



# Version 6.30 New Features

*Accura 6.30 Build 10 compiled on 11<sup>th</sup> March 2024*

*Accura Online 6.30 compiled on 19<sup>th</sup> June 2023*



# Introduction

## Welcome to Accura Version 6.30

Version 6.30 is the latest release for the Accura MIS, and contains many new features, fixes and changes as well as support for AccuraOnline 6.30.

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](mailto: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 6.15 Build 1 and AccuraOnline 6.20.

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

<b>New Features in Accura 6.30 Build 10</b> .....	<b>5</b>
Common Packing Setting.....	5
Multiple product orders within Sales Invoice.....	6
<b>New Features in Accura 6.30 Builds 8-10</b> .....	<b>7</b>
RDC module operator permissions.....	7
<b>New Features in Accura 6.30 Build 6</b> .....	<b>9</b>
Enhanced parcel label printing for Delivery Notes.....	9
Accura now supports custom themes .....	10
Product orders now support multi-drop deliveries .....	11
<b>New Features in Accura 6.30 Build 1</b> .....	<b>12</b>
Client Requisition for Materials Supplied .....	12
Customizable Tab Properties .....	13
AccuraSync MYOB.....	13
Product order from a quote .....	14
Packaging default by Office location .....	14
Layout Sets for Clients & Suppliers .....	15
Batch purchase-order invoicing.....	16
<b>New Features in Accura 6.15 Build 6</b> .....	<b>17</b>
Email Profiles & Proof Sync for Microsoft 365 .....	17
<b>New Features in Accura 6.15 Build 5</b> .....	<b>18</b>
Product Price and Price-list Adjustments .....	18
<b>New Features in Accura 6.15 Build 4</b> .....	<b>19</b>
Office365 Modern Authentication for SMTP .....	19
<b>New Features in Accura 6.15 Build 3</b> .....	<b>23</b>
Accura Livechat Platform .....	23
<b>New Features in Accura 6.15 Build 1</b> .....	<b>24</b>
Accura Online Product Order Changes.....	24
Domain Linking .....	24
<b>New Features in AccuraOnline Version 6.30</b> .....	<b>25</b>
Tiledesk Live Chat Integration .....	25
Trustpilot Micro Review Widget .....	27
Voucher Codes .....	29
CAPTCHA for Contact & Sign-up Forms .....	33
Single-step Checkout Form.....	34
Pop-up Basket .....	35
Desynchronize Company Details .....	36
Live Interactive Theme Previews .....	37
Live Interactive Widget Previews .....	38
8-Colour Widgets.....	39
Pages & Custom Content.....	40
<b>New Features in AccuraOnline Version 6.20</b> .....	<b>43</b>
Large Address List Support .....	43
Checkout and Requests .....	46



General Product Features..... 46  
Improved Online Help ..... 47  
Improved Theme Colour Customisation..... 48  
Admin Area: Products..... 49  
Admin Area: Basket Items..... 50  
Admin Area: Accounts ..... 51  
Emails, Automated Reminders & Clean-ups ..... 54  
Admin Area: Security Profiles ..... 55  
Admin Area: Settings & Searches..... 56



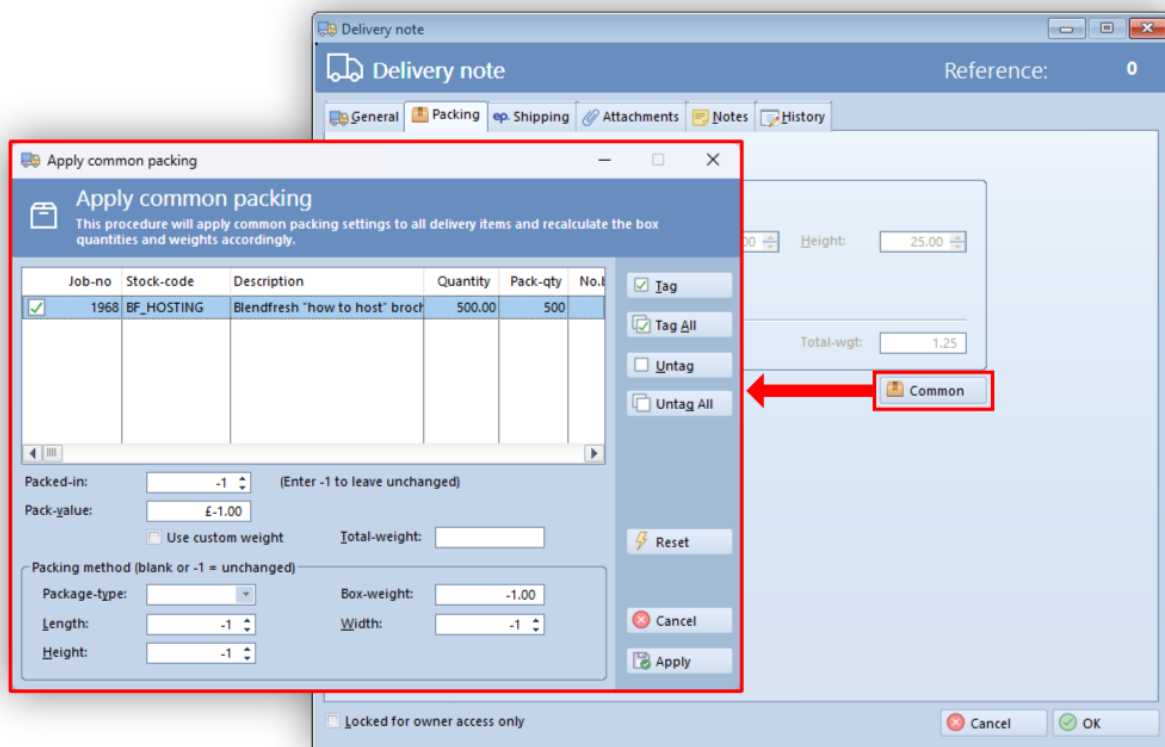
# New Features in Accura 6.30 Build 10

## Common Packing Setting

It is now possible to apply common packing settings to all delivery items which will recalculate the box quantities and weights accordingly.

The reason for this change is that it is particularly good if you have a lot off delivery items which are all common to one another and you want to bulk edit the details, whereas previously this was a laborious task which required you to manually edit each delivery item.

This is located under the **Packing tab** of the delivery note:

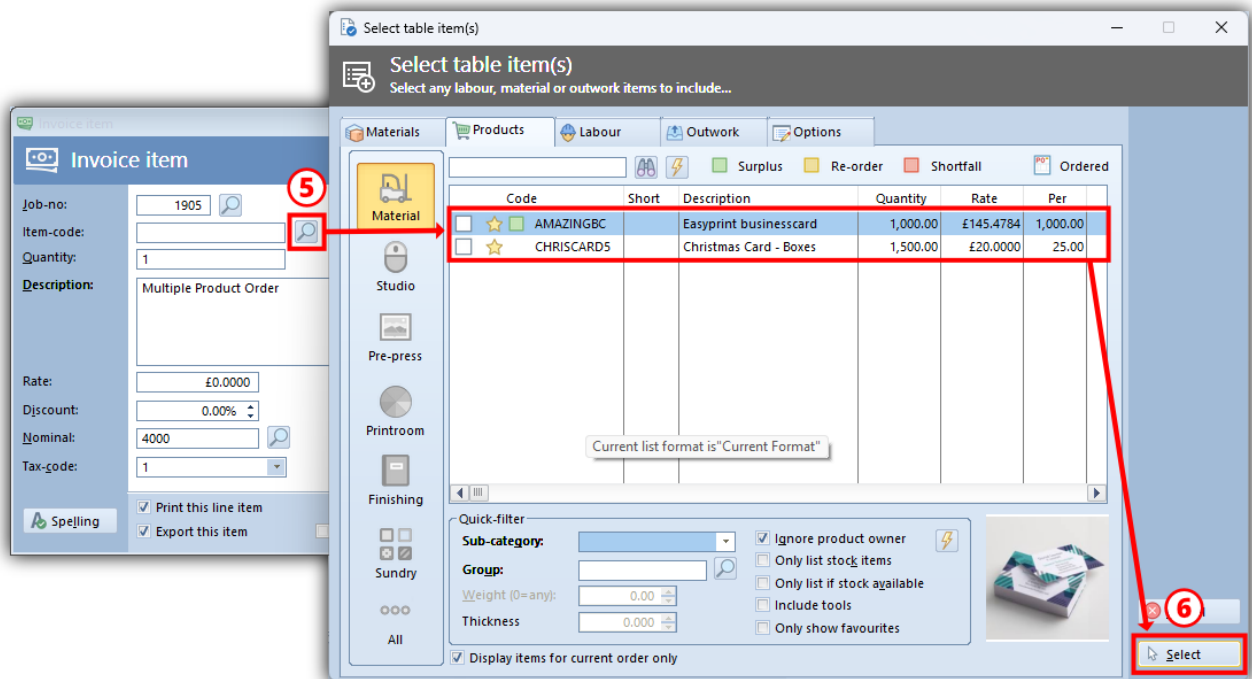
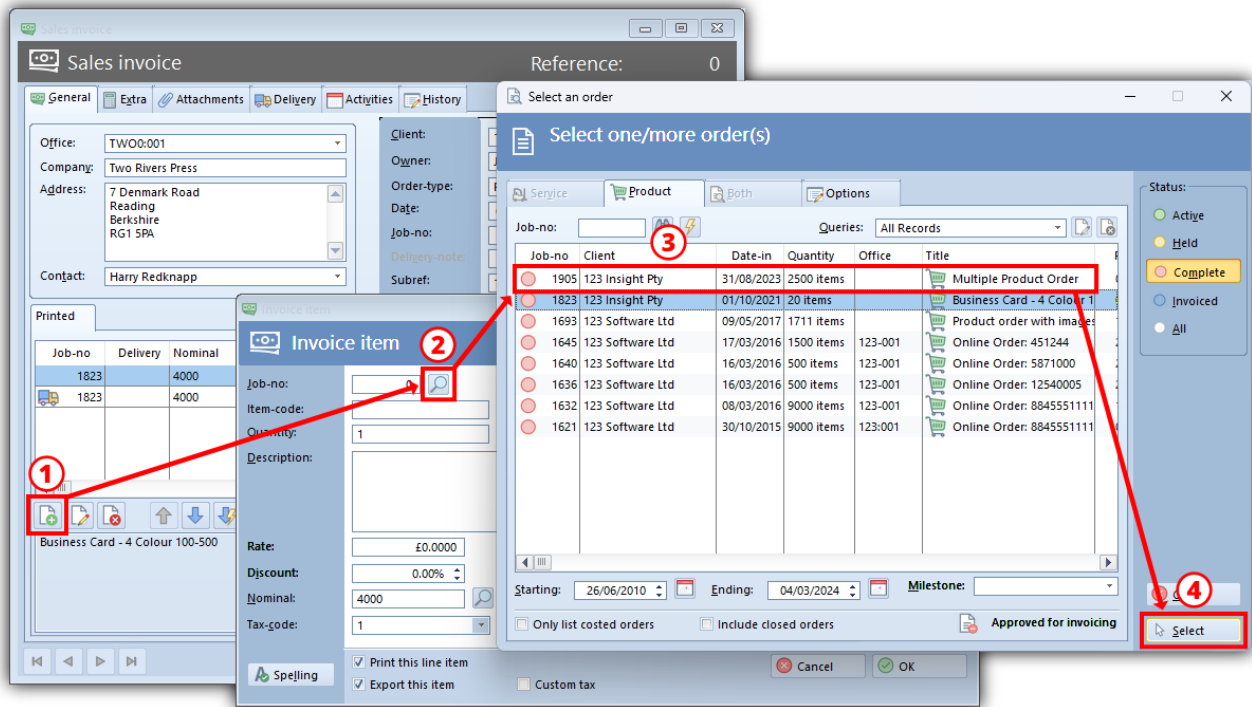


**NOTE:** This does require you to have packaging types to be setup (*Setup > Packaging*).



# Multiple product orders within Sales Invoice

It is now possible to manually add multiple product orders and/or additional line items within a single sales invoice, previously only service orders could be invoiced in this way.



**NOTE:** If your product order contains multiple products you will need to select the **Item-code** for each product you want to include into the invoice, so if you have more than one product, you will need to repeat the above steps to include all items for that order.



# New Features in Accura 6.30 Builds 8-10

## RDC module operator permissions

**PREVIOUSLY** each remote data capture (RDC) workstation would share one common set of user permissions to define the ability to perform various tasks such as raise purchase-orders, proofs, or edit orders (as opposed to view-only). The user access permissions were defined the first time RDC was run on the specific workstation, then saved.

**NOW**, when a user is selected from the left-hand panel in the RDC console that user-profile access permission will be applied. That is, menu options/buttons and edit access versus view-only access will change according to which operator is using the workstation at that time.

Furthermore the **user's own email profile setting will be used if they send an email notification** to the custom or internally to their supervisor. If they do Not have an email profile of their own, then the default email profile (**as assigned in RDC... Setup.... Defaults**) will be used.

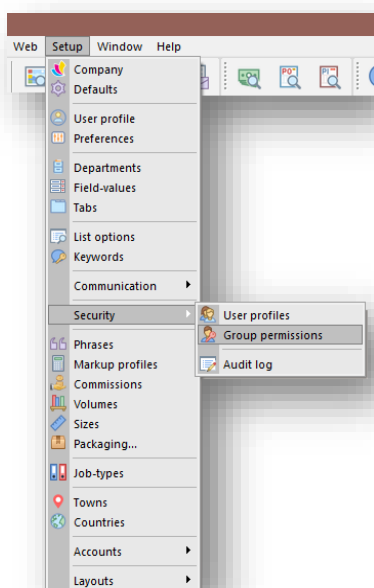
### WHY HAVE WE DONE THIS?

This change is so that **it is not possible for staff to need to share access permissions, and thus a less restricted profile – allowing them functions they do not need, or it is undesirable for them to have.** e.g. **Raising a purchase order.** If an **unauthorised factory operator was to raise a PO** and send it to a supplier this could incur a lot of financial and logistical consequences for the company, when the good arrive!

This change, **is also very useful if you have staff that “float” between departments...** either they work in the **back-office as a core user, and occasionally do jobs on the factory floor or move between departments** in the factory. Previously, they would only be able to perform functions assigned to the workstation, whereas now, they will have their full array of functions their security profile allows i.e. their permissions “follow them”.

