changed to allow greater flexibility in a variety of scenarios. For example, the full order quantity may need to be spread across one or many delivery points but samples need to be sent to the designer. Now a separate delivery point can be added for the samples without have to “fix” the delivery quantities to allow for the extras being sent.



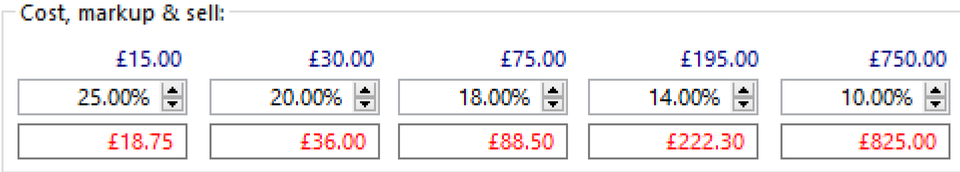
Another scenario may be that the order needs to be sent to a supplier by a certain date so it can be returned to the factory in order to fulfil the order due date. Now you can create a delivery point for a supplier for the full quantity AND delivery points for the end product to be sent to the various destinations.

If there is a mismatch between the order and delivery quantities, Accura will now display a warning about the discrepancy but the user will be allowed to continue.

Delivery points to a supplier can be created by Inserting a new record then selecting ‘Supplier’ from the **Deliver to** drop down. You can then browse for a supplier from the Accura database.

Component Mark-up Profile

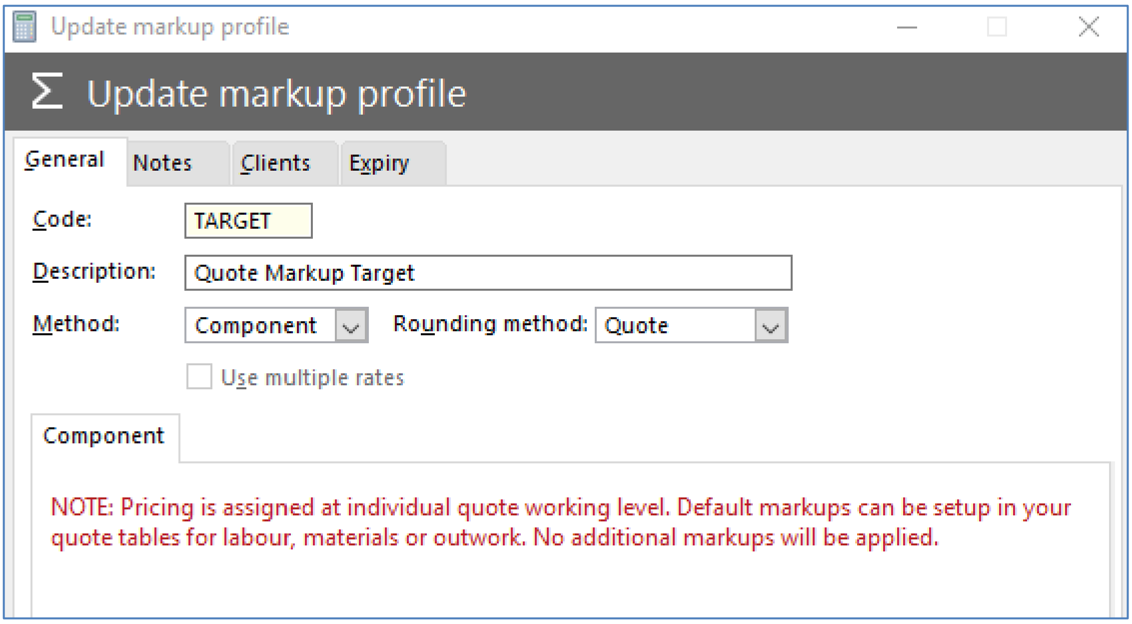
A frequently requested addition to Accura has been the ability to create an itemised mark-up within an estimate and with the component mark-up profile, you can now do exactly that.



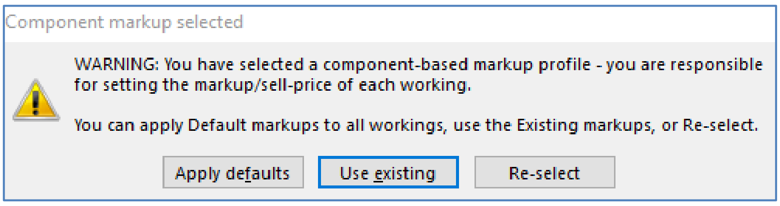
Previously, users would only have the ability to target the sell price and percentage in outwork working entries (provided the estimate outwork default was set to working).

Now, the component mark-up profile disables the overall mark-up, enabling access for targeting the sell price or the percentage mark-up within every single working entry within an estimate. This now being the case whether the working is Material, Labour or Outwork.

In order to take advantage of this feature, you'll need to first create a new mark-up profile and select **Component** from the dropdown in the creation of the profile.



Upon selection of the component mark-up into the quote, the user will be prompted with this message:



You will then have the choice to either apply the default mark-up percentage which is derived from the item (set in tables), use the existing mark-up set in the working entry (perhaps from a previous mark-up selection) or re-select a different mark-up profile altogether.

To complement this feature, there have been a number of small feature additions associated with itemised mark-ups including the ability to apply a mark-up en-masse to quote workings via the right click menu and applying a default mark-up en-masse to a selection of operations in the labour, material or outwork tables. We've also added the sell price visual into the workings, alongside the cost in the bottom corner of the window.

Detailed Estimate Layout

Quote workings can now be displayed separately onto an estimate layout, much in the same way that quote extras have been previously. This is particularly beneficial for an estimator when wanting to display multi element quote workings where size and stock differs from one working to the next.

Estimate display properties can be applied to Labour, Material and Outwork workings and can reside both inside and outside a section by checking "Print as line-item on quote".

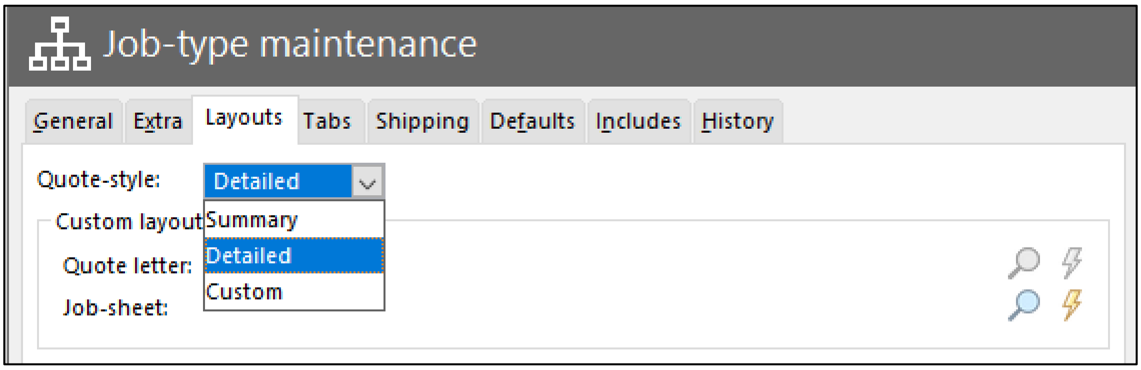
☐ Optional extra	☑ Print as line-item on quote
☑ Include cost in estimate	☐ Create invoice line-item

A new detailed estimate layout is shipped with this latest version of Accura and can be easily customised to your business requirements through Setup > Layouts > Detailed Quotes.

An example of the new estimate layout below:

Section 1	**POS Header Boards**		
29.00	TELF14 Hanging Boards w/out logo (printed both sides) 1000mm x 600mm 5mm foamalite strapline: "Natural Ingredients" Individually wrap and add barcode		£574.20
Section 2	**POS Hanging Boards**		
26.00	SOUT14 Hanging Boards w/out logo (printed both sides) 1000mm x 600mm 5mm foamalite strapline: "Natural Ingredients" Individually wrap and add barcode		£772.20
Non-section elements			
20.00	SOUT12 Logo Generic POS Header Boards W/logo (printed one side only) 1200mm x 300mm 5mm foamalite strapline: "Bursting with flavour" Individually wrap and add barcode		£389.40
		TOTAL (tax incl.)	£2,005.08
Not included in the Price (extras)			
1.00	Scratch laminate for all boards		£264.00

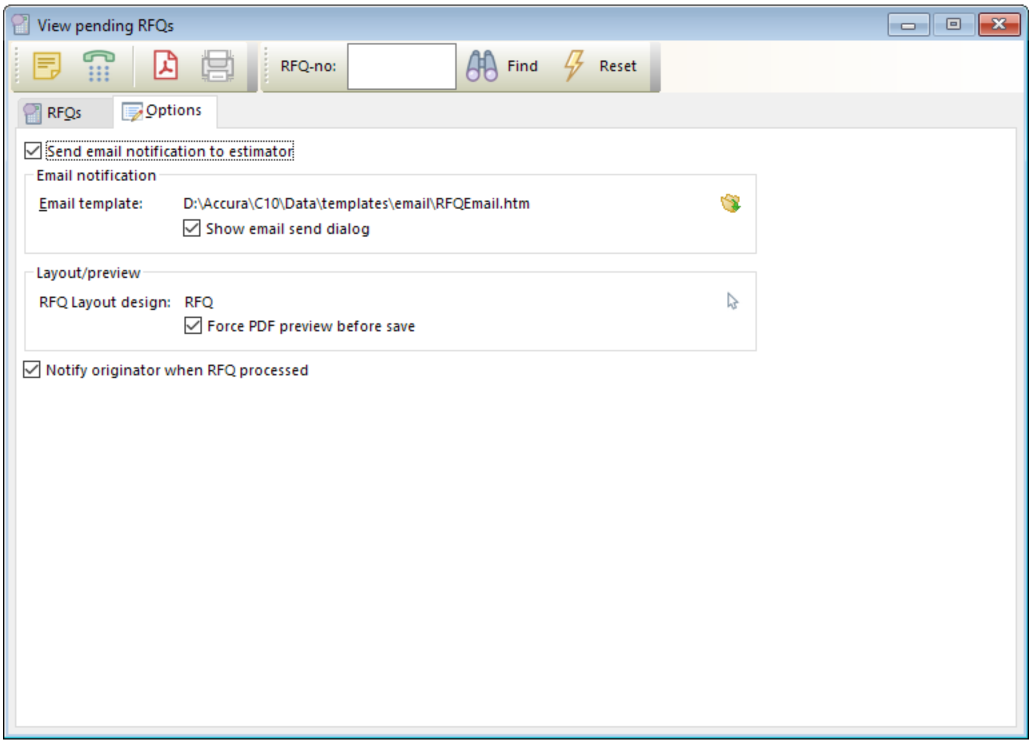
Use of the detailed layout is driven by a job type with the inclusion of a new layouts tab which also includes the ability to define a custom Job-sheet layout to be used on estimate to order conversion.
There are 3 options to choose from within the job type:



- Summary: Standard quote letter layout
- Detailed: Default Quote letter used from options tab in print dialog
- Custom: Detailed letter layout defined by job type

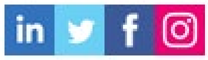
RFQs

RFQ email and printing options have been moved from the RFQ Options tab to the **View Pending RFQs Options** tab as it was felt that settings would be common to all raised RFQs rather than on an individual basis.



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.

Instagram



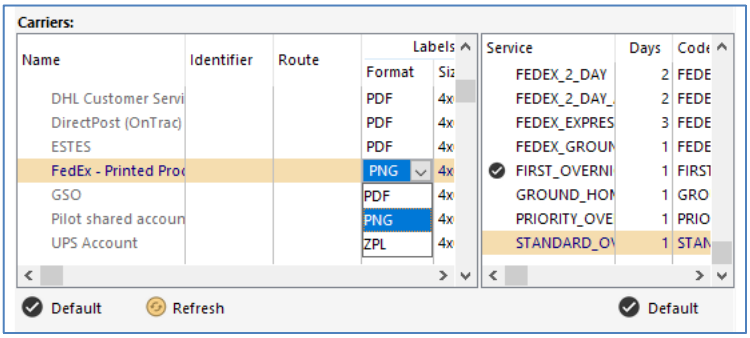
Fields for Instagram have been added to the main Company record and User profiles. Adding URLs to these will enable use of the new [UserInstagram] merge token which will then display an Instagram icon and link on your email signature.

Any company Instagram link will sync and display on AccuraOnline 6.

In addition to company and users, Instagram fields have also been added to client, supplier and contact records.

EasyPost

Certain carriers supported by our EasyPost module do not return easily printable labels. To help our users work around this, it is now possible to print EasyPost labels in a variety of formats and sizes. The settings to change these can be found in *Defaults* > *Settings* > *Carrier*.



