Version 6.15 New Features

Accura 6.15 Build 6 compiled on 21st December 2022

Accura Online 6.20 Hotfix 2 compiled on 31st October 2022

Introduction

Welcome to Accura Version 6.15

Version 6.15 is the latest release for the Accura MIS, and contains many new features, fixes and changes as well as support for AccuraOnline 6.20.

All clients with a current support contract for Accura (and AccuraOnline 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 AccuraOnline since the last major public releases, which were Accura 6.03 Build 5 and AccuraOnline 6.11.

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

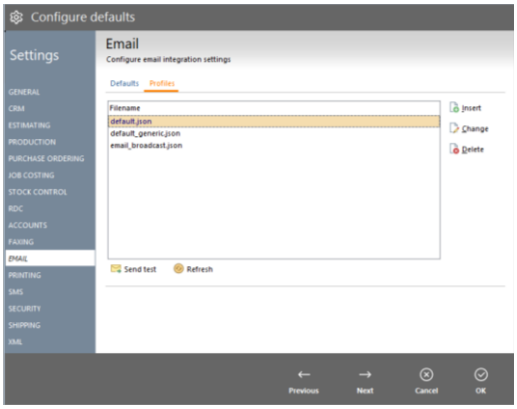
The technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel. These are available on request.

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

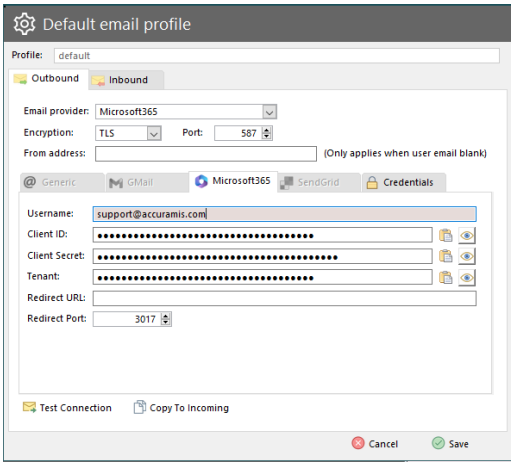
Email Profiles & Proof Sync for Microsoft 365

With **Accura 6.15 Build 4** came the introduction to Microsoft365 Modern Authentication for SMTP, now we are pleased to finally add Email Profiles and Proof Sync. I will go through the setup for both **Outbound** *(Quotes, Orders etc)* and **Inbound** *(Proof Sync).*



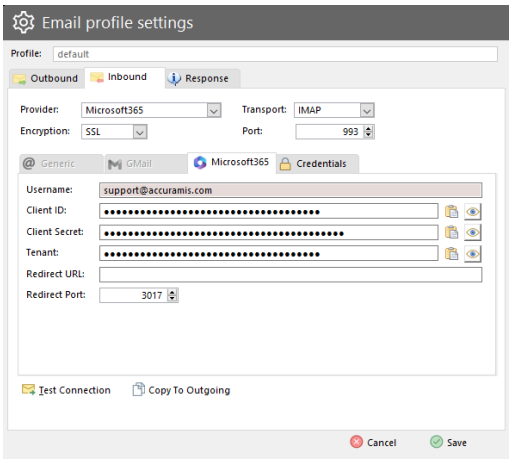
Outbound Setup

To start you will need to obtain your **Client ID**, **Client Secret** and **Tenant ID** and navigate to the default email settings **(Setup > Defaults > Email)** then select which profile you want to change, from here you want to input the above into the relevant fields, the **Username** is the email you want to authenticate and then click the icon to test the connection, your browser will open and you will be prompted to login with your Microsoft 365 details, once you have logged in your browser will open a new tab with the message ***OAuth2 access is granted*** and Accura will have a window pop up with ***Connection Successful!*** click **OK** then select the **Inbound** tab.



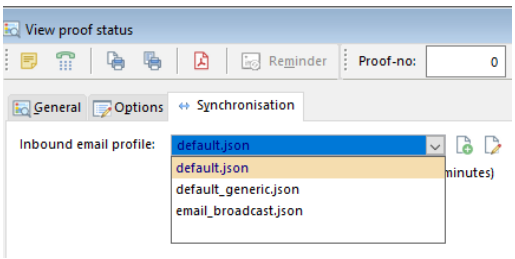
Inbound Setup

If you started with the **Inbound** setup, you will need your **Client ID**, **Client Secret** and **Tenant** as you will need to input these into the relevant fields, but as we have already completed and authenticated the **Outbound** settings we can go ahead and click the which is going to copy all of the settings to the **Inbound** tab, which will include the **Username** and above information. The only settings it will not copy across is **Transport**, **Encryption** and **Port** which you will need to setup yourself as each configuration is different. You will then want to click the icon to test the connection again and follow the steps as we did previously this will then give you another ***OAuth2 access is granted*** in your browser and Accura will display a ***Connection Successful!*** click **OK** and then **Save**. You now want to click the icon which will send a test email to the email that was setup.



Proof Sync Setup

Before you can start proofing, first you need to go to the proof status window **(Order > Proof > View)** or click the icon and select the **Synchronisation** tab, then select the **Inbound email profile** you want to use.



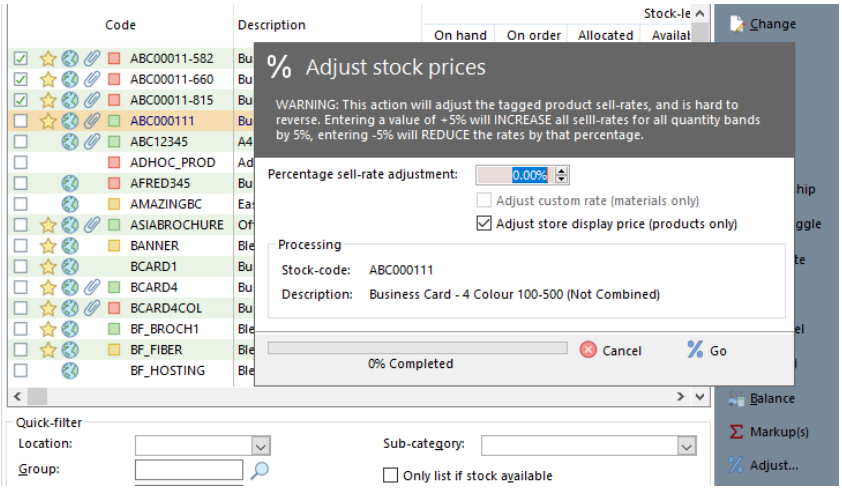
Email Hierarchy

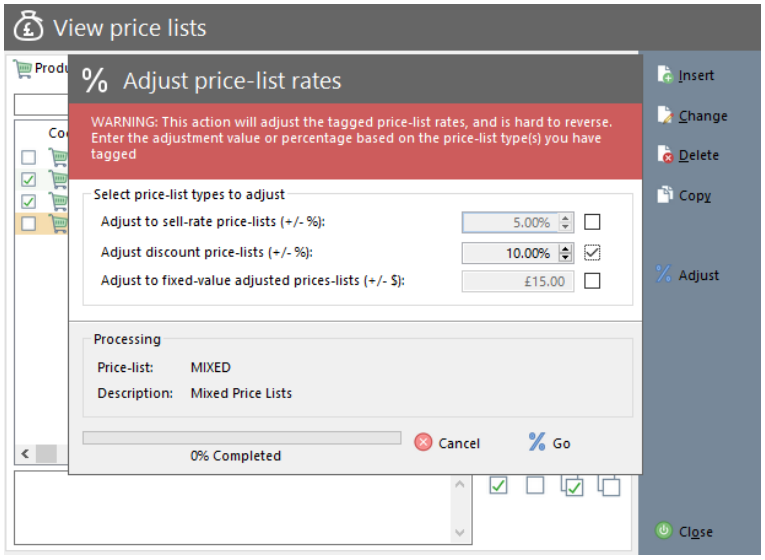
1. User Settings *(Setup > Communication > User Settings)*
2. User Profile
3. Default Email Profile

Product Price and Price-list Adjustments

It is now possible to tag multiple products in the products window **(Stock > Products)**, then click the **Adjust** button and then enter either an **+/- Percentage Rate** to increase or decrease the pricing.

This will affect **Selling Prices Only**, and in all bands, including the Thereafter rate.





It's also now possible to tag multiple price lists from the price lists window **(Stock>Price-lists)** and adjust them as one.

Price lists can be based on a **Fixed Sell-rate** *(which overrides the product pricing completely),* OR a fixed **Adjustment on the product sell-rate** *(i.e. - $1.00 reduce the sell rate by $1.00 per the unit price)*, and finally **Discount** which represents a price that offers a % discount on the product sell-rates. e.g., +10% is a 10% increase on the product sell-rates.

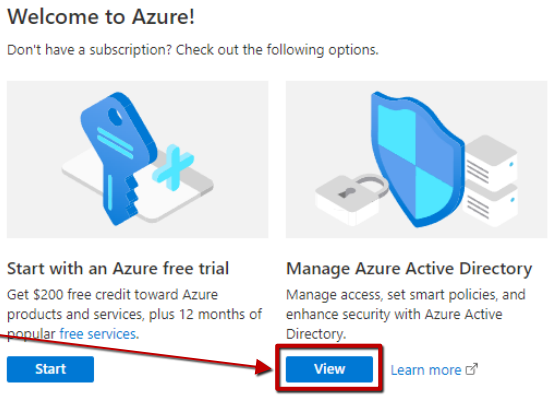
New Features in Accura 6.15 Build 4

Office365 Modern Authentication for SMTP

Firstly we need to create the Azure App Registration for use with SMTP within Accura

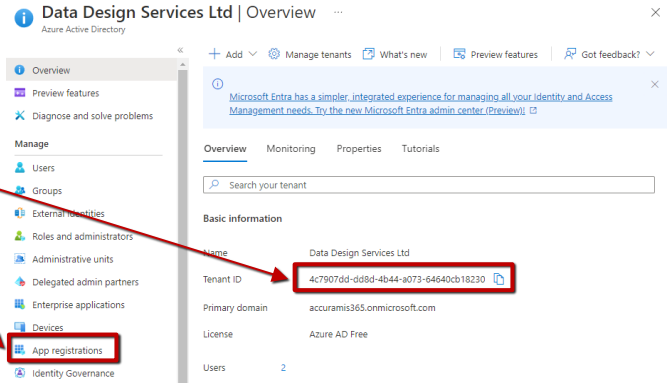
1) Go to **https://portal.azure.com/** and login to your Office365 Microsoft account.

then go to **Azure Active Directory**

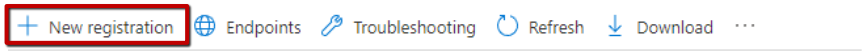


2) Copy your **Tenant ID**, and save it somewhere as you'll need it later.

3) Then click on **App Registrations**



4) Click on **+ New registration**



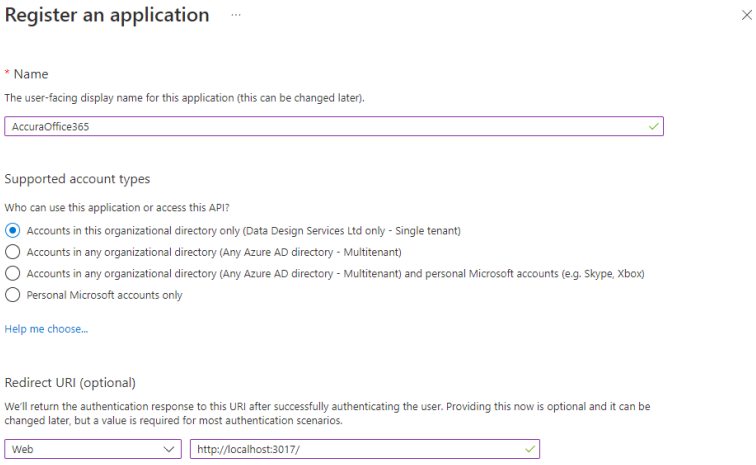
5) Give your application a **Name.**

6) Make sure **Accounts in this organizational directory only (COMPANY NAME only – Single tenant)** is selected.

7) For the Redirect URI, select **Web** and then use **http://localhost:3017/**

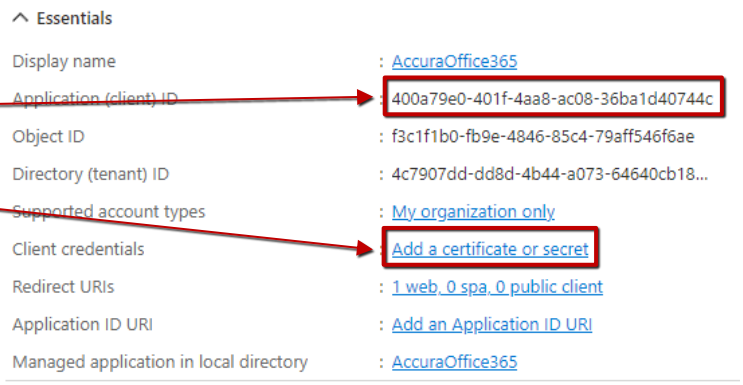
8) Then Click Register at the bottom of the page

Make sure to enter http://localhost:3017/ exactly as shown. Don't use https://, Use http://.

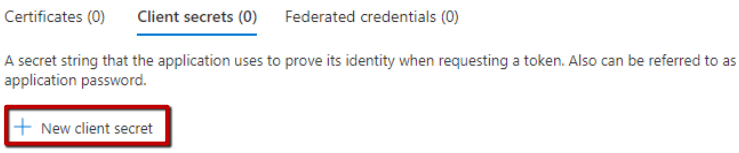


8) You created an App in Azure.
Copy the **Application (client) ID**, and save it somewhere as you'll need it later.

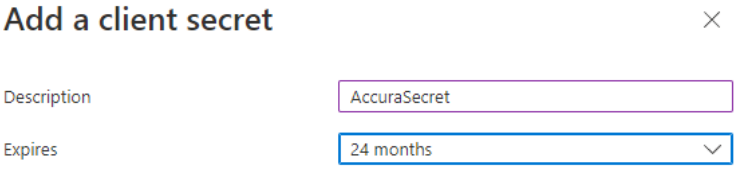
9) Click on **Add a certificate or secret**.



10) Click on **+ New client secret**

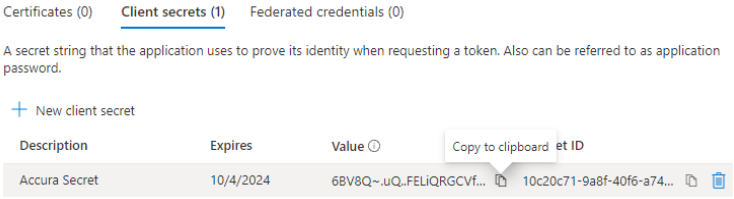


11) Give the Client Secret a **Description** and set the **Expiration** to 24 months, then Click **Add**



12) Copy the **client secret value** by clicking the icon that is to the right of the partially shown secret.