### HOW TO STOP PEOPLE ABUSING ACCESS PERMISSIONS

**To prevent one user selecting another name in the list, that is not their own** (deliberately or otherwise) e.g. choosing a supervisor (**to gain additional access levels**), we suggest anyone with a higher-level of security access and/or is a core user **set a RDC PIN number** to protect their account. When that name is chosen from the user list, **the PIN will be prompted before before they can continue.**

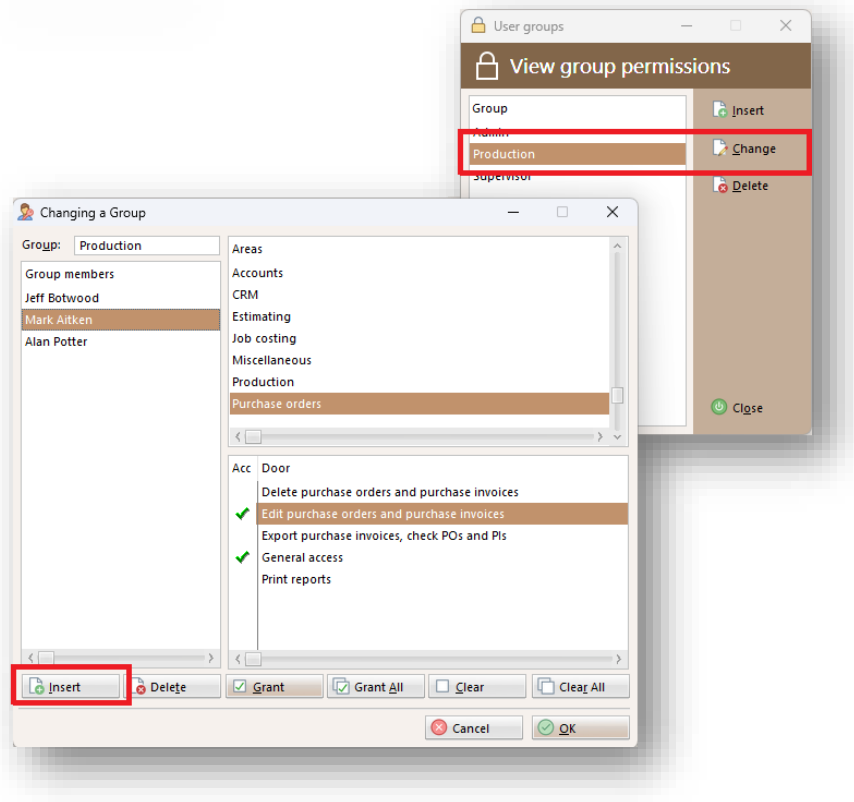


It is therefore a **REQUIRED STEP that you assign a restricted security profile to ALL RDC operators from within Accura (if they do not already have one).**

**NOTE:** You may well choose to **give supervisors an enhanced level of security.** E.g. ability to EDIT orders.

This can be done from the Accura main menu using **Setup... Security... Users/Groups.**





From the Groups list, either **change** an existing group, or **Insert** a new security group for editing.

You can grant or deny permissions for each of the module/areas of Accura on the right-hand side.

Then we specify the members of this group.

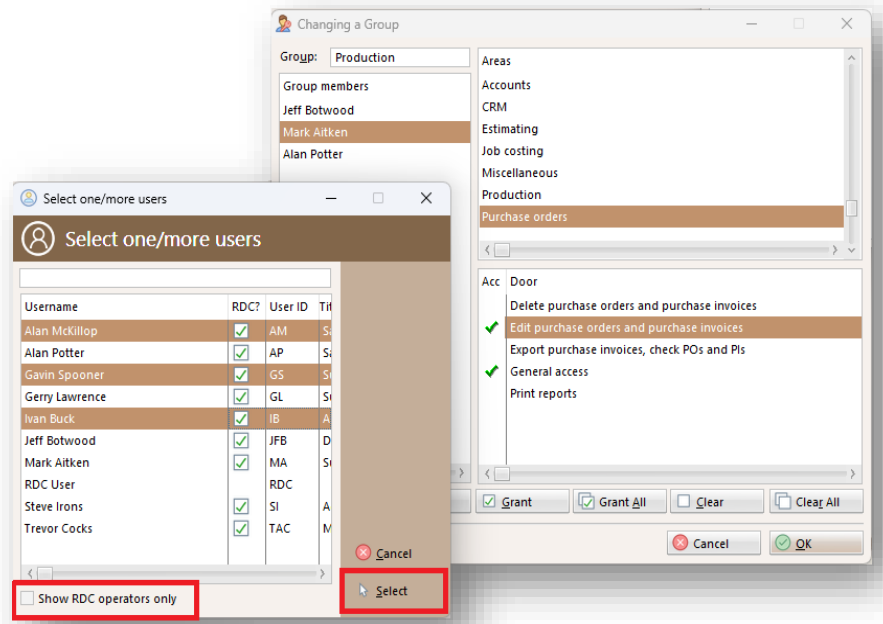
Simply press Insert, to **add one/more RDC operators as "members"** of this group.

You can multi-select using the usual Windows marking feature (Ctrl-click, Shift-click or Ctrl A for everyone)

You can also filter users to only show RDC operators if applicable.

Press Ok from the Group permission window to save the new group member(s), and permissions.

**NOTE: You only need to do this ONCE.**



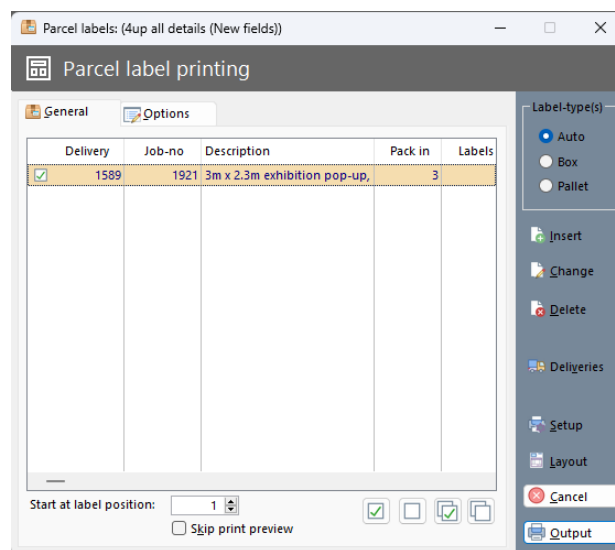


## New Features in Accura 6.30 Build 6

### Enhanced parcel label printing for Delivery Notes

This means that users can seamlessly continue using it in its current state, generating exclusively box labels. However, should you opt to palletise the Delivery Note, you now have the flexibility to print either ONLY pallet labels or BOTH box and pallet labels. In Parcel label printing you now have Label-type choices of:

- **Auto** – Print both box and pallet labels if applicable (i.e. if Custom packing set in DN, and the PalletQty > 0)
- **Box** – Box/bundle labels only.
- **Pallet** – Pallet labels only (if applicable)



The following fields have been made available to customise your parcel label templates, if required:

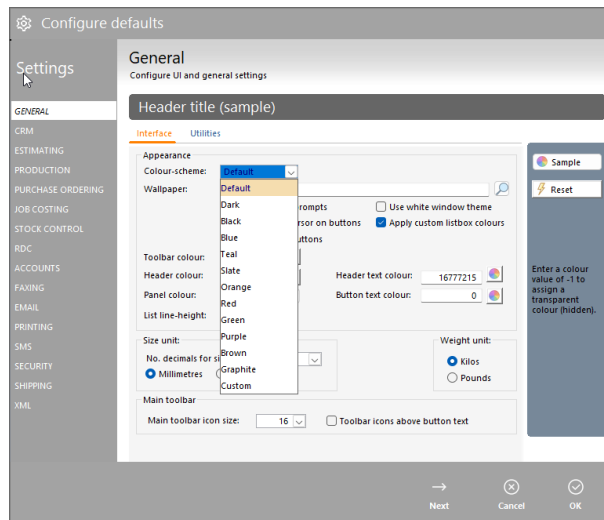
- **LOC:LabelNo** – Current label No.
- **LOC:LabelQty** – Total number of labels to be printed (could be boxes or pallets)
- **ITM:PackQty** – No of items in one box/bundle
- **HDR:NoBoxes** – Total boxes per shipment (regardless of label type)
- **ITM:NoBoxes** – No of boxes needed for current DN line item (will be same as HDR: unless multiple jobs on a DN)
- **HDR:NoPallets** – Total no of pallets on shipment
- **ITM:NoPallets** – No of pallets needed for current DN line item (will be same as HDR: unless multiple jobs on a DN)
- **HDR:PalletQty** – No of boxes on each pallet (when pallet is full)
- **ITM:PalletQty** – No of boxes on the CURRENT pallet (may be smaller for last pallet)
- **ITM:PackWeight** – Weight of one box
- **ITM:PalletWeight** – Weight of CURRENT pallet
- **HDR:PalletWeight** – Average weight of one pallet (approx.)

To achieve: ## of ### use **LOC:LabelNo** of **LOC:LabelQty**



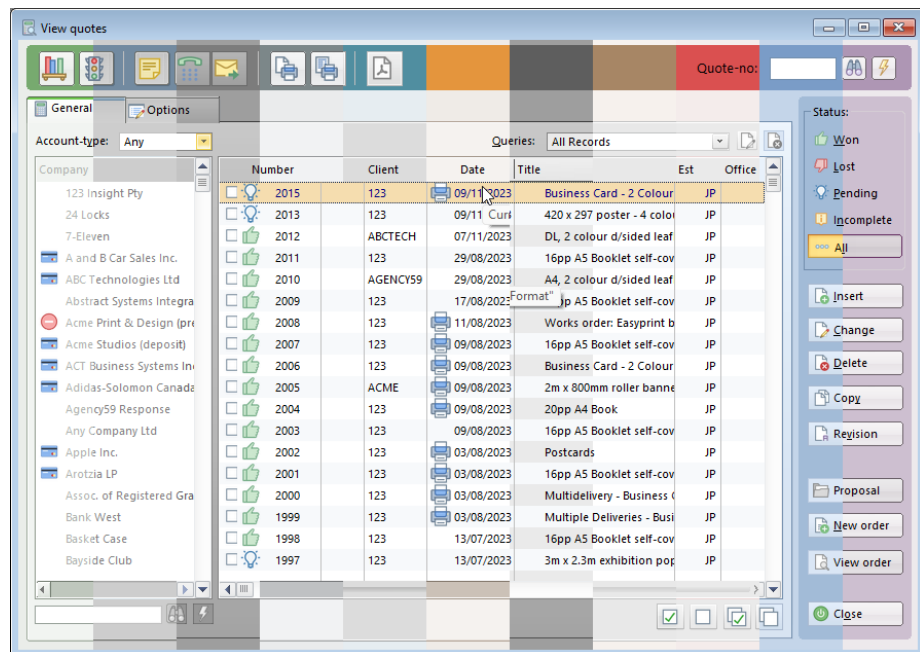
# Accura now supports custom themes

Accura now supports custom theming with the ability to add different colour schemes like. Themes are disabled by default but can be turned on by using **Setup → Defaults → General** and then selecting a different Colour-scheme.



Themes are kept in your Accura folder i.e C:\Accura\Themes The following styles are available to use are as follows:

- Black
- Blue
- Brown
- Dark
- Graphite
- Green
- Orange
- Purple
- Red
- Slate
- Teal



To go with each of the themes, we have included a matching wallpaper which is located in the Accura\Themes folder, you also have the option to use custom colours for your theme along with your own wallpaper, ensure that if you prefer to use your own wallpaper, its dimensions match those of your monitor, such as 1920x1080.

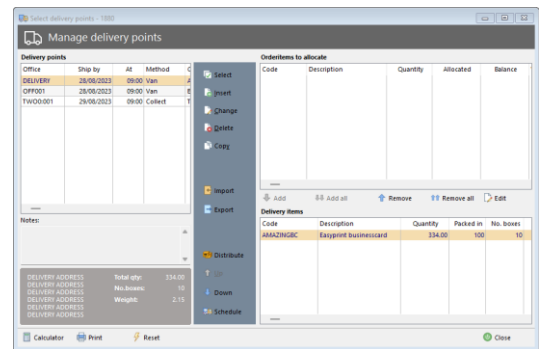
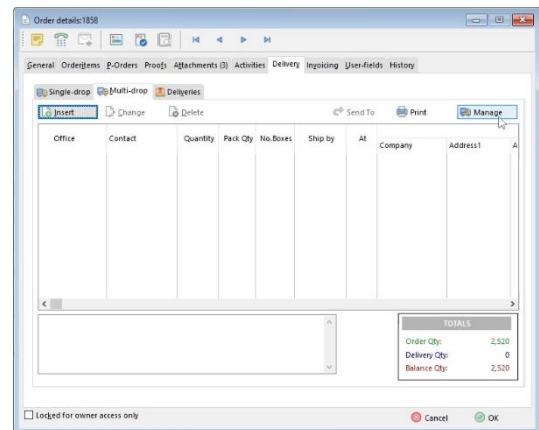
**NOTE:** If you are using a custom font in Accura, this will reset every time you change your theme.



# Product orders now support multi-drop deliveries

We have included support for Product orders using multi-drop deliveries. Use the **Manage** button in the Update Order window.

- **Select** will allow you to select multiple offices for that client.
- **Insert** will allow you to select either Client, Supplier or Other as a delivery point.
- **Change** will edit the selected delivery point details.
- **Delete** will remove the highlighted delivery point.
- **Copy** will duplicate the highlighted delivery point.
- **Import** delivery points from a CSV file.
- **Export** delivery points to a CSV file.
- **Distribute** evenly to all selected delivery points.
- **Add/Add all** will allocate all selected order items to the selected delivery point.
- **Up/Down** will change the order of the selected delivery point.
- **Schedule** will assign delivery due dates for repeat deliveries.
- **Remove/Remove all** will remove any allocations from the selected delivery point.
- **Edit** will change the required quantity of the selected delivery item.
- **Calculator** will open the Windows calculator.
- **Print** will generate any reports you have created, they can also be created from this window.
- **Reset** will remove all allocations from each of the delivery points.
- **Close** will be used to save your allocations to the multi-drop tab on your order.



DN and PL now support Orderpoint fields - so (optionally) you can make ORDP:xxxxxxx fields available to those layouts using **Ardzupx.exe**. However, other than a few fields like due-date, and notes, most of them are replicated in Header.

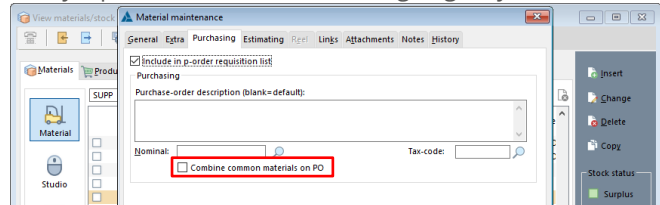


# New Features in Accura 6.30 Build 1

## Client Requisition for Materials Supplied

We have added this feature as a response from one of our trade finishing customers but this would also appeal to any trade printers who will be supplied the resources from say a print broker or even a design agency.

