Version 6.11 New Features

Accura 6.11 Build 3 compiled on 14th May 2021

Accura Online 6.11 compiled on 17th August 2021

Introduction

Welcome to Accura Version 6.11

Version 6.11 is the latest release for the Accura MIS, and Accura Online and contains many new features, fixes and changes as well as support for Accura Online 6.11 features.

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. Please contact the UK Accura Support team for information on how to download and install this new version AccuraOnline 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 **New Features** document details all the major features added to Accura and Accura Online since the last major public releases, which were Accura 6.03 Build 5 and Accura Online 6.03.

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.

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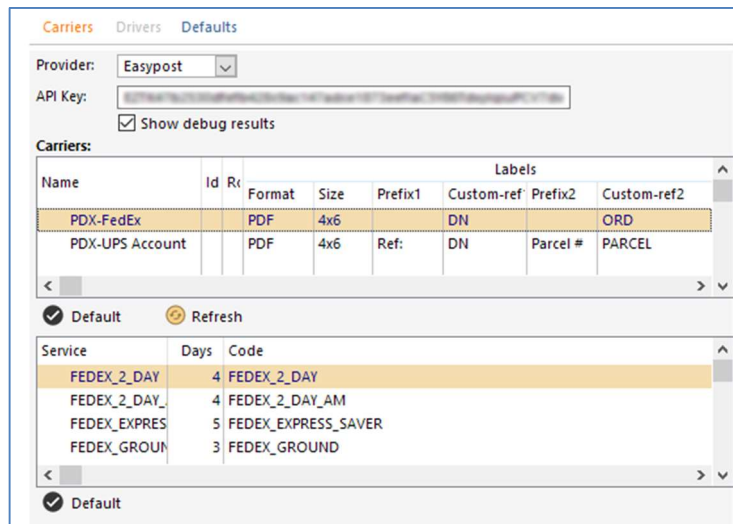
In the Carrier defaults (*Set-up > Defaults > Shipping*) The **Custom Ref** fields are set to the desired field settings. The fields available are – Delivery Number, Job Number, Order Number, Subref and Parcel Numbers.

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.

It is also possible to define how the Custom ref fields are prefixed for each carrier by editing the **Prefix**. This value can be left blank if no prefix is required.

Invoice Due Date Advancing

To increase support for external accounts platforms, specifically QuickBooks Online, it is now possible to advance the due dates for sales and purchase invoices to the next month for payment terms that specify a fixed day of the month if the due date is a set number of days before the usual day of the month.


For example, a client's payment terms are to pay by 28th day of this month. Using the new **Advance to next month if due within** setting, we can now defer this due date to the following month if the invoice was raised with a certain number of days before the usual due date of 28th of this month.

Using the above example, if I raise an invoice for the client on 21st of the month I am within the 10 days deferral period so the due date of any invoice raised will roll over until the 28th of next month.

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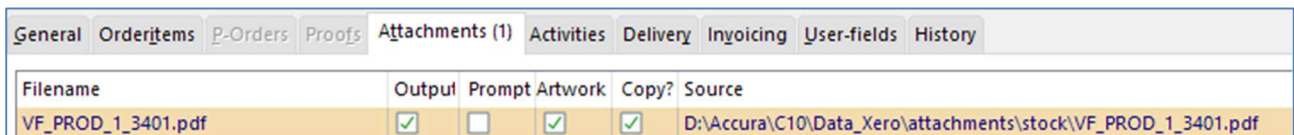@ support@accuramis.com
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Product Attachment to Order Sync