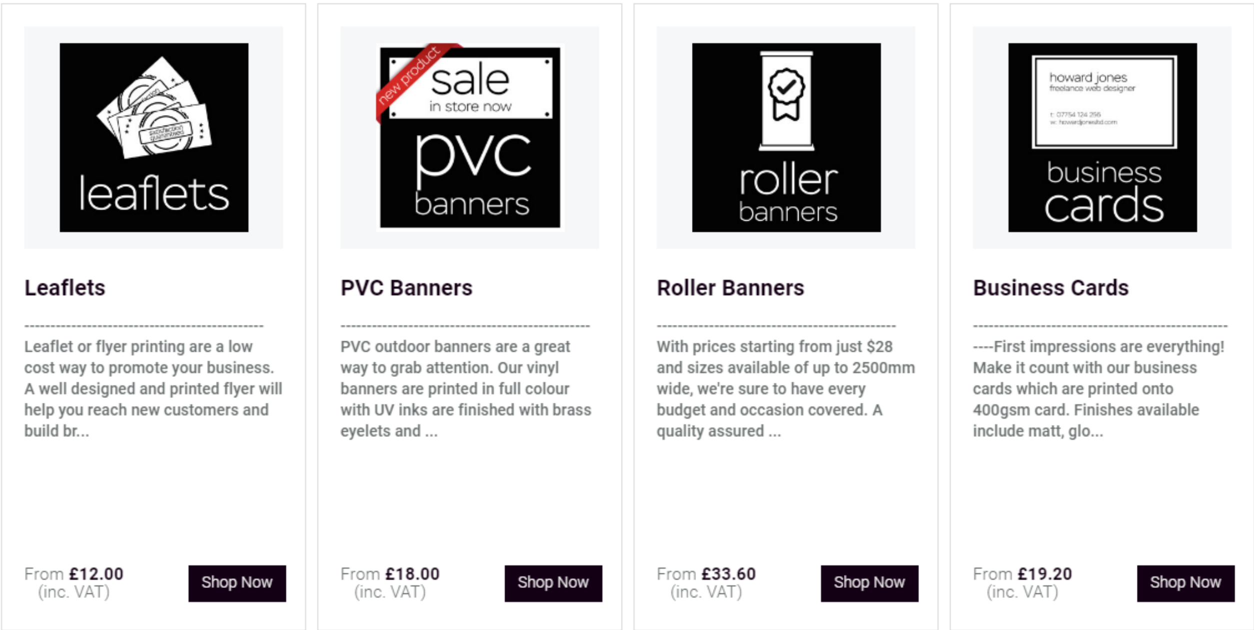
There is a setting for each carrier as different characters may be better supported by one of the available formats and sizes. As well as the default PDF format, you can also select PNG or ZPL (the format for Zebra label printers). Available sizes are the default 4x6 sizes as well as 5 x 8, 8.5 x 11 and A4.

New Features in Accura Online Version 6.10

Please note that Accura Online 6.10 requires the installation of Accura 6.03 Build 3 or later

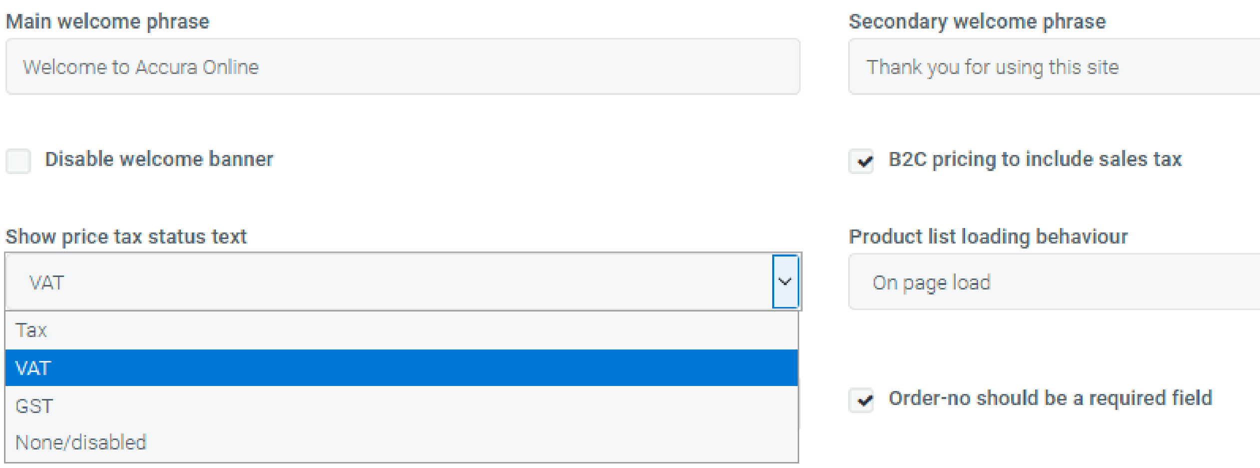
Pricing Includes Sales Tax

All pricing throughout the website is now capable of switching between including or excluding sales tax based on the logged in user account. The user interface can optionally display text throughout the website to indicate if prices include or exclude tax, and can be configured to denote tax as VAT (for the UK), GST (for Australia and New Zealand) or Tax (for USA and other markets).

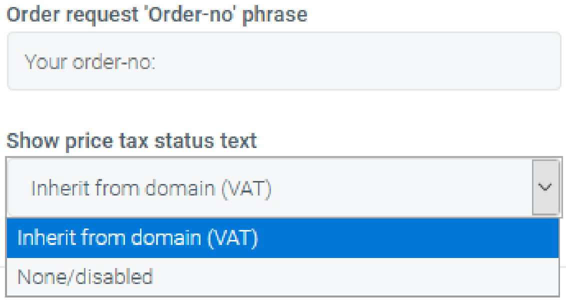


The new tax features are controller partly via Accura and partly via the Admin area settings page:

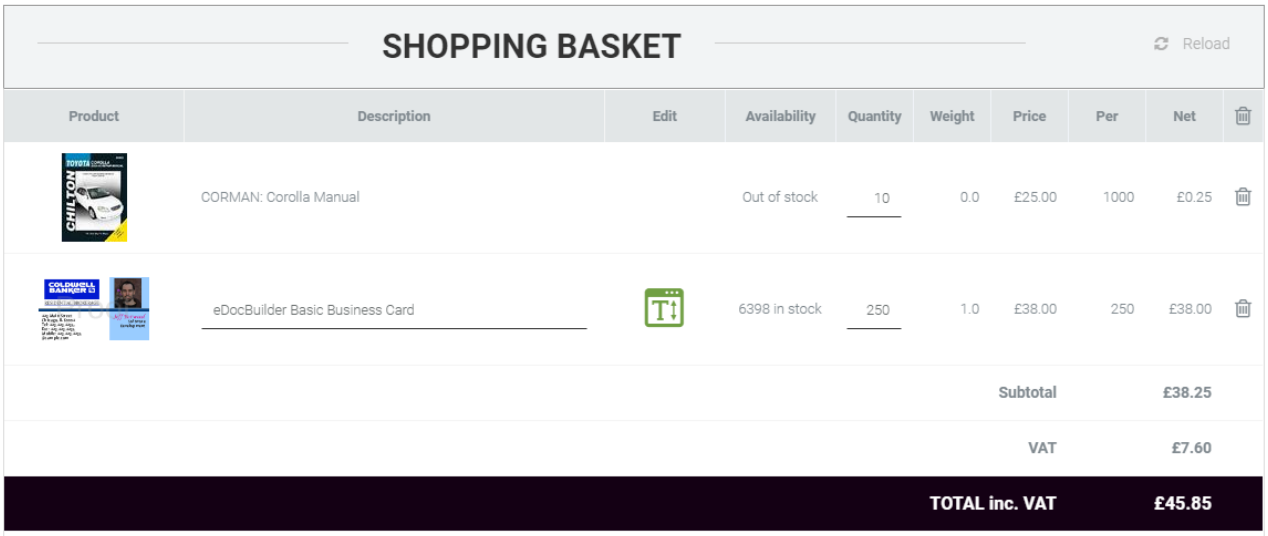
- The tax-inclusive behaviour for logged in client accounts is controlled by Accura on the Accounts tab of Client maintenance 'Show prices including tax', so each client can control tax behaviour independently.
- The tax-inclusive behaviour for B2C users (either not logged in, or before being converted to clients in Accura) is controlled at domain-level by the Admin area setting **'B2C pricing to include sales tax'**.



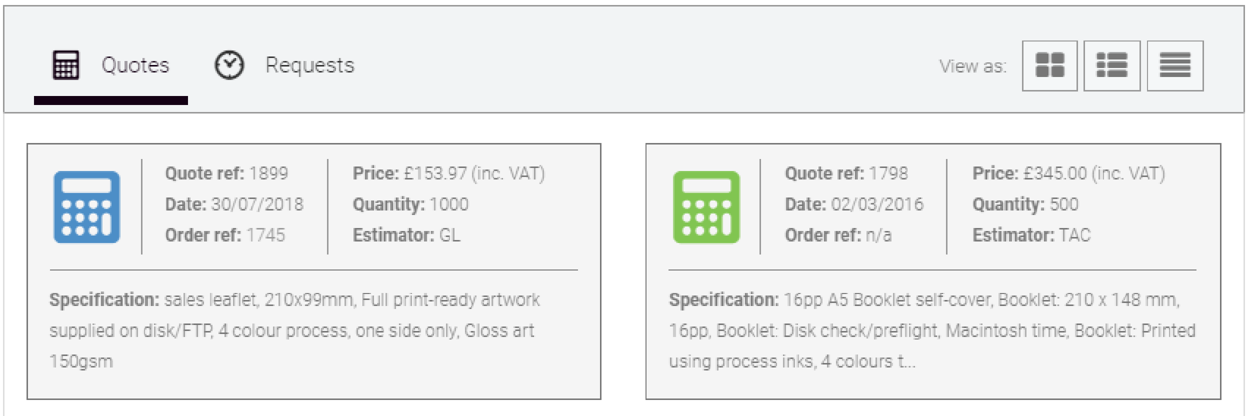
- The optional UI text to denote if prices include or exclude tax is controlled at domain-level by the Admin area setting **'Show price tax status text'**. This can be set to VAT, GST, Tax or None. Selecting 'None' will disable the text but will also prevent customisation of the UI for VAT or GST.
- The 'Show price tax status text' setting can be customised in **client branding**. Here, the options are either to inherit the behaviour from domain level (which is the default), or disable the text for that client.

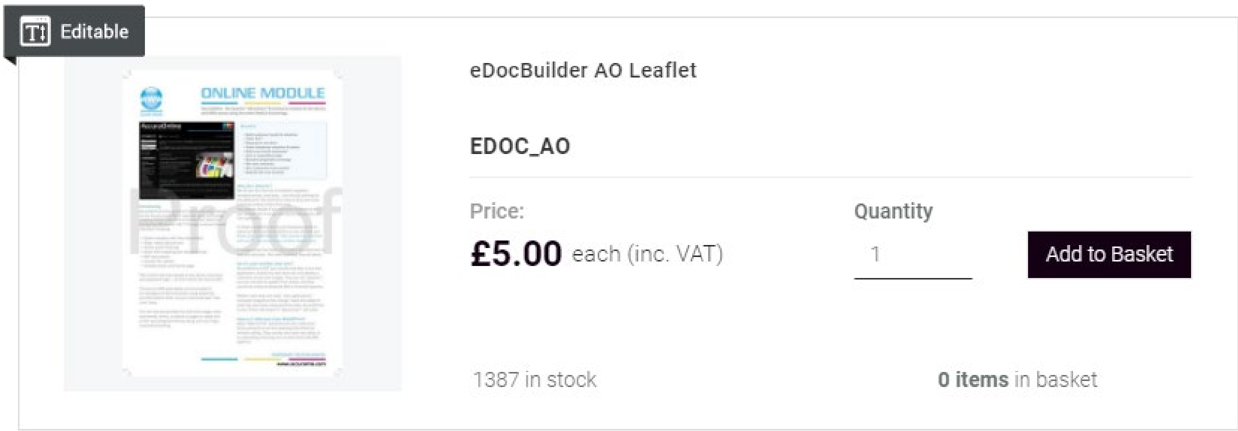


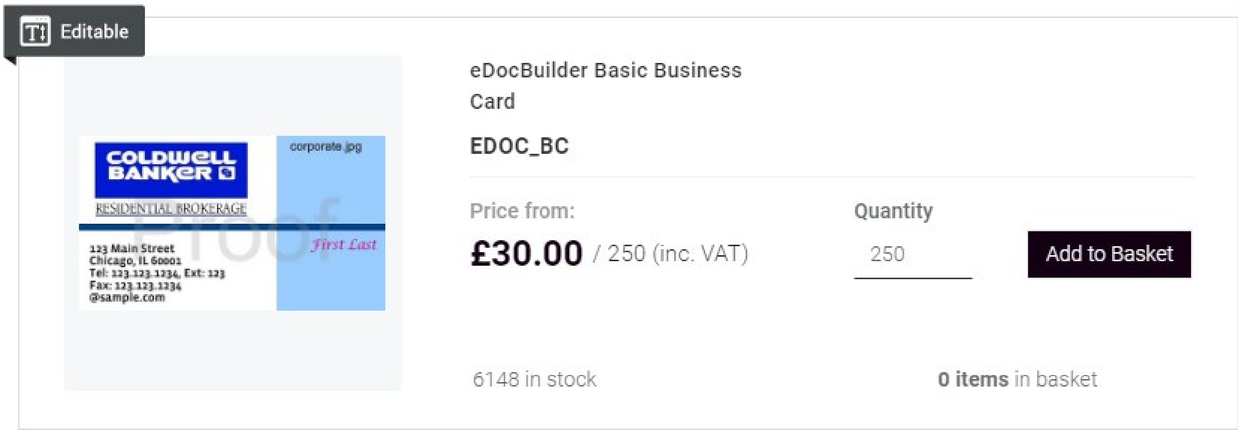
Product lists in the shopping basket, checkout wizard and view store orders will always display full breakdowns of net, tax and total pricing regardless of the pricing includes sales tax settings. This retains the behaviour of previous versions.