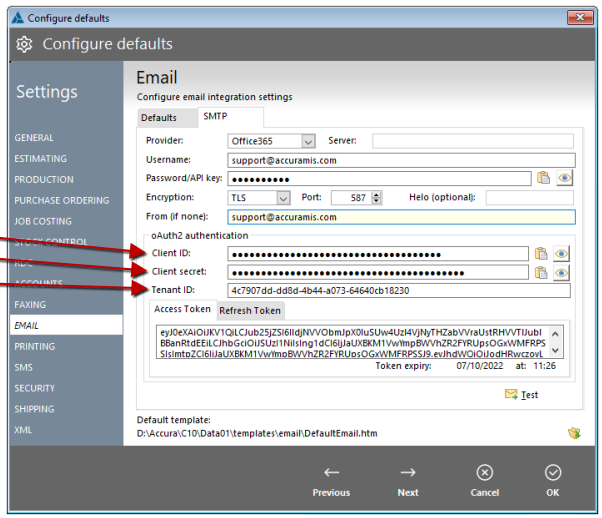
Save the **Secret** along with your **Tenant ID** and **Client ID**. *You may not be able to get the secret later.*



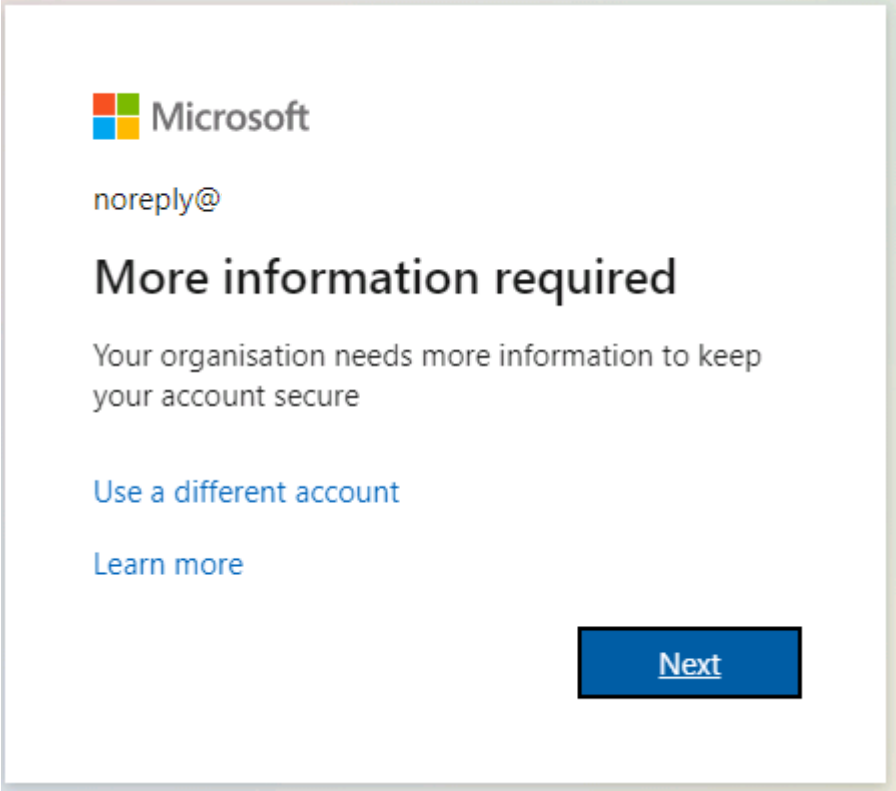
13) There are 3 pieces of information needed which you should have saved to obtain an access token for the modern SMTP authentication:

1) Your **Application (client) ID**
2) Your **Application client secret value**
3) Your **Directory (tenant) ID**

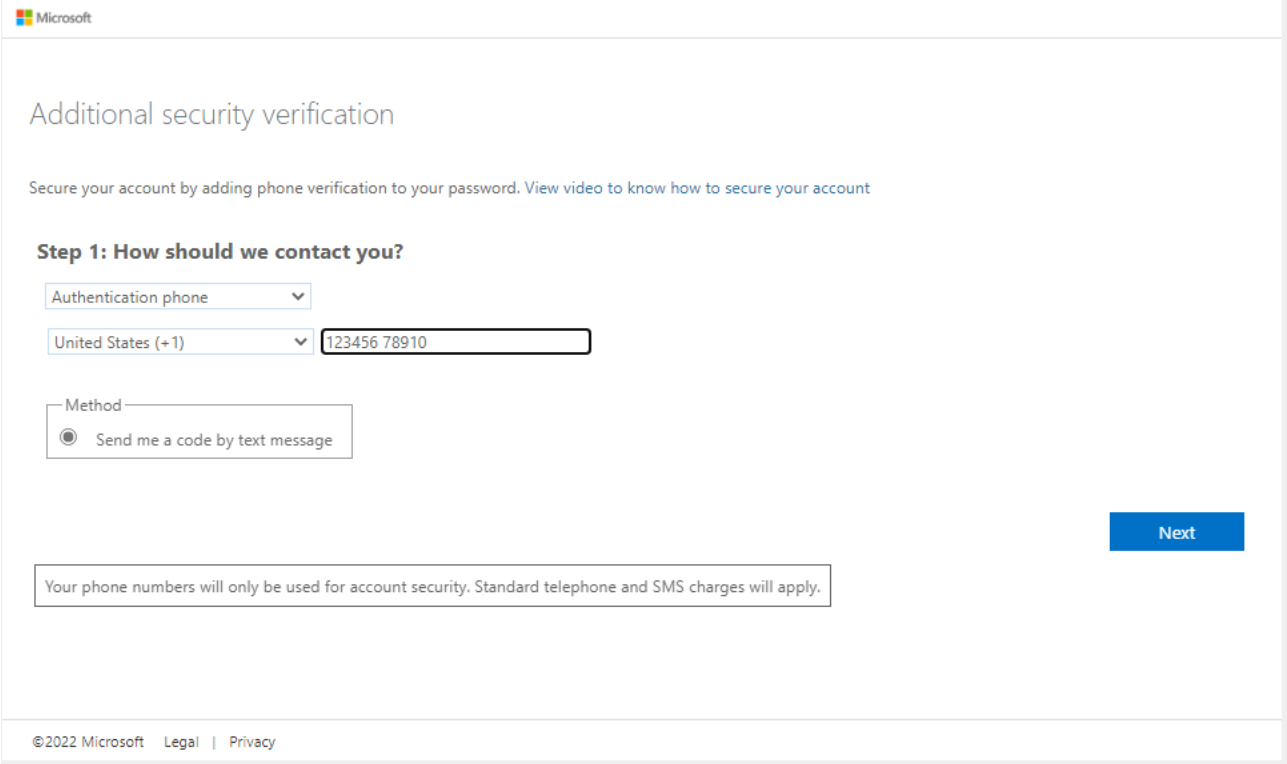
Copy each of the above ID's and paste into the relevant fields within Accura *(Setup > Defaults > Email > SMTP)*



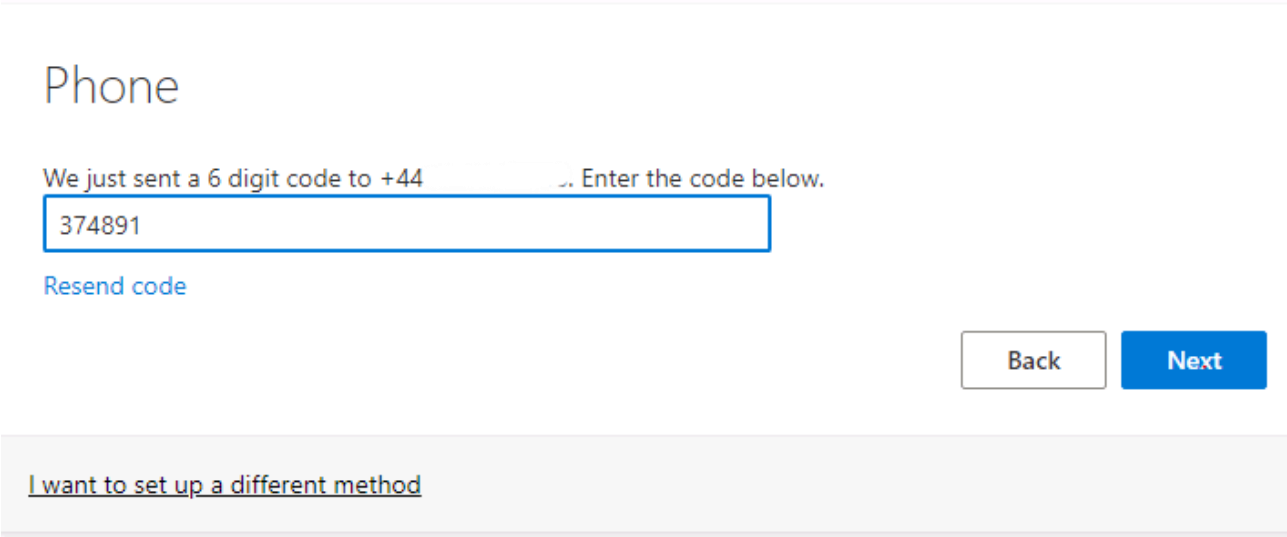
First time you send an email from Accura, you will receive the below.



Once logged in you will get a verification screen: -



Select the verification method & next. Then enter the code you have been sent.



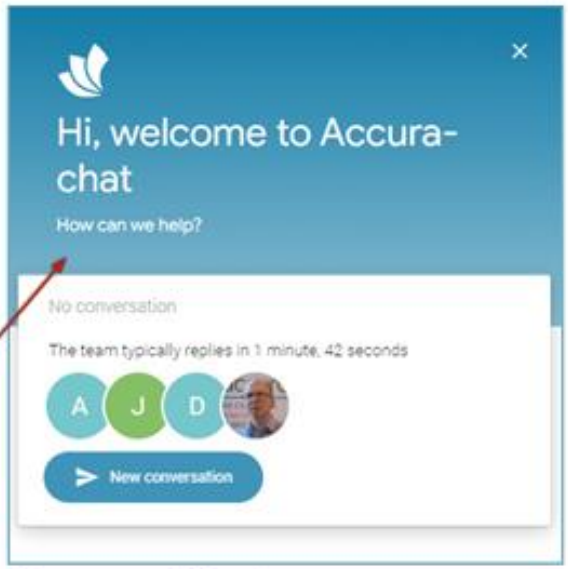
After clicking next on this window select to remain signed in or 2FA verification will be asked for every time someone attempts to send an email.

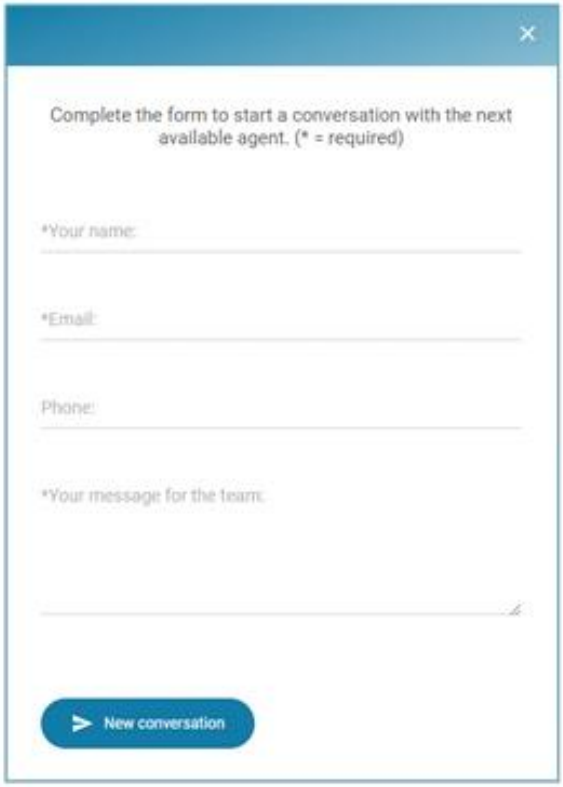
Accura Livechat Platform

We have now added a new livechat feature within accura which consists of a new widget and chat window.

1 When you load accura for the first time you will notice there is the new animated widget which can be used to access the live chat window *(This start-up behaviour can be toggled on/off in the Window main menu)*

2 Starting a new live chat conversation can also be accessed from the **Help** menu, or main **Toolbar**.





Form and Topic

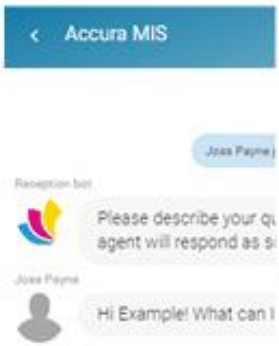
Enter the required information and your one step closer to chatting with us.

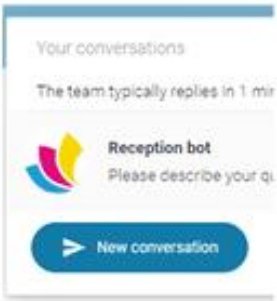
3 Enter your **Name, Email** and your **Query** with as much information as possible so we can easily assist you.

4 Once you have completed the form you will then be prompted to select the topic which consists of **Sales** or **Support**

Live chat

5 Once you've selected the department you will then be put into a queue and when an agent becomes available you will then enter the live chat window





Your Existing Conversations

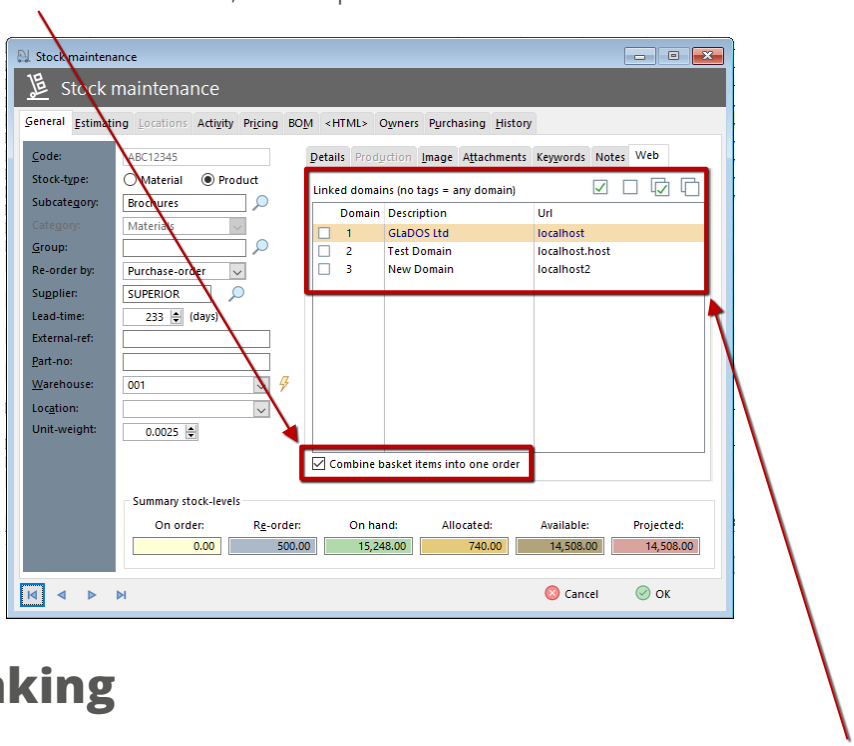
Accidently close accura or the chat window?

6 All you need to do is re-open the chat window and you can continue with your conversation

Accura Online Product Order Changes

We have now added the option to select whether or not you would like to combine all of your basket items into one singular order or have them split into individual orders.

This feature is purely to allow tab specification on each product, regardless of whether the web user orders 1 product, or 5 products in their basket. You can have mix-and-match on a basket, so in theory a 5-item basket could consist of 2 combined products on one order, and 3 separate orders for the rest.

