



# Version 6.11 Release Notes

*Accura 6.11 Build 3 compiled on 14<sup>th</sup> May 2021*

*Accura Online 6.11 compiled on 17<sup>th</sup> 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](mailto: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 6.03 Build 5 and Accura Online 6.03.

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.



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## ***Changes in Accura 6.11 Build 3 (14<sup>th</sup> May 2021)***

### **General**

**FIX:** Client and job-type default field values were not being applied.

### **Order Processing**

**FIX:** Commission was not being applied to orders created from library templates.

### **Purchase Ordering**

**FIX:** Order artwork was not being attached correctly to purchase order emails.

### **Invoicing**

**FIX:** Nominal type invoices were not always pulling the correct nominal description in.

## ***Changes in Accura 6.11 Build 2 (6<sup>th</sup> May 2021)***

### **Client and Supplier**

**FIX:** The Contact tab of View Clients was not displaying the full list of contacts.

### **Estimating**

**FIX:** Mark-ups manually added to outwork items were being removed when a mark-up profile was applied to the quote.

### **Technical**

**CHANGE:** The Accura installer will no longer perform CPU detection as modern CPU configurations render such a check useless. PCs that conform to our minimum hardware specification will have an adequate CPU in the vast majority of cases.



# Changes in Accura 6.11 Build 1 (14<sup>th</sup> April 2021)

## General

**CHANGE:** As support for Internet Explorer becomes less and less, Accura will now open the system default browser when accessing web pages from within Accura rather than the built-in IE based browser. However, some in-window browser controls such as delivery note tracking will still use IE and may cause some issues. It is in our roadmap to change to a Chromium-based browser plug-in in the near future so these problems will be addressed then.

**CHANGE:** Certain checkable records will no longer unnecessarily display their print dialogs if they are not flagged as checked. These are orders, purchase invoices and sales invoices.

**CHANGE:** Users denied the security door ACC:Tables will now be able to change a client address if they are either the client creator, account manager or sales rep.

**CHANGE:** The Group field in tax rates has been reinstated.

**FIX:** Tagging and checking a record in the quote and order checking windows would cause Accura to crash.

## Client and Supplier

**FIX:** Bill-to in an office's Shipping tab would have no setting for imported offices. Now imported offices will default to "Use-parent" if Bill-to does not form part of the import file.

## Email, Fax and SMS

**FEATURE:** The password field in custom email settings in the client and supplier e-shot interface now has paste and reveal password options.

**CHANGE:** The wording of the default [InvoicePaymentHTML] and [InvoicePaymentText] merge tokens has been amended to allow better phrasing for clients with a COD account type.

**FIX:** The username field in the custom email settings in the client and supplier e-shot interface was reverting back to the logged in user's name.

**FIX:** Inactive users were showing in the Rep and Account Manager dropdowns in Change Account Status.

## Estimating

**FEATURE:** RFQs with attachments now display an icon.

**CHANGE:** The Thickness field in materials and products now adhere to the Defaults "No. decimals for size units" setting.

**CHANGE:** The tagging options have been removed from the View Ink browse to avoid confusion when selecting an ink in a quote section.

**CHANGE:** The Time-in is now displayed next to the Date-in in View RFQs

**CHANGE:** To prevent confusion for some users, the generic tagging boxes are hidden when selecting a section material.

**FIX:** Section click charge values that used a base quantity of CLICKS could be affected by other sections that used the same click charge if they didn't have the same front/back configuration.



# Order Processing

**FEATURE:** Orderpoint fields have been made available in the Order Summary Wizard report. This includes the field ORDP:RequiredDate which in an order's UI is the Ship-by date.

**FEATURE:** It is now possible to add attachments into a Quick Order.

**FEATURE:** It's now possible to select a job image in a quick order.

**CHANGE:** When selecting a product into an offline product order, the user will be asked if they wish to use the product's image (if any) as the order image. This will only apply to the first product selected into the order.