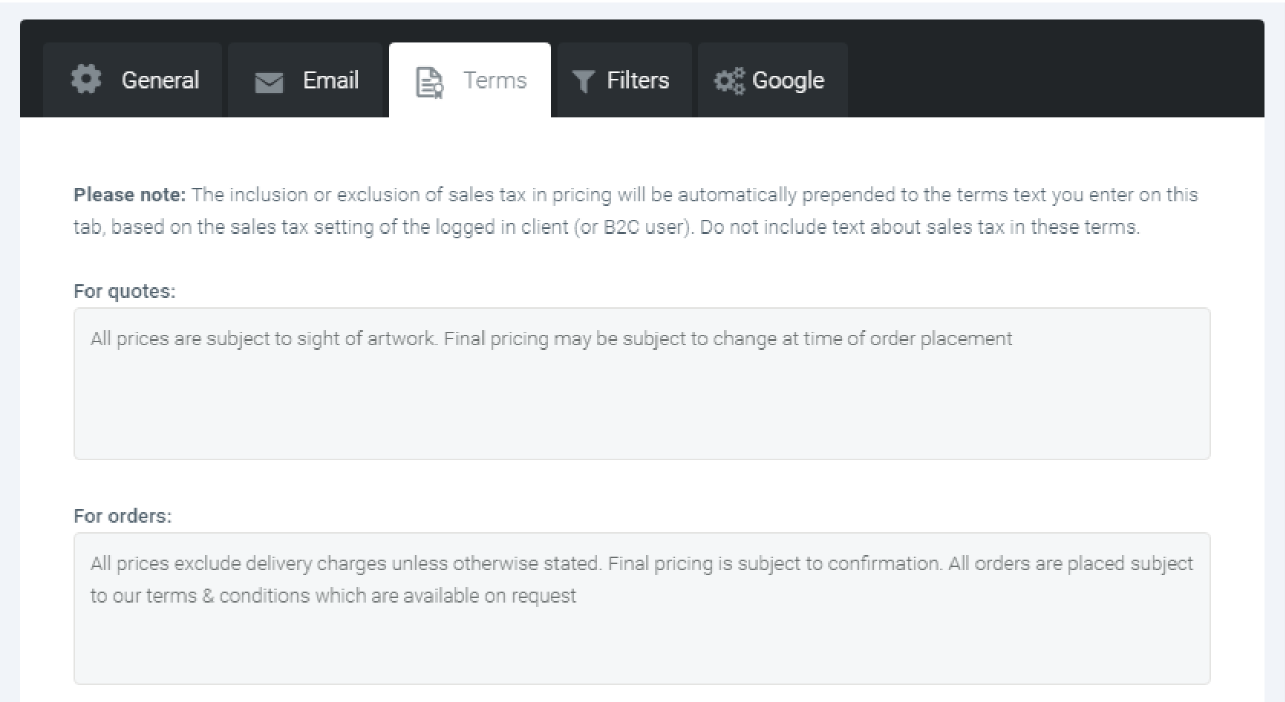
All other areas will look exactly as they do when they display net pricing, but will instead display total (net + tax) pricing when pricing is configured to include tax unless 'Show price tax status text' is enabled, for example: Quotes (this page), and Products (next page)





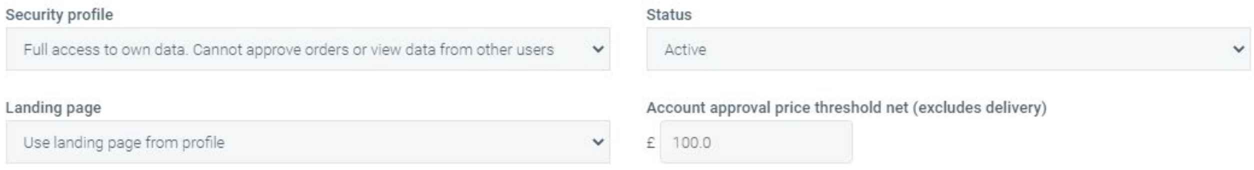


The **terms and conditions** phrases entered in Admin settings and displayed on quotes, orders and requests should no longer contain wording to indicate that pricing excludes sales tax. The website will automatically prepend text to the terms and conditions phrases to state if pricing includes or excludes tax. Users who have altered their terms and conditions phrases will need to edit these after the upgrade to remove references to sales tax. If the default phrases are being used, they will be changed automatically during the upgrade.

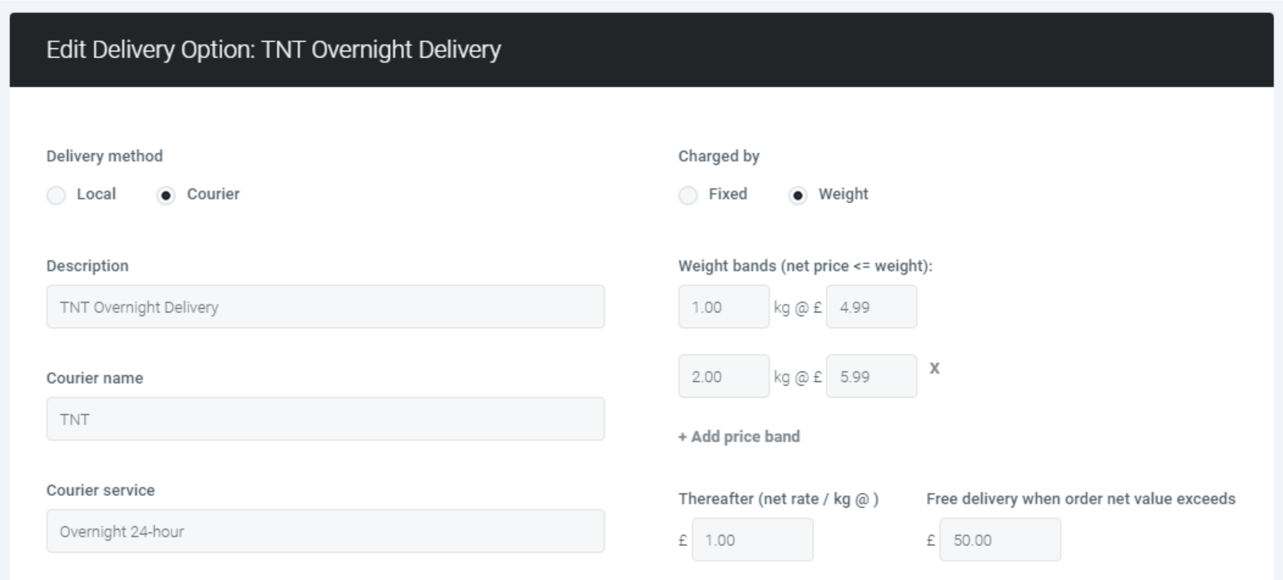


There are certain places in the Admin area that require entry of pricing values. These values should continue to be entered as **NET prices**, regardless of the sales tax behaviour of the website. The relevant areas are marked up in the UI as requiring net values. These areas are:

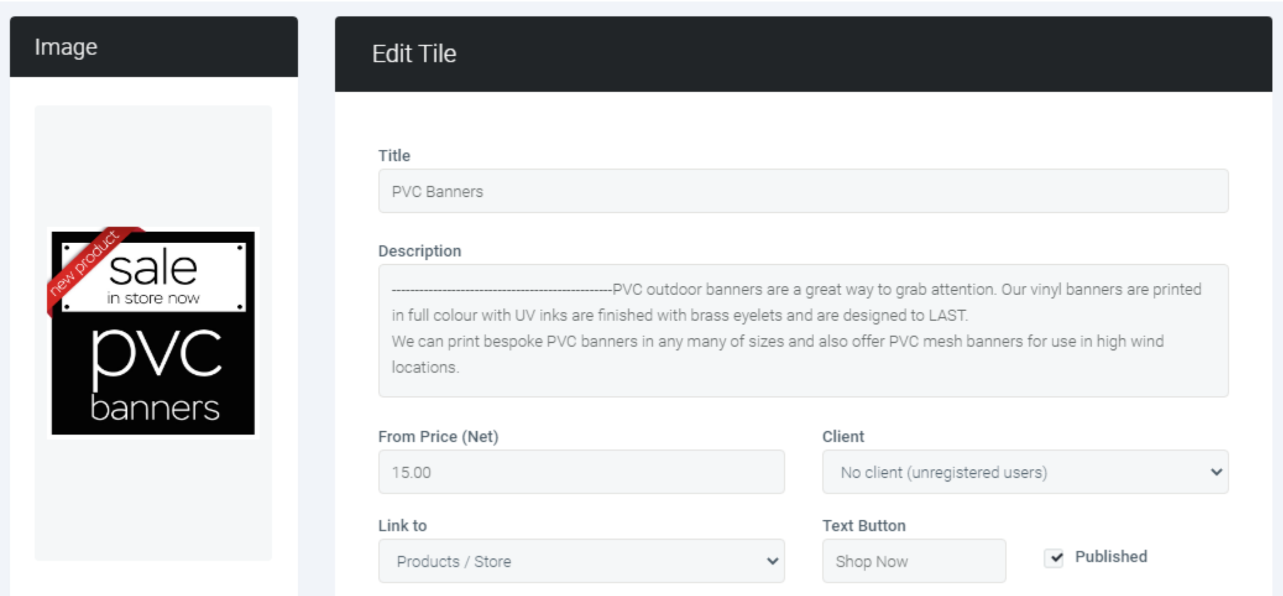
- *Approval price thresholds* for website accounts that lack the ability to automatically approve their own orders.



- All pricing values entered in *delivery options*.



- *'From' pricing in tiles* linked to products.

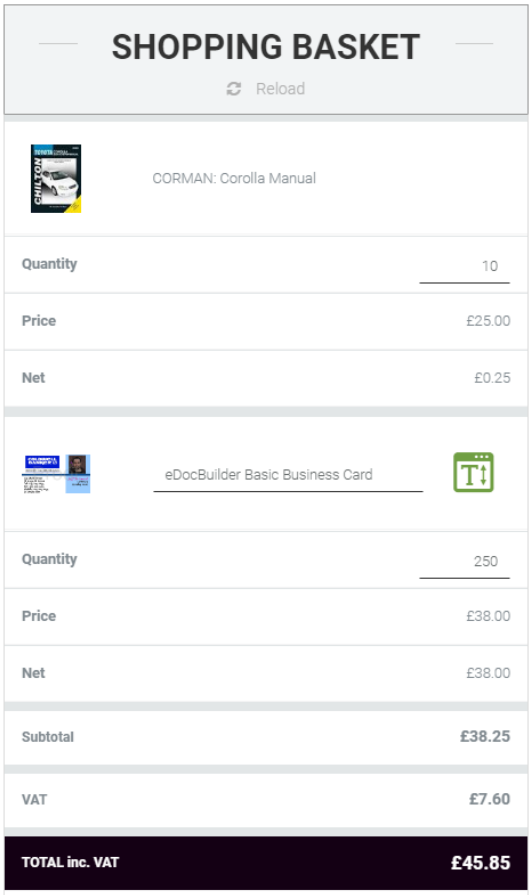


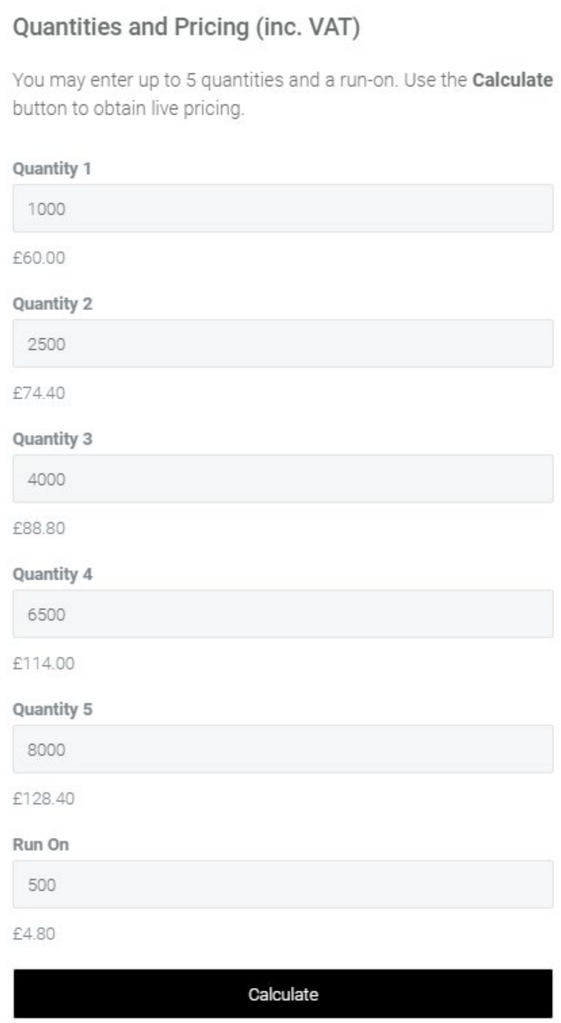
Mobile Responsive Design

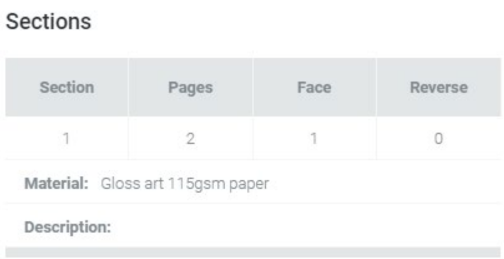
Various areas of the website have been **optimised for display on mobile devices**; in particular turning horizontal tables on desktop into vertical tables on mobile (removing the need for horizontal scrolling), and sometimes removing less important data where there is a lack of room to display it on mobile. These optimisations also include improvements to the display of the website on desktop devices.

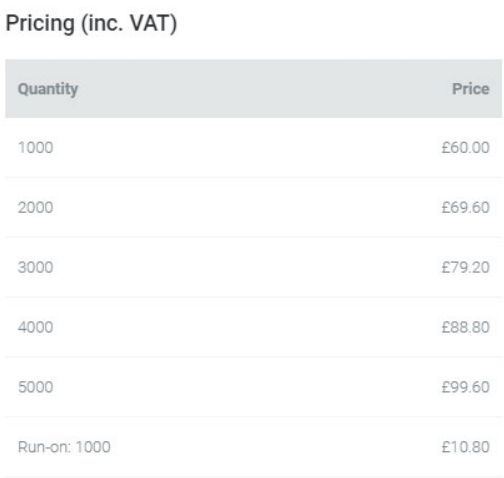
Areas optimised are:

- Store: Product lists in shopping basket, checkout step5, viewing store orders and viewing store order requests (see right).
- Product slides displayed on the homepage.
- Attachments: request forms, checkout step2, proofs, proofs tab on orders, attachment tabs on quotes orders and requests.
- Quotes, orders & requests: quantity and pricing areas and section lists (see bottom-left and bottom-right).
- Orders: delivery and invoice tabs.
- Proofs: view proofs thumbs and list views, view orders proofs tab.