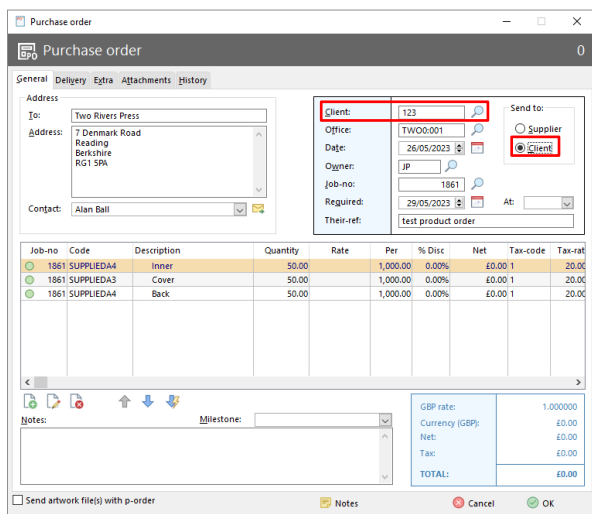
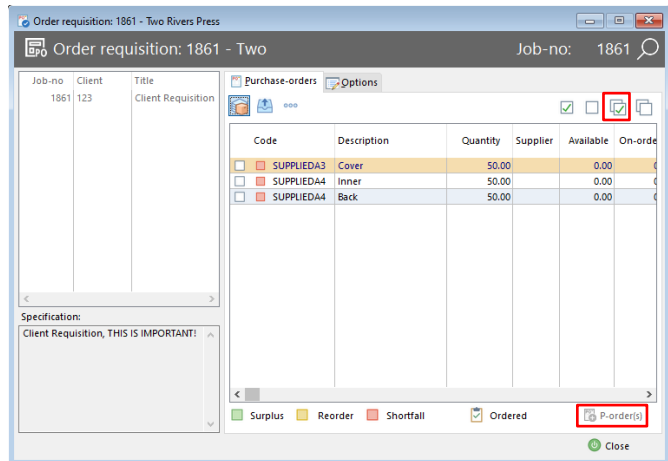
For this to work as intended you will need to uncheck the **Combine common materials on PO** for any materials you wish to use, otherwise it will combine any materials that are the same.



Code	Description	Item-ref	Quantity	Available	Cost-rate	P
SUPPLIEDA3	Cover		100.00	0.00		1
SUPPLIEDA4	Inner		100.00	0.00		1
SUPPLIEDA4	Back		100.00	0.00		1

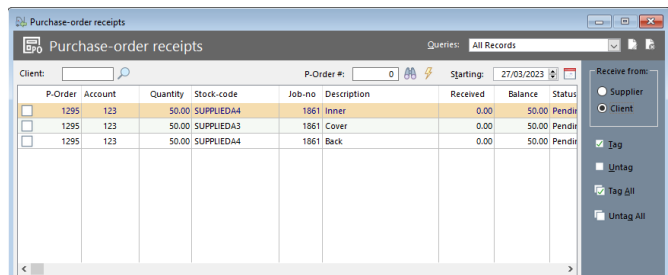
Now you can add the materials you setup in the previous step, as I have shown here, I have used 2 different stocks one of which is a copy of an existing stock and edited the descriptions of each of them so I know which sections are which. Once you have setup your materials you are ready to proceed with your order.

You will be prompted to create the order requisition once you have OK'd the order and now you will be on the Order requisition window, so you will want to tag all items and then click the **P-order(s)** button, this will then open the Purchase order window.



Once the purchase order window is open you will want to change the Send to from Supplier to Client and then add the client you setup the order for and this will then bring in your order details and then you can click OK. You may then want to output the purchase order to either a Printer, Email or PDF this will be up to how you want to send this to your client.

Next you will want to do a stock receipt **Stock** → **Receipts** and receive everything that is available to you, obviously if you haven't received a certain stock you can leave it active and once that stock does come in you can then go back to the stock receipts and receive that stock in. Once you have confirmed you have received everything you can click OK and then you will be prompted to print either the batch report and/or stock tracking labels.

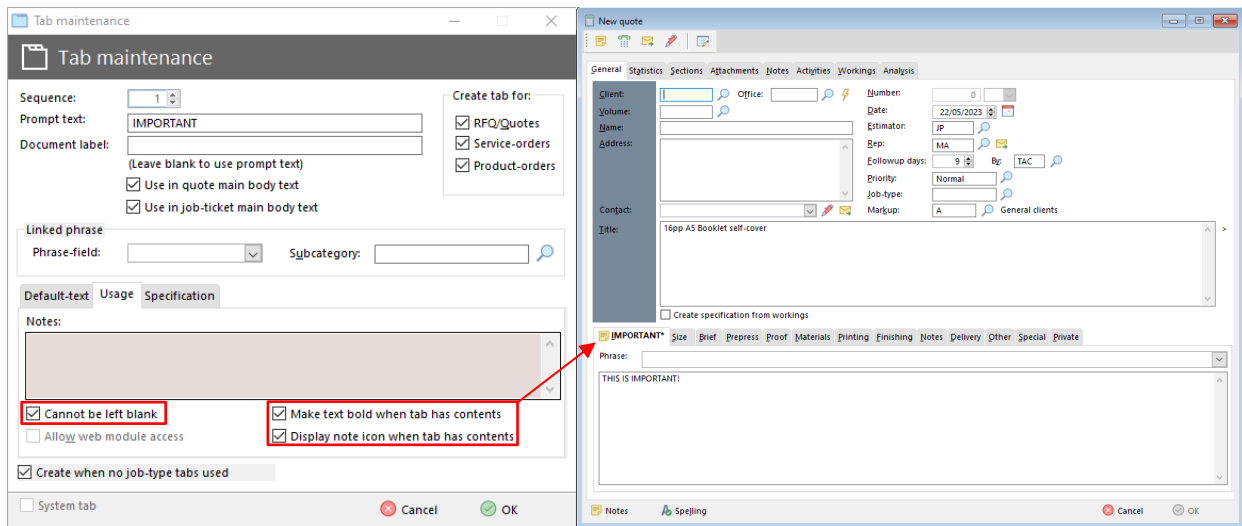


# Customizable Tab Properties

Any tab can now display with bold text (the tab label) and/or a notepad icon when it is populated with content. Previously only the "Private" tab did this, this was hard-coded to draw attention for internal staff only. Now this can be applied to ANY tab, as we do not know how custom-tabs are being used, and they may contain critical information for your customers.

If the tab content is "Required" (cannot be left blank), an \* is placed after the tab text.

This is controlled in the "Usage" tab of the tab settings, which can be amended by going to **Setup → Tabs**



## AccuraSync MYOB



We have included support for MYOB for our Australian & New Zealand customers in this latest version of Accura, more information on how to get started can be found on the 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.



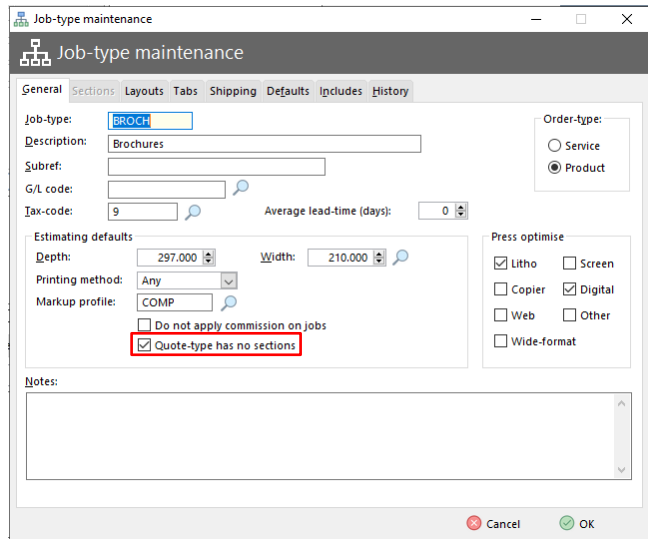
# Product order from a quote

It is now possible to specify the order-type when raising an order from a quote. This is to allow component-based markup profiles to be used with products in a quote which in turn will raise an order.

The Order type can be specified when raising an Order from the **Quote template library** OR based on the Job-type of the quote. i.e. the Job-type dictates the Order-type raised and the markup profiles thus allowing you to use a Component markup and Order-type OR a product for a quote.

From the Product order of course, service-orders or POs can be added for items that need manufacturing.

Additionally, a Job-type can now **HIDE** the Sections tab in a quote where printed sections are not required, this compliments the Product-quote to Order feature.



# Packaging default by Office location

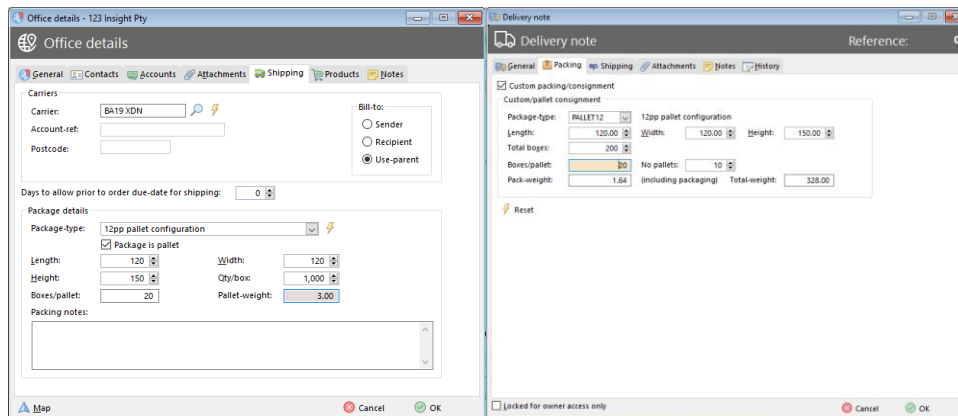
It is now possible to assign office packing defaults, which will be used as the **custom packing** option in a delivery note. Some clients may want boxes to be delivered separately, while others may want them to be sent on a pallet.

NOTE: These defaults are not applied routinely to the Order, or Orderpoint itself but instead to the delivery as a whole (after packing in boxes). Thus, delivery note item records will still use boxes, and box quantities/weights, whilst the delivery note header can now optionally assign pallet defaults (i.e. number of boxes on pallets etc.)

Additionally, the **Box-weight** comes from the setting in the **Delivery** tab of the order and only the **Pallet-weight** comes from the office packaging settings.

It is also possible to have multiple jobs on one delivery note each packed in boxes, then have the Office assigned pallet wrapping to the delivery note and set the **Custom Packing/consignment** as active.

These defaults can be setup in the **Shipping** tab of an Office record.



# Layout Sets for Clients & Suppliers

Layout sets are a set of pre-selected layouts e.g. quote (summary or detailed), invoice, delivery note etc. Once a layout set is created it can be assigned to one/more clients (or suppliers for tenders and POs). Within a layout set, if any particular layout design is left blank, then the default/current layout will be used at runtime. e.g. If the Invoice layout is not selected, then the runtime layout will be used (as selected in the print dialog).

This will be useful for trade customers (who may want white-label delivery notes for example), or if the printer trades under different brands, according to the customer.

Layout switching occurs intelligently at runtime when the document is printed, and can be mix-and-matched in one print batch e.g. you may have layouts linked to "123 Software" only, and everyone else has no layout set linked. At runtime if you tag 10 invoices - 7 from 123, and 3 from other clients, it will mix and match within the same batch.

**LIMITATION:** The page FORM band is printed ONCE only per print batch... thus is cannot contain variable data - it will print on every page using the data in memory at the time the FIRST page is printed, and never changes for that batch. This is how the print engine works, a FORM band should contain elements that never change (form lines/boxes, logo etc.). Therefore, anything that must be different between layouts MUST be within the Page Header band (or Detail or Footer), **NOT the FORM** band (where some things exist right now). e.g. If you need a Logo or trading address to be different between custom & default layouts - ALL logos and addresses must exist in the Page Header band (for all layouts) - **NOT the FORM** band.

NB: This limitation already applies to Product & Service order acknowledgements right now.... you will see in the Product order acknowledgement lines/boxes using for product orders are within an extended Page Header band.

Layout sets are setup using the following **Setup → Layouts → Layout sets**

Dynamic layout switching is supported for the following:

## Clients:

- **Quotes** (*detailed or summary*)
- **Order acknowledgements**
- **Proof note**
- **Delivery notes** (*e.g. perhaps white-label of shipping direct to their customer's customer*)
- **Parcel labels**
- **Invoices** (*e.g. some clients need special references on their invoices, that others do not*)
- **Credits** (*auto-detected & used when invoice value is negative*)
- **Client Requisition** (*e.g. print broker has supplied their own stock*)

## Suppliers:

- **Tenders** (*So you could have a tender showing whole job spec for a trade printer, or just showing Finishing notes for a trade finisher*)
- **Purchase-orders**

The image shows two screenshots of the 'Update layout set' dialog box. The top screenshot is for '123 Insight Pty' and shows a list of layout types with their assigned layouts. The bottom screenshot is for 'Allbright Digital Printers' and shows a list of layout types with their assigned layouts.

Layout Type	Assigned Layout
Summary-quotes	Itemised
Detailed quotes	Standard
Service-orders	Standard (tax inclusive)
Product-orders	Standard (text from order)
Proof-notes	Standard
Delivery-notes	Standard
Parcel-labels	Avery L7166 6up (2x3)
Sales-invoices	Standard
Sales-credits	Credit note
Requisition	Client requisition (landscape)

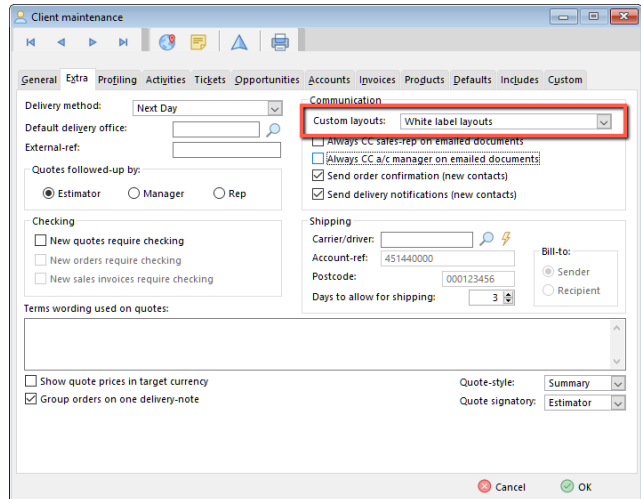
  

Layout Type	Assigned Layout
Tenders	Outwork tender
Purchase-orders	Standard (landscape)



**ADDITIONAL NOTES:**

1. Additionally, Accura will auto-detect if an "invoice" is in fact a credit by having a NEGATIVE Net value and will switch layouts accordingly. The default Credit-note layout can be selected on the Options tab of the Invoice printing dialog.
2. It has been possible for some time to link a quote style to a specific Job Type - this is usually for a specific reason e.g. job-type specific Tabs need to be printed. In the Client record... users should select "Quote-style = JobType" to make the job type override the Client linked layout set, otherwise the layout set quote layout(s) will be used.

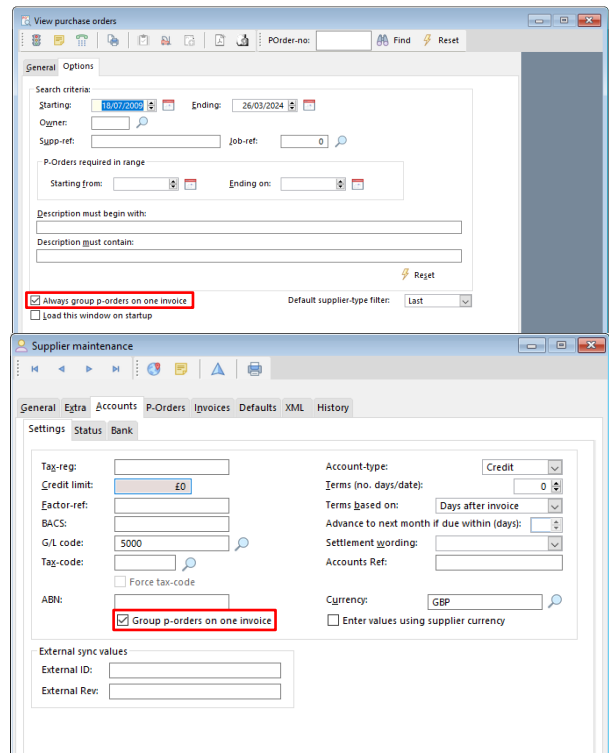


## Batch purchase-order invoicing

There are now 2 ways in which you will be able to combine purchase orders onto a Purchase invoice.