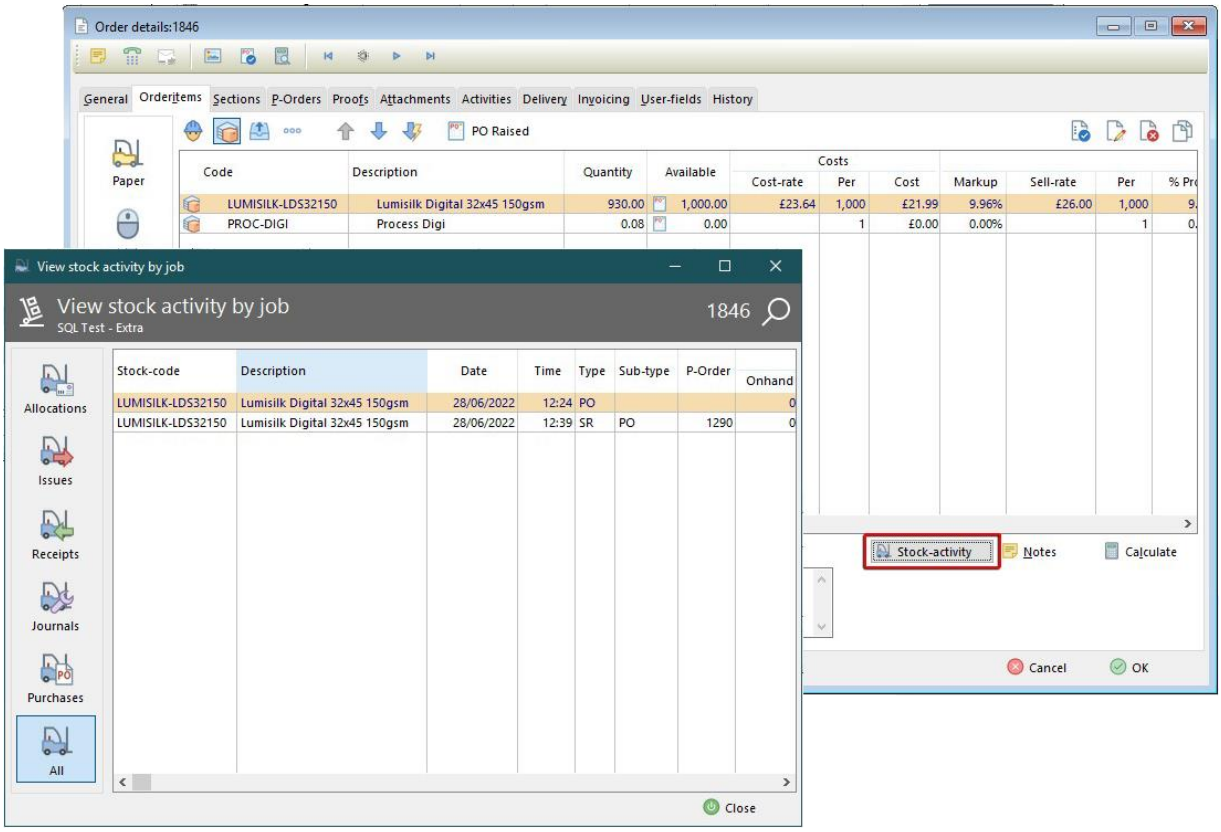


Domain Linking

You now have the option to select a specific or multiple domain(s) by simply tagging the domains for each product.

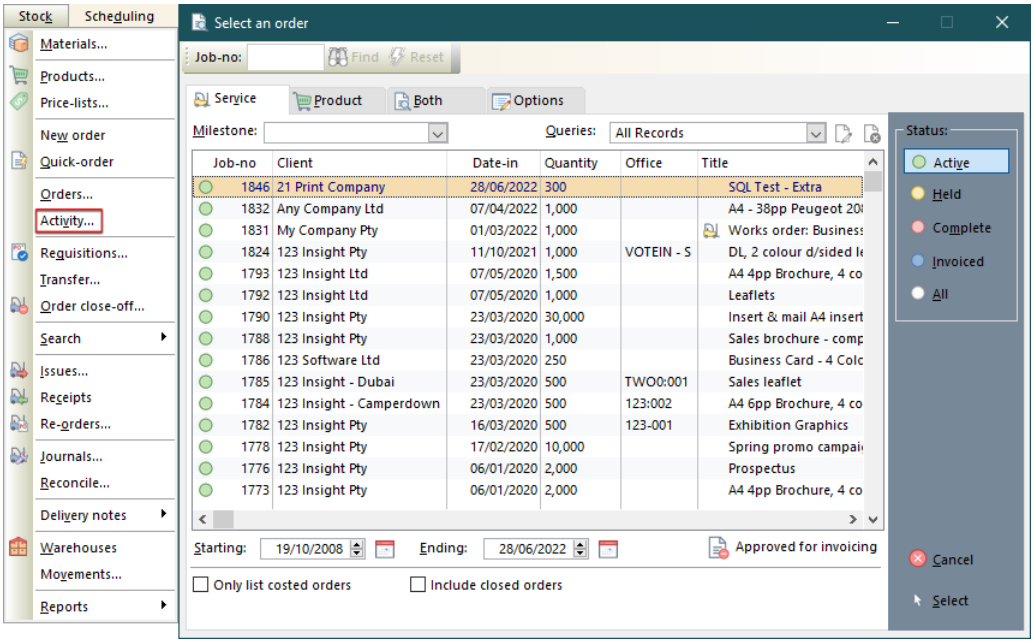
Stock activities from within Orders

All stock activity can now be viewed from within an order from the **Orderitems** tab, which has been redesigned to accommodate a **Stock-activity** button.



This can also be accessed by selecting **Stock > Activity** from the **Stock** main menu, you will then be prompted to select the relevant order.

The contents can also be printed or exported to Excel using the **Send-to** feature. Activity can be filtered by type, so listing only allocations, issues, journals etc.

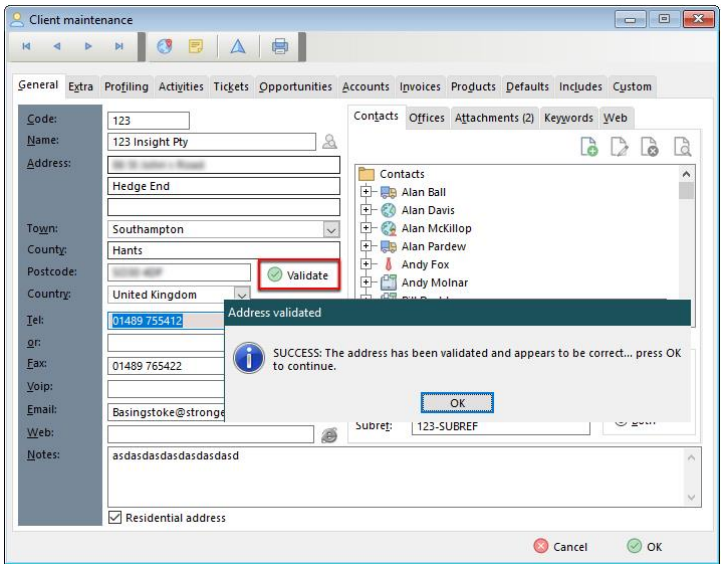


AccuraShip Address Validation

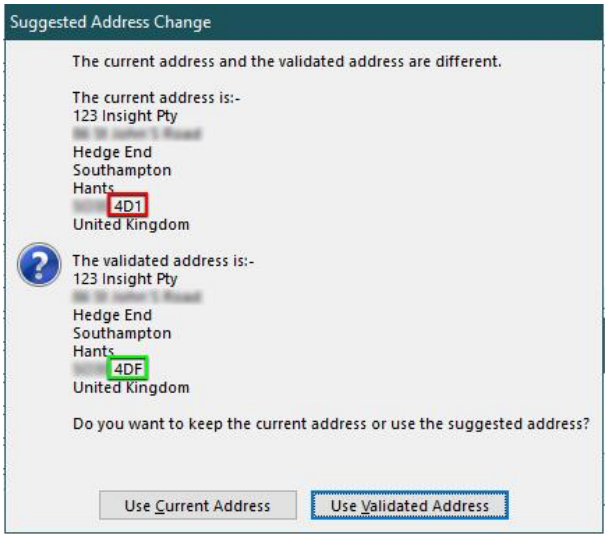
We have added address validation in various places when AccuraShip is installed, the button will be disabled if it is not installed. This will ensure that addresses are valid when originally entered, instead of at delivery stage.

You will be able to see this button in the following areas of Accura:

- Orders – Delivery tab
- Quick Orders – Delivery tab
- Delivery Notes
- Client, Supplier and Offices databases



Note: The button uses the EasyPost address validation API, and will offer to correct the address if applicable.



Note: While the address validation will work with UK addresses it is recommended that you review any address changes before proceeding.

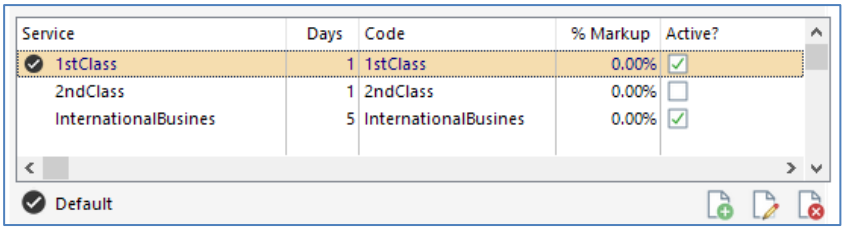
New Features in Accura 6.14 Build 1

This is a maintenance release of Accura containing bug fixes, further development of our Chromium email engine and some small feature additions. These are detailed comprehensively in the accompanying release notes.

AccuraSync Quickbooks USA

We have now been able to include support for QuickBooks USA Intuit in this latest version of Accura, more information regarding feature changes relating to this can be found in the accompanying release notes.

New Features in Accura 6.12 Build 7



Service	Days	Code	% Markup	Active?
1stClass	1	1stClass	0.00%	☑
2ndClass	1	2ndClass	0.00%	☐
InternationalBusines	5	InternationalBusines	0.00%	☑

Default

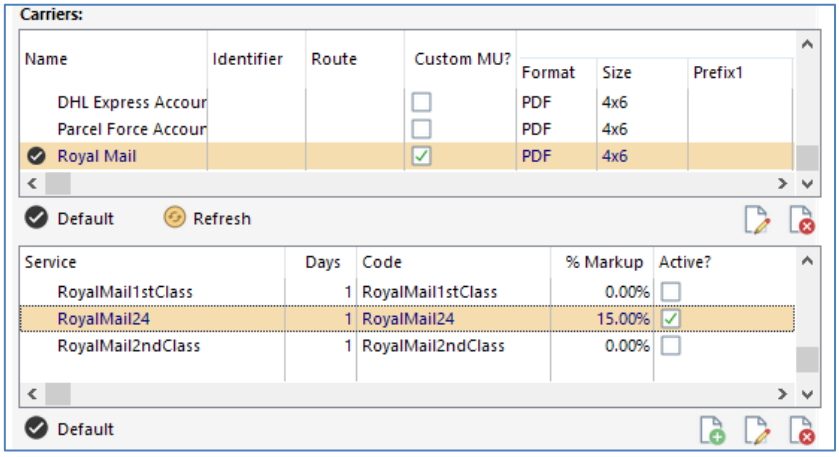
Carrier Service Selection

Some carrier APIs that are available for the AccuraShip (EasyPost) module return all of the carrier services, regardless of whether some of those services are applicable to you, the end-user.
It's now possible to prevent unwanted services returning rates in AccuraShip. This is done by unticking the **Active** flag against the unwanted services in Shipping defaults. These can be found by going to *Setup – Defaults – Shipping*.

Carrier Service Custom Mark-ups

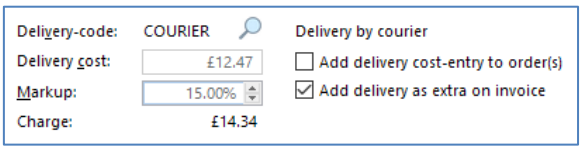
When a carrier service is booked for a delivery note and an outwork delivery charge is added, the outwork's default mark-up is applied which can then be amended manually. If an AccuraShip booking is made for a delivery note by an RDC user, they may not know what mark-up to add or have the authority to change the default value.

Now, using **carrier service custom mark-ups**, different mark-ups can be applied to different services for individual carriers.



To start, tick the **Custom MU?** checkbox against the carrier you want to use custom mark-ups for. Once enabled, the **% Markup** field becomes available for each of the carrier's services. You can then mark-up services at different levels.

When a service is booked, its custom mark-up will be applied to the outwork charge.



Please bear in mind that when using custom mark-ups, a 0% is a valid value mark-up so make sure all the services for the affected carrier have appropriate mark-ups.

Chromium Embedded Framework

We have come across certain issues when using the Internet Explorer plug-in we embed within Accura. This plug-in can be called when opening web pages from in Accura such as Online Help or the LinkedIn link, to embedded frames such as the route planner or AccuraShip tracking details.

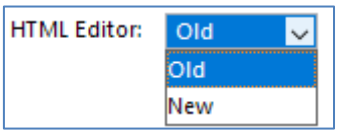
We have long had a solution for these issues but have had to hold off due to the need to keep backwards compatibility with customer systems where PCs and operating systems are not kept up-to-date. However, with Internet Explorer being deprecated and no longer supported by Microsoft, we now need to implement a more modern and future proof internet plug-in using the Chromium Embedded Framework (CEF).

Despite what the name suggests, CEF does not necessarily require Chrome to be installed on the PC, it should run with no browser at all installed as we ship the necessary files in the 6.12 upgrade.

To all intent and purposes, end users should not notice much difference in day-to-day operation. As we now use CEF, we've been able to upgrade the built-in HTML editor to CKE4 which fixes long standing bugs that were part of CKE3.

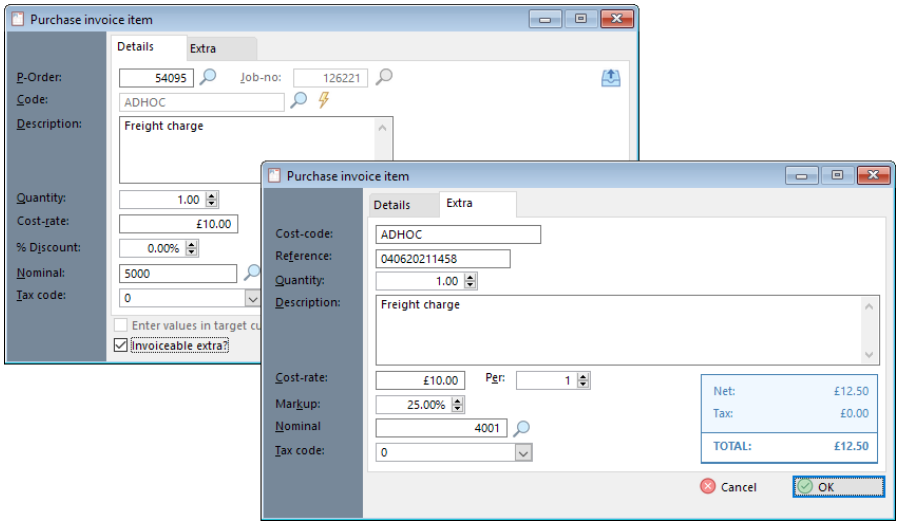
On upgrade to 6.12, Accura will turn on CEF depending on the hosted operating system. If it determines the operating system is less than Windows 7, the old-style plug-in will be used. For Windows 7 and above, the CEF control will be used. However, this does not necessarily mean the CEF will work well on older systems and operating system that fall below our recommended operating system, **64-bit Windows 10** (or similar server O/S for RDS installations). Please see our minimum system requirements for further details.

If any problems occur on a PC-to-PC basis that can't be resolved by Support then it may be necessary to switch the problem PC back to using the old IE plug-in. This can be done from Accura's *Defaults* > *Email* window or the *Communication* > *Setting* window. Unfortunately doing so means that the issues resolved by the implementation of CEF will return.



Purchase Invoice Extras

Occasionally, suppliers can add extra charges to a purchase order that is only raised at the purchase invoice stage. For example, a paper merchant charges an unforeseen freight charge for a specially ordered material or an outwork supplier may charge extras for work that wasn't included in the original PO.



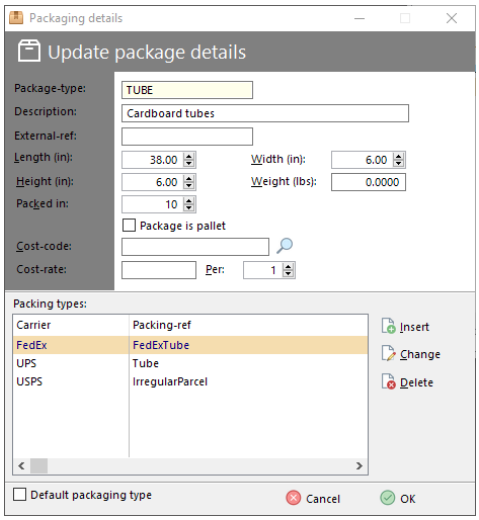
In the event of a supplier adding an unexpected charge to a purchase invoice, we have now added the ability to create order extras from purchase invoices.