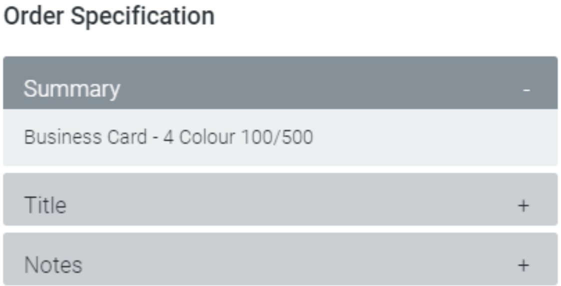


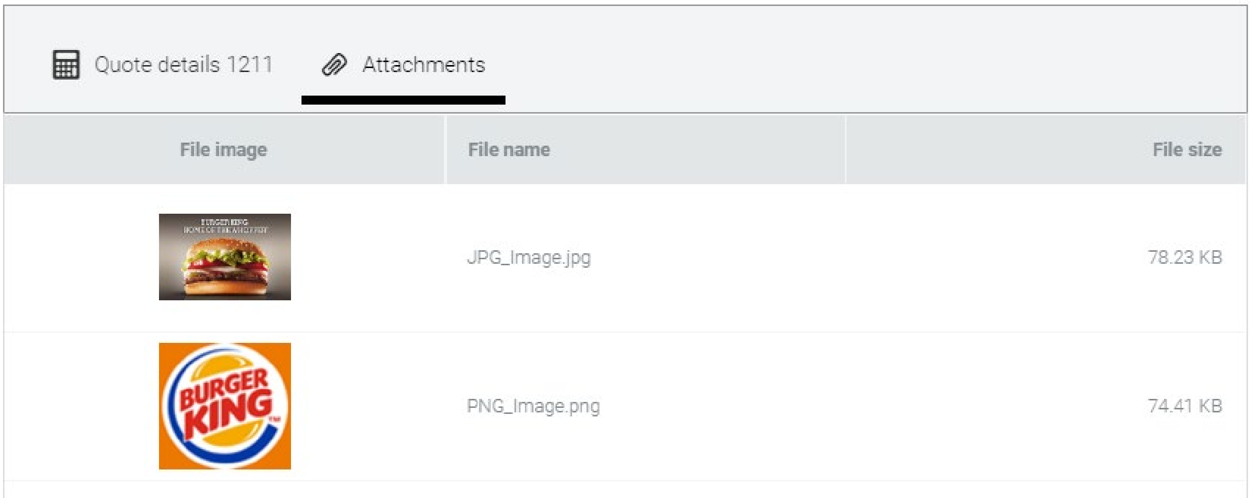
User Interface

Other changes to the user interface in this release include:

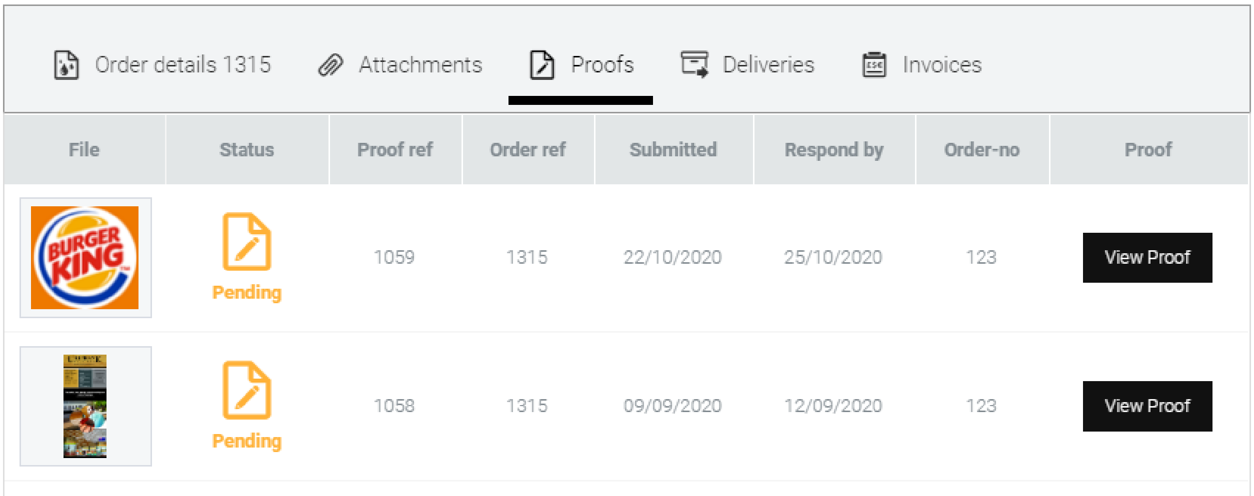
Quote, order and request view page designs have been updated. All designs now display spec fields in accordions (hiding empty values), quantity areas have been improved, and designs have been made consistent with each other.

Quote view page now displays an **attachments** tab displaying files that were uploaded to the original quote request. Previously only orders displayed attached files.





The **order proofs tab** has been redesigned into a horizontal layout that looks better when orders have more than one proof. Proof attached files no longer display on this tab.

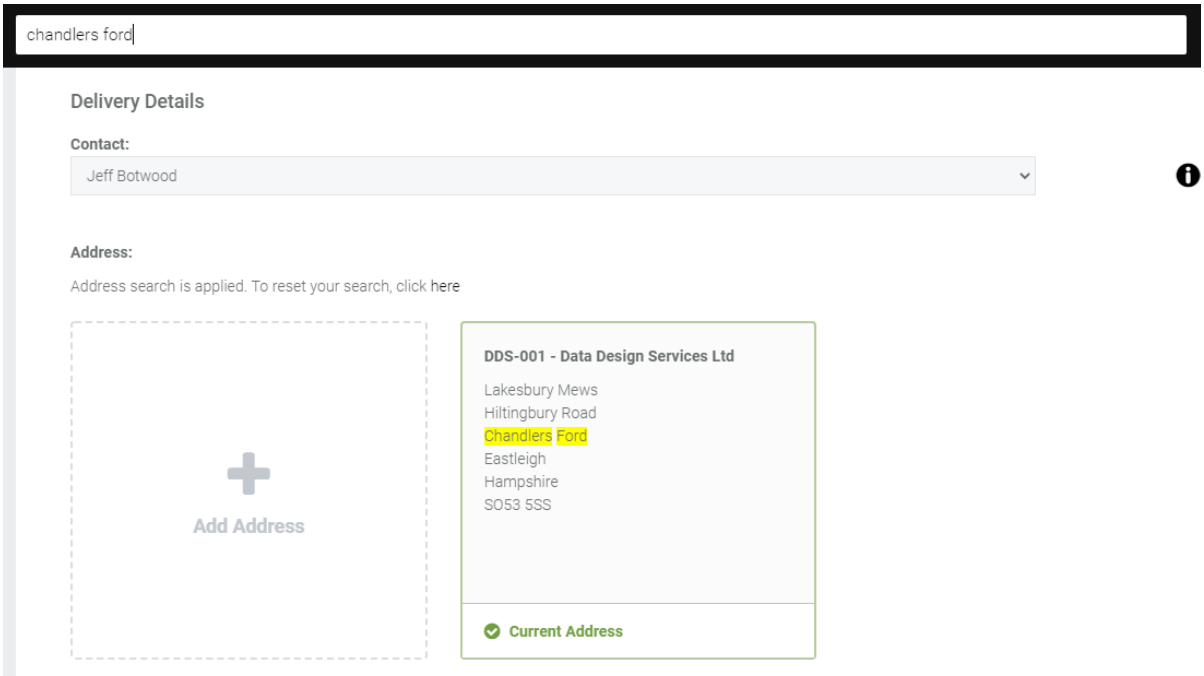


There are a number of other minor improvements to the user interface documented in the technical release notes.

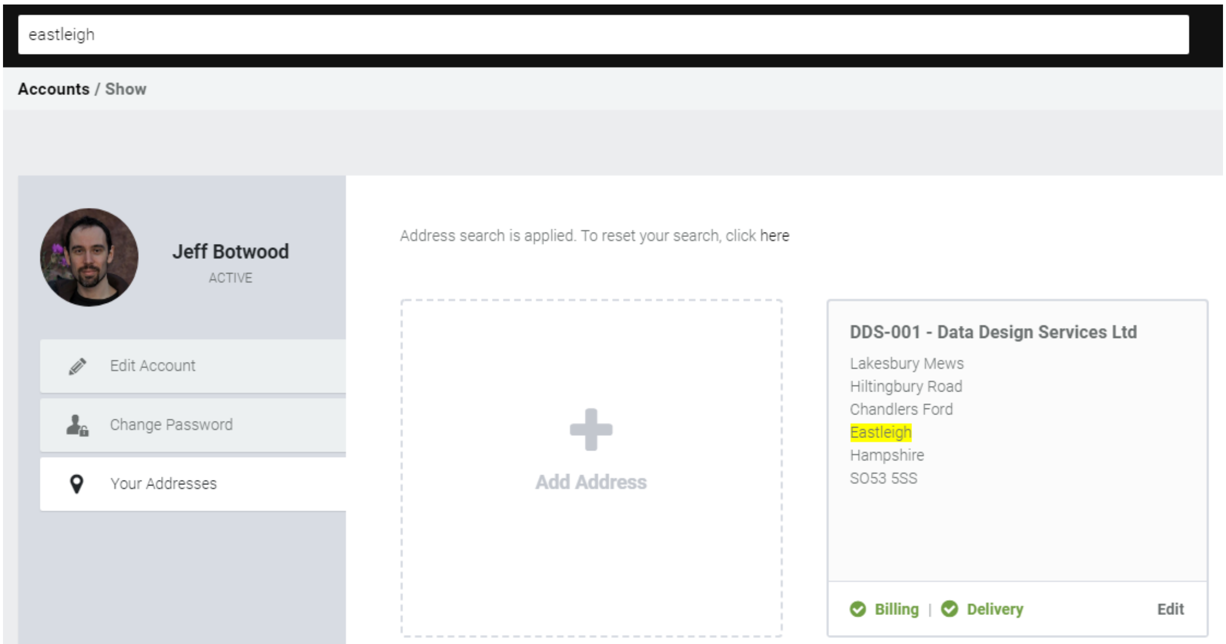
Global Search

The **Global Search** feature which is activated in the website header from the search icon has been expanded in this release to cover new website areas:

- **Checkout wizard billing and delivery steps** to filter client office address cards.



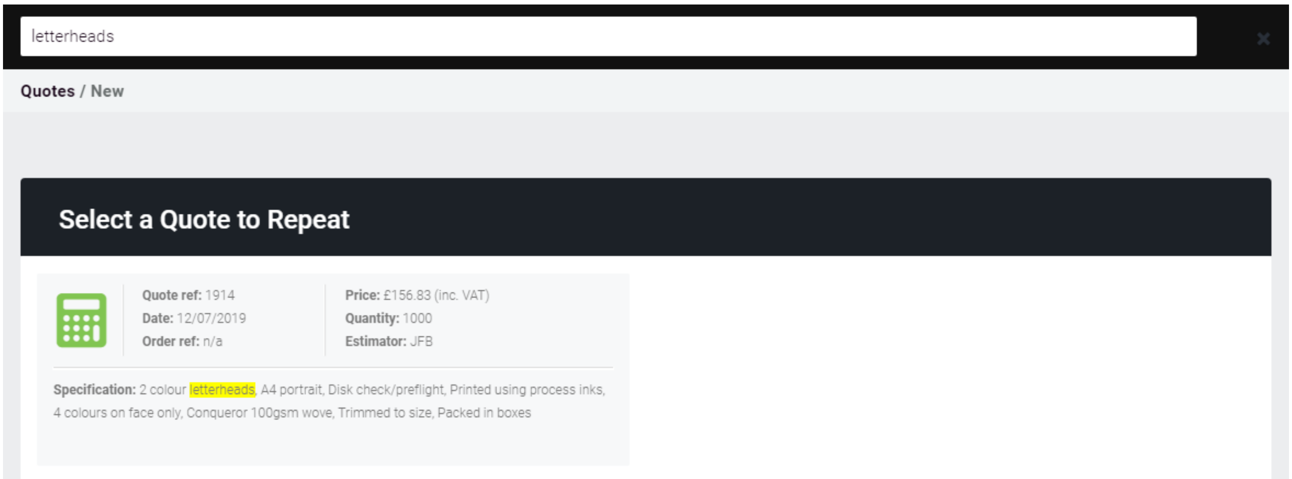
- **My account area addresses tab** to filter client office address cards.