**FIX:** Order and web order due dates could be incorrectly generated if a linked job type had a legacy lead time value.

**FIX:** Product order job quantity would be skewed if one of the constituent products had linked a B.O.M. material. Now only parent order items will be included in the job quantity total in this circumstance.

# Purchase Ordering

**FEATURE:** Purchase orders have new fields on the History tab to enable the recording of order acknowledgments from the supplier.

**FEATURE:** Suppliers now have an option on their Extra tab to always "Attach artwork to purchase order". When enabled, this will automatically tick the send artwork checkbox in a purchase order.

**FIX:** Adding a pop-up note to a purchase order, where the supplier's POs required checking, was setting the PO checking fields.

# Stock Control

**CHANGE:** Selecting a product as a linked item will now set the initial quantity to the same value as the product's Sell Quantity.

**CHANGE:** Products with BOM materials will now include the weight of children in their total weight in Accura Online if the child materials are set to "Include weight in calculation".

**CHANGE:** It was not possible to import or update a product's MTL:PackWeight value as it was calculated by the item weight \* dimensions. This has now been changed so the MTL:PackWeight value now takes precedence and will be used to calculate item weight.

**FIX:** It was possible to produce a negative on-hand figure when issuing two orders with the same product where the combined total was in shortfall. Validation will now prompt for removal of one of the line items.

**FIX:** The variance % figure in a stock reorder email csv, which is the % difference between what is available and the min-reorder level, was not being calculated correctly.

**FIX:** A product's Last Job Number and Last Number values were being forwarded into any copies of that product.

**FIX:** The Works-order button would not become available in the Order Requisition window without toggling tabs when the Stock module was installed but the Purchase Order module was not.

**FIX:** Transferring stock between locations when material tracking is not turned on would not move the material to the new location.

# Deliveries

**FEATURE:** The full delivery address is now displayed in the Delivery Wizard.

**CHANGE:** Cancelling from the 'Process Batch?' dialog in Delivery Wizard will no longer step back a page.

**CHANGE:** A warning will now be posted if edits are made to header or items in the Delivery Wizard and the user clicks Back. Delivery notes are regenerated at this point so the user needs to be aware changes may be lost.

**CHANGE:** Delivery notes for BOM-type products will now only list materials. Materials that are not stock controlled or where the order item is not set to be invoiced will not be included.



- FIX:** Delivery note HDR:Weight field would not have the correct weight if products were removed due to insufficient quantities on-hand during insert.
- FIX:** Amending a delivery note item without opening the header in the Delivery Wizard would reset the custom weight to its original value meaning HDR:Weight would be inaccurate.
- FIX:** Changing the Quantity to delivery in a delivery note item that had been manually inserted would not update the To-follow figure.
- FIX:** The Tracking button in the View Delivery Notes right-click menu would be available when the currently highlight record had no valid tracking URL.

## Job Costing

- FIX:** Selecting multiple instances of the same outwork or material costing items could pull through an incorrect rate.

## Sales Invoicing

- FIX:** The quantity for invoice items on tax-type invoices could be skewed when an order item was set to show on the invoice and the parent order used delivery points. Invoicing this way is NOT recommended.

## CRM

- FEATURE:** In View Prospect Profile, it is now possible to raise an RFQ from existing quotes and orders.
- FIX:** Only the CRM default activity was available in the Task list when inserting a new activity from View Prospect Profile.
- FIX:** It was not possible to forward an appointment's Start Date using the spin box controls past the End Date value.

## RDC

- FIX:** Parcel labels created in RDC for an order with activities running would not populate order address fields on a label layout correctly.