1. This can be achieved by checking the box on the **Options** tab of the **View purchase orders** browse window **Always group p-orders on one invoice** which will group all tagged POs onto one purchase invoice per supplier. Each purchase invoice will be displayed and can be edited if any lines need to be removed.
2. A **Group p-orders on one invoice** checkbox on the **Accounts** tab within the supplier record will determine on a *per-supplier* basis if POs should be grouped onto one invoice or invoiced individually. This allows for Suppliers that raise one purchase invoice per purchase order, versus those that issue ONE monthly invoice/statement for multiple POs e.g., a Courier or Trade finishing house.

*\*\* The View purchase orders checkbox overrides this setting.*






# New Features in Accura 6.15 Build 6




## 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

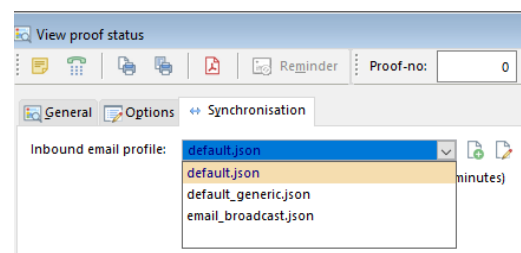
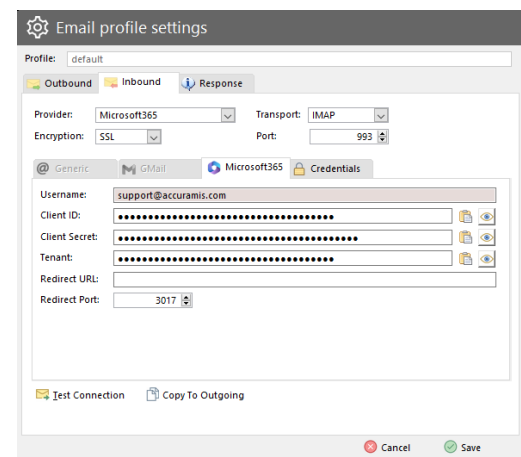
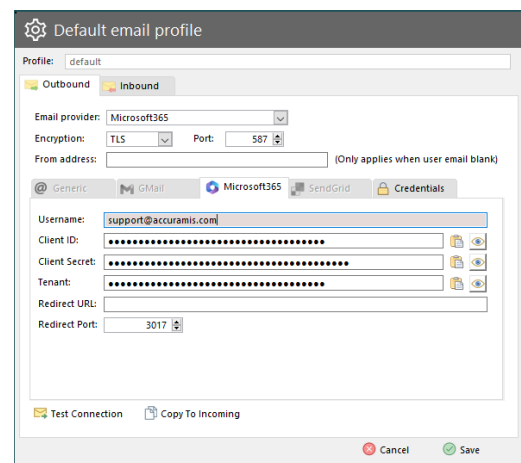
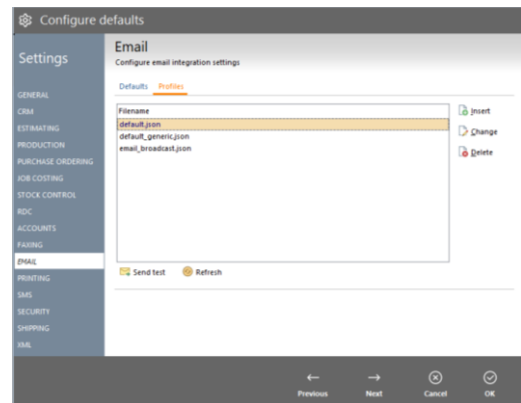
If you started with the **Inbound** setup, you will need your **Client ID**, **Client Secret** and **Tenant** as you will need to input these into the relevant fields, but as we have already completed and authenticated the **Outbound** settings we can go ahead and click the  which is going to copy all 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

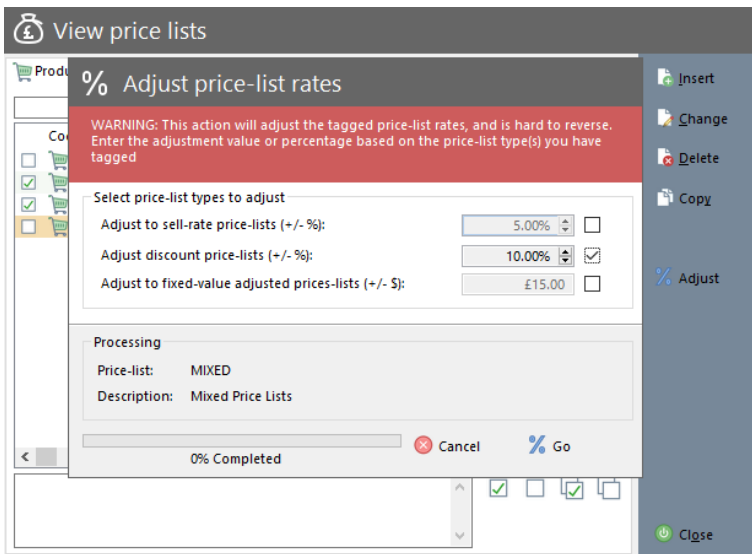
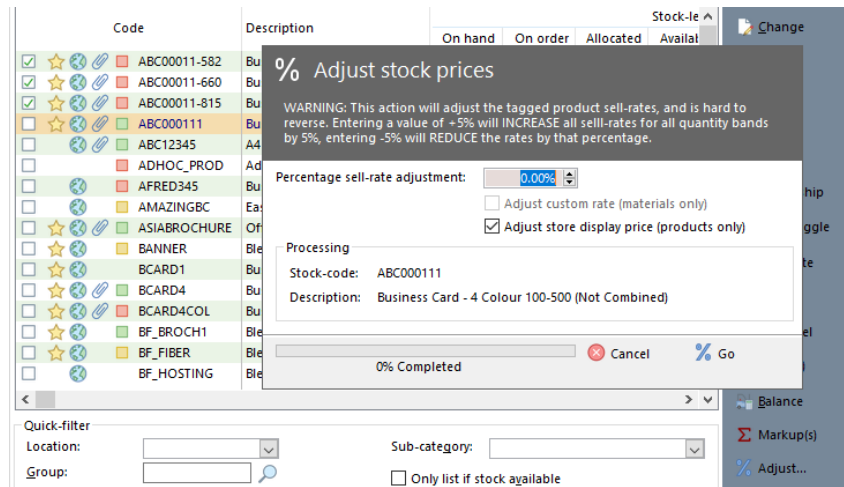


# New Features in Accura 6.15 Build 5

## 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**

### Welcome to Azure!

Don't have a subscription? Check out the following options.



**Start with an Azure free trial**  
Get \$200 free credit toward Azure products and services, plus 12 months of popular free services.

Start



**Manage Azure Active Directory**  
Manage access, set smart policies, and enhance security with Azure Active Directory.

View

Learn more

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

3) Then click on **App Registrations**

Data Design Services Ltd | Overview

Overview

- Preview features
- Diagnose and solve problems

Manage

- Users
- Groups
- External identities
- Roles and administrators
- Administrative units
- Delegated admin partners
- Enterprise applications
- Devices
- App registrations**
- Identity Governance

Basic information

Name	Data Design Services Ltd
Tenant ID	4c7907dd-d58d-4b44-9073-64640cb18230
Primary domain	accuramis365.onmicrosoft.com
License	Azure AD Free
Users	2

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://](https://localhost:3017/), Use [http://](http://localhost:3017/).*

### Register an application

\* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Data Design Services Ltd only - Single tenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant)

Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Personal Microsoft accounts only

Help me choose...

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web



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

Essentials

Display name	: <a href="#">AccuraOffice365</a>
Application (client) ID	: <b>400a79e0-401f-4aa8-ac08-36ba1d40744c</b>
Object ID	: f3c1f1b0-fb9e-4846-85c4-79aff546f6ae
Directory (tenant) ID	: 4c7907dd-dd8d-4b44-a073-64640cb18...
Supported account types	: <a href="#">My organization only</a>
Client credentials	: <b>Add a certificate or secret</b>
Redirect URIs	: <a href="#">1 web, 0 spa, 0 public client</a>
Application ID URI	: <a href="#">Add an Application ID URI</a>
Managed application in local directory	: <a href="#">AccuraOffice365</a>

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

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

Certificates (0) Client secrets (0) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.


[+ New client secret](#)

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

### Add a client secret

Description:

Expires:

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

Certificates (0) Client secrets (1) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

[+ New client secret](#)

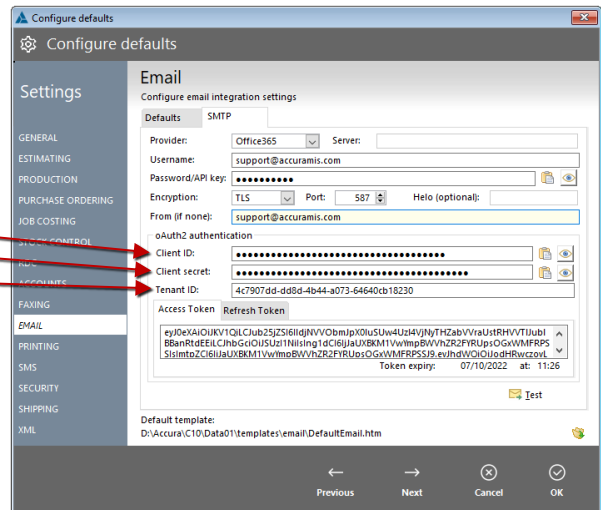
Description	Expires	Value	Copy to clipboard
Accura Secret	10/4/2024	6BVB8Q~..uQ..FELIQRGCvf...	et ID

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**

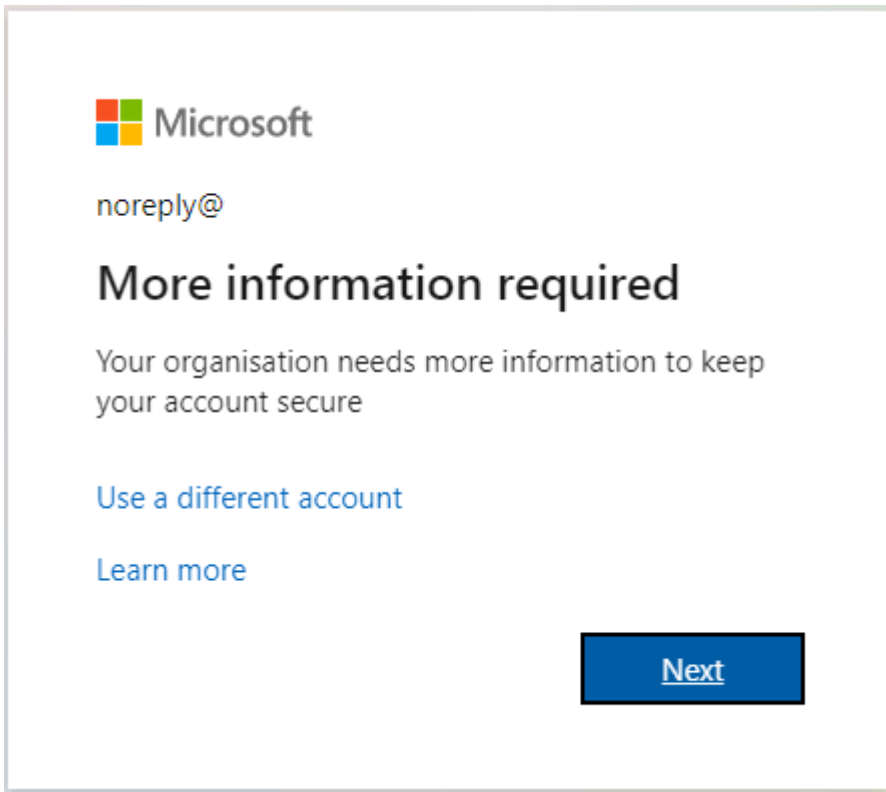
Copy each of the above ID's and paste into the relevant fields within Accura (*Setup > Defaults > Email > SMTP*)



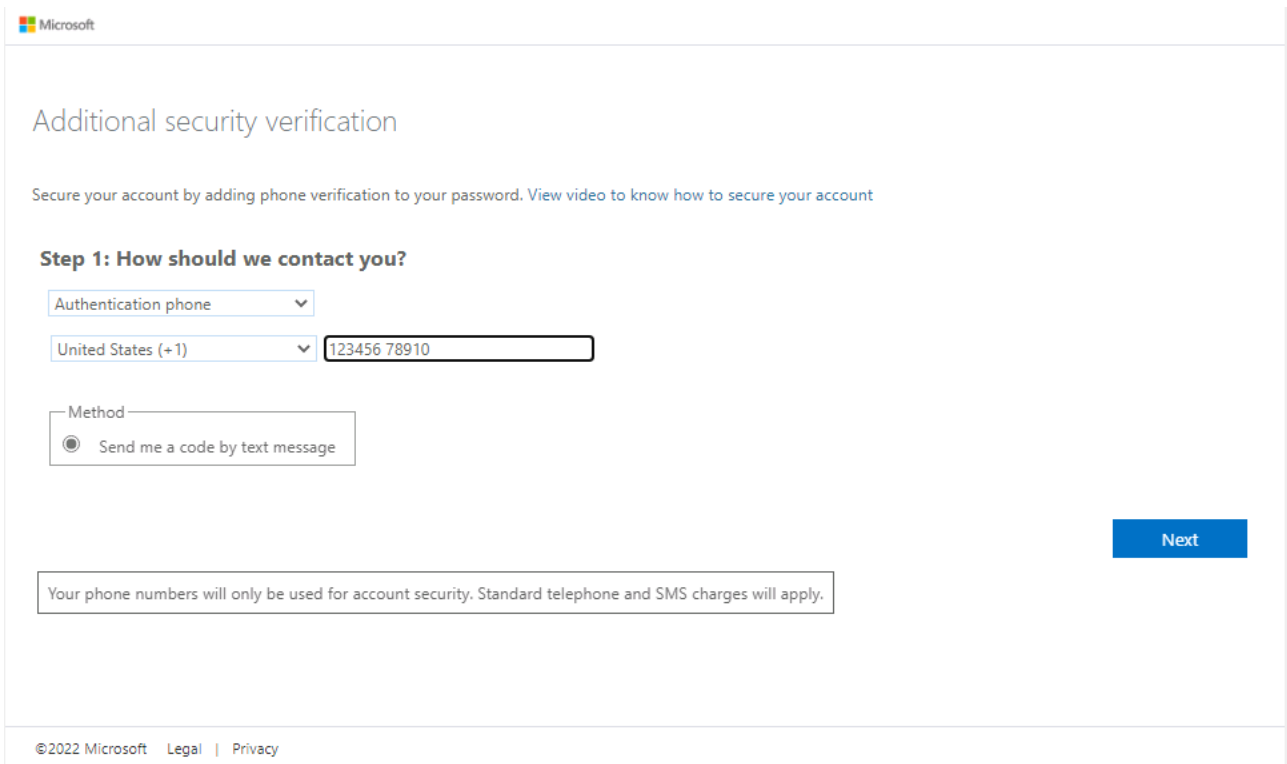
The screenshot shows the 'Configure defaults' dialog box with the 'Email' section selected. The 'SMTP' sub-section is active. Fields for 'Provider' (Office365), 'Username' (support@accuramis.com), 'Password/API key' (masked), 'Client ID', 'Client secret', and 'Tenant ID' are visible. Red arrows from the instructions point to these fields.