It is now possible to output a product's attachment(s) to an order containing said product. This is useful when a product has artwork or a file that needs to be referenced in an order.
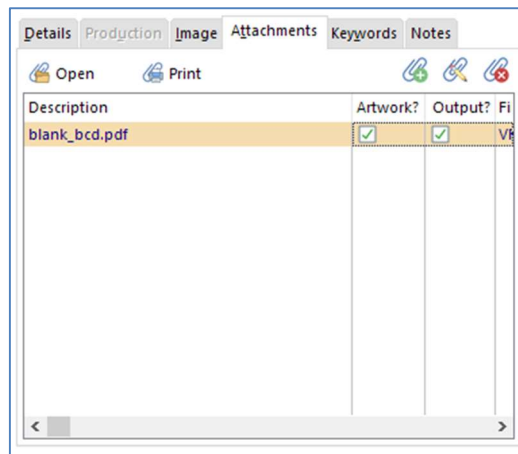
To set a product's attachment to behave in this manner, its **Output?** checkbox should be ticked. When this product is then used in an order or web order, it will create an attachment record referencing the original file in the *Accura\Data\Attachments\Stock* folder. A copy will **not** be made in *Accura\Data\Attachments\Order* folder to prevent unnecessary creation of the same file multiple times on disk.

Bill of Material Products

In previous versions, web orders containing products that had a **bill of materials** (BOM) would not pull through the product's child items as offline orders would. In Accura 6.10 this has been changed.

Now if a web order contains a product that has a BOM, the user will be prompted to add child items when processing the order.
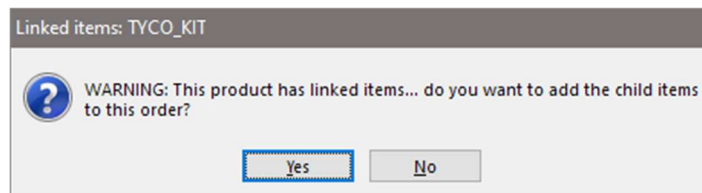
If Yes is answered, all linked items to the product will be pulled through into the order - labour, materials, outwork and other products.

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BOM Products as "Kits"

Using product bill of materials allows for a kind of rudimentary "kit" feature although it is not intended to be a fully-fledged kitting feature; this is in the roadmap for a future version.

For example, you could set up a BOM product parent "kit" product with a list of other products as child, linked items. The customer will then order the "kit" and receive all the components that constitute the "kit".

A parent "kit" product would be created and on the **BOM tab**, the child products or "kit" components can be added.

When selected in, the quantity of child products will default to their own sell pack quantities and each one can be set to optionally prompt to be added or pulled in silently.

If components can be sold as products in their own right and are invoiced as such, when they are used as child products, they can be set not to be invoiced when they are part of a "kit". This is done in the BOM links as per the image above where the values in the **Invoice** column are set to No This way at invoicing stage, only the parent product is invoiced, not all the component parts.

When delivering "kits", all stock-controlled items will be listed as well as any other materials where their order item invoiced required flag is set to true. This is so stock controlled components and other materials can be issued from stock correctly when raising the delivery note.

Product Order Commission

It is now possible to add commission to product orders. Previously it was only possible to calculate commission for orders that were quoted.

Existing commission plans can be used but products to be set up correctly with cost and sell prices for some commission plan types to work correctly.

As well as being able to use commission plans, a commission value can be targeted too.