A purchase invoice extra is created by simply adding a new purchase invoice item, select in the parent purchase order and add a related item from your tables. For example, you might want to select in a generic freight outwork item to cover a freight cost added by the supplier.

Next you need to tick **Invoiceable extra?** which will then take you to the PI item's **Extra** tab where you can change the sell values as you would in a standard order extra. Once the PI extra and PI have been saved, the additional cost(s) will automatically be added to the job costing.

Carrier Default Packing Types

Accura packaging types now support **carrier default packing types**. This allows AccuraShip to query carrier APIs using their own preferred packing types.



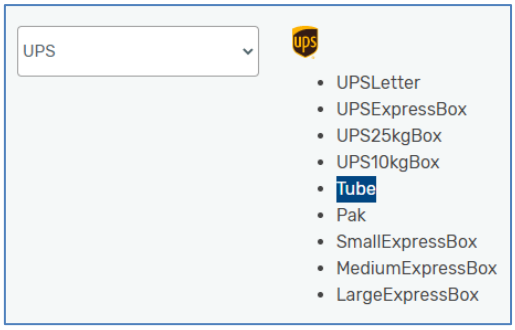
For example, you may wish to use a generic tube package type for packaging as setup in Accura. FedEx, UPS, and others use their own identifier codes, and dimensions for their standard pre-defined "tubes". Therefore, we need to send a different packaging-type code to each carrier.

This new feature allows you to select one packaging type in Accura for an order or delivery but send multiple carrier-specific identifier codes during EasyPost calls (to get proper comparison rates from different carriers)

To set up carrier packing types, go to **View Packaging Types** (*Setup – Packaging*) and **Change** your desired record.

In the **Packing types** section, click **Insert** and browse for one of your Carriers.

Next, tab across to **Packing ref** using the carrier's **predefined package code.** The correct carrier codes can be found here https://www.easypost.com/docs/api#parcels



When an AccuraShip request is made to EasyPost, where a carrier packing types is available for the delivery note's selected packaging type, the carrier response will be for their predefined package type. If a queried carrier has no predefined package type, the Accura packing type values will be used.

There are a couple of points to note-

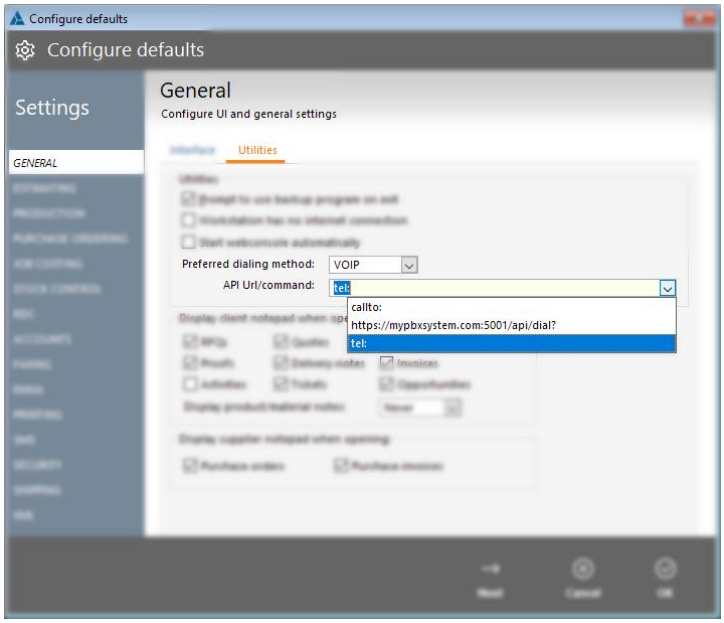
- Only one predefined package type per carrier can be linked to a single Accura packing type
- Not all carriers support predefined packaging type, this is something beyond our or EasyPost's control.

Please also see the 6.12 Technical Release Notes regarding known issue when using carrier packing types.

Improved VOIP Compatibility

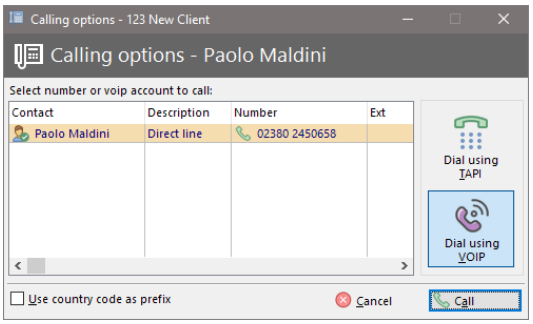
In order to support more modern PBX/ VOIP phone systems, we have introduced the ability to customise the VOIP API call. This will make VOIP dialling more compatible with modern PBX systems which do not support the old **callto:** API call which seems to have been replaced by **tel:** in some instances.

The new API/URL setting can be found in Accura Defaults, on the **Utilities** tab of the **General** section (*go Setup > Defaults*).



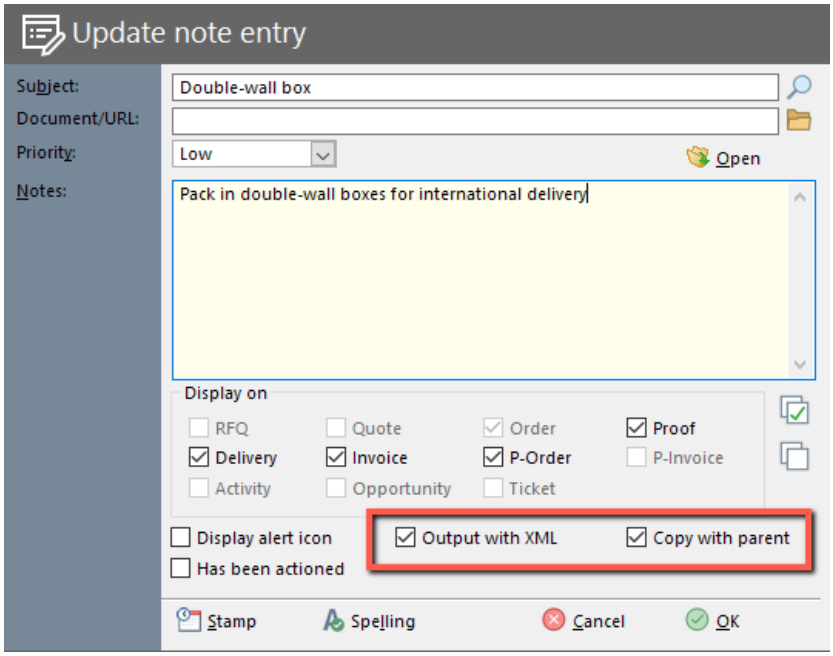
When Accura dials using the VOIP, it will prefix the number with the specified URL or command which should then connect to your preferred phone system.

The **callto:** and **tel:** entries will be automatically created during the upgrade to 6.12. New entries can by typed directly into the dropdown. When tabbing out of the field Accura will ask if you wish save the new entry. These entries can also be created or edited in **List Options** (*Setup > List Options)* under the **INI:DialURL** category



Improved Note Control

Pop-up notes now have a couple of new options to govern behaviour for notes attached to quotes or orders.



The first is **Copy with Parent** which when ticked, means the note will be copied if the quote or order are copied If unticked, the note will **not** get copied forward to the new quote / order. This means notes that may only be relevant for this particular quote or order can be prevented from copying forward thus avoiding confusion. This option is always ticked by default.

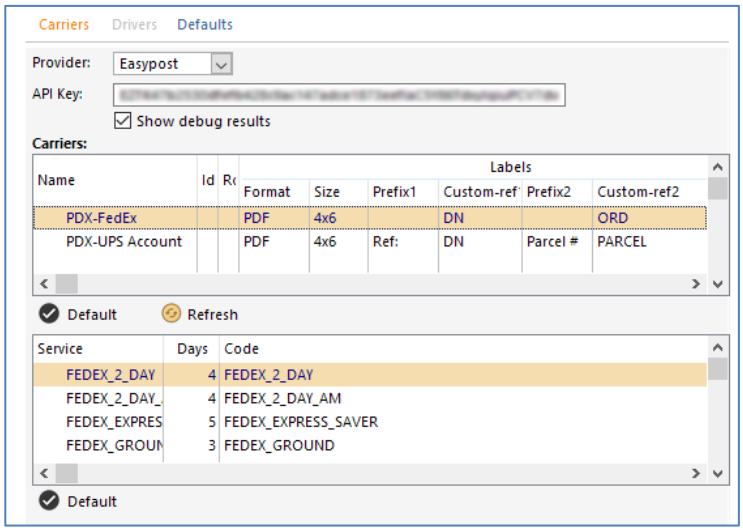
The second option, **Output with XML**, is available in systems where the **XML Toolkit** has been purchased. This option will determine whether or not individual notes are output with quote or order XML.

New Features in Accura 6.11 Build 1

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.



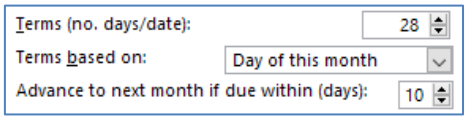
In the Carrier defaults (*Set-up* > *Defaults* > *Shipping*) The **Custom Ref** fields are set to the desired field settings. The fields available are – Delivery Number, Job Number, Order Number, Subref and Parcel Numbers.

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.

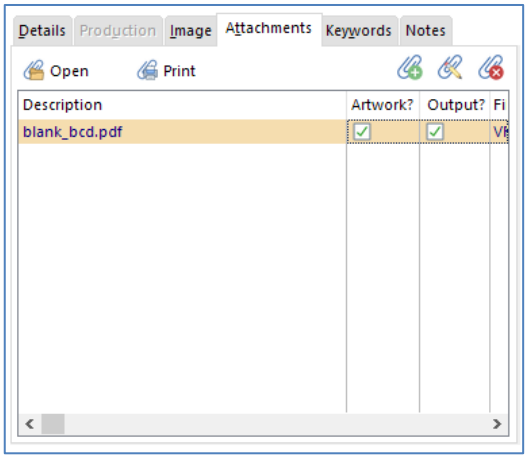


For example, a client's payment terms are to pay by 28th day of this month. Using the new **Advance to next month if due within** setting, we can now defer this due date to the following month if the invoice was raised with a certain number of days before the usual due date of 28th of this month.

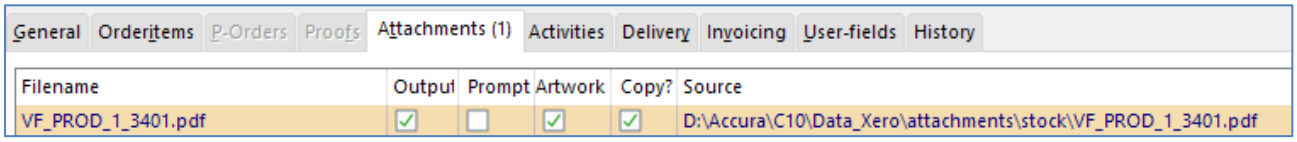
Using the above example, if I raise an invoice for the client on 21st of the month I am within the 10 days deferral period so the due date of any invoice raised will roll over until the 28th of next month.

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.



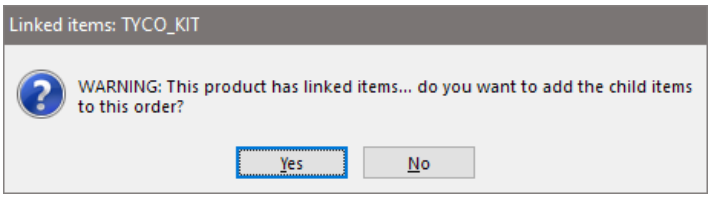
To set a product's attachment to behave in this manner, its **Output?** checkbox should be ticked. When this product is then used in an order or web order, it will create an attachment record referencing the original file in the *Accura\Data\Attachments\Stock* folder. A copy will **not** be made in *Accura\Data\Attachments\Order* 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.



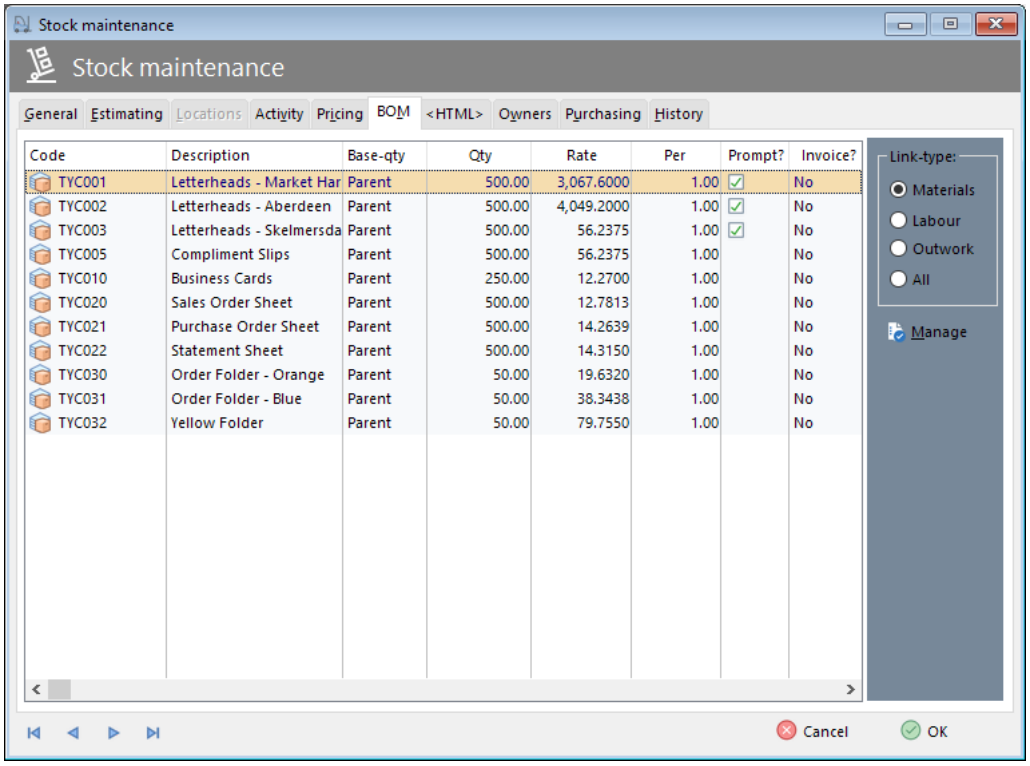
If Yes is answered, all linked items to the product will be pulled through into the order - labour, materials, outwork and other products.

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.

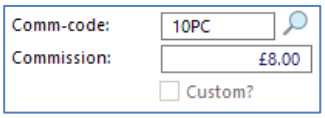


When selected in, the quantity of child products will default to their own sell pack quantities and each one can be set to optionally prompt to be added or pulled in silently.

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



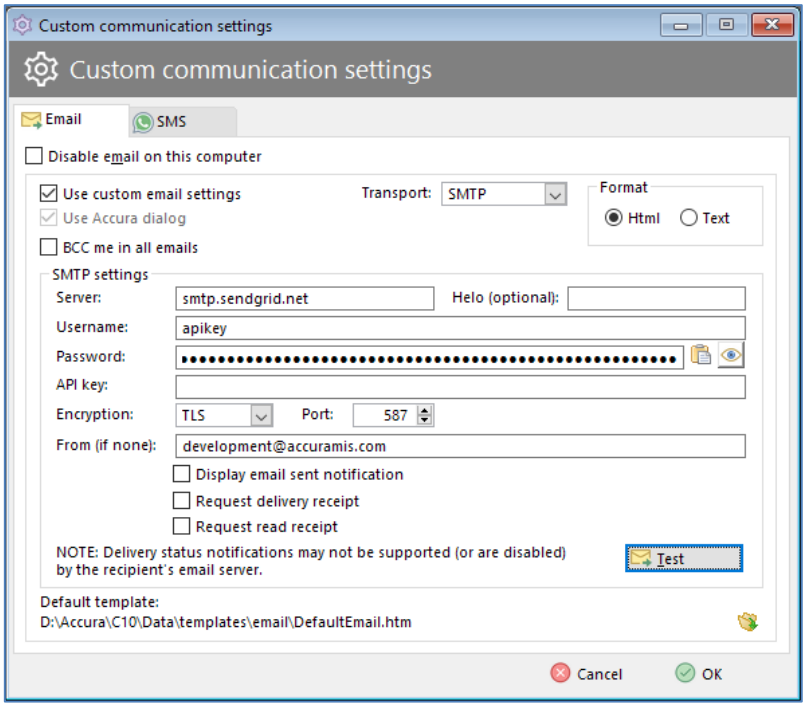
It is now possible to add commission to product orders. Previously it was only possible to calculate commission for orders that were quoted.