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.

📞 UK: +44 (0)23 8024 0470

📞 US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 21 of 56

# Phone

We just sent a 6 digit code to +44 . Enter the code below.

[Resend code](#)

Back

Next

[I want to set up a different method](#)


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.

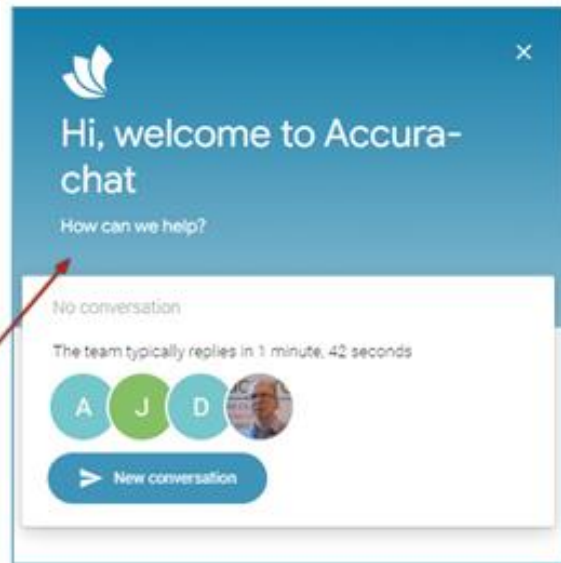


# New Features in Accura 6.15 Build 3

## 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

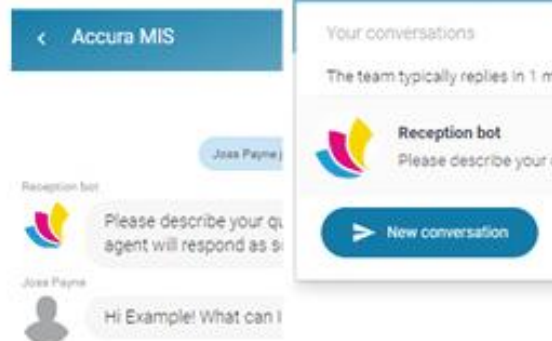
Enter the required information and your one step closer to chatting with us.

- 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

Accidentally 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

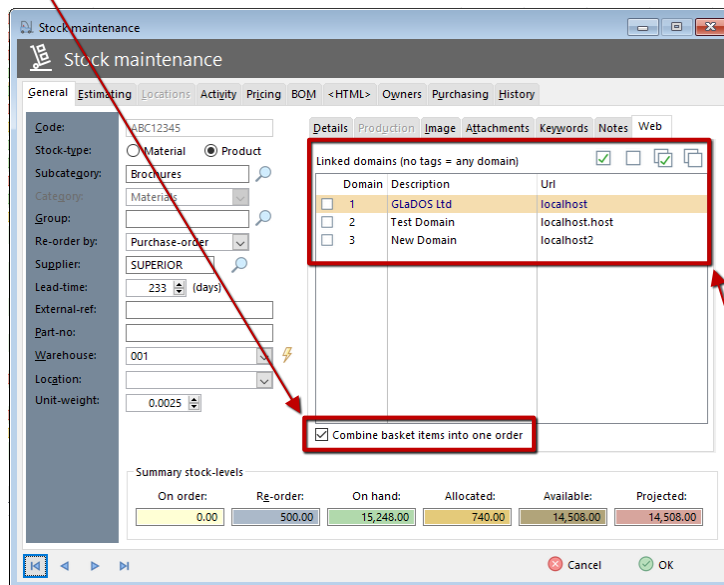


## New Features in Accura 6.15 Build 1

# 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.



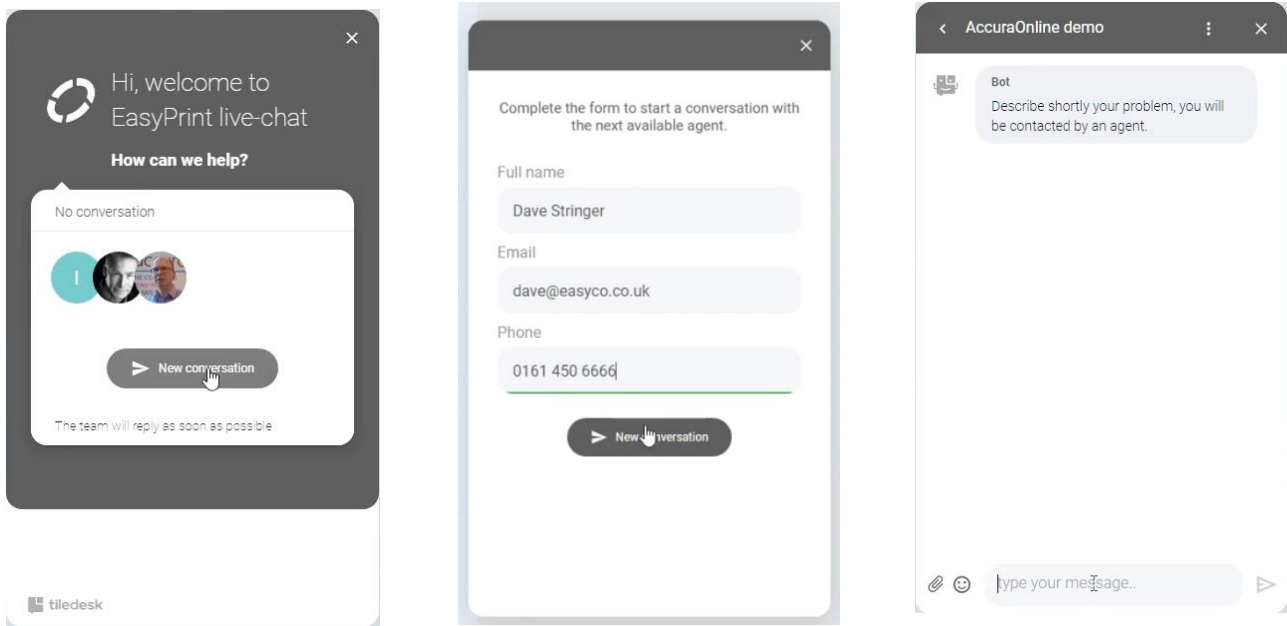


# New Features in AccuraOnline Version 6.30

## Tiledesk Live Chat Integration

**Live Chat** gives your clients the ability to chat in real time with a member of your team. Live chat is something we expect from modern websites. We want to browse and interact without picking up the phone. We want our questions answered **now** and not have to wait for an email response. This will make you **more professional** and improves the overall experience for your clients. A very easy to set up but extremely **powerful** feature for your B2C or B2B customers

Live chat will appear as a **circular icon** in the **lower-left or lower right corner** of your website. When your customer clicks on it, they can start a **new conversation**. You have full control of the details the customer must enter before the conversation starts, for example, name, email address and phone number



This requires a **Tiledesk account**, however they have a **free plan** which is comprehensive and may be all you need. Alternatively, you can upgrade to one of their paid plans to get more features. Pricing at the time of writing is:

Plan	Price	Features	Action
Free	€0	Test our no-code chatbot builder and provide a turnkey live chat widget to your website	Use TILEDESK for FREE
Growth	€25	Improve customer experience and qualify leads better with premium features	Start your trial (14 days)
Scale (BEST PRICE FOR VALUE)	€89	Go omni-channel & find your customers where they already are: WhatsApp, Facebook, etc.	Start your trial (14 days)
Plus	€299	Exploit all the premium features and receive support to design chatbots tailor-made	Contact Sales

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 25 of 56

Live chat can be configured at **domain and client branding** levels. Go to the Admin area – **Settings – Edit settings - Integrations** tab and click **Get code** next to the **Project ID for Tiledesk live-chat**. This will open the Tiledesk create account and login page in a new browser tab. In client branding it's the same

Client Branding: Data Design Services Ltd

Settings Theme Contact Details Accounts Slides Menus Tiles

Widgets Pages Filters Integrations

**Google Maps API key**  
AlzaSyDLmjHmytqnb8NZ5C6oX\_1GYABFdODI1vc Get code

**Company name as shown in Google Maps**  
Accura MIS

**Tracking Code for Google Analytics**  
Insert your tracking code here (format: UA-000000-0) Get code

**Project ID for Tiledesk live-chat**  
62ffaf01f50cdb00134494ea Get code

Once you've created your free account, you create a **project** in the [Tiledesk Dashboard](#), to configure the chat widget. You can create multiple projects for different **domains and clients** if required, which fits **B2B and B2C**. For example, we use Tiledesk for our own website and a separate one for our AccuraOnline demo site

## Your Projects

**Add project**

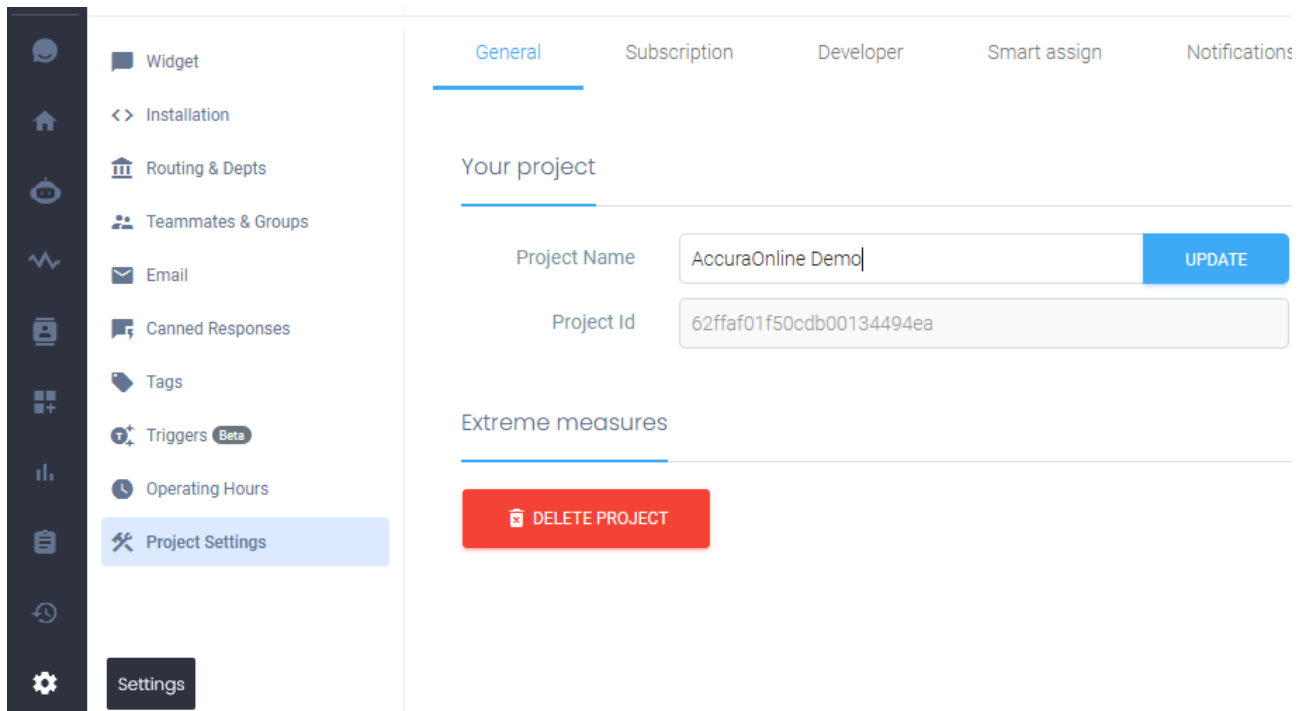
Project Name	Project ID	Plan	Owner/Administrator	Status	Created
AccuraOnline Demo	62ffaf01f50cdb00134494ea	Free Plan	Owner	Available	19/08/2022
Accura MIS	62f24f4849b2fb0013ff58c3	Free Plan	Administrator	Unavailable	09/08/2022

Inside each project, you can configure the form fields, colours and branding to suit your needs. You can set a **timer** to make the widget pop-up automatically prompting your customer to interact with it. Now your website visitor is engaged with a **real person** and you have **captured their details**



You can use bots to create welcome greetings or ask basic questions if you wish or jump straight to a real interaction. We won't go into full details of how to use Tiledesk, as this is all documented on <https://gethelp.tiledesk.com>

Each project will have a unique **Project Id**. You can find this by going to the **Settings** icon on the left, then **Project Settings**



Copy and paste the Project ID into AOL Integrations tab and that's all you need to do to enable live chat for that particular domain or client

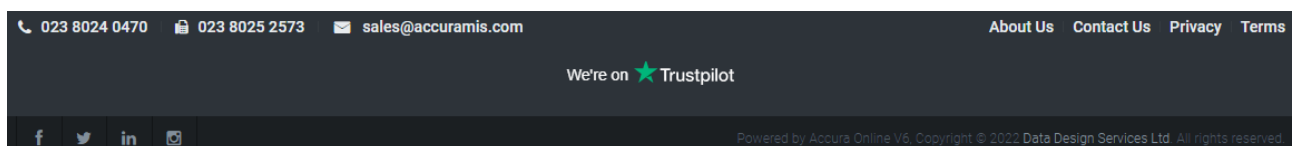
Project ID for Tiledesk live-chat

62ffaf01f50cdb00134494ea

Get code

## Trustpilot Micro Review Widget

**Trustpilot** support displays a widget in the footer of your site. When clicked, it takes your customer to your company page on the Trustpilot website so they can read reviews left by other customers. This reassures visitors that you are a trustworthy, credible supplier with safety in numbers, particularly useful for **B2C** websites



This requires a **Trustpilot account**, and this widget is free to use. Trustpilot can be configured at **domain and client branding** levels

Go to the Admin area – **Settings** – **Edit settings** - **Integrations** tab and click **Get code** next to the **Code for Trustpilot Micro Review Count widget**. This will open the Trustpilot create account and login page in a new browser tab. In client branding it's the same