## Accura Online

- FEATURE:** System tab text can now be prevented from displaying in Accura Online by toggling the "Allow web module access" checkbox in the Tab maintenance on the Usage tab.
- CHANGE:** A client's default delivery office would inherit a new delivery address created through an Accura Online order and there was no delivery office currently defined. Now this will only occur if there is a separate delivery address for a new web sign-up.
- FIX:** Edoc artwork from non-Chicago servers was not being downloaded correctly.
- FIX:** The Standard file downloader app would fail when downloading multiple files from Accura Online.
- FIX:** Custom delivery details entered in AOL orders for existing clients were creating office and contact records in Accura.
- FIX:** Web console could post record retrieval errors after processing a record when the record list had been column sorted.



# AccuraSync

**FEATURE:** The AccuraSync utility apps, Configuration and Mapper, now display if each other or the Monitor service are currently in use elsewhere on the network. Each app has its own \*.LOCK file and the other apps will show the current status of AcctsLink apps running.

**FEATURE:** The ability to optionally prefix the Accura job number to the sales invoice item description on upload to accounts has been added. This is enabled in the Configuration app by ticking the "Prefix Job No. to Items" checkbox.

**CHANGE:** On upgrade to 6.11 Build 1, AcctsLink\_Status will be automatically split into separate transaction types - AcctsLink\_StatusTaxRate, AcctsLink\_StatusClients, AcctsLink\_StatusSLInvoices etc.

**CHANGE:** The Reference field in a Xero invoice will now store the Order No. value of invoice items instead of the Notes fields. If there are multiple invoices items, all Order No. values will be listed separated with a \.

**FIX:** Valid sales and purchase invoices would not get recognised as exportable if the user updated the header table while creating the record. There are many ways a user could trigger this, making a delivery note while creating a sales invoice or making a stock receipt while creating a purchase invoice for example.

**FIX:** Mapping wouldn't work correctly if the browse was filtered.

**FIX:** Forcing a re-download and resync of content could cause records not to be resynced correctly if web monitor was not restarted.

**FIX:** Opening the Configuration app from within Mapper would prompt for a database selection in a multi-company system.

**FIX:** Editing an invoice that used the system base-currency after editing an invoice that used a non-base-currency could get synced to accounts with the wrong currency.

**FIX:** Client and Supplier Town values were being added to the combined Address field in Xero giving the appearance of a duplicate town.

**FIX:** Uploading a new client to Xero was creating the primary contact twice.





# Changes in Accura Online 6.11 Hotfixes (25<sup>th</sup> February 2021 to 17<sup>th</sup> August 2021)

## General

**CHANGE:** B2C guest accounts are automatically converted to client accounts if they are manually enabled in Accura before the account has raised an order. This will stop the 'account creation failed notice' email being sent.

**CHANGE:** The sign-up page when triggered in B2C branding mode makes the company name an optional field appearing below the first and last name fields.

**CHANGE:** Improved Admin area menus, adding page navigation controls to support more than 10 menus.

**CHANGE:** Various undocumented changes.

**FIX:** Forgot password function did not work on email addresses with uppercase characters unless the exact case matching the account was entered.

**FIX:** Email addresses containing apostrophes failed validation throughout the website.

**FIX:** Various undocumented bug fixes.

## User Interface

**CHANGE:** Changed some UI text and colours in various places following feedback from customers.

**FIX:** Abstract theme search boxes were either duplicated or did not display on mobile on certain widget combinations.

**FIX:** Only the first 8 tiles were displayed on the homepage tile carousel when more than 8 tiles existed in the database.

## Basket & Checkout

**CHANGE:** The Store menu will now disappear for logged in accounts that do not have permission to view products, which matches the behaviour of the quote, order and proof menus.

**CHANGE:** Checkout wizard skips step1 (which shows the basket contents) and starts on step2. This removes an unnecessary step from the checkout process.

**CHANGE:** It is now possible to delete basket items from the checkout wizard step1 page (except for the last item on a saved order).