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.

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

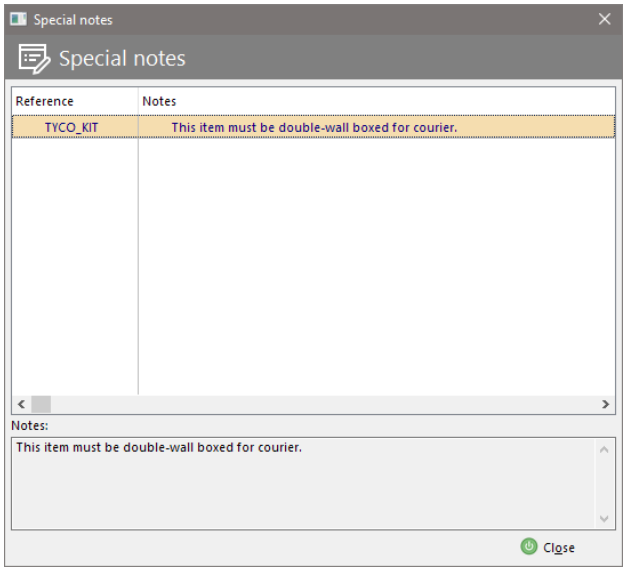
If using SendGrid for day-to-day emailing, Accura users should have their email addresses within Sendgrid's list of authenticated users.

Material Notes

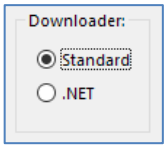
Material notes can now optionally be displayed as a read-only, pop up notes. This may be useful when certain materials need handling in a specific way or products that need packaging in a certain manner.

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.



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.

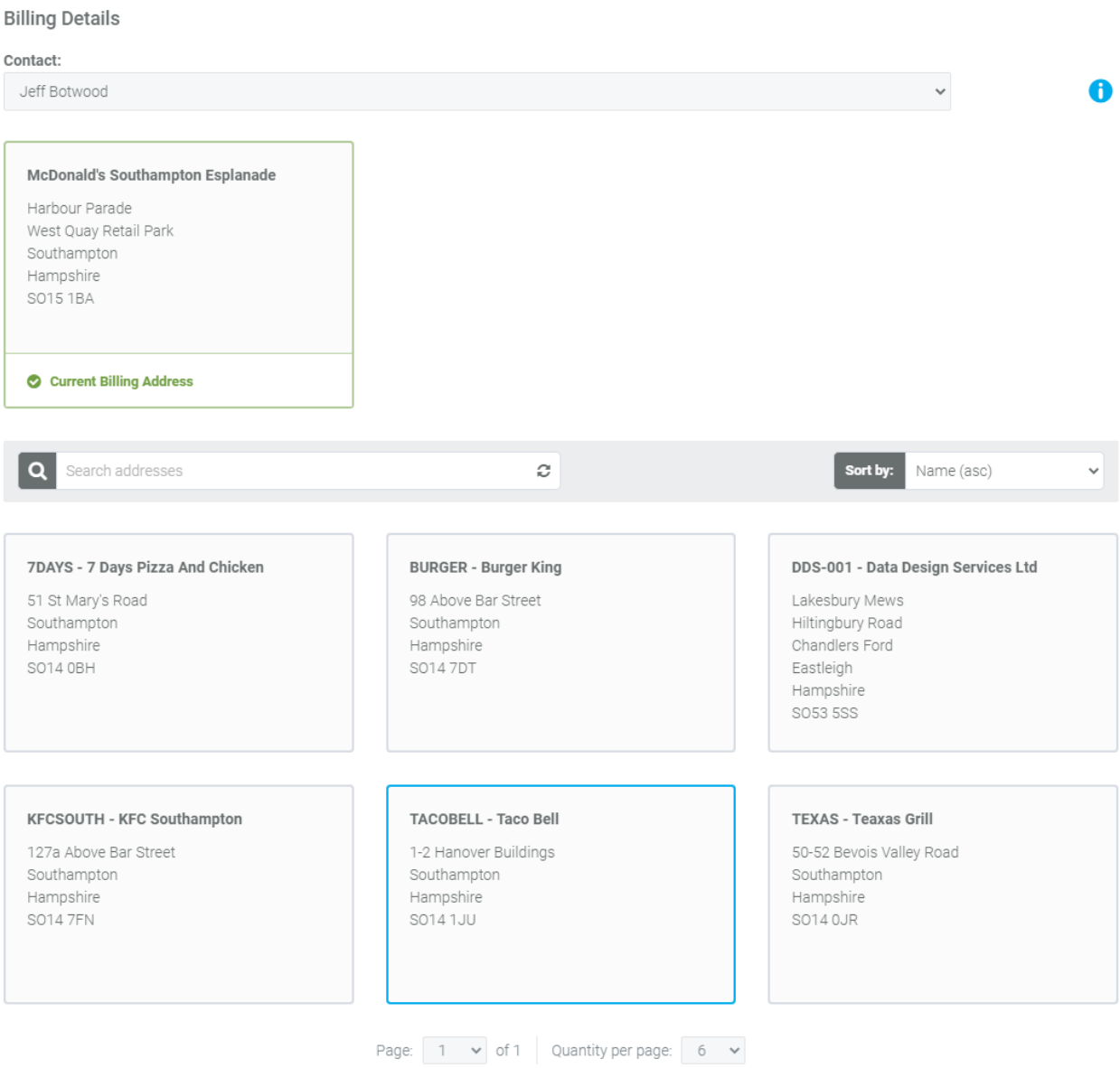
The Online Help site is still available from your Accura help menu but only our wide range of "How to..." PDF guides are viewable as well as other documents such as hardware specifications and previous release notes.

Large Address List Support

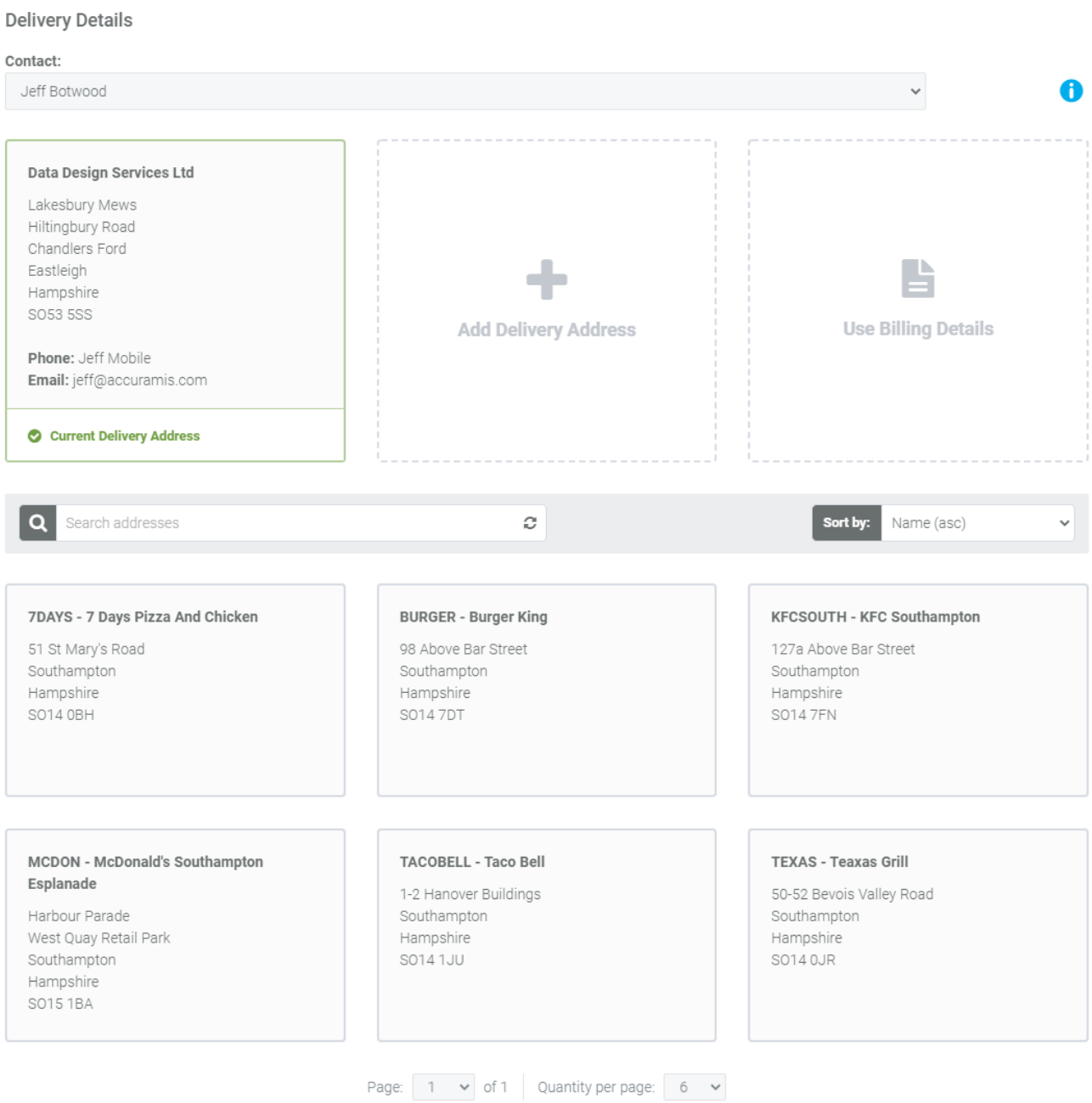
Address (Accura office) lists in the **My Account Addresses** tab, **Checkout Wizard Billing** step and **Checkout Wizard Delivery** step have been overhauled to handle hundreds of addresses for large B2B clients in an efficient, user-friendly way that avoids huge scrolling lists, and provides full control of which addresses can be seen by each account. These features will automatically be enabled on client accounts with multiple addresses. B2C accounts and client accounts with single addresses will not see these new features unless they add multiple addresses over time

- The address list becomes **multi-page** with standard **page navigation** controls to control the page number and number of addresses per page
- **Address searches** and **sort orders** are available at the top of each address list. The text cursor always defaults to the address search box to avoid having to click on it
- The currently selected address will always appear above the address list search and sort header so users no longer need to search for it

Checkout Wizard Billing Step



Checkout Wizard Delivery Step



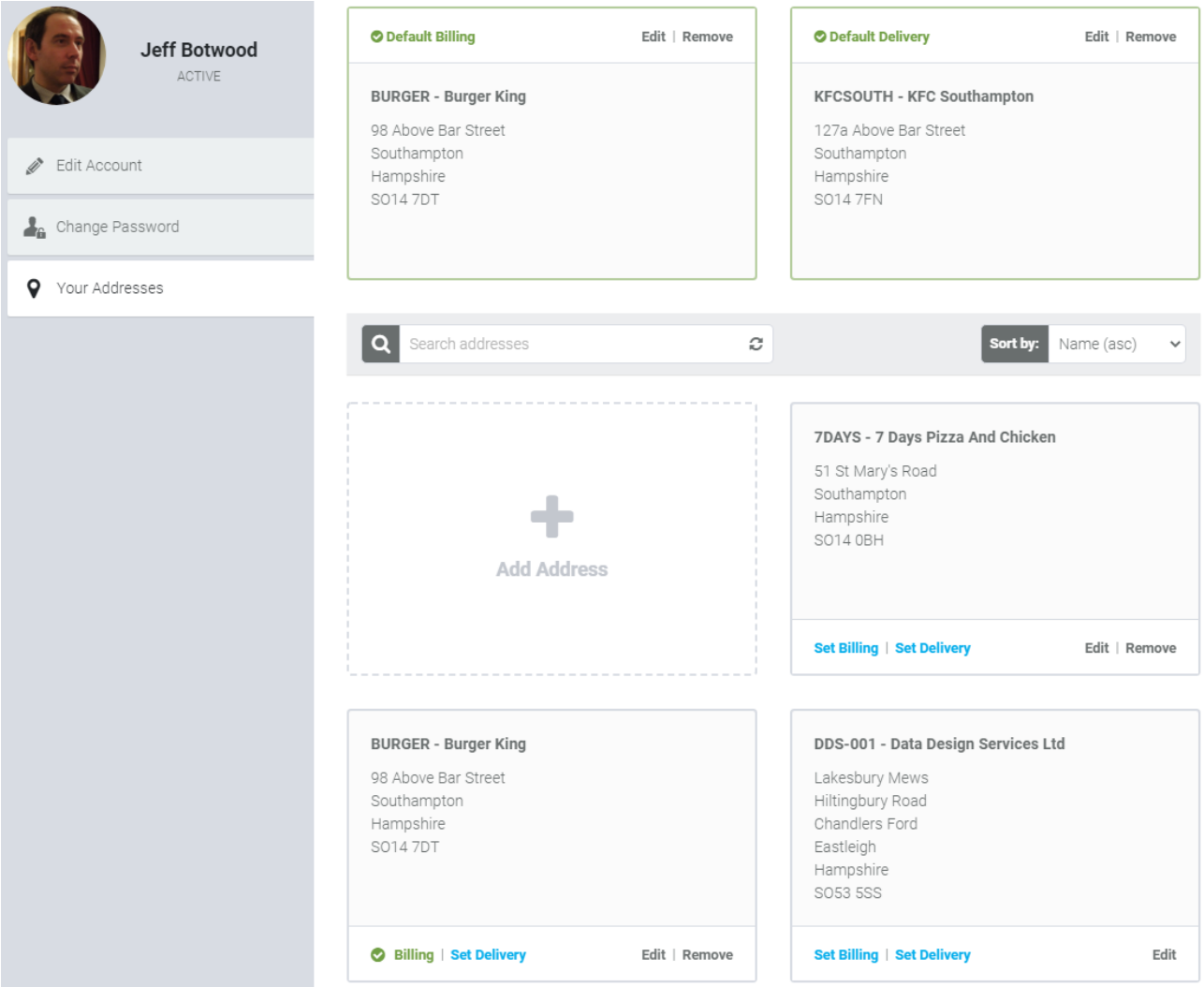
The **default sort order** for addresses is 'name'; other sort orders are 'address' (the first address line), 'town', 'postcode', or 'code' (the Accura office code)

All settings (sort order, page number, addresses per page and the last search phrase entered) are stored for each user in each of the addressing areas. If you always deliver to the same address for example and entered a search to display that address, it will automatically be highlighted on your next order until you manually clear the search

Security profile permissions have been improved in all of the above addressing areas:

- Accura-based offices (which are visible to ALL users of the same client) can be hidden by denying permission to 'View Accura offices' (this used to be called 'View products owned by other offices')
- Offices created by other users via the 'my account' area (such as people's home addresses) can be hidden from other users of the same client by denying permission to 'View data owned by other accounts'