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SendGrid Compatibility

To allow continued use of the SendGrid email platform, usually used for mass e-shot, we now support the use of their API. In order to use SendGrid, your email settings must be set up in a specific way.
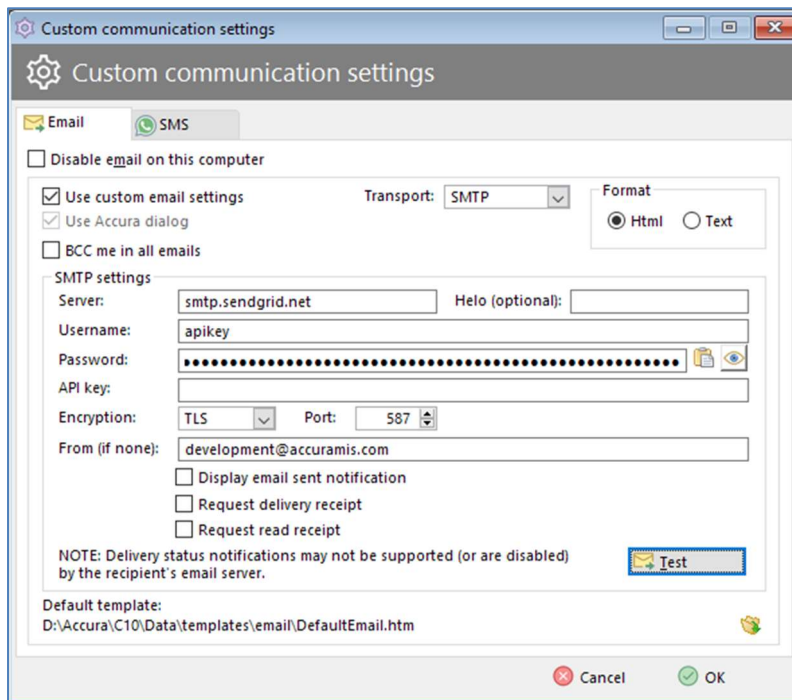
- Server should be the SendGrid server i.e., smtp.sendgrid.net
- Username should be **apikey**
- Password should contain your SendGrid **API Key**
- The API key field should be left **blank**
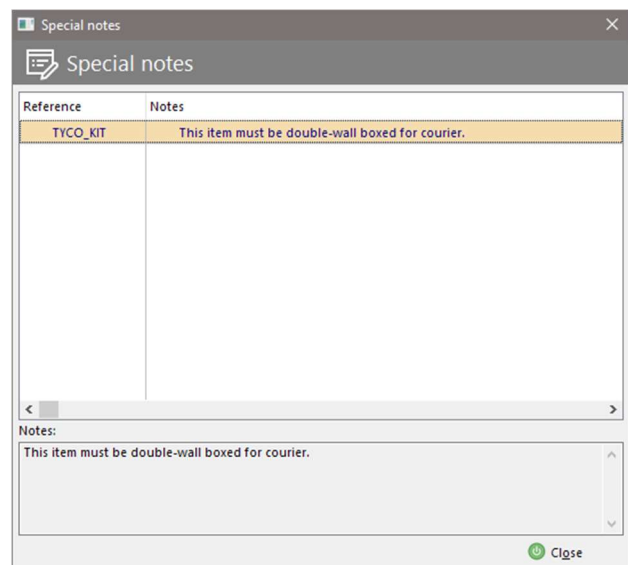- Encryption should be TLS using the **587** port

If using SendGrid for day-to-day emailing, Accura users should have their email addresses within Sendgrid's list of authenticated users.

Material Notes

Material notes can now optionally be displayed as a read-only, pop up notes. This may be useful when certain materials need handling in a specific way or products that need packaging in a certain manner.

This is controlled by a setting in *Defaults > General > Utilities* by selecting the desired behaviour from the drop-down menu for **Display product/material notes**.

- **On-order** – notes will display when used in an order
- **On issue** – for products only, notes will display when they are issued by raising a delivery note.
- **Always** – will always display as both the above settings.
- **Never** – material/products notes will never display.

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Web Console Downloader

The **Standard** downloader that web console uses to download eDoc artwork and attachments from Accura Online has been overhauled and improved. Testing has shown it is now more reliable than ever and quicker in operation than the .NET downloader. Therefore, we recommend that the downloader is set to use the Standard version.
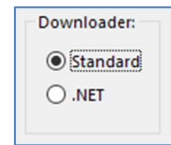
To do this, open web console and go to *Setup > General*. Change the radio button setting to **Standard** and click **Save** on the left. The web monitor service on the server should then be restarted.

Accura Online Help

With Adobe Flash being deprecated in January 2021, the video section of our online help has become unusable. These videos are being replaced and added to the **FAQ section** of our **Customer Portal**.

To access the Customer Portal, you will need to log on [here](#) with your log in details. If you do not have log in details, you can ask our support team to [activate your account](#). You will then receive an email with your details.