**CHANGE:** Checkout wizard will redirect to the products list if the user has an empty basket.

**CHANGE:** The quantity entry field in the shopping basket page has been increased from 4 digits to 8 digits.

**CHANGE:** Shopping basket items for products that have been deleted in Accura will prompt the user to remove them.

**CHANGE:** Checkout wizard will automatically remove items from orders for products that have been deleted in Accura.

**FIX:** Resolved various issues related to basket items for products that get deleted in Accura.

**FIX:** It was not possible to add calculable products to the basket if the logged in account did not have permission to view prices.

**FIX:** Resolved various issues relating to store permissions not being enforced correctly.



# Quotes & Orders

**CHANGE:** Added support for multiple email addresses to be entered in order custom delivery details separated with a semi-colon with a maximum of 80 characters total.

**FIX:** The currently selected tab in quotes and orders was not remembered. Users working on the Requests tab would always be taken back to the Quotes or Orders tab.

**FIX:** It was possible to copy a print order from the view order page when the logged-on account did not have permission to do so.

**FIX:** Deleted accounts were triggering crashes when trying to view requests set to 'approve' status, making it impossible to remove the requests.

**FIX:** Resolved various issues with sales tax handling in quotes, print orders and the checkout.

**FIX:** Resolved various issues with delivery contacts and addresses in print orders and the checkout.

**FIX:** The default delivery option was not automatically selected in print or store order requests in the delivery drop-list.

**FIX:** Resolved intermittent browser update failures in checkout & my account address cards, and custom addresses entered in orders.

# Performance & Technical

**CHANGE:** The website theme engine colour handling has been optimised to reduce general page loading times by up to 50%.

**CHANGE:** The homepage tile carousel has been optimised to reduce the homepage loading time by up to 50%.

**CHANGE:** Improved the performance of the homepage when logged in as Admin on B2C systems by ignoring B2C basket items.

**CHANGE:** Application settings stored in config.yml are read into constants at app start-up instead of constantly accessing the config.yml file on disk.

**FIX:** Resolved various technical problems relating to Accura data sync.

**FIX:** Resolved various issues reported by automated website crash reports.



## Changes in Accura Online 6.11 (13<sup>th</sup> February 2021)

Please refer to the **New Features** document for full information on new functionality in this release. This section covers complex and/or minor changes only.

### Store

**CHANGE:** The store locations filter is now hidden when it has more than 250 office locations to display. This is required to avoid long delays in loading the store when there are large numbers of client office links.

**CHANGE:** The store filters for category, group, colour, finish and size will be automatically hidden if they have no filter entries to display.

**FIX:** Checkout wizard was crashing on submit when an order requires approval.

**FIX:** Single basket-item product orders could have the wrong order type which triggered crashes when viewing affected orders.

**FIX:** Product sync from Accura was very slow when there are large numbers of client office links.

**FIX:** Product sync from Accura could truncate the office\_ids field value when there were large numbers of client office links.

### Quotes and Orders

**FEATURE:** Quote and order requests created by accounts that no longer exist can be removed from the website using the Remove request action when viewing the requests.

**CHANGE:** Quote request lists now displays the specification text instead of title.

**FIX:** Orders list hung on the loading animation when the order type value was missing.

**FIX:** Order request lists were crashing when accounts that created visible requests did not exist.

**FIX:** Non-alphanumeric characters in delivery contact telephone numbers broke delivery functionality in orders.

**FIX:** Non-alphanumeric characters in contact or account name caused address pop-ups in orders to hang.

**FIX:** Trying to create a repeat quote request where there was a related non-expired price calculation in the database triggered a crash.

**FIX:** The calculate button did not work properly on mobile responsive quote requests.

### User Interface

**CHANGE:** The search area in the top-left of the Minimal header widget has been enlarged and now appears with clear outline borders to make it more usable. It has also been optimised for mobile responsive.

**CHANGE:** Improvements to product slides for mobile responsive design.

**FIX:** The Instagram social media icon did not appear in the Abstract header widget when it was used in conjunction with the Modern, Minimal or Basic menu widgets.