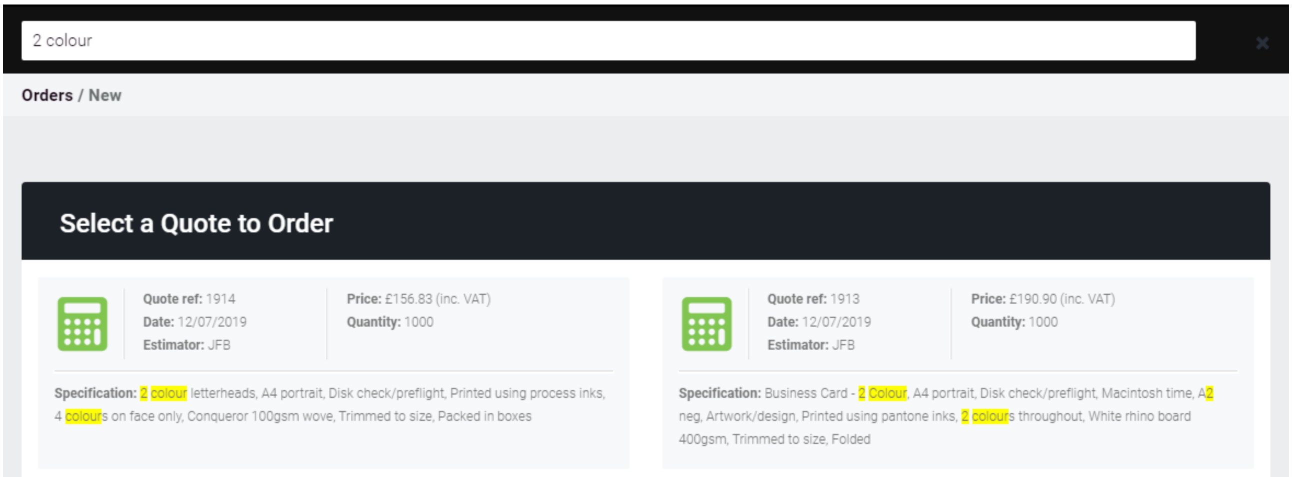
The address searches are designed for clients who have large numbers of offices and need to quickly locate the one they want without scrolling through pages of addresses. When address searches are applied, the website informs the user of this and provides a link to reset the search

Global search has also been implemented on:

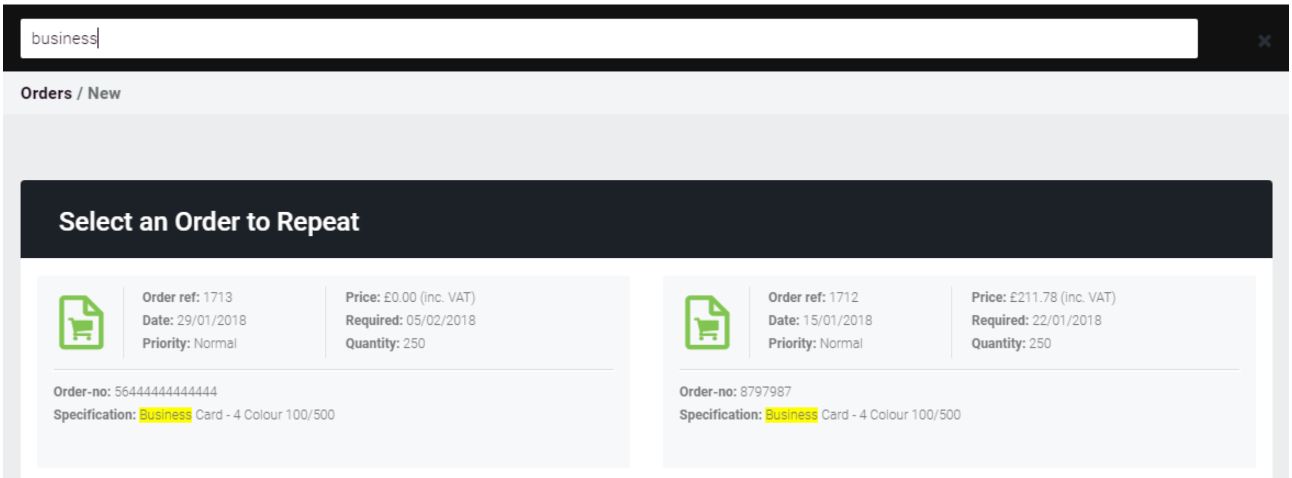
- **Repeat quote** lists.



- **Order from quote** lists.



- **Repeat order** lists.



Business to Consumer Public Store Front

Business-to-consumer (B2C) is a new website 'Branding Mode' which allows public use of the Store. Public products can be ordered without logging in, and account login or sign-up becomes part of the checkout process. This feature allows AccuraOnline to be used by members of the general public as a conventional shopping website.

The product list, basket, add to basket, eDoc artwork designer (if enabled), and checkout features are all available for public use in B2C mode.

Public users are called 'guest accounts' until their first order gets processed in Accura and a client is created for them. At this point, they are converted to regular 'client accounts', and then they get full access to the website based on the default security profile and work the same as B2B accounts.

New account sign-up in B2C mode is now immediate and no longer requires interaction from Accura. Account activation emails are also bypassed. Once signed up, guest accounts can log in, log out and raise multiple orders before Accura data sync occurs – PAYMENT MUST BE CONFIRMED BY PAYPAL - before order is received in web console.

***Terminology change**: The old branding modes used to be called B2B and B2C prior to V6.0 which is confusing as both modes were types of Business to Business operation. The branding mode that locks out the website behind the login is now called Business to Business (or B2B). The branding mode that displays the full website, requiring login to place orders is called Business to Business with Homepage (or B2BH). Business to Consumer (or B2C) is the new public website mode.*

Business-to-consumer mode requires a number of features to be enabled and configured correctly:

- A set of public products that can be ordered by the general public in Accura. Client-linked products will not be visible in Business-to-consumer mode when public users are browsing the website. Client-linked products become visible when existing clients log in.
- The store menu item in the Admin area needs to be configured to appear before account login by setting its Visibility setting to 'Both'.
- Unless you are offering free delivery for all products, Delivery Options must be configured in the Admin area.
- PayPal payments must be configured in Accura and on secondary domains as appropriate in order to take payments for orders.
- To use the Google address locators, you will need to configure a Google API key in Admin Settings (please refer to Accura v5.31 New Features document for setup).

Logging into a client or guest account after adding items to the basket will add the items to any basket contents that may already exist for that account.

Sign-up forms and links are removed in B2C branding mode as this is handled in the new checkout wizard.

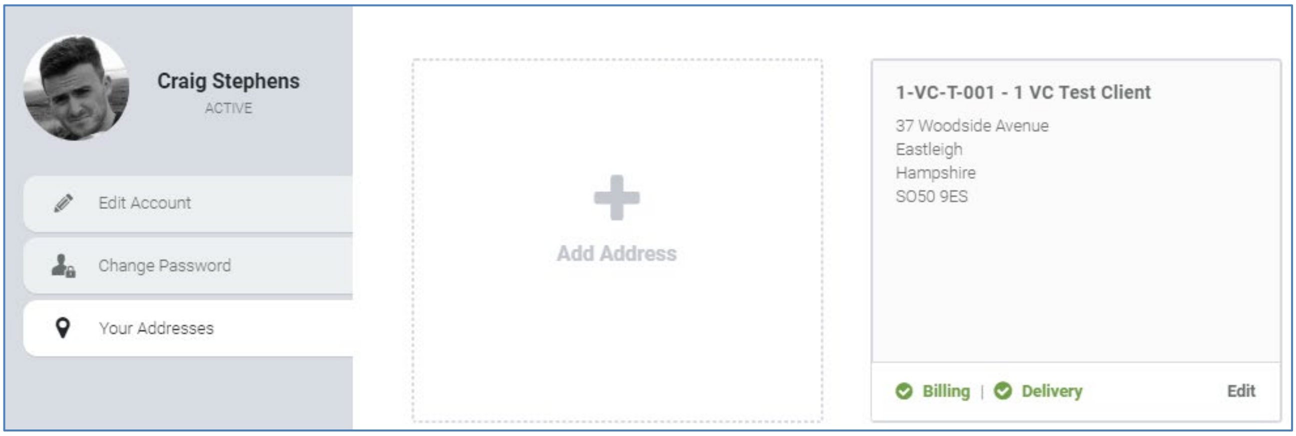
The guest account order request confirmation uses a new email notification so it can be customised separately to the client account order request confirmation.

Guest account notes:

- Guest accounts without company names will sync the account name to Accura’s company name field.
- Guest accounts have cut-down access to the My Account area prior to Accura data sync.
- Guest accounts are not visible from Web Console ‘users’ area.

Address Management

There is a new "Your Addresses" area for logged in users within the My Account area. Users have options to amend billing and delivery addresses (where security permissions permit the user to do so) and also add or edit addresses with sync back to the Accura database.



This area utilises our new address card system which is used instead of the old address drop list method used previously. This new card system is also one of the main focal points of our new Checkout Wizard mentioned later in this document.

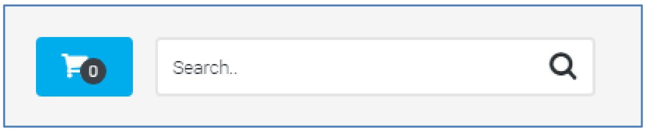
All address entry pop-ups throughout the website now allow Google address location (configured on the Google tab of Admin Settings). Previously, this only worked on the signup form for new accounts.

Custom order delivery addresses (on print orders) now appear in a pop-up dialog, and allow entry of delivery phone and email fields which will be used on Accura's delivery notes and integrated shipping module.

It is no longer necessary to specify company names in addresses in the My Account area, so B2C users can enter standard addresses without the need for a company name.

Global Search

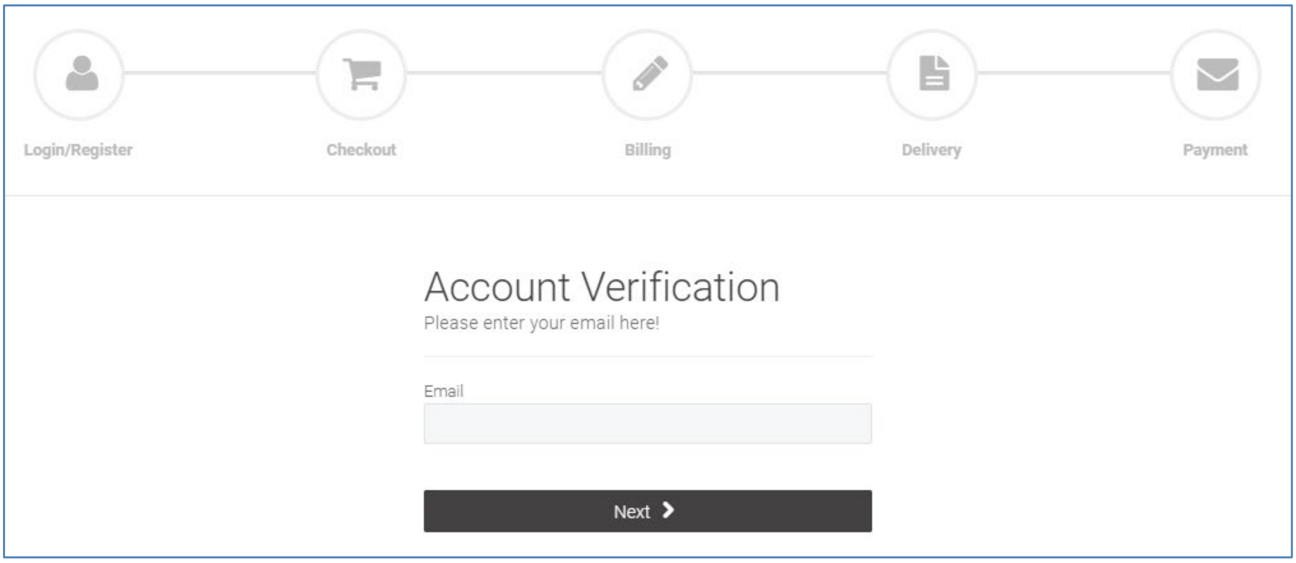
Global search standardises the text search facilities throughout website. The search field or icon is built into the website header or menu bar instead of appearing above the filter area in areas that display searchable data. You can now perform a search from any page on the website.



Searches will usually default to the page you are searching from. Searches on pages that don't list quotes, orders, proofs, templates or products (e.g. My Account, Home, Contact Us etc.) will redirect to the product list and perform the search on products.

Checkout Wizard

The Checkout Wizard is a step-by-step replacement for the old checkout 'form' which required vertical scrolling and displayed a large number of fields to enter in one place. The wizard features account login and registration, along with some major design changes to the way addresses are handled. The checkout wizard will be used for all product orders in V6.0 regardless of branding mode.



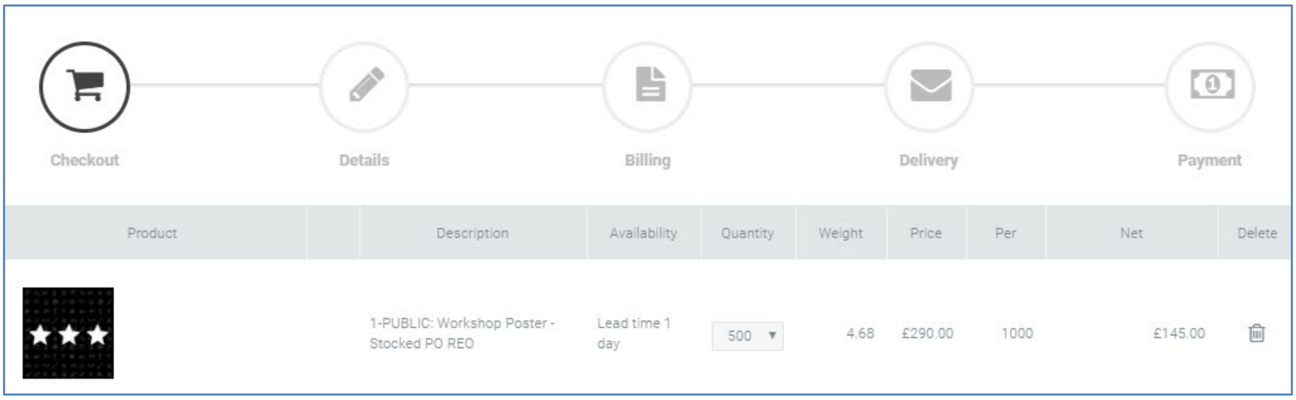
Wizard steps:

- If not logged in, it asks for Account email. If email exists then the next step is the password, else the next step is the sign-up form to register an account.
- Once logged in or signed up, the wizard steps are: Order details (with attachments), Billing Details, Delivery Details, Payment Details (list of products with delivery charge selection), then Pay with PayPal.

The Checkout Wizard uses our new address card design instead of office drop-lists in billing and delivery steps. Delivery step has 'Use Billing Details' option to set delivery details to match billing details.