The Online Help site is still available from your Accura help menu but only our wide range of "How to…" PDF guides are viewable as well as other documents such as hardware specifications and previous release notes.

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Order Reference Fields

The behaviour of the **Your order-no** field in website order requests has been enhanced:

- Your order-no can now be hidden if it is not required for a particular domain or client. This affects all of the various order-related UI, and automated email content.
- The admin area setting to control if the order-no field is required or not now displays as a drop-list with the options 'Required', 'Optional' and 'None/disabled'. Previously this setting was a tick box to indicate that the field was required.
- In client branding, the order-no behaviour drop list can be set to 'Inherit from domain' to ensure the client reverts back to the default domain behaviour.
- The order-no label is now applied to the various order lists and automated email content. This was not previously supported.

A new **Sub reference** field has been added to order requests, which allows for entry of secondary order reference information such as budget or department codes that might be required for certain B2B clients:

- The sub reference field works the same way as the revised 'Your order-no design' and can be set to 'Required', 'Optional' or 'None/disabled' at domain level, and the field label can be customised.
- In client branding, the sub reference behaviour drop list can be set to 'Inherit from domain' to ensure the client reverts back to the default domain behaviour.
- The sub reference field will appear in the print order form, the checkout wizard, and the view print and store orders pages.
- The sub reference value will be synced back to Accura and will populate the order **Subref** field in Web Console. Subref values in orders synced out from Accura to the website will appear on the view print and store order pages. This functionality requires Accura 6.10 Build 1 or later.

Admin settings:

Client branding settings:

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Print order form:

Checkout wizard:

Mobile Responsive Design

More areas of the website have been **optimised for display on mobile devices**. These optimisations also include improvements to the display of the website on desktop devices.

Areas optimised are:

- Product lists when selecting from the two 'View as' icons in the main store area.

- Quote, order & request lists when selecting from the three 'View as' icons in the main quotes and orders areas. The 'list' view turns horizontal tables on desktop into vertical tables on mobile, removing the need for horizontal scrolling (see right).

- Maximised the amount of text that can be displayed for title/spec on quotes, orders and requests at various browser widths.

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Global Search

Global search has been improved to add support for **new fields**:

- Order lists can be searched on 'Your order-no' and 'Order ref'.

- Quote lists can be searched by 'Quote ref'.

- Request lists can be searched by 'Request ref'.

- Proof lists can be searched by 'Proof ref'.

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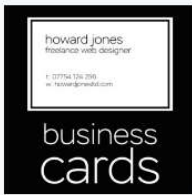
Please note that Accura Online 6.10 requires the installation of Accura 6.03 Build 3 or later.

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'**.

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- 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)

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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.

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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.

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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.

SHOPPING BASKET
⟳ Reload

	CORMAN: Corolla Manual
Quantity	10
Price	£25.00
Net	£0.25

	eDocBuilder Basic Business Card	T↕
Quantity	250	
Price	£38.00	
Net	£38.00	

Subtotal	£38.25
VAT	£7.60
TOTAL inc. VAT	**£45.85**

Quantities and Pricing (inc. VAT)

You may enter up to 5 quantities and a run-on. Use the **Calculate** button to obtain live pricing.

Quantity 1
1000
£60.00

Quantity 2
2500
£74.40

Quantity 3
4000
£88.80

Quantity 4
6500
£114.00

Quantity 5
8000
£128.40

Run On
500
£4.80

Calculate

Sections

Section	Pages	Face	Reverse
1	2	1	0

Material: Gloss art 115gsm paper

Description:

Pricing (inc. VAT)

Quantity	Price
1000	£60.00
2000	£69.60
3000	£79.20
4000	£88.80
5000	£99.60
Run-on: 1000	£10.80

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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.

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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

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Global search has also been implemented on:

- **Repeat quote** lists.

- **Order from quote** lists.

- **Repeat order** list.

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