**FIX:** Slide preview images in the Admin area displayed messy title and strapline text on larger font sizes.

**FIX:** Slide title and strapline text were not displayed in the preview image on the slide edit page.

**FIX:** Slide title and strapline font weight settings did not get applied to the homepage slider.



# eDocBuilder

**FEATURE:** Added support for globalised eDocBuilder servers and their portals located in Amsterdam and Singapore via config.yml. The server location is configured in the edoc\_builder section of config.yml by setting the 'server' entry to either 'chicago', 'amsterdam' or 'singapore'.

**CHANGE:** There are no longer any settings in the Admin area related to eDocBuilder, but the Admin settings page will report which server is being used when eDoc is enabled.

**FIX:** Admin area eDocBuilder links to the Aleyant portal and to attach templates to products were not hidden when eDocBuilder was disabled.

**FIX:** It was not possible to complete the checkout when products being ordered had eDoc templates attached after disabling eDocBuilder support.

## General

**CHANGE:** Messages displayed when submitting quotes, orders, contact us & registration forms have been made less formal.

**FIX:** The upgrade script was not retaining customised quote, order and store terms phrases.

**FIX:** The upgrade script was not changing slide font settings to the correct 6.10 values

**FIX:** Resolved various issues reported by automated website crash reports.

**FIX:** Minor technical bug fixes.



# Changes in Accura Online 6.10 (29<sup>th</sup> October 2020)

Please refer to the **New Features** document for full information on new functionality in this release. This section covers complex and/or minor changes only.

## User Interface

**FEATURE:** Repeat quote lists now display links to orders for converted quotes.

**CHANGE:** The view proofs thumbs and list designs have been updated to display more of the proof description text and remove pop-up 'read more' links.

**CHANGE:** Changed 'job ref' and 'job spec' text to indicate if this relates to quotes, orders or requests.

**CHANGE:** Page navigation buttons have been removed from areas of the website unlikely to ever display more than one page of data: attachment lists, sections in quotes, and deliveries invoices and proofs on orders.

**CHANGE:** Various undocumented changes

**FIX:** Various undocumented bug fixes.

## Quotes & Orders

**CHANGE:** The page number and records per page are now remembered in quote and order lists when creating repeat quote and order requests, and orders from quotes.

**CHANGE:** Quantities and pricing on quotes improved to remove zero value prices and avoid confusing text that may display in some scenarios such as expired pricing.

**CHANGE:** Unsaved or draft quote and order requests could fail to display or select the previous quantities, prices and delivery charges in some cases. Quantities, prices and delivery charges are now written back to the database immediately, so cancelling price calculations, navigating away from a request without saving, or using browser refresh will all retain the previous values.

**CHANGE:** Live price calculations include the ability for Accura to adjust weight values which may help when auto-includes are added that would increase the weight.

**CHANGE:** Improved validation of draft, confirm and PayPal buttons on print order requests when interacting with the quantity fields.

**FIX:** Selecting billing and delivery office address cards in checkout wizard did not always register correctly.

**FIX:** Editing an unsaved or draft quote or order request where the source quote, order or template was missing triggered crashes.

**FIX:** Pricing on calculable draft copied quote requests expired after the source quote has expired, when it should be based on the date of the last price calculation.

**FIX:** Prepay clients were able to complete and pay for repeat and quoted order requests with expired pricing that did not support live calculation of new (valid) prices.

**FIX:** PayPal payments triggered crashes or PayPal error messages when logged in account cannot view prices. It is a requirement of PayPal to have a valid price, so such accounts will now be able to see the order pricing from the PayPal payment page.



# Global Search & Filtering

**FEATURE:** All areas of the website (quotes, orders, proofs and templates) now display links to reset all filters and/or search parameters when empty lists are displayed. Previously this was only supported in the store.

**CHANGE:** Filtering template lists by category and size now remembers the filter values/settings and displays a message on empty lists.