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24

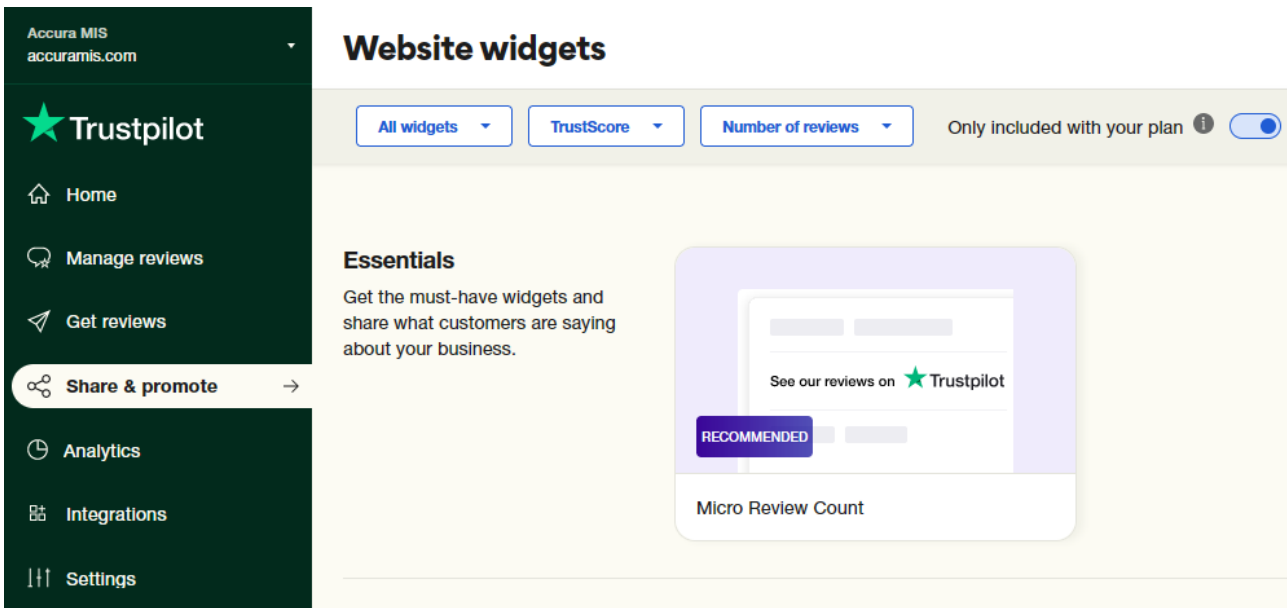


@ [support@accuramis.com](mailto:support@accuramis.com)

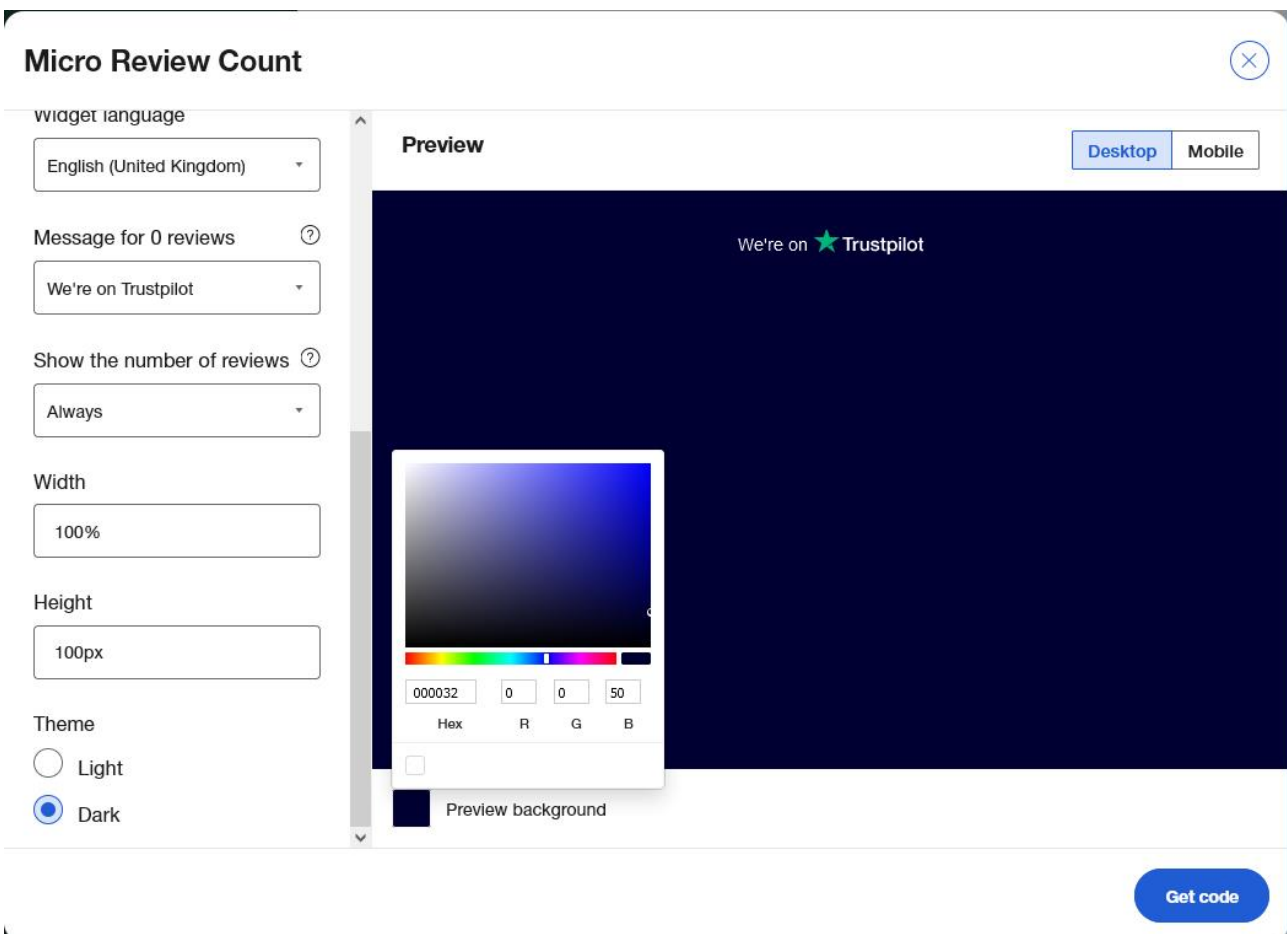
[www.accuramis.com](http://www.accuramis.com)

Page 27 of 56

Once you have created a free account, configure the widget in your [Trustpilot business portal](#). Select **Share & Promote, All widgets**, then select **Only included with your plan** to hide all the widgets you need to pay for, then select the **Micro Review Count** widget



You will see a preview of the widget on a fixed background colour which you can change to match your AOL footer. You can configure the message text, show how many reviews you have received and opt for a dark or light theme



Once you have it looking the way you want, click **Get code** which generates some JavaScript

## Micro Review Count

Add this code to the head section of your website's HTML.

```
<!-- TrustBox script -->  
<script type="text/javascript" src="//widget.trustpilot.com/bootstrap/v5/tp.widget.bootstrap.min.js" async></script>  
<!-- End TrustBox script -->
```

Copy code

Add this code to the HTML of your website where you're displaying your TrustBox.

```
<!-- TrustBox widget - Micro Review Count -->  
<div class="trustpilot-widget" data-locale="en-GB" data-template-id="5419b6a8b0d04a076446a9ad" data-businessunit-id="630894b40bc3b14483ab9b57" data-style-height="24px" data-style-width="100%" data-theme="light" data-min-review-count="10" data-without-reviews-preferred-string-id="1" data-style-alignment="center">  
  <a href="https://uk.trustpilot.com/review/accuramis.com" target="_blank" rel="noopener">Trustpilot</a>  
</div>  
<!-- End TrustBox widget -->
```

Copy code

Under *Add this code to the HTML of your website where you're displaying your TrustBox*, use the **Copy code** button to put the code into your clipboard. Switch back to your AOL Admin browser tab and paste into the **Code for Trustpilot Micro Review Count widget** field

### Code for Trustpilot Micro Review Count widget

```
<!-- TrustBox widget - Micro Review Count -->  
<div class="trustpilot-widget" data-locale="en-GB" data-template-id="5419b6a8b0d04a076446a9ad" data-businessunit-id="630894b40bc3b14483ab9b57" data-style-height="24px" data-style-width="100%" data-theme="light" data-min-review-
```

### Widget Position

Right footer

Get code

- You can choose whether the widget is **positioned** to the left, centre, or right of the footer area

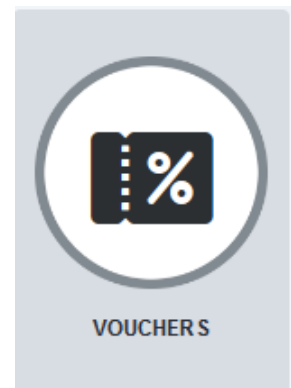
It's a bit more technical than live chat, but still requires no JavaScript or HTML coding ability. Support for further Trustpilot widgets will be added in future releases

## Voucher Codes

You can now create your own promo **voucher** codes and give your site users a discount on **product checkout** or **print orders**. Vouchers are used on most popular eCommerce websites. They are a **great business tool** in attracting new customers when you feature the code on your website, or in an email promotion. These can be **seasonal offers**; limited to a month or a specific date range

Vouchers can be used to attract new customers on B2C websites, and they can be used for existing customers on B2B websites as **incentives** to encourage **loyalty** and **repeat business**

Vouchers are created at domain level, so they match your website branding mode. Go to the Admin area dashboard, and, you can see a new icon for VOUCHERS



UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 29 of 56

To provide examples, we have two voucher codes set up. The first voucher has a code of 10OFF and a description of 10% off orders over £150. This voucher is a generic site wide offer applying to everything. The next voucher code has been limited by product category. It has a code of 5OFF, with a description of 5% off business cards over £45

Vouchers									
Active	Code ▼	Description	Type	Amount	Threshold	Restriction	Products?	Starts On	Ends On
✓	10OFF	10% off orders over £150	percentage	£10.00	£150.00	None	✗	01/06/2023	30/06/2023
✓	5OFF	5% off Business Cards over £45	percentage	£5.00	£45.00	None	✓	01/06/2023	30/06/2023

Page: 1 of 1 | Quantity per page: 10

✓ Active

Going into more detail, vouchers have the following basic properties:

- **Voucher type:** Fixed amount or percentage discount
- **Net threshold:** The minimum order net value before delivery charges for the website accept the voucher. You don't have to set a threshold if you don't want to. You can set this to zero so the voucher will be accepted on ANY order
- **Start and End dates:** this sets the date range when your voucher will be accepted, for example the month of June. You MUST have a date range. If a customer found your voucher code outside the date range, it wouldn't work. When the voucher date range runs out, the voucher 'Active' column will show you a red cross icon
- **Product categories:** Selecting one or more categories will automatically limit the voucher to the store area checkout and it can't be used on print orders. The voucher will only be accepted if one or more products on the order match the selected categories. In this case, the **Net threshold** will only add up the products in the selected categories for the voucher to qualify

Add Voucher

Voucher code 5OFF	Voucher type <input type="radio"/> Fixed <input checked="" type="radio"/> Percentage	Discount percentage % 5.00	Products net threshold 45	Start Date 01/06/2023	End Date 31/07/2023
Description 5% off business cards over £45			Restricted to Unrestricted		

Product Categories

Acme  Booklets  Brochures  Business cards  Catalogue  Display  Easysteps  Fitting  Flyers  Gift cards  Greeting cards  Labels  
 Leaflets  Manuals  Music  Packaging  Photobooks  Postcards  Posters  Promotional  Renault  Roller Banners  Service  Signage  
 VAT-Free  Vehicle  Zeiss

**Restricted to:** you have three choices here:

- **Unrestricted** means the voucher applies to any customer
- **New signups** means the voucher can only be used on a B2C checkout wizard signup to attract new customers to place their first order with you
- **Client uses** allows you to set a number of times the voucher can be used by an existing B2B client. Each 'use' of the voucher is counted when the order leaves the website and enters the Accura Web Console

**Restricted to**

Client uses ▼

- Unrestricted
- New signups
- Client uses

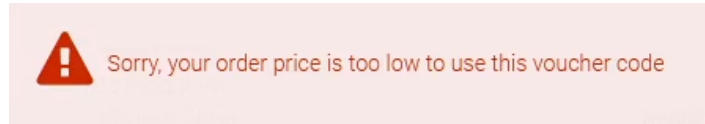
**Client uses**

1




To see this from the **customer's point of view**, you can log into a client account, and add some business cards or whatever product categories you have set up and go to checkout. For our example of the business cards voucher, with a mixed basket of brochures, multiple business cards and other items, the business card items must total £45 or more for the voucher to apply the discount. If it's less, then the voucher is invalid and will do nothing, regardless of the pricing on the other basket items


Enter the 50FF voucher code and apply the voucher. If the business cards did not add up to more than £45, then the discount total will not appear and you will see the following message



If the voucher is accepted and the business cards add up to more than £45 you will see the **discount** applied to the checkout totals like this

<p><b>Billing Details</b></p> <p><b>Trevor Cocks</b> Two Rivers Press 7 Denmark Road Reading Berkshire RG1 5PA</p>	<p><b>Delivery Details</b></p> <p> Voucher code accepted. Discount applied</p> <p>Fair Oak Eastleigh Hampshire SO50 7PS</p> <p><b>Phone:</b> +447876471710 <b>Email:</b> trevor@123software.com</p>	<p><b>Order Details</b></p> <p>Business Card - 4 Colour 100-500</p> <p><b>Required by:</b> 04/06/2023 <b>Your order-no:</b> 689898 <b>Our ref:</b> 177</p>
--	--	--

**Items Ordered**

Product	Description	Availability	Quantity	Weight	Price	Per	Net
	ABC000111: Business Card - 4 Colour 100-500	20132 in stock	400	1.84	£54.50	250	£87.20
<input type="text" value="50FF"/> <input type="button" value="Remove Voucher"/>		<b>5% off business cards over £45</b>					
Enter any other comments or instructions					Subtotal		£87.20
					Discount		<b>-£4.36</b>
					Net		£82.84
					Delivery Method		2-3 day delivery (free if over £100.00) ▾
					Delivery Charge		1.84 kg: £10.00
					Tax		£2.00
<b>TOTAL inc. TAX</b>							<b>£94.84</b>

- The voucher code entry area will **ONLY** appear if you have one or more 'active' vouchers in your database, meaning they must have a valid date range
- The voucher **doesn't apply to delivery charges** because these are external fixed costs that you incur and are simply passing on
- We've updated the UI in the checkout and the print order form to support vouchers, and now **print orders** will give you a **full sales tax breakdown** in the pricing area regardless of your client sales tax display settings in Accura



Next, let's look at the workflow from the **Accura** side of things. In our **Web console** you can see our business card order at the bottom of our inbox list. On the right we can see how it has itemised the product, the voucher and the delivery charge

The screenshot shows the 'Web console v6.30' interface. It features a sidebar with navigation options like Activity, Users, Website, Refresh, and Quit. The main area is divided into 'Quote requests' and 'Order requests' sections. The 'Quote requests' table shows a client '123 Insight Pty' with a received date of '11/08/2022' and a quantity of '500' for '20pp A4 Book'. The 'Order requests' table shows three orders from 'Two Rivers Press' with various received dates and quantities. On the right, a 'Signups' table shows a contact 'Giles Brandwith' with a received date of '05/02/2020'. Below the order requests, a 'Details' panel shows a list of items including 'Business Card - 4 Colour', 'VOUCHER 5% off business cards', and '48HR 2-3 day delivery'.