Guest accounts have certain restrictions in the Checkout wizard compared to client accounts:

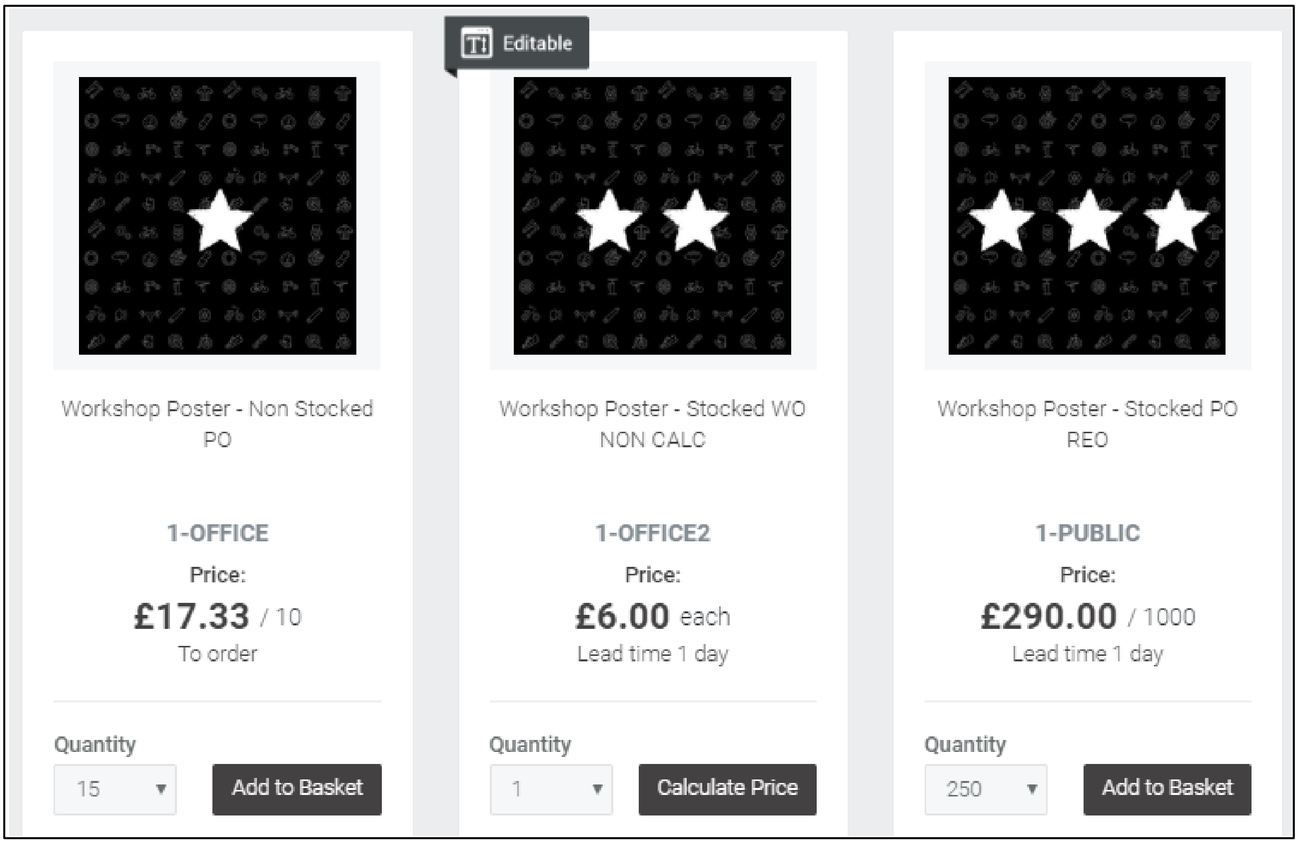
- Guest accounts cannot edit billing details after their first order has been placed.
- Guest accounts cannot save orders as drafts. Only client accounts can do this.
- Guest accounts do not have access to the orders area, so they cannot view request details for their orders until they have been processed in Accura.



© Data Design Services Ltd Nov-20

Store / Products

Add to basket and live price calc are now available directly from the product list instead of needing to go into product details for faster ordering.



A default order quantity is synced from Accura to populate the product quantity field or drop-list for faster ordering.

The main price displayed for each product is now editable in Accura on the pricing tab of each product if it needs to be customised, otherwise it will automatically use the price of the highest price band (which would be the lowest price per unit)

Product codes and descriptions have been swapped in the product list so description appears as the main text.

eDoc icons appear as 'Editable' overlays on product image thumbnails.

Basket item description editing is now possible on all products linked to library quotes or eDoc templates. Previously, some product configurations did not allow this.

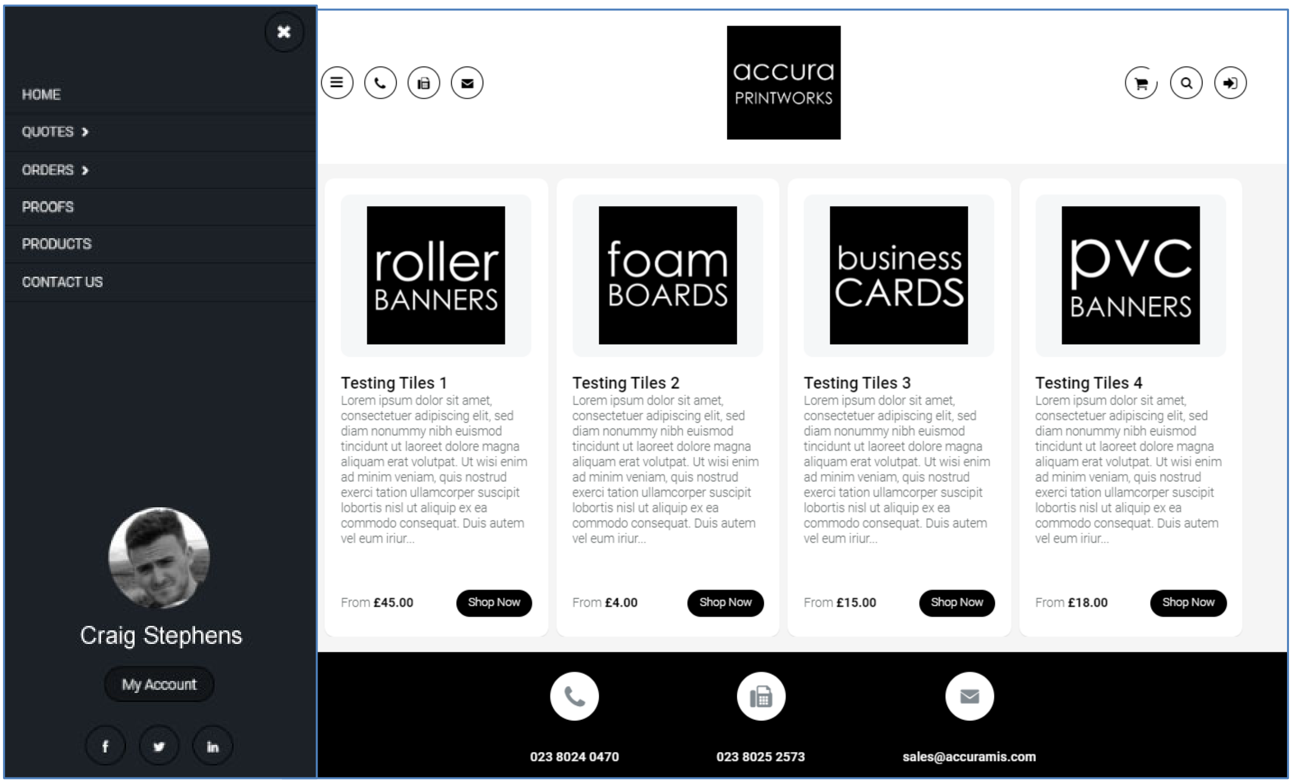
Emptying the basket now redirects to the product list.

Product page price lists are hidden unless the product has multiple price breaks, and thereafter rates are hidden for quantities that are impossible to order (e.g. quantity choices, or where thereafter > max order quantity).

Website Themes (Abstract) & User Interface

A new theme has been added called **Abstract** which gives the website a more modern/clean feel with rounded icons and a new pop out side menu called the “push menu”. This will make the website feel more similar to other mobile responsive websites that have a similar menu system applied and allows more room on your homepage to showcase your products, or anything else you choose to display.

You can also pick and choose which elements of the abstract theme you like, and create a customised theme that is applied to selected clients in the client branding section within the admin area of your website.



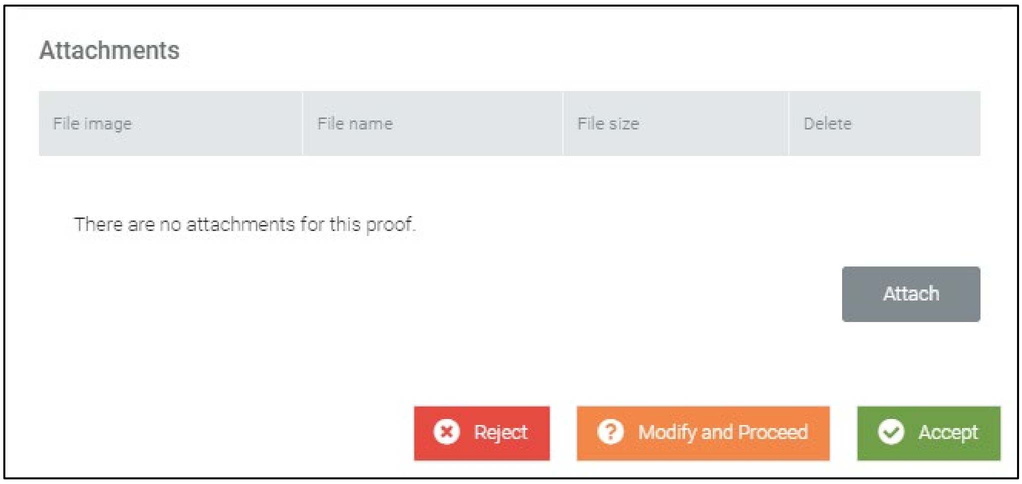
The menu used for Abstract was previously available as the 'Push' menu style. This has been renamed to 'Abstract'.

Instagram social media icons/links have been added, synced from Accura's Company settings for the first domain. These are editable from Admin Settings on subsequent domains.

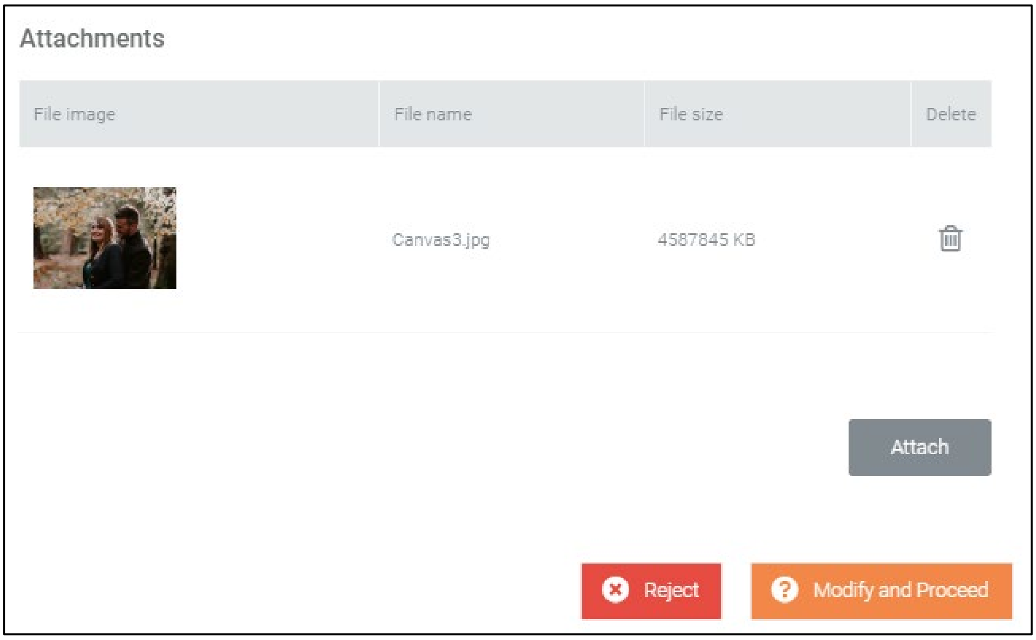
All of the website themes have been visually improved and debugged, including improved widget colour settings for theme customisations.

Proof Attachments

It is now possible to allow proof attachment to pending proofs with sync back to Accura. The new attachments are shown in the proofs area and also in the proof tab of an order within an AccuraOnline account.