My Account Addresses Tab



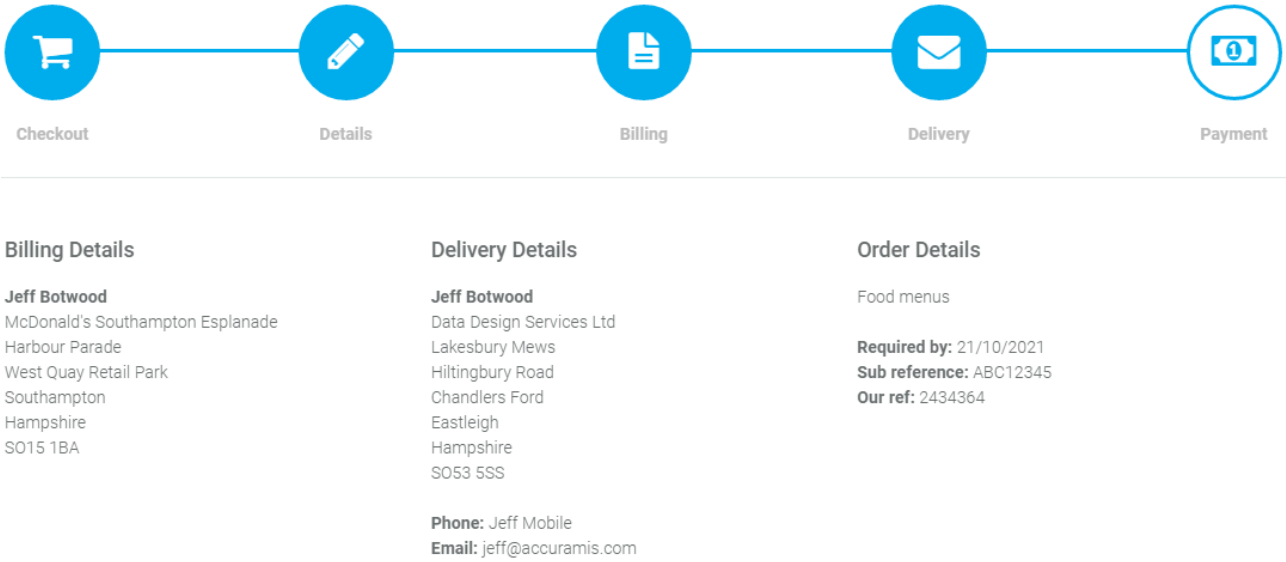
Further **security permission** improvements apply to the **My Account** area:

- Accounts require the 'Manage addresses' permission to be able to create, edit or delete addresses. This is further locked down by the above permissions that determine if the account is able to see Accura-based offices and offices created by other users
- Accounts require the 'View billing details' permission to be able to see their default billing office. This allows accounts to be bolted down properly where the checkout wizard was already configured to skip the Billing step using this same permission
- Accounts require both 'View billing details' and 'Edit billing details' permissions to be able to change their default billing office
- Accounts require the 'Edit billing details' permission to change their default delivery office. Accounts can always view their default delivery office as has always been the case in the checkout delivery step
- Accura-based offices will be displayed at the top of the page if they are set as the account default addresses, even if the account does not have permission to 'view Accura addresses'

See the *Admin Area: Security Profiles* section later in this document for more information on the changes in security profiles in this release

Checkout and Requests

The checkout wizard displays a **read-only summary** of the billing, delivery and job spec details on the final step, to prevent having to step back through the wizard to check the correct details were entered. Display of billing details require the logged-on account to have the 'View billing details' permission



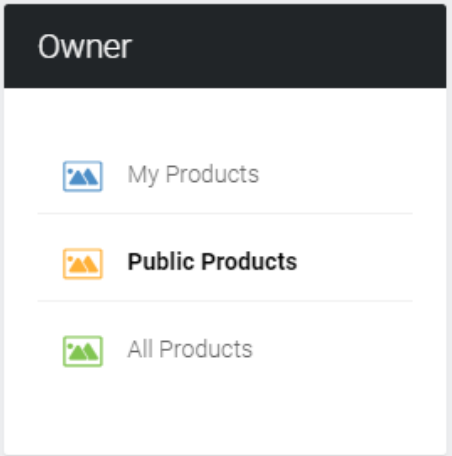
The **Priority** and **Respond by** fields in quote, print order and checkout wizard requests have been removed after feedback from customers indicated they were not desirable. Some fields have been rearranged accordingly in the view orders, and view order requests lists

The checkout wizard will enforce the minimum **Required by date** based on the lead times of the products in the basket (if lead times are configured in Accura), or the default store order Admin setting (whichever is the longest), provided a required by date has been selected by the user

Custom delivery information entered into the checkout wizard or print orders now requires entry of both phone and email vales. Previously you could enter either phone or email but did not need to enter both

General Product Features

A **Product Owner** filter has been added to the store, which filters by 'Public Products' (B2C), 'My Products' (owned by the currently logged in client) or 'All Products'. Previously all types of products were always displayed



The filter only appears on B2C systems for logged in clients when there is a mixture of public and client owned products available

The owner filter behaves in the same way as the existing product filters, automatically removing entries that are no longer relevant after applying other filters

The last selected option on the owner filter is stored for each website user as with other product filters

Owner filter title

Owner

☑ Owner filter enabled

Owner filter is only displayed if there is more than 1 client and 1 public products in the database, and the logged in client can see public products

To use and configure the Product Owner filter in the **Admin area**, you must be using B2C branding mode

The filter can be renamed and/or disabled via the settings filters tab and client branding filters tab in the same way as the other store filters (see left)

The filter will also appear when linking menus, slides, tiles, profile & account landing pages to the 'Products / Store' link-to option in the same way as the other store filters (see right)

Select filter options (optional)

Owner	Category
☐ Public Products	☐ Min & Max
☐ All Products	☐ No Limits
	☐ Quantity Choices

There is a corresponding client branding setting **Hide public products in store** to allow a B2C website to offer public products when not logged in, but remove these products once a client has logged in, rather than force the client to use the owner filter to hide them

☐ Hide public products in store

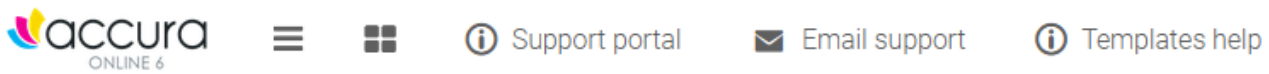
A new Admin setting **Display product codes in store** allows product codes to be hidden from website users. This setting is also available in client branding. Hiding product codes will affect the following:

- More characters in product descriptions will be displayed
- Product lists cannot be sorted by 'code', and will be sorted by 'description' by default
- Admin product areas will always display product codes regardless of this setting. This is for end-users only

☐ Display product codes in store

Improved Online Help

Links to the Accura client *Support Portal*, *Email Support* and *Templates Help* (for users with the optional eDocBuilder module) have been added to the **Admin area toolbar** at the top of the browser:



What used to be the 'Version' page in the Admin area has been changed to **Online Help**, using a new icon with links to various support resources:

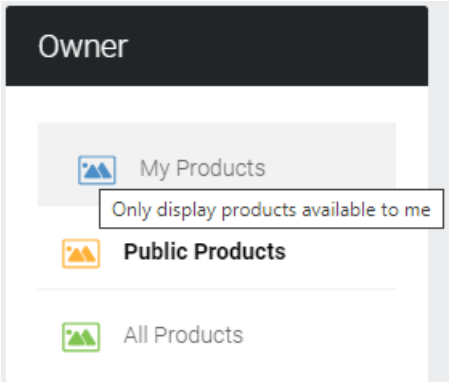
- **How to Get Help** details various help options available such as the Accura support portal, an email link to ask support to activate customer accounts on the portal, the eDocBuilder knowledgebase, and download links to the Adobe InDesign Plug-in for eDocBuilder
- **PDF Documentation** provides download links to AccuraOnline new features and technical release notes guides going back to version 6.00
- The old version tabs detailing features and changes in each release have been removed, as this information is now contained within the new PDF documentation

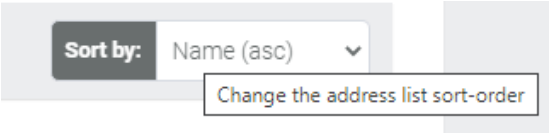
New Features documents give an overview of the major changes in each release

Release Notes documents provide detailed information on minor changes and bug fixes in each release

Software Release	New Features	Release Notes
Version 6.20 (latest)	**Version 6.20 New Features**	**Version 6.20 Release Notes**
Versions 6.10 to 6.11	Version 6.11 New Features	Version 6.11 Release Notes

Mouse **tooltip support** has been added to the main end-user areas changed in this release (addressing and products), providing detailed information about what each action does to enhance the usability of the website



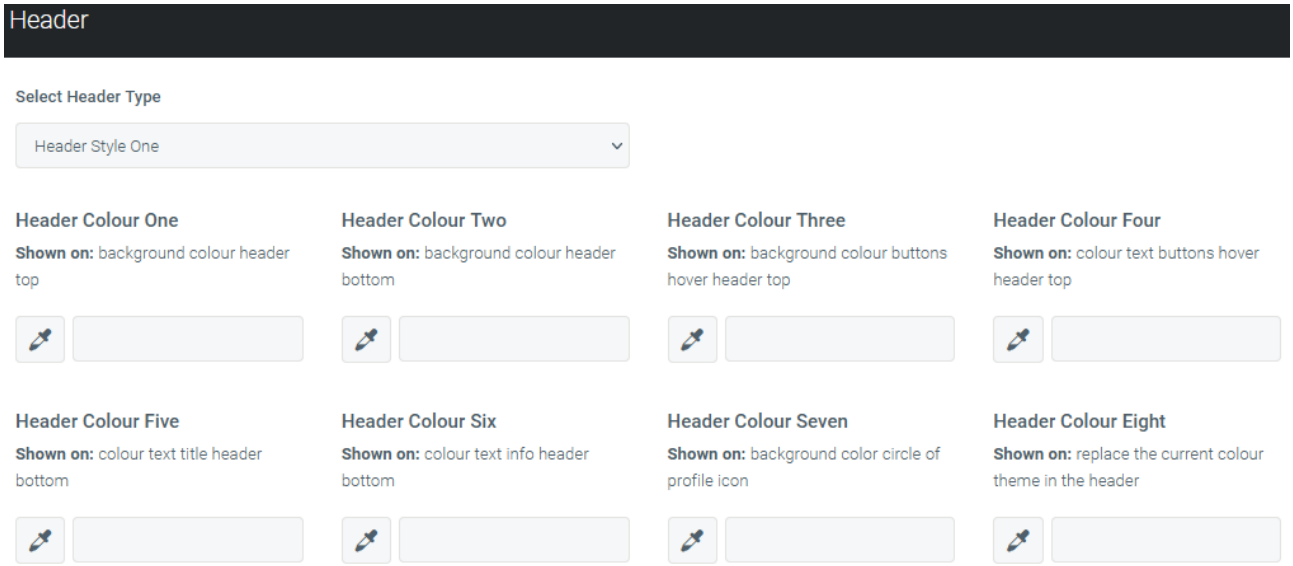


To view the tooltips, hold the mouse cursor over the various buttons, links and options on each page. This is a work-in-progress; more tooltips will be added in each future release

More information about online help available throughout the Admin area is contained within the various *Admin Area* sections of this document

Improved Theme Colour Customisation

This is a **preview feature** of a new header, menu and footer **widget design** to customise the **website themes** and is provided 'as is' without thorough testing for interested clients to test out. Widgets can display 8 colour fields instead of the 4 fields currently available, with much better control of how the website colours are applied and more accurate descriptions of what each colour will apply to



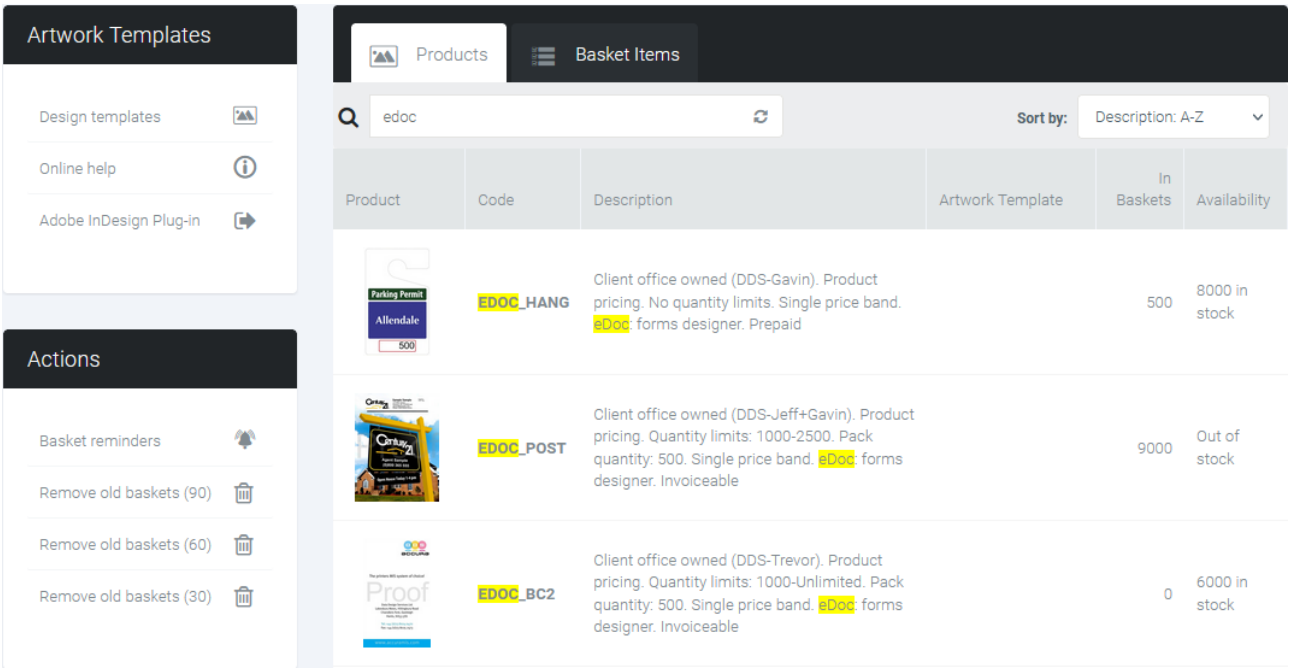
This feature can be tested out by enabling **Use new theme widget colour formats** in Admin domain settings. Users that switch to the new scheme will have to set up all their colours from scratch again (including client branding), however the colour settings for the old and new widget formats are totally independently of each other so it's possible to swap and change between the two modes without any hassle or reconfiguration. Returning to the old widget behaviour will always restore the exact look and feel of the website before the changes were made

This is a domain-level setting and client branding cannot use one method whilst the domain uses another method

This feature will be fully documented and polished in a future release, however we strongly encourage interested customers to play with this feature and provide feedback on how this works with their chosen colour schemes to help us improve this feature

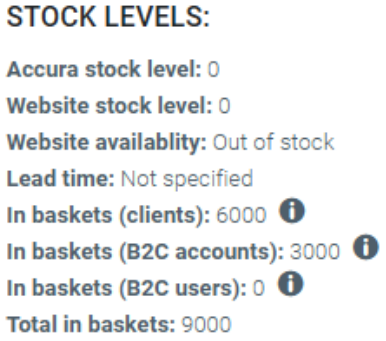
Admin Area: Products

The **Admin Products area** has undergone a significant redesign to provide support for the new 'owner' filter and for the Admin user to view and control basket contents and adjust stock levels



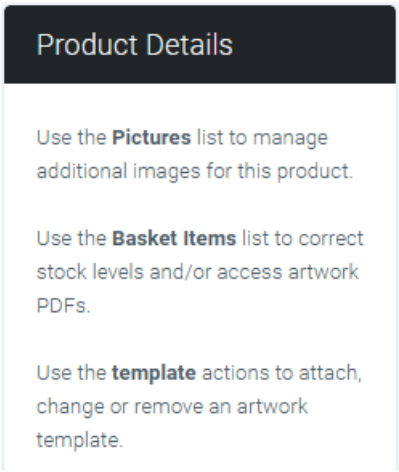
- The product list has been split into two tabs; **Products** and **Basket Items**. Previously it was impossible to view basket items. Basket items are covered in the *Admin Area: Basket Items* section of this document
- Text search and sort orders are displayed in a header area at the top of each tab. Previously, product text searches were displayed to the left of the list
- The products list view now includes the total amounts held in user baskets and the current stock level displayed in the product list for end users
- A new Artwork Templates toolbox displays for users of the eDocBuilder module, which provides new links to the eDocBuilder online help and the download page for the InDesign Plug-in
- Various tooltips have been added throughout the Admin area products pages
- A number of new actions are available for management of basket items; these will be covered in the *Admin Area: Basket Items* section of this document