When we process the order into Accura, we now have a product order showing our order items, including an **additional line item for the voucher discount**

The screenshot shows the 'General Order items' view in Accura. The interface includes a sidebar with icons for Material, Studio, and Pre-press. The main area displays a table of order items with columns for Code, Item-ref, Quantity, Available, and Costs (Cost-rate, Per, Cost, Mark). The items listed are ABC000111, A4BOX, ART100, CREASING, DPID, VOUCHER, and 48HR. The 'VOUCHER' item is highlighted in yellow and has a negative cost of £-4.36, indicating a discount.

The order item uses the voucher description from AccuraOnline so we know which voucher was used and it has a **negative cost** showing the discount. This ensures all the order items total up to the correct amount. The voucher discount will be pulled through onto the **sales invoice** when the job is complete

Typically, you would **promote your vouchers** using **email broadcasts** from our CRM module, Google Adwords, or using **Slides** and **Tiles** on your AccuraOnline website





# CAPTCHA for Contact & Sign-up Forms

If you are getting spam flowing into Web Console with rogue signups or spam emails from your Contact Us page, then you can now put a **STOP** to it using the new **CAPTCHA** feature

## Send us a message

### Contact Info


#### Easyprint

1 Glaisdale Point  
Glaisdale Parkway  
Nottingham  
Norfolk  
NG8 4GP

**Phone:** 0115 939 9797  
**Fax:** 0115 939 9960  
**Email:** sales@easyprint.co.uk  
**Website:** https://www.easyprint.co.uk

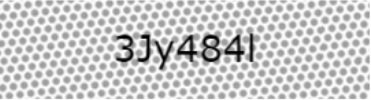
**Company Reg:** 2233967  
**Tax Reg:** 459021944

### Contact Form

Your name	<input type="text"/>	Email	<input type="text"/>
Attention of	<input type="text"/>	Priority	Moderate <input type="text"/>
Subject	<input type="text"/>		
Message text	<input type="text"/>		
		Please prove you are not a robot	
			
		<input type="text"/> <input type="button" value="Refresh"/> <input type="button" value="✓"/>	
		<input type="button" value="Cancel"/> <input type="button" value="Send"/>	

The CAPTCHA feature is enabled at domain level in the Admin area Edit settings page. The feature is disabled by default. When enabled, it will only apply to your website before login, because spambots can't log in; they simply exist to annoy, frustrate and stress websites by malicious hackers

## Signup

Company name (required)	Prefix (e.g. 'Mr', 'Ms' etc.)	Are you an existing customer?
<input type="text"/>	Please select <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No
First name (required)	Job title	Please prove you are not a robot
<input type="text"/>	Please select <input type="text"/>	
Last name (required)	Email (must be a valid email address)	<input type="text"/> <input type="button" value="Refresh"/> <input type="button" value="✓"/>
<input type="text"/>	<input type="text"/>	
		<input type="button" value="Cancel"/> <input type="button" value="Sign up"/>

When the CAPTCHA is enabled, you cannot submit the contact or signup form without typing in the unique alphanumeric sequence. This randomly generated image is hard for spambots to read, but is easy for humans. If for some reason the user cannot read the capture image, they can generate a new one and have another try

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 33 of 56

# Single-step Checkout Form

We've brought back the very old ability from AccuraOnline V5 to use a **single-step checkout form** instead of the 5-step checkout wizard introduced in V6. Some customers love the wizard, but others find it cumbersome so now we can please everybody

The **checkout behaviour** can be configured at **domain** and **client branding** level; however, it will ONLY apply to client accounts. B2C signups will always see the checkout wizard. We will enable this feature for B2C signups in a future release

Go to the Admin area – **Edit settings**, or Client branding, **Settings tab**

**Checkout behaviour**

Multi-step wizard

Multi-step wizard

Single-step form

When using the **Single-step form**, the checkout will look like the long, scrolling **print order form**, with billing and delivery addresses at the top, order details, then the **product list**, including vouchers if you have created any, before attachments and terms & conditions. Everything is done in one form, no stepping backwards or forwards




Order Details


Job/Project Title:  Date Required:

Your order-no:

---

Items Ordered

Product	Description	Edit	Availability	Quantity	Weight	Price	Per	Net
	Easyprint businesscard		Lead time 5 days	250	1.6075	£60.00	250	£60.00
	BROCHURE: Brochure - 4 colour		To order	500	0.0	£304.00	1000	£152.00

 Use this button when it appears in your order to edit your artwork

Enter any other comments or instructions

Subtotal	£212.00
Delivery Method	DPD
Delivery Charge	1.6075 kg: £10.00
VAT	£2.00
<b>TOTAL inc. VAT</b>	<b>£224.00</b>

---

Attachments

File image	File name	File size
There are no attachments for this store order request.		

Attach

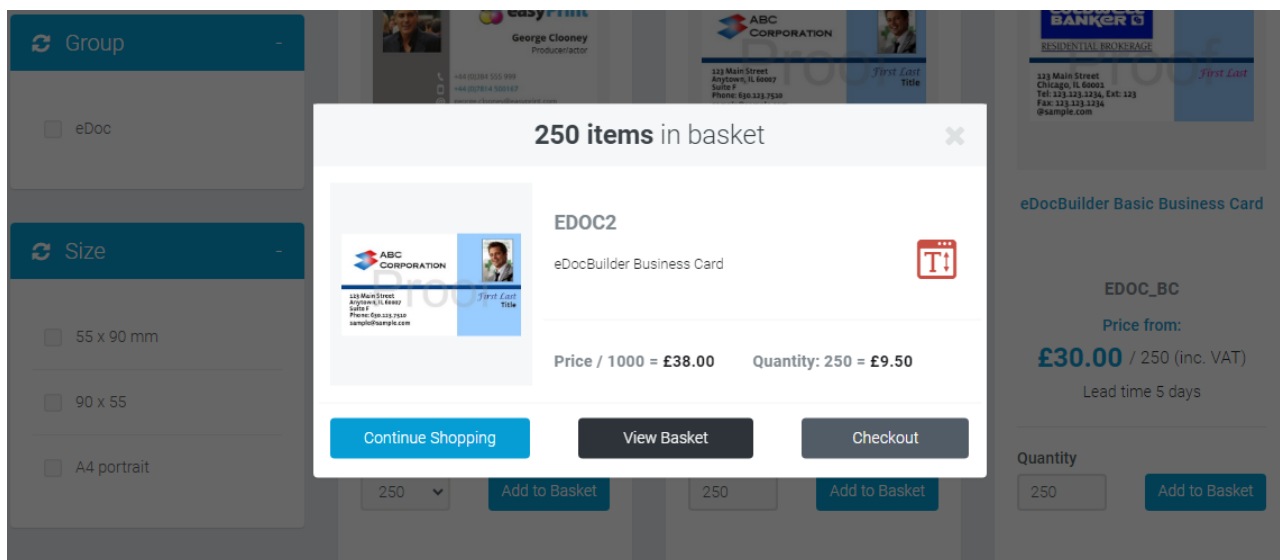


# Pop-up Basket

We've added the option to use a **pop-up basket** and this can be enabled at domain level in the Admin area Edit settings, or client level in the client branding Settings tab

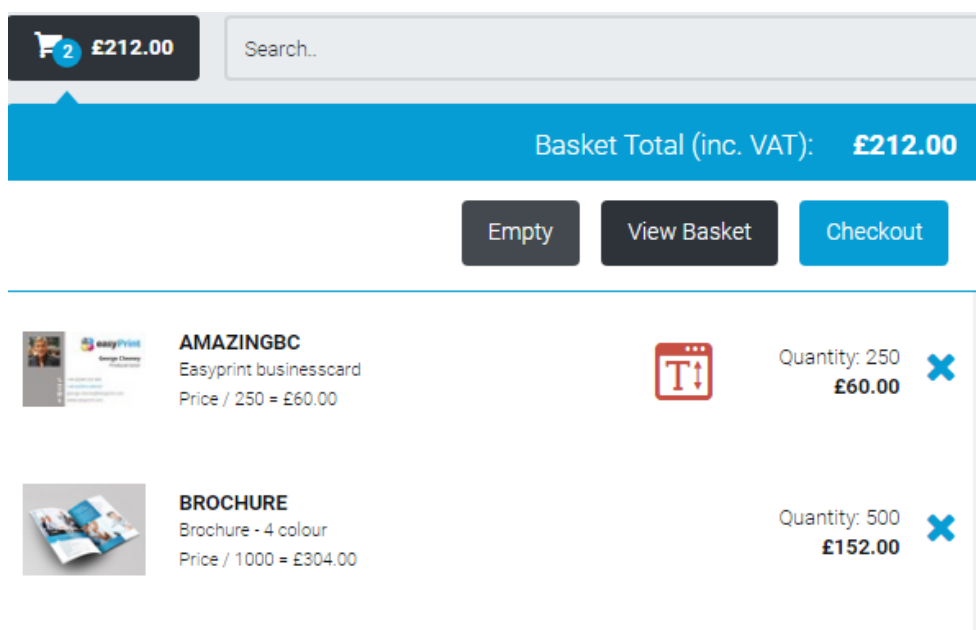
**Add to basket displays pop-up**

Now if you select a product and add to basket you now get a **floating pop-up basket** with button choices. This gives you a very quick way to either **continue shopping**, view and edit the **basket**, edit the **eDoc artwork** if you have our eDocBuilder module, or go directly to **checkout**



This is much quicker for single item orders because the user does not need to navigate to the main basket first; scrolling all the way up to the top of the page to find the basket in the website header

We've also added additional options to the header pop-up basket. You can now **Empty** the basket and **edit eDoc artwork** on products linked to eDoc templates



When combined with the single step checkout feature, **ordering becomes simpler and faster**

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 35 of 56

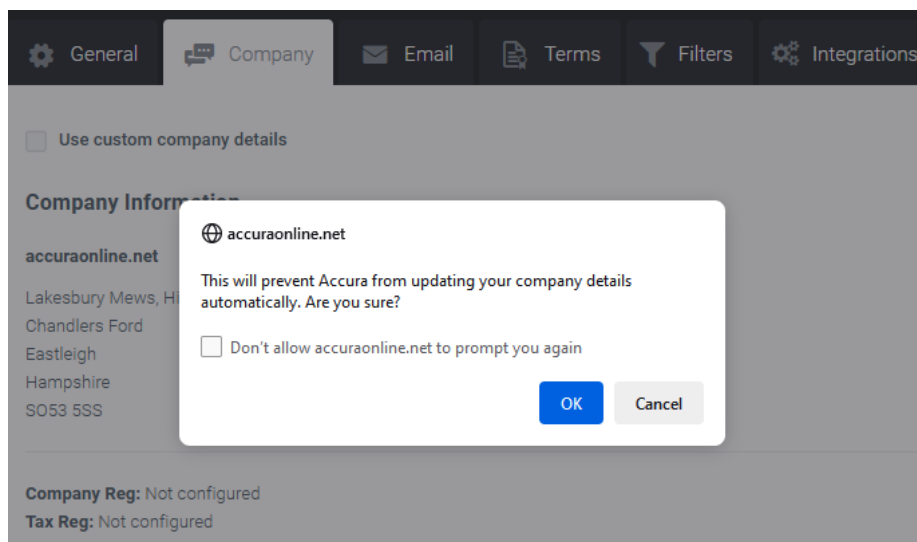
# Desynchronize Company Details

We've added the ability to **desynchronise your company information from Accura**. You will see in the header and footer areas of your home page and contact pages that your company address, telephone, email, fax, and social media links have been populated for you from the Accura database. You can't remove these from Accura because you need them on printed documents

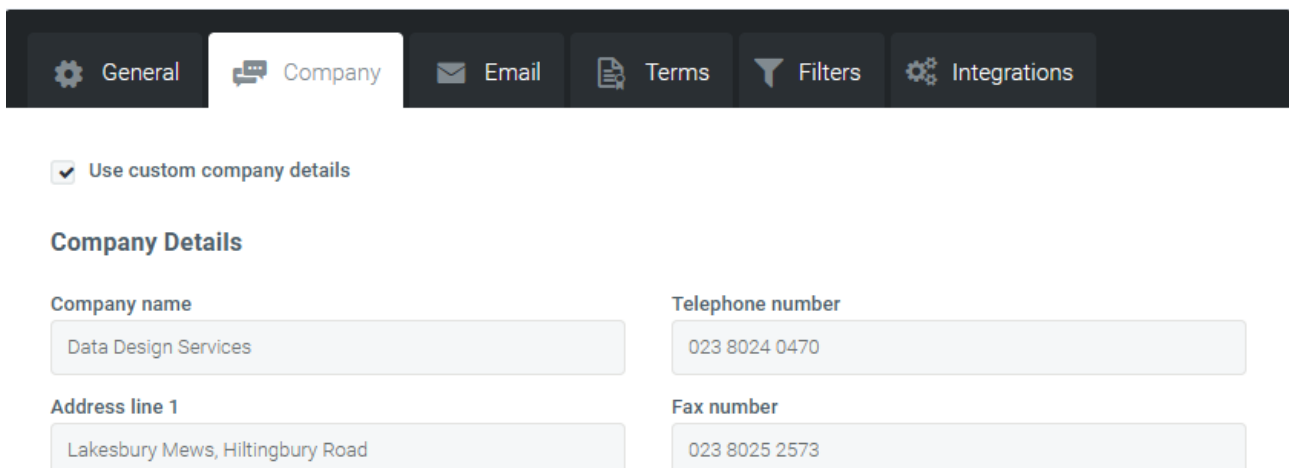
In certain scenarios, mainly for B2C sites, you don't want this. You may want to hide your contact information so you don't get random emails and phone calls all day that stop you from being productive. Perhaps you are hosting the site for a print broker and his customers or you may have another trading address for your sign making division etc

Now you can change these details on your **primary domain**. You could always do this on secondary domains, but not on your primary domain

Go to the Admin area **Edit settings – Company tab**. The Accura details can be seen but not edited until you check the **Use custom company details** box



When you click OK you will be able to edit all of the details as you want. Accura data sync will remain desynchronized until you uncheck the **Use custom company details** box



We've also moved the **social media** links into the **company tab** in order to facilitate this feature. They were previously on the email tab



# Live Interactive Theme Previews

We've added some **fantastic new tools** enabling you to customise your site and client branding in the admin area and preview it using different themes and widgets

As you are aware we ship AccuraOnline with **four themes**: Each theme can be customised at **widget level**:

- Modern
  - Basic
  - Minimal
  - Abstract
- Header
  - Menu
  - Slider
  - Footer

You can have any combination of theme and widgets. You can also change the colours on each widget, so this can get very complicated, but the Admin area widget pages didn't give you any clue as to what your website would look like as you were changing the widget styles and colours. The only way to test things was to switch between widget & themes pages or run the website up in a second browser

**We've enhanced the theme selectors dramatically**, and now you can see a **full-page genuine mirror preview** of the theme you've chosen for your domain or your client, including menus, slides, welcome banner, actual page content right down to the website footer including the Trustpilot & Live Chat widgets if you have enabled them

Client branding has been re-designed to have a dedicated **Theme** tab, and the General tab is renamed to **Settings** with various UI improvements

The screenshot displays the AccuraOnline admin interface. At the top, it shows 'Client Branding: Data Design Services Ltd'. Below this is a navigation menu with tabs for Settings, Theme, Contact Details, Accounts, Slides, Menus, Tiles, and Widgets. The 'Theme' tab is selected. Below the navigation menu, there is a section for 'Select Theme for Data Design Services Ltd' with a color picker and a dropdown menu set to 'Modern'. The main content area shows a live preview of the website. The website header includes social media icons, a user profile with 'Welcome!', a 'Logout' button, and a shopping cart icon with '£39.98'. The main navigation menu includes 'QUOTES', 'ORDERS', 'PROOFS', 'STORE', 'CONTACT US', and 'CLIENT MENU'. The 'ORDERS' menu is expanded, showing options: 'Request an Order', 'Order from Quote', 'Repeat Order', and 'Order from Template'. The website footer features the AccuraOnline logo and contact information.