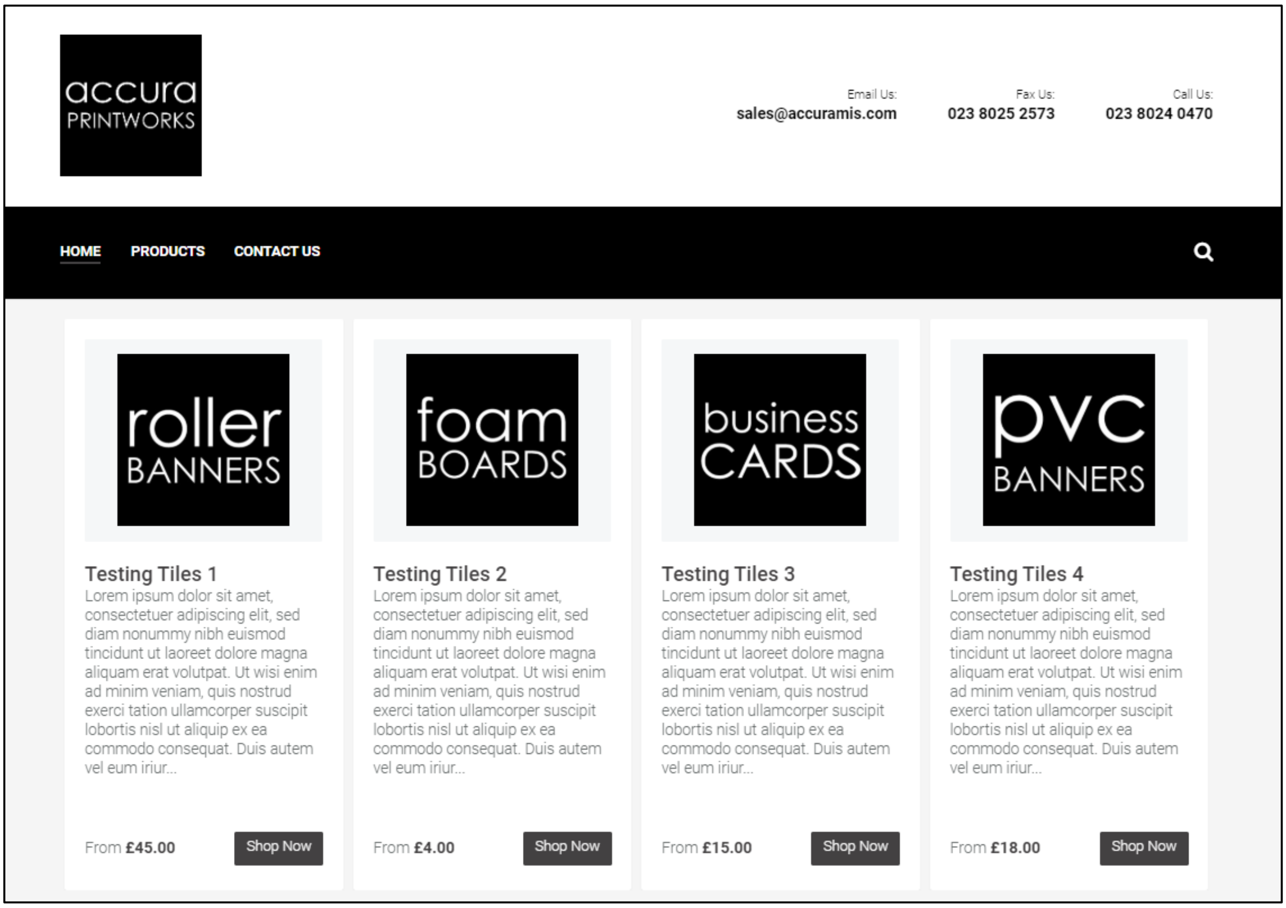
As soon as a new file is attached to a pending proof, the “Accept” option is dynamically removed and the user must either “Modify and proceed” or “Reject” the proof along with adding some mandatory customer notes for clarification to the client account manager. The email sent to the Accura studio manager will include a download link for attached files, and they will also be available in Accura from the Proof and Order.



Whether “Modify and proceed” is shown in a pending proof is dependent on how Accura is configured to handle order status with proofs. If Accura's production defaults are configured to set order status to 'Active' on proof modify, then proofs will allow the modify (and proceed with order) action. If Accura is configured to leave orders 'On hold' when proofs are modified, then proofs will not allow modify and will only allow the accept and reject actions.

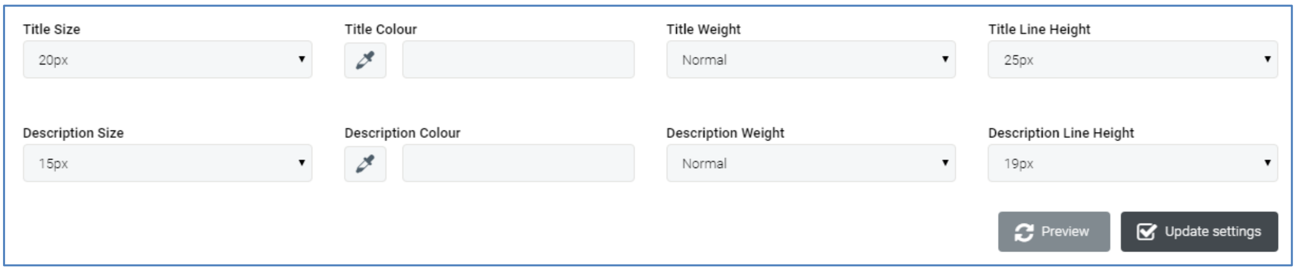
Home Page Tiles

Tiles appear in a new area on the homepage below the slides and above the banner using thumbnail images, a text area and clickable links. Tiles can be used to advertise products & special offers, to display news, or just to display graphics.



Tiles can be created at domain-level or client-level in client branding.

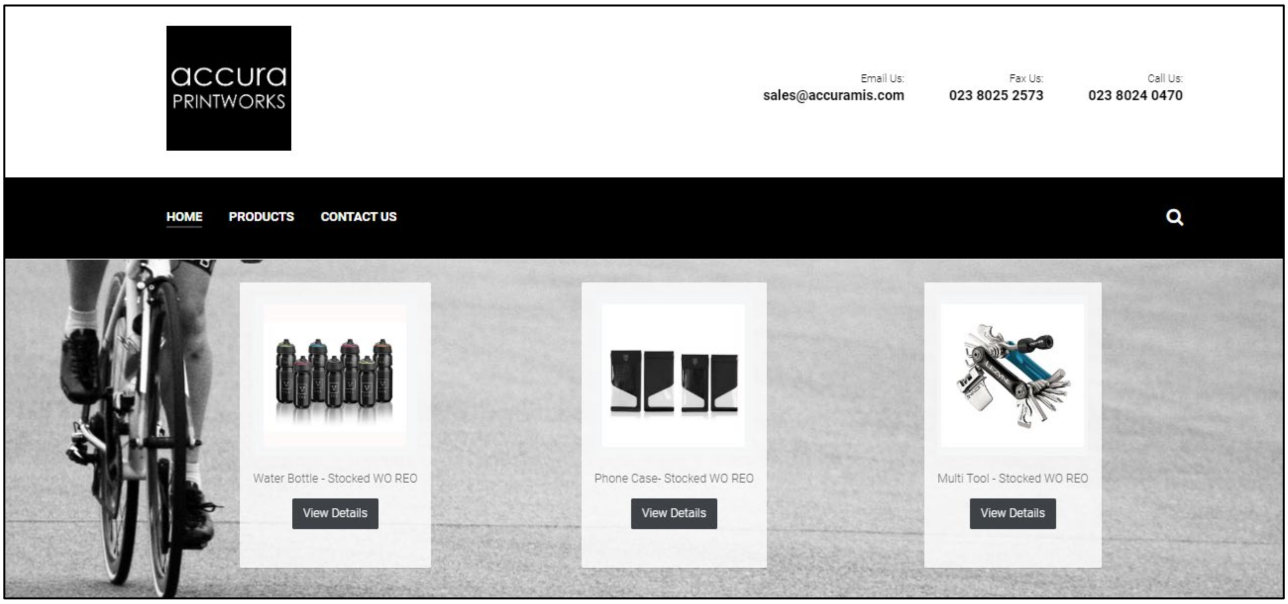
Font settings are configured for all tiles per domain or per client in the relevant tiles area to ensure they are displayed consistently.



- If tiles are configured in client branding, the client will see domain-level tiles before logging in, and client-level tiles after logging in.
- Tiles 'Link to' options are: None, News, News article, Page, Product list, Product code, My Account, Contact Us, Custom URLs.

Home Page Slides

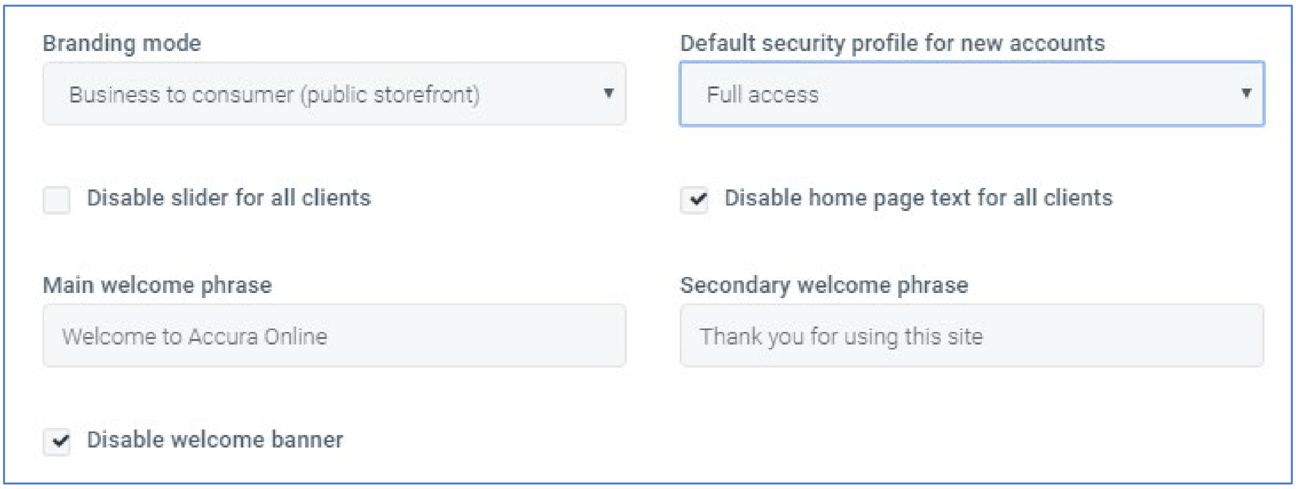
Product slides now feature up to 3 product links appearing as thumb overlays over the main slide image.



There are also new slide 'Link to' options: Product list, News list, and My Account.

Admin Area Settings

You can now disable many of the homepage elements that were mandatory in previous versions, including the welcome banner, the slider area and the home page text content in the Admin area Settings. You can also edit both of the text phrases displayed in the banner if you choose to keep it enabled. This provides greater control over the home page appearance, for example to showcase any products or other content you wish to display.

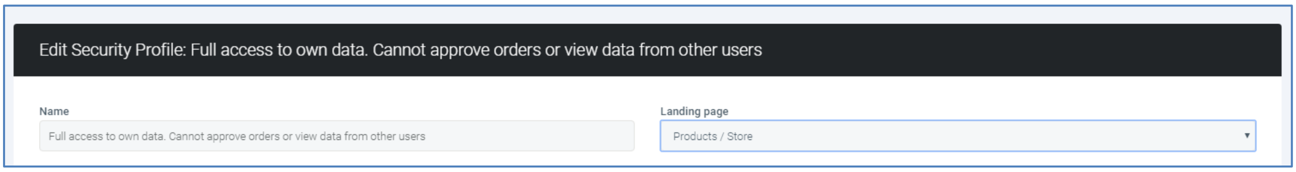


Some of the Actions available in the Settings area have been improved:

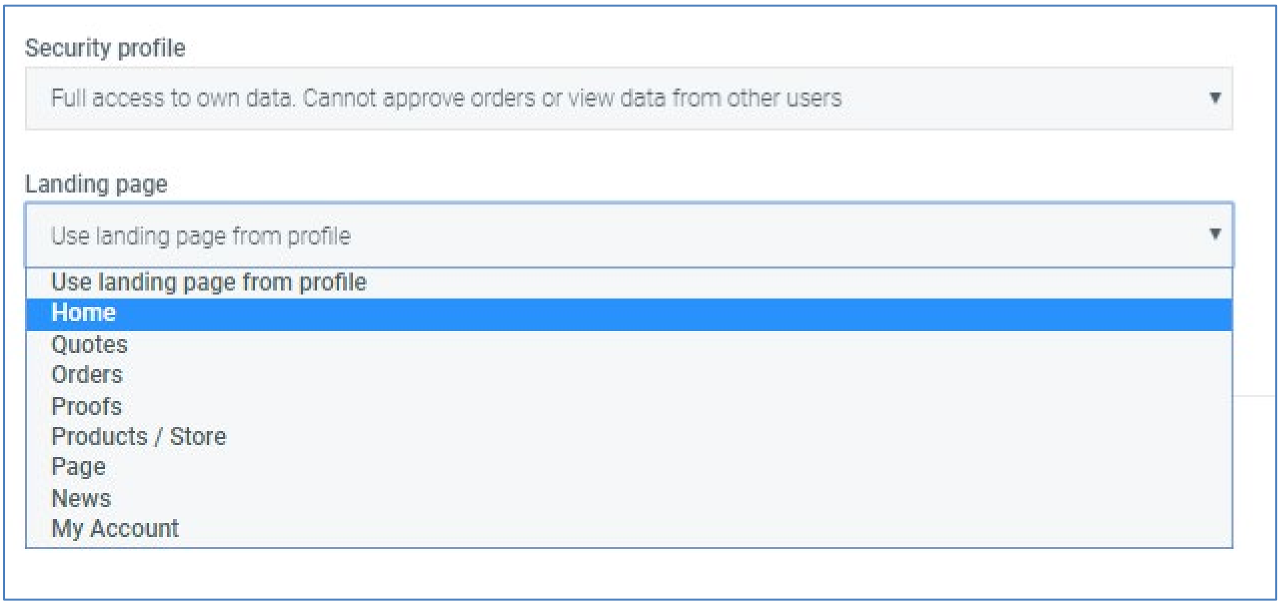
- The 'Approval reminders' action now sends notification emails when clients are missing approval accounts and orders are awaiting approval.
- Using the 'Check payments' action will now send order confirmations to web users when their orders are marked as paid.

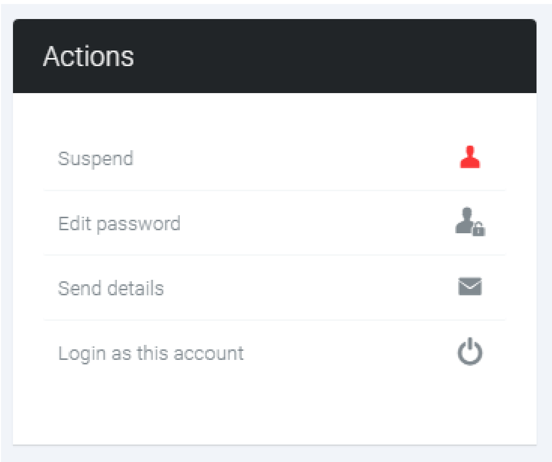
Admin Area Accounts

It is now possible to select a **landing page** for each user account which controls which part of the website they see after logging in, for example to take them directly to the store. This can be set at security profile level, which would then apply to every account using that security profile.



The account landing page can also be set at account level which would override any setting at security profile level.