## Delivery Charges

**CHANGE:** Free delivery on print orders and checkout is now marked as 'Free' instead of £0.00.

**CHANGE:** Delivery charge selection is now validated when saving orders as draft.

**CHANGE:** Delivery charge behaviour was inconsistent between print and store orders and delivery options or list options. List options will only be displayed when there are no delivery options in the Admin area, and the 'Delivery charge to be confirmed' text will be displayed when delivery options exist but none of them are suitable for selection in the order. These scenarios are:

- Delivery address is not a 'local' office in Accura and all delivery options are 'local'.
- Delivery address is a custom address (so local or non-local cannot be determined) and all delivery options are 'local'.
- Order weight is zero and all delivery options are charged by 'weight'.
- Print orders incapable of generating weight and pricing values.

**FIX:** Checkout wizard displayed empty delivery areas when no delivery options or list options existed, and when delivery was free.

**FIX:** Selecting delivery charges in checkout wizard did not always register correctly.

**FIX:** Selecting delivery charges in print order requests did not always register correctly.

## My Account Addresses

**CHANGE:** Creating a new office address requires the user to wait for the office to be synchronised through Accura (which should be as fast as a live price calculation). The offices are created with 'inactive' status, which is set to 'active' once data sync is complete. A link displays if there are inactive offices asking the user to wait for 30 seconds before refreshing their browser. This is necessary to avoid duplicate office addresses and website crashes.

**CHANGE:** Editing Accura-generated offices assigned the logged in user as the owner of the office, which then allowed the office to be deleted (including the default client office). Delete is only allowed on offices created by an account via the website.

**CHANGE:** The default client office is now identified with green ticks for billing or delivery when the account does not have default offices.

**FIX:** Selecting the default billing and delivery office address cards in my account addresses did not always register correctly.

**FIX:** Fixed address field alignment issues when editing my account addresses in the pop-up address form.



# Technical

**FEATURE:** Added 'Product list load behaviour' setting in Admin area. This controls if the product list loads each product as the user scrolls down the list (on scroll), or if all products are loaded immediately (on page load). This setting exists for development purposes to research potential website performance improvements. The normal behaviour for the product list is 'on scroll'.

**FEATURE:** Added future support for product 'permalinks' which will enhance the ability of a B2C website product database to be indexed by search engines. This will be enabled in a future release.

**FEATURE:** Town records are now synchronised from Accura to AccuraOnline. This will be used in a future release to provide full support for USA sales tax laws which require orders to be taxed based on delivery location.

**FEATURE:** Added debugging / troubleshooting messages to various areas of the website which can be used by Accura support to diagnose problems with website behaviour. These messages are enabled by setting 'debug\_ui' to 'true' in config.yml. The website does not need to be restarted after editing config.yml:

- Quantity and pricing behaviour in quote and order requests.
- Print and store orders display different icons for store and print orders to easily identify order types.
- Delivery charge validation in checkout and print order requests when 'Delivery charge to be confirmed' is displayed.

**CHANGE:** Sales tax calculations throughout the website use the same tax-code inheritance as Accura, where the sales tax rate applied could be based on logged in account default invoicing or delivery address, or the use of the force tax code flags in Accura clients or offices.

**CHANGE:** Removed the ability to attach multiple files at the same time throughout the website. Many website areas have not been designed to support multiple attached files such as images on accounts, tiles, slides etc. Areas that do support multiple files such as attachments lists in checkout and print/order requests are far more stable when the files are uploaded individually.

**CHANGE:** Loading 'spinning wheel' animations have been removed from various website functions, which may help with end user perception of website performance:

- Loading of product details when scrolling down in the store.
- Selection of address cards in my account area and Checkout billing and delivery steps.
- Print order request delivery office and quantity selection. Delivery charge selection in print orders and checkout.

**CHANGE:** Various undocumented changes.

**FIX:** Various undocumented bug fixes.