Previously you would see a 'mock-up' of what the website should look like that was cut off halfway down the default homepage content that you don't even use. Now you see the **actual drop-down menus** your client will see when logged in. You can **hover your mouse over areas that pop-up** like the shopping basket, searches, and my account, and you can see **changes in colour** as you move your mouse over links such as your contact and social media details

## Live Interactive Widget Previews

We've applied this same preview functionality to **widgets** as well as themes. We've also improved the UI to tell you which client and theme you are editing when you are editing the widgets

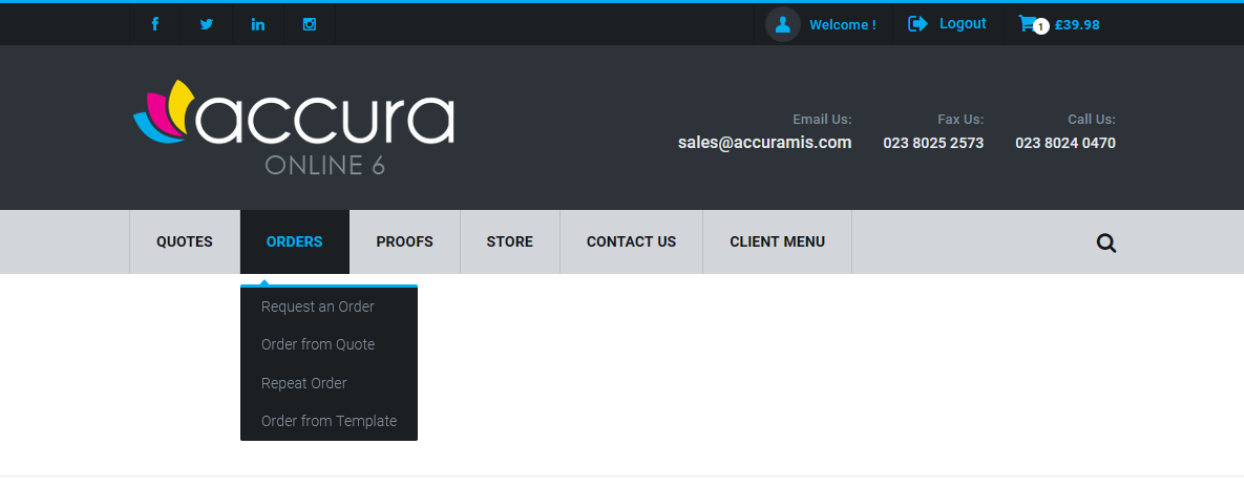
Customise Menu for Modern theme, Data Design Services Ltd

Select Menu Design:

Colour Quantity:  4 colours  8 colours

Background colour:  Top-level text colour:  Top-level hover & drop-down background colour:  Drop-down text colour:

Drop-down background hover colour:  Drop-down text hover colour:  Top-level text hover colour:



Restore Defaults

All of the colour values have been renamed to describe exactly what they effect, and now that you can interact with the preview, you can customise colours that only appear on **mouse hover** events such as pop-ups and links

Click **Preview** to see the effect of your changes of either colour or widget design/style. Move your mouse over pop-up areas to see what they look like. **Update** when you are happy with your changes. If for any reason you don't like your colour scheme you can always **Restore Defaults**

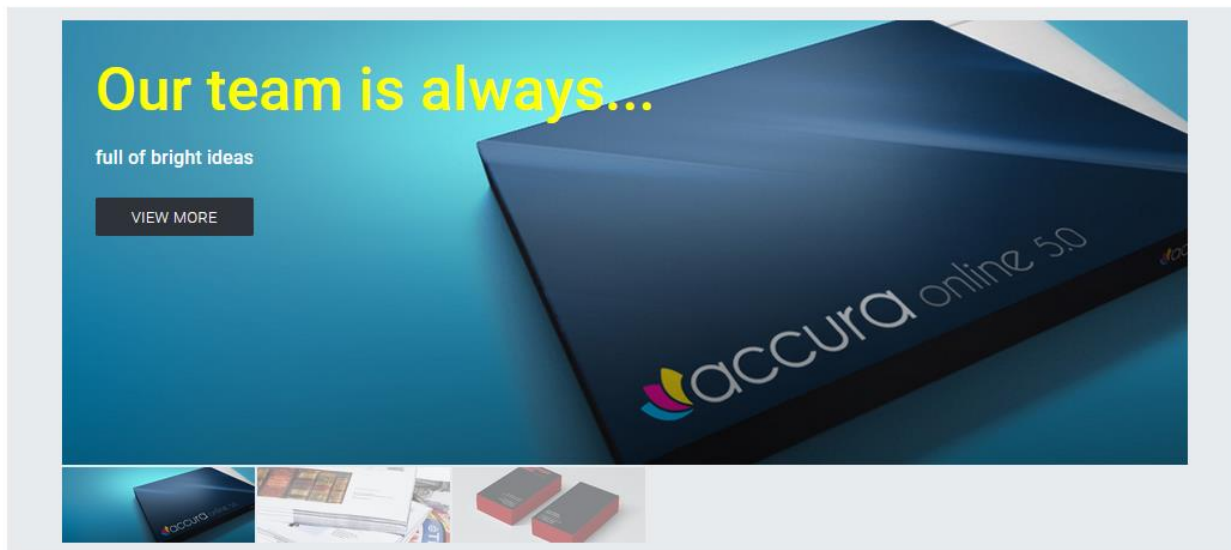


As for slide widgets, we have reinstated the **Flex Thumbs Slider** that displays thumbnail images beneath the main slider images and this will be used by **default** on the **Minimal** theme as it was previously. This slider was removed in previous versions due to UI issues which are now fixed

### Customise Slider for Modern theme

Select Slider Type

Flex Thumbs Slider



The slider widget doesn't have colour customisation as this is done in the **Slides** admin area, but you can still preview your actual domain or client slides and interact with the slider in the Slider widget page

## 8-Colour Widgets

We previously released an 'experimental' **8-colour widget mode**. This has now been optimised, but is still a **work in progress** and we **recommend** you try it out, as it allows **far greater** customisation than the 4-colour mode does. For example, 8-colour widgets will allow you to control **hover colours** displayed when you move your mouse over an area, whereas 4-colours might do this but will probably also apply to lots of other elements at the same time. Moving to 8-colours is a more **artistic** and **detailed** way of customising your website

You can enable 8-colour widgets in Admin **Edit settings**  **Use 8-colour theme widgets (recommended)**

**PLEASE NOTE this will switch both your domain & client branding and will effectively reset your website to its out of the box default colours** unless you have already configured everything for 8-colours

**We've found a SOLUTION to this**, which allows you to **switch between 4 colours and 8 colours in the widget previews**, regardless of which colour mode you are in, so you can remain in 4-colour mode whilst you go through your domain and client branding and set up your 8-colours



## Customise Footer for Modern theme, Data Design Services Ltd


Select Footer Design


Style Modern


Colour Quantity


4 colours  8 colours

Switch the **Colour Quantity** between 4 & 8 colours and then click **Preview** to see what the 4 & 8 colour widget looks like. You can **copy and paste** your 4-colour values into the new 8-colour fields, again clicking **Preview** each time to work out which colour values you should copy them to. Nothing is saved to the database unless you click **Update**. If you click **Cancel**, you will lose all your changes and you can go back to the out of the box settings with **Restore Defaults**

 Restore Defaults

 Cancel

 Preview

 Update

When you're happy with the design of everything, you can enable **Use 8-colour theme widgets** in Admin settings and the website will now use the 8-colours you have designed

There is a **new feature** ONLY available when using 8-colours: If you have not customised a colour value then you will see the out of box **default value** in the widget preview. This cannot be done in 4-colour mode

Top background colour



1b1f22

Bottom background colour



2d3339

Buttons background hover colour



121417

Buttons text hover & basket items colour

ffffff

Contact titles colour



828f9b

Contact details colour



e7ebee

My account icon background colour



2d3339

Top icons & buttons text colour



21b8c6

If you refer to the **release notes** you will also find a number of significant bug fixes and improvements on the display of the website on **mobile devices** in 8-colour mode. We welcome **suggestions** and **feedback** from **all customers** about how the 8-colour widgets work, and will be happy to build in changes to these colours based on customer feedback in the next release

**4-colour mode will no longer be updated in future releases** and when 8-colours are **perfected** we will remove it completely

## Pages & Custom Content

We've added the ability to upload **custom-designed HTML pages** to AccuraOnline. These can be created with whatever software, web service or web designer you wish to use

This is an alternative to editing your page content using the built-in page editor (CKEditor) which is highly restrictive in terms of styles, layout and linking of images. If we can be more technical, pages created in CKEditor will be affected by the overall AccuraOnline theme engine CSS which means you cannot design exactly what you want to see

You design your page content **outside** of AccuraOnline, based on a **HTML file**, with images, JavaScript, fonts if needed and CSS files. You **zip up** the content and **email it to Accura support** to get the content **uploaded to your website**. You must refer to the **Release notes** document which details the specification of the custom content you provide to us, and this will require some basic knowledge of HTML

📞 UK: +44 (0)23 8024 0470

📞 US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

🖱️ [www.accuramis.com](http://www.accuramis.com)

Page 40 of 56



You will see some new **checkboxes** in the Admin area **Pages** view:

- **Display as iFrame:** This checkbox hides the CKEditor field and displays a new field; **iFrame page**. You enter the name of the HTML or HTM file you sent to Accura support in this field
- **Display full-size:** This checkbox will **remove all padding** from the top, bottom, left and right of the content

Edit Page: Nicepage

Title  
Nicepage

iFrame page  
nicepage.html

Show title     Display as iFrame     Display full-size

This is an example page we've designed, displayed as an **iFrame**:

The screenshot shows the Accura ONLINE 6 website interface. At the top is the Accura logo and navigation links for STORE, CONTACT US, and PAGES. The main content area features a grid of six service cards, each with an icon, a title, and a brief description:

- Your design or ours:** We can work with your files, or our experts will design you a completely new design all-included.
- Competitive pricing:** We won't always be the cheapest, but we will be consistently competitive, not just for your first order!
- Fast delivery:** Our friendly courier will deliver your job, fast and often FREE (for orders over \$100)
- Quality:** Your brand is more than a logo, it's what you do, the values you stand for - that demands the upmost quality.
- Account manager:** We'll appoint one of our friendly team to take care of your every need - now and into the future.
- Money-back guarantee:** If you're not happy, then we're not happy - get a full refund up to 14 days after delivery.



This is the same example page, displayed as an **iFrame**, with the **full-size** option enabled:

The screenshot shows the Accura ONLINE 6 website with a dark header containing the logo and navigation links (STORE, CONTACT US, PAGES, and a search icon). Below the header, six service highlights are presented in a grid. Each highlight includes an icon, a title, and a brief description:

- Your design or ours:** We can work with your files, or our experts will design you a completely new design all-included.
- Competitive pricing:** We won't always be the cheapest, but we will be consistently competitive, not just for your first order!
- Fast delivery:** Our friendly courier will deliver your job, fast and often FREE (for orders over \$100)
- Quality:** Your brand is more than a logo, it's what you do, the values you stand for - that demands the upmost quality.
- Account manager:** We'll appoint one of our friendly team to take care of your every need - now and into the future.
- Money-back guarantee:** If you're not happy, then we're not happy - get a full refund up to 14 days after delivery.

The **Pages list** has been updated to display custom HTML filenames in the **title** column where appropriate and also includes the **Show title** flag in addition to the new **iFrame** flag

Pages					
Name	Title/Page	Last Update	Removable?	Show title?	iFrame?
home	nicepage.html	09/05/2023	✗	✗	✓
about	About Us	25/04/2023	✗	✓	✗
privacy	Privacy Statement	21/02/2022	✗	✓	✗

If you have previously supplied images or any other **custom content** to Accura support to be uploaded to your website, then we may need you **to edit your pages** after you upgrade to AccuraOnline 6.30. This is because we are enforcing strict guidelines on where custom content can be placed in order to be able to migrate to the next **MAJOR AccuraOnline release** which will use a **new hosting platform and completely updated technology**. Further details on how this works can be found in the **release notes** document. If you need to make changes to your pages, Accura support will let you know when they do your AccuraOnline 6.30 upgrade



# New Features in AccuraOnline Version 6.20

## 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

#### Billing Details

##### Contact:

Jeff Botwood



##### McDonald's Southampton Esplanade

Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

✔ Current Billing Address

Search addresses



Sort by: Name (asc)



##### 7DAYS - 7 Days Pizza And Chicken

51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

##### BURGER - Burger King

98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

##### DDS-001 - Data Design Services Ltd

Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

##### KFCSOUTH - KFC Southampton

127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

##### TACOBELL - Taco Bell

1-2 Hanover Buildings  
Southampton  
Hampshire  
SO14 1JU

##### TEXAS - Teaxas Grill

50-52 Bevois Valley Road  
Southampton  
Hampshire  
SO14 0JR

Page: 1 of 1 | Quantity per page: 6

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24



@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 43 of 56

## Checkout Wizard Delivery Step

### Delivery Details

#### Contact:

Jeff Botwood



**Data Design Services Ltd**  
Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

**Phone:** Jeff Mobile  
**Email:** jeff@accuramis.com

**Current Delivery Address**

**Add Delivery Address**

**Use Billing Details**

Search addresses **Sort by:** Name (asc)

**7DAYS - 7 Days Pizza And Chicken**  
51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

**BURGER - Burger King**  
98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

**KFCSOUTH - KFC Southampton**  
127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

**MCDON - McDonald's Southampton Esplanade**  
Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

**TACOBELL - Taco Bell**  
1-2 Hanover Buildings  
Southampton  
Hampshire  
SO14 1JU

**TEXAS - Teaxas Grill**  
50-52 Bevois Valley Road  
Southampton  
Hampshire  
SO14 0JR

Page:  of 1 | Quantity per page:

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

 **Jeff Botwood**  
ACTIVE

 Edit Account

 Change Password


 Your Addresses


**Default Billing** Edit | Remove


**BURGER - Burger King**  
98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

**Default Delivery** Edit | Remove

**KFCSOUTH - KFC Southampton**  
127a Above Bar Street  
Southampton  
Hampshire  
SO14 7FN

Search addresses 

Sort by: Name (asc) 

  
Add Address

**7DAYS - 7 Days Pizza And Chicken**  
51 St Mary's Road  
Southampton  