It is also possible to log into accounts from the account editing page 'Actions' list '**Login as this account'** command, instead of having to use the Login button in the account pop-up when selecting an account to edit.

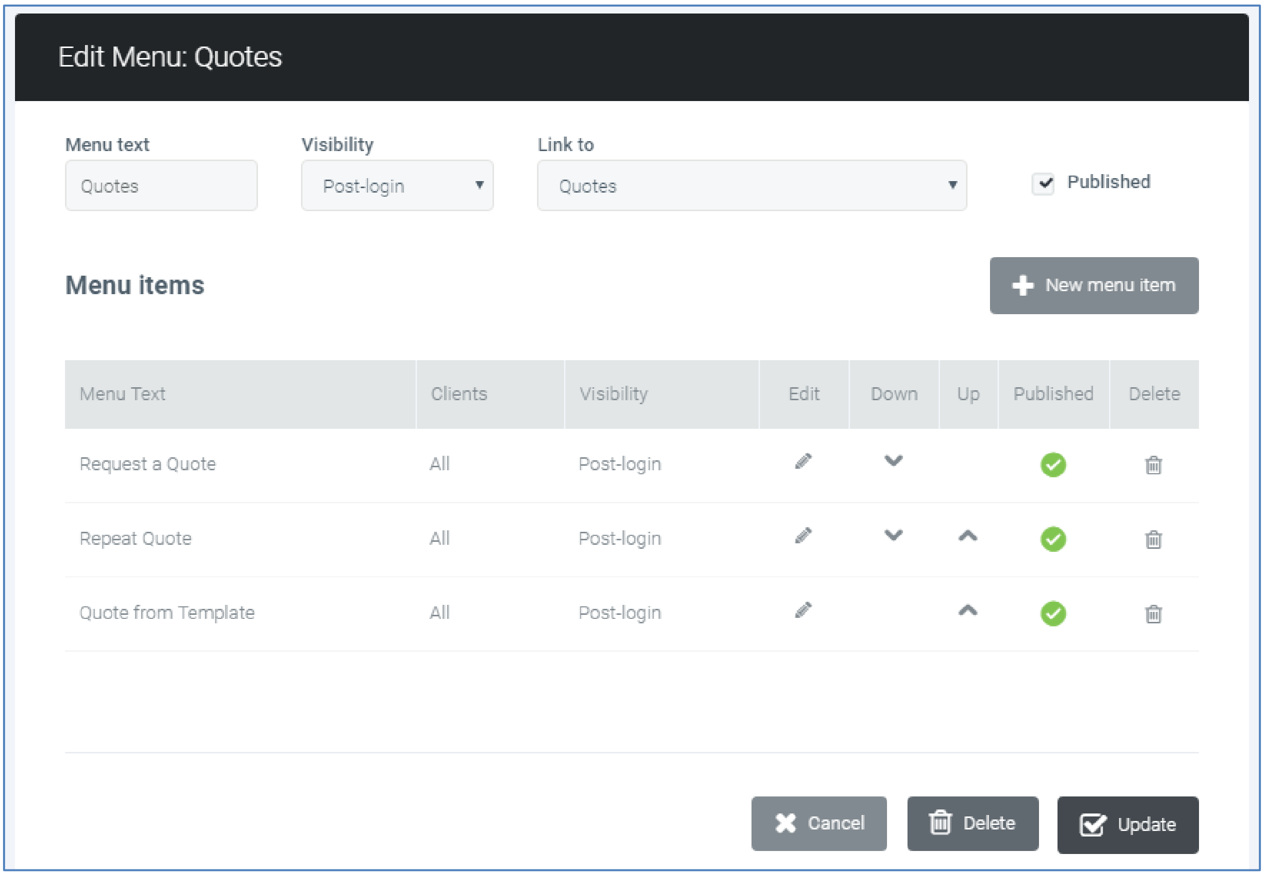
Multi-Level Customisable Menus

The website menu system has been overhauled to provide two-level customisable menus. Not only does this allow you to customise the various options that appear on the Quotes and Orders drop-down menus, but you can create any number of drop-menus based on your own content such as custom pages, or other areas of the website.

Many users have asked us if AccuraOnline can effectively replace their main company website. Being able to customise the menu system in this way if a large step towards this goal.

Top-level menus are called ‘Menus’, whereas second-level menus are called ‘Menu items’. The Quote and Order drop list menus will be converted to multi-level menus automatically during the upgrade.

The menu ‘visibility’ setting (pre-login, post-login or both) replaces the previous ‘requires login’ setting, so it’s now possible to create menus that will appear before login, but disappear after login.

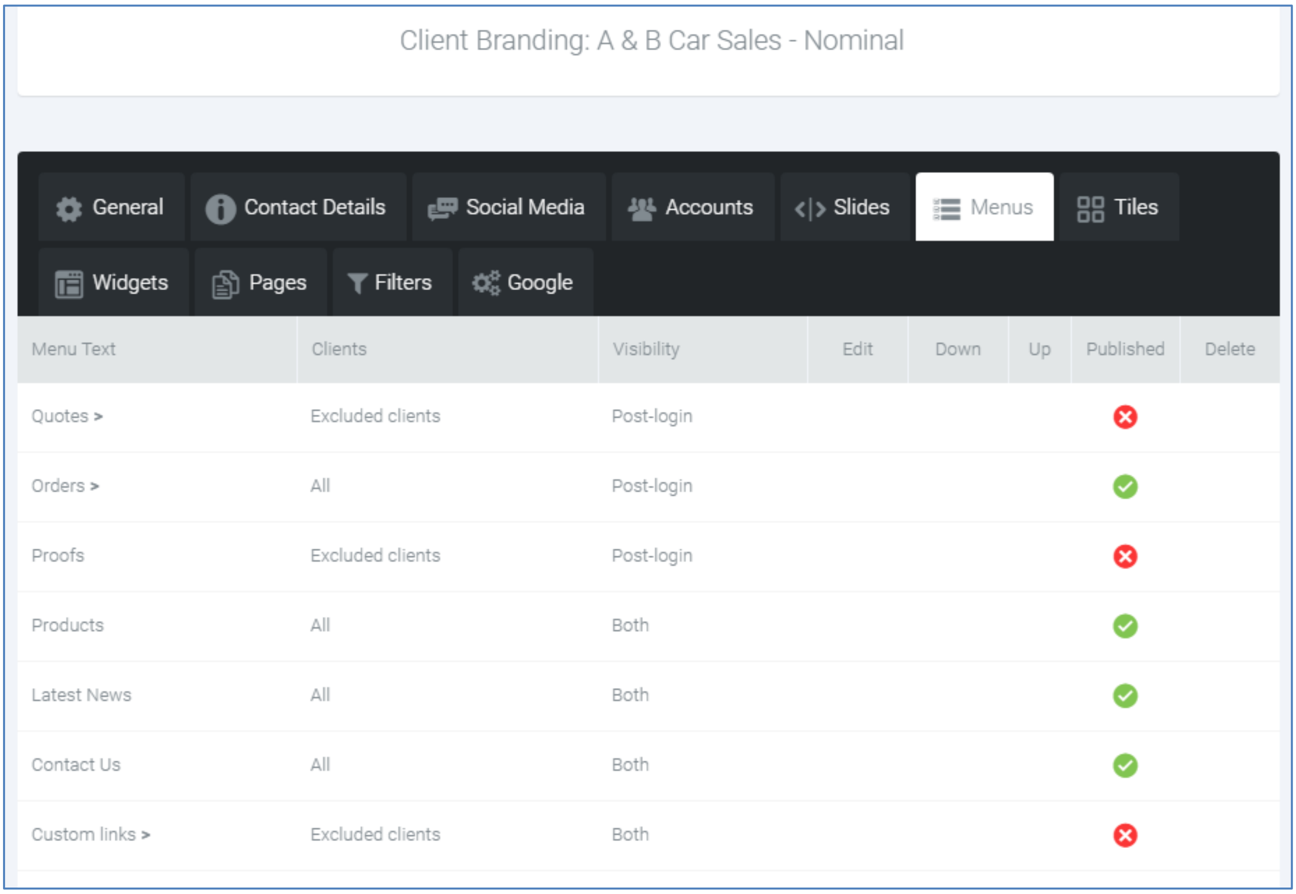


There are a number of new menu 'Link to' options: None (e.g. for top-level menus that don’t need to link to anything), Custom URLs that will open in new tabs, Terms/Privacy pages, My Account, Individual product pages, and individual news articles.

It should be noted that ‘Home’ menus are no longer created by default as you can get to the ‘home’ of the website by clicking on the company logo in the header area. Home menus will be removed during the upgrade, but can be reinstated if users still want to use them.

Menus in Client Branding

You can now edit menus in **Client Branding**. In here you will see all of the domain-level menus, and can ‘unpublish’ them to hide them for that individual client. You can also add new menus that will only appear when that client has logged in.



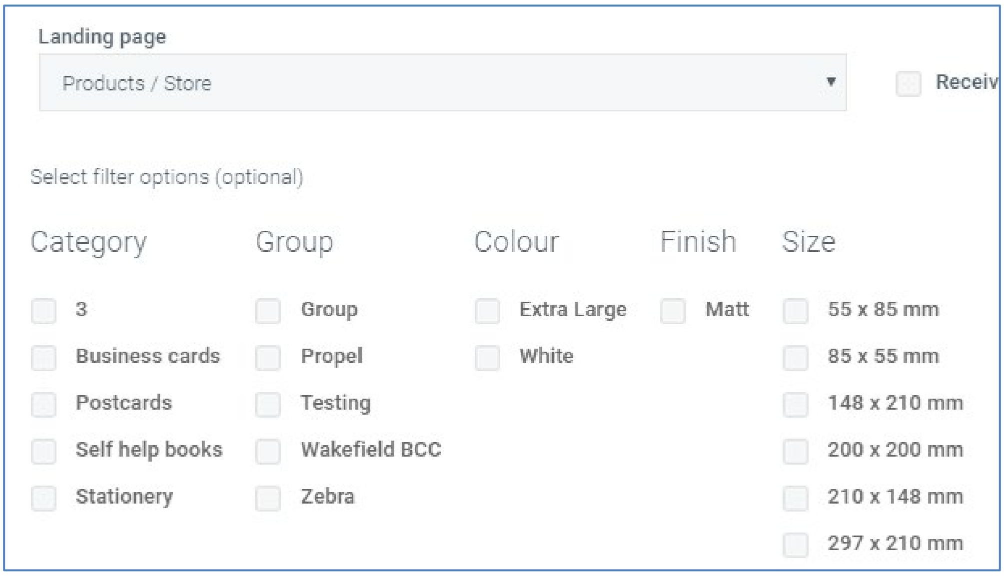
Menu Text	Clients	Visibility	Edit	Down	Up	Published	Delete
Quotes >	Excluded clients	Post-login					
Orders >	All	Post-login					
Proofs	Excluded clients	Post-login					
Products	All	Both					
Latest News	All	Both					
Contact Us	All	Both					
Custom links >	Excluded clients	Both					

Menus can no longer be linked to multiple clients. They are instead hidden from multiple clients using the ‘unpublish’ feature in client branding, which was determined from customer data to be more practical. The above screenshot shows that A & B Car Sales will not see the Quotes, Proofs or Custom Links menus because they have been ‘unpublished’.

If you ‘unpublish’ a menu at domain-level, then that menu disappears from all clients and will not be visible from client branding. Domain-level menus cannot be edited from client branding – they can only be published or unpublished. Menus created in client branding will be fully editable.

Product Link Filtering

When you choose to link a slide, tile, menu or user landing page to 'Products / Store', you can now select optional filters that will be applied to the product list. This gives you the same options you would normally see on the left of the product list in the store but the user will not be aware that the product list has been filtered

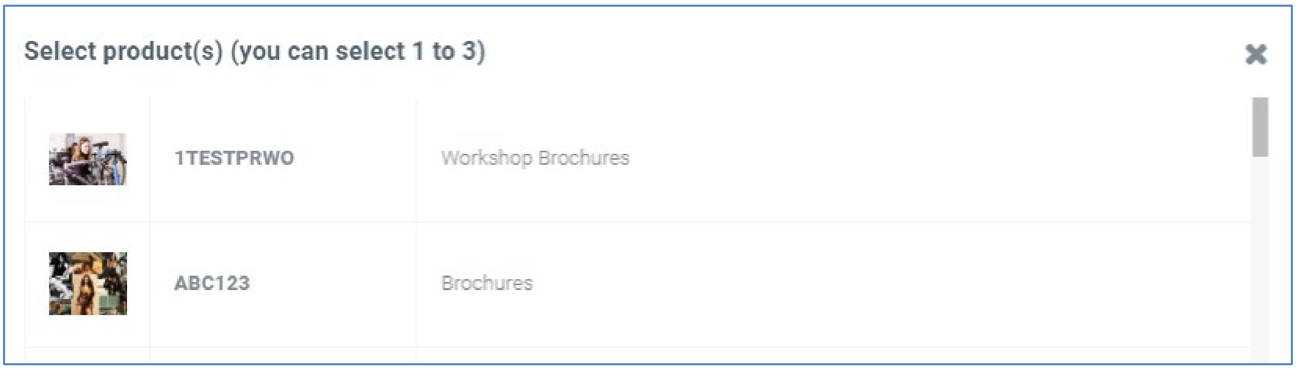


An example of how you can use this is to create a multi-level products menu where each menu item filters the product list in a different way. Or you could create a tile to appear on the homepage advertising a special offer on certain products using filtering to make sure only the products on offer get displayed.

If you are creating product links inside client branding, then you will only see filters that apply to the products visible to that client (pubic + client owned). If you are creating product links at domain-level, then you will only see filters that apply to publicly owned products. Also, as you tick a filter in each area, the remaining filter options will automatically be filtered out so you cannot select a set of filters that would result in no products being displayed.

Other Link Improvements

When you link to an individual product in a slide, tile, menu or user landing page the product list is now displayed graphically with thumbnails instead of just being a drop-list with product codes.



Similar improvements have been made when selecting pages and news articles in links.