Product Details displays a new **Stock Levels** area detailing a breakdown of stock levels and amounts in shopping baskets:



- *Accura stock level*: the stock availability level in Accura
- *Website stock level*: the numeric stock level availability on the website
- *Website availability*: the stock level availability phrase shown on the website
- *Lead time*: The product lead time when out of stock in Accura
- *In baskets (clients)*: The amount of the product currently in client-account shopping baskets. These items will reduce the website stock level compared to the Accura stock level
- *In baskets (B2C accounts)*: The amount of the product currently in B2C account shopping baskets. B2C accounts have created accounts on the website but have not yet placed orders which have appeared in Accura's Web Console. These items will reduce the website stock level compared to the Accura stock level
- *In baskets (B2C users)*: The amount of the product currently in B2C user shopping baskets. B2C users have not yet created accounts or placed orders. These items will NOT reduce website stock levels compared to the Accura stock level

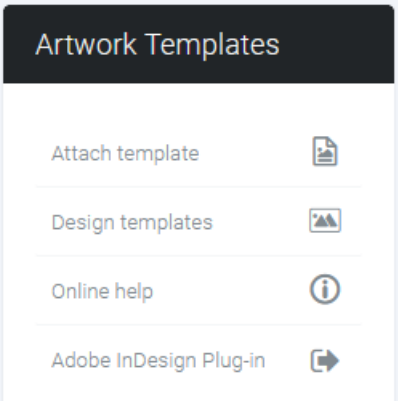
- Tooltips against each of the 'in baskets' fields explain to what these levels mean and how they affect website stock levels
- Websites running in one of the B2B branding modes will only see the client baskets figures as the others are not relevant to B2B websites



Online **help toolboxes** have been added to the left of the main area for help with product details and basket items if they exist for the currently displayed product

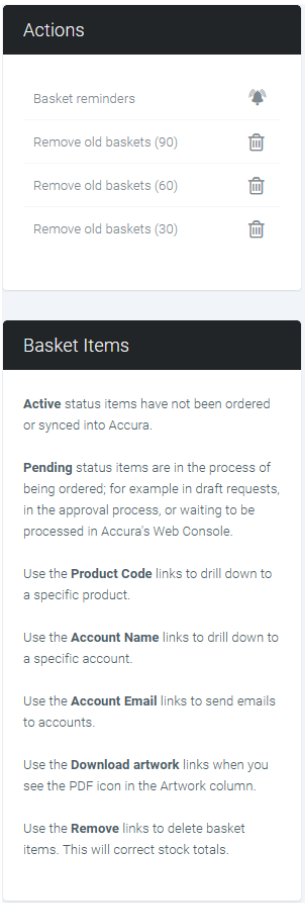
Additional links are provided for users of the eDocBuilder module to get online help for designing templates and downloading the Adobe InDesign Plug-in for eDocBuilder

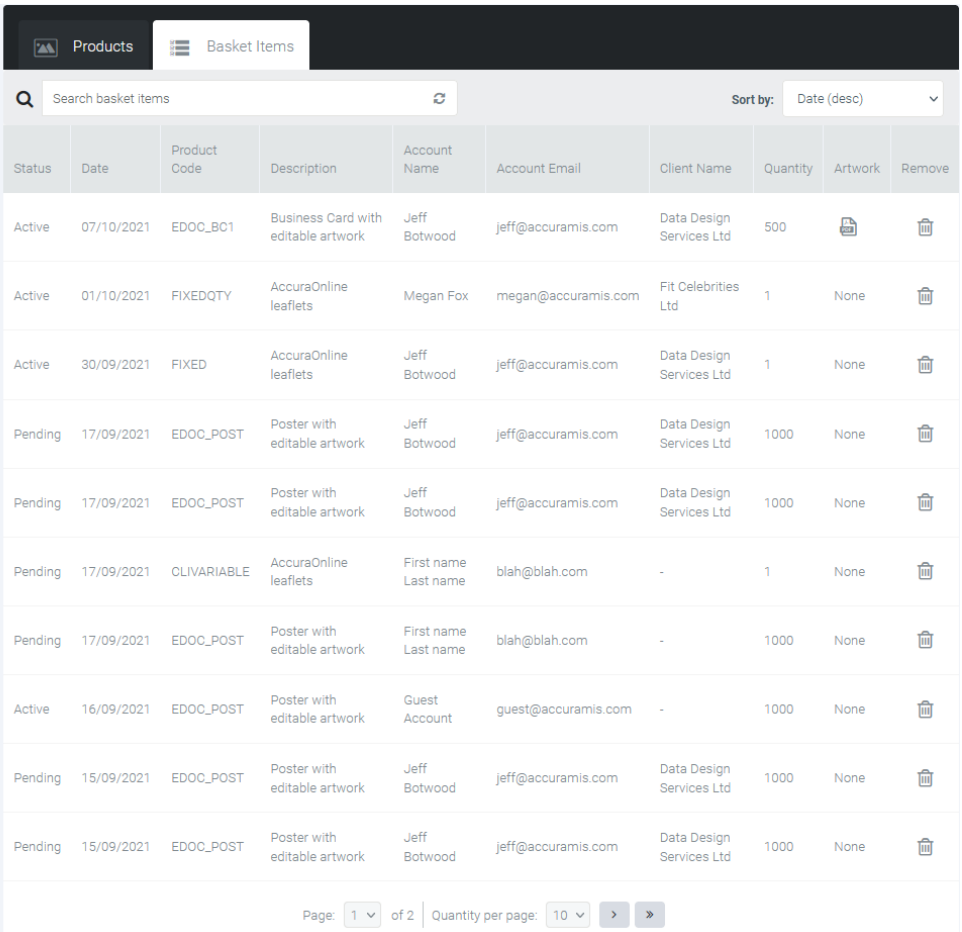
A **Basket Items** list displays if there are any basket items present for that product. Basket items are covered in the following section of this document



Admin Area: Basket Items

The **Basket Items tab** in the Product List and **Basket Items list** in the Product Details pages allows the Admin user to control basket items for users and make corrections to stock totals displayed on the website where they don't agree with the stock levels in Accura





Status	Date	Product Code	Description	Account Name	Account Email	Client Name	Quantity	Artwork	Remove
Active	07/10/2021	EDOC_BC1	Business Card with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	500		
Active	01/10/2021	FIXEDQTY	AccuraOnline leaflets	Megan Fox	megan@accuramis.com	Fit Celebrities Ltd	1	None	
Active	30/09/2021	FIXED	AccuraOnline leaflets	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	17/09/2021	CLIVARIABLE	AccuraOnline leaflets	First name Last name	blah@blah.com	-	1	None	
Pending	17/09/2021	EDOC_POST	Poster with editable artwork	First name Last name	blah@blah.com	-	1000	None	
Active	16/09/2021	EDOC_POST	Poster with editable artwork	Guest Account	guest@accuramis.com	-	1000	None	
Pending	15/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	
Pending	15/09/2021	EDOC_POST	Poster with editable artwork	Jeff Botwood	jeff@accuramis.com	Data Design Services Ltd	1000	None	

- Basket items with status **active** and **pending** are displayed. Active items are in shopping baskets and have not yet been ordered. Pending items have been ordered but not yet submitted into Accura, for example on draft orders, or orders in the approval stages
- Most settings (sort order, page number and number of basket items per page) are stored for the Admin user account
- Basket items for B2C users (that do not have accounts or clients) or B2C Accounts (that do not have clients) will display dashes (-) in the related columns
- An online help toolbox has been added to the left of the basket items tab which also appears in product details when there are items in baskets for the viewed product

The **Basket Items lists** allows the following actions on each basket item:

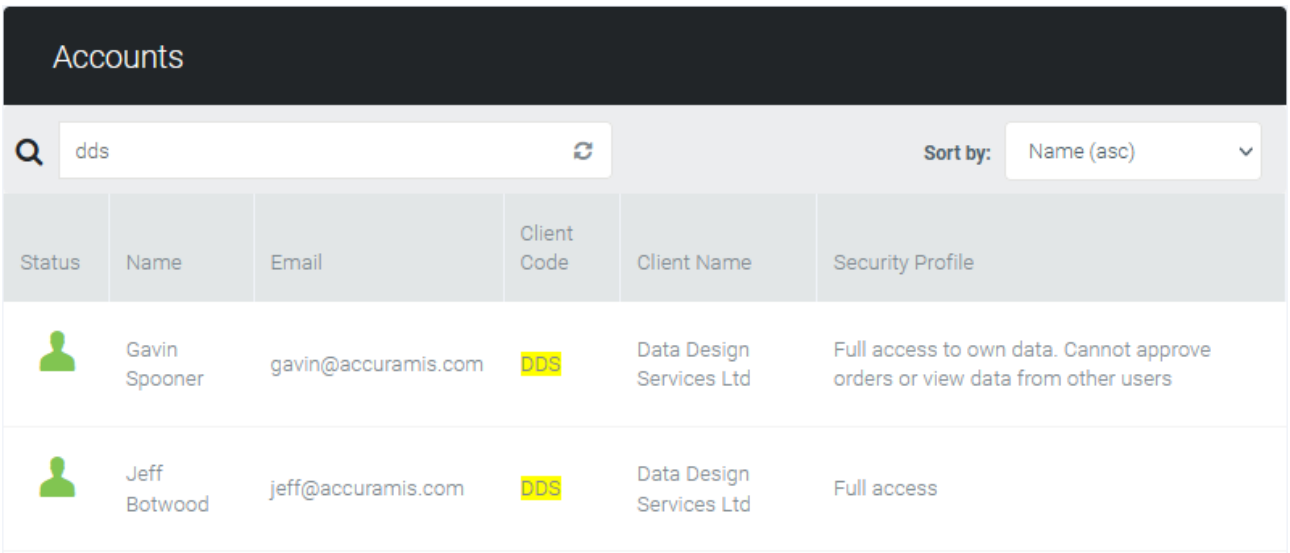
- Clicking a *Product Code* will navigate to the product details view for that product to allow the Admin user to drill down to view the basket items for that product. This column does not appear when viewing basket items from product details
- Clicking an *Account Name* will navigate to the edit account page, which allows the Admin to 'Log in as this account' to look at their shopping baskets and any requests they may have that contain these basket items
- Clicking an *Account Email* value will create a new email to that account
- If downloadable artwork exists for a basket items a PDF icon will be displayed in the *Artwork* column allowing download of the full quality artwork PDF that would appear in Accura if the item was ordered (for users with the eDocBuilder module)
- Basket items can be removed using the trash icon on the right. Active status items can be removed immediately. Pending status items will display a warning before removal because removing items from orders that have not yet been submitted could damage those orders. It is best to use the Account name link to log into accounts with pending basket items to investigate their unsubmitted requests before removing them from the basket item lists

Tooltips have been added to all links throughout the Basket Items areas

Admin Area: Accounts

These features allow the Admin user full visibility and control of **B2C accounts** when running the website in B2C branding mode, and better control of large **B2B clients** with lots of accounts when running the website in B2B branding modes

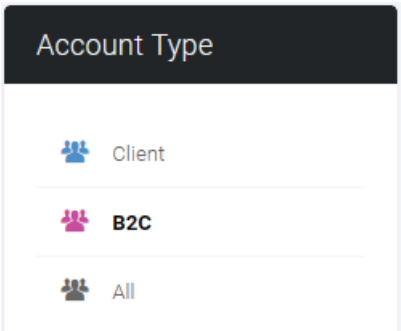
The Admin accounts list features a new text search and sort order header at the top of the list. Previously, text searches were displayed to the left of the list and sorting was done by clicking on the column headings in the list



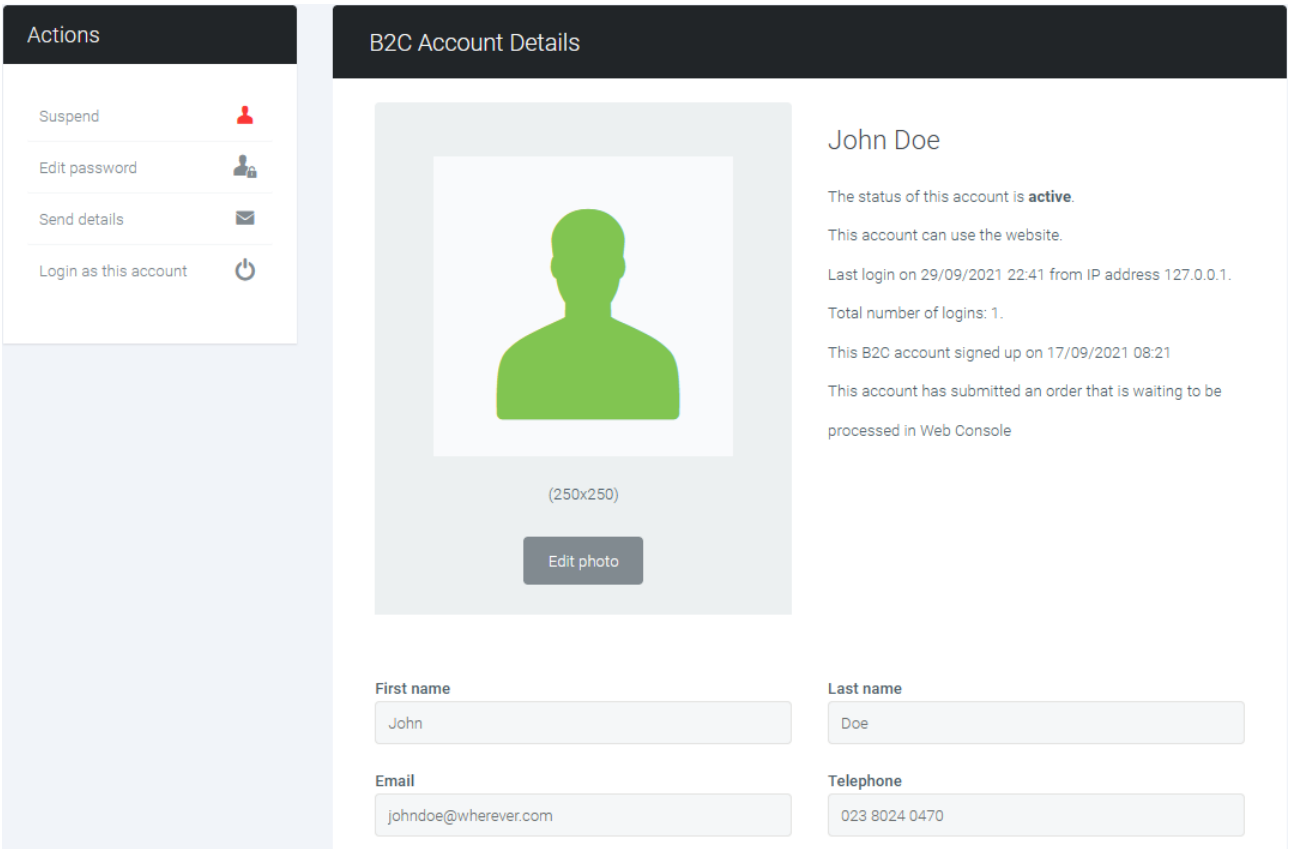
A number of new actions are available for email reminders and management of old requests; these will be covered in the *Emails, Automated Reminders & Clean-ups* section of this document

An **Account Type** filter has been added to the Admin accounts list to show client accounts, B2C accounts or both

- B2C accounts are users that have created an account during the checkout wizard but have not yet submitted an order and so will not have appeared in Web Console. As soon as a B2C account order is processed in Accura, the B2C account becomes a client account
- This filter will only display when the website is running in B2C branding mode
- This can help with troubleshooting 'account creation failed' email notifications sent from the website when trying to web-enable contacts in Accura. Go the Admin accounts list, set the 'type' filter to 'both, and then perform a text search for the offending email address



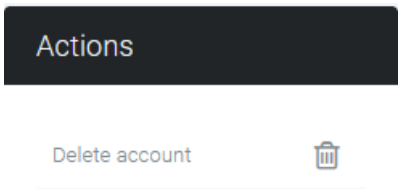
B2C accounts can be edited to see their sign-up details which includes their phone number. Previously it was impossible to see B2C accounts



- B2C accounts will display dashes (-) in the client code and name columns because they do not belong to clients
- B2C accounts do not have security profiles, but use a built-in (hidden) profile providing basic store access only
- B2C accounts will have 'active' status by default, unless they are manually suspended by the Admin user
- Editing B2C accounts will only provide access to the details they had to enter when they created their account, however various details such as when they signed up, their last login, number of logins and if they have submitted an order (or not) are displayed
- Available actions on B2C accounts are suspend/unsuspend, change password, send details by email and 'login as this account'

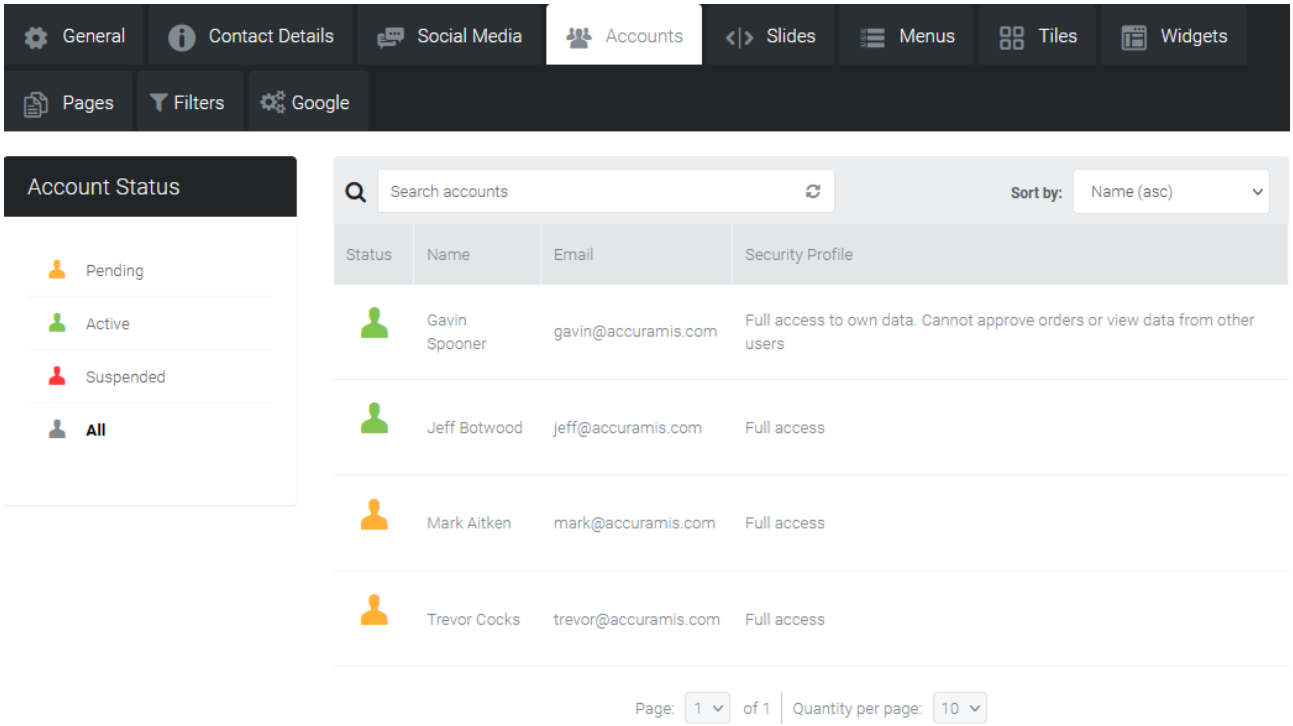
Certain types of website **accounts can be deleted** from the account edit page by using the *Delete account* action

- Deleting an account will remove the account and all associated data
- All B2C accounts can be deleted unless they have submitted an order request that has appeared in Web Console
- Suspended client accounts for clients whose web-access has been removed in Accura can also be deleted. This feature should only be used if there is no intention of reinstating web access to the account



Please note that manually suspending an account for a web-enabled client via the website will not allow you to delete the account

The **Client Branding Accounts tab** has also been redesigned to help manage large numbers of accounts for B2B customers



- The text search and sort order header as used on the main Admin accounts list is now displayed at the top of the contact list. Previously, text searches were impossible, and sorting was done by clicking on the column headings in the list
- The account status filter (pending, active, suspended or all) now appears to the left of the contact list. Filtering by status was previously impossible

Tooltips have been added through the Admin accounts and Client Branding accounts lists

Emails, Automated Reminders & Clean-ups

A number of **new email notifications** have been created and some have been updated, along with actions to trigger these emails, new **automated daily reminders** for users to complete orders, and **clean-up features to remove old data** from the database

New email: **Web2Accura: B2C account creation**:

- This email is sent to the Admin email address when a B2C account is created when they start the checkout wizard for the first time. For various reasons, these users may cancel the checkout process or navigate away from the website, leaving their account on the website and the Accura user previously had no knowledge of this
- The email contains the signup name, email address and phone number for easy contact access
- Normally this email should be quickly followed by receiving a B2C order in Web Console for the new account. If this does not happen, then you can use the new email to contact them and see why they did not order with you

Updated email: **Outstanding request approvals reminder**:

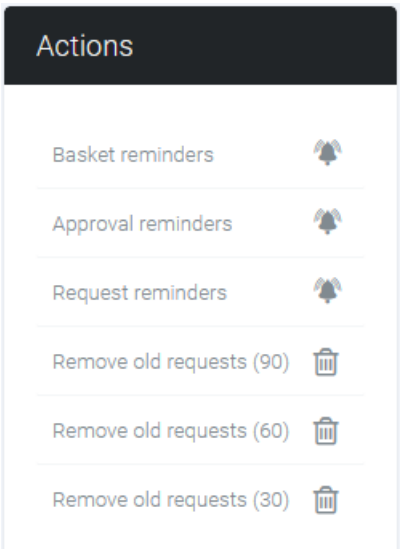
- This is an old reminder sent to approval accounts to remind them to approve orders submitted by users who lack permissions to approve their own orders. The email has been renamed from 'requests stuck at approve status' to 'outstanding request approvals reminder'
- The requests table in the email now details the type of request, and includes direct links to go to each request approval page, saving the need to navigate through the website
- The *Approval reminders* action to run this email on demand has moved from Admin settings to Admin accounts (see below)
- Automatic daily reminder emails are sent at 10am provided the email template is enabled

Updated email: **Web2Accura: Order approval account missing**:

- This is an old email sent when the *Approval reminders* is triggered, or when an individual order has been submitted for approval and the client has not been correctly configured for the approval process
- The email now contains a link to the client accounts page in the Admin area to more easily resolve the problem

New email: **Outstanding requests reminder**:

- This reminder contacts all website accounts with requests that have not yet been submitted, meaning drafts, approval rejections, and unsaved requests that were started and navigated away from. Requests awaiting approval are not included as these are already covered by the above 'outstanding request approvals reminder' email
- The email contains a table of each request, with request details, and direct links to go to the request editing page, saving the need to navigate through the website manually. Users are asked to either submit or cancel their requests
- The email can be sent on demand from the Admin account list via the *Request reminders* action (see right)
- Automatic daily reminder emails will be sent at midday provided the email template is enabled. After an upgrade, the email template will be disabled to prevent unwanted emails from being sent. It is recommended this feature is enabled only after removing old requests (see below)

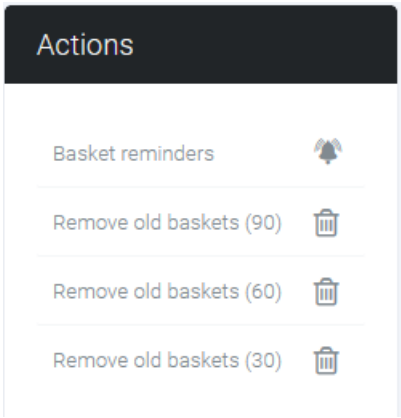


Remove old requests (days) actions:

- There are three new actions in the Admin accounts list that will delete old requests from the database. Each action details a number of days (30, 60 or 90)
- The requests must be older than the number of days selected to get removed
- These actions remove unsaved requests that were navigated away from and can safely be considered of low value. Requests saved as draft, or in the approval stages will be left alone regardless of their age, so must be dealt with by emailing the users via the 'outstanding requests reminder' email described above
- It is recommended the Admin users runs one or more of these actions to clean-up their database before they enable and start using the 'outstanding requests reminder' email

New email: **Outstanding basket items reminder**:

- This email tells users they have items in their basket (listing them in a table), and asks them to return to either complete their order or remove their items from their baskets
- This covers 'active' basket items only (meaning basket items that have not been included in a checkout request). Outstanding checkout requests are handled by the 'outstanding requests reminder' email
- The email can be sent on demand from the Admin account and product lists via the *Basket reminders* action (see right)
- Automatic daily reminder emails will be sent ay 11am provided the email template is enabled. After an upgrade, the email template will be disabled to prevent unwanted emails from being sent. It is recommended this feature is enabled only after removing old basket items (see below)



Remove old baskets (days) actions:

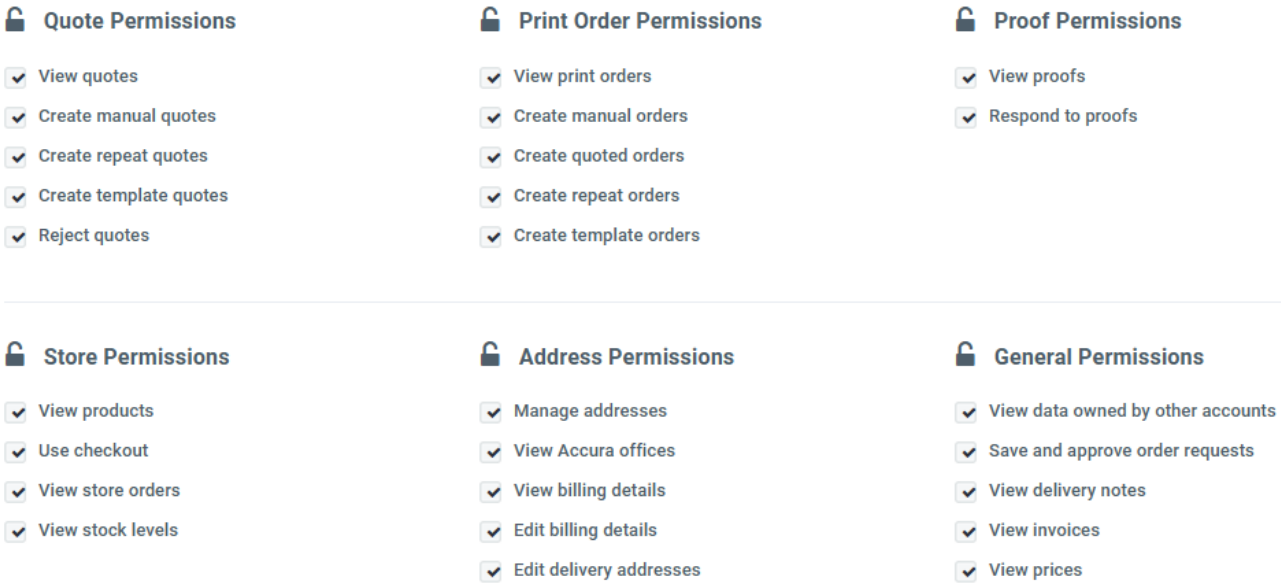
- There are three new actions in the Admin products list to delete old basket items from the database. Each action details a number of days (30, 60 por 90)
- The basket items must be older than the number of days selected to get removed
- These actions remove 'active' status basket items that can be safely considered of low value. Basket items saved in draft requests or requests in the approval status will be left alone regardless of their age, so must be dealt with via the 'outstanding requests reminder email' described above
- It is recommended the Admin user runs one or more of these actions to clean-up their database before they enable the 'outstanding basket items reminder' email

When disabled reminder emails are manually triggered by the Admin user, a prompt will appear asking if the emails should be enabled or not. This enables both on-demand sending of the emails and the daily reminders sent at specific times

Tooltips have been added to all actions that trigger these reminder emails & related clean-up processes

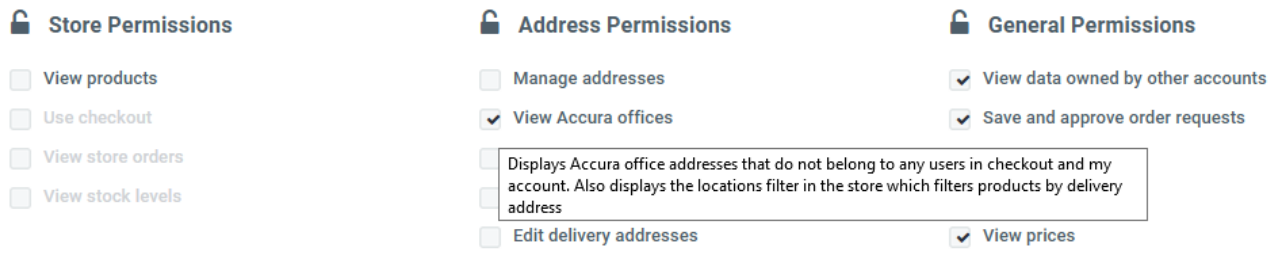
Admin Area: Security Profiles

The **Edit Security Profile** page has been reorganised, moving some permissions around and renaming others to make things more logical with the changes in this release



- There is now an 'Addresses Permissions' category instead of 'Delivery and Invoice Permissions' which helps to focus on the security permissions applied in the new address card features
- The 'View products owned by other accounts' permission has been moved from the 'store' area to the 'address' area and renamed to 'View Acura offices', which should be a more intuitive description of what the permission does; if you can view Accura offices then it follows that you can view/filter offices owned by them, and see a list of them in the billing, delivery and my account address lists
- Detailed tooltips appear on every permission to explain in full how it affects the website, and also to explain how it relates to or may require other permissions, or which permissions you should combine it with to achieve certain results. All users are advised to take a look at these new tooltips to make sure you understand what the various permissions do
- Permissions are now validated, so if you remove a permission that prevents access to other permissions, the other permissions will be un-checked and greyed out until the required permission is reinstated. This makes it impossible to create a security profile that will trigger unexpected website behaviour

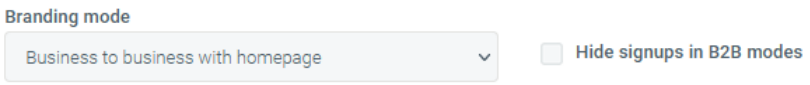
In the following example, the 'View products' permission has been denied so all of the other store permissions have been greyed out. This also shows the tooltip that appears when hovering over the 'View Accura offices' permission



Admin Area: Settings & Searches

A new domain-level setting **Hide signups in B2B modes** will remove the register buttons and links in the website header, login screen and welcome banner when running the site in one of the B2B branding modes

This is aimed at large B2C customers where all sign-ups need to be done manually or via a third-party system



Various changes have been made to **Admin and Client branding settings**:

- The Admin view settings, edit settings and client branding settings pages have been updated. Some settings have moved position to improve the layout, and some are renamed to clarify their purpose
- The view settings page now uses a two-column layout for many settings instead of the previous three columns and identifies Accura-based settings that cannot be edited via the website clearly
- Changing some settings will now show or hide related settings automatically, for example the branding mode, or disabling the slider
- The setting *Show price tax status text* is renamed to *Sales tax will be labelled as* to help clarify what the setting does: it is a way of localising your country sales tax terminology (e.g., VAT, GST and so on). This setting also displays a tooltip
- Client branding now tells you if the client is configured in Accura to include sales tax in website pricing

Text searches throughout the Admin area have been improved to support new fields and fix various issues. Some Admin areas that did not have text searches now feature them: news, job-types and pages. Search changes are fully documented in the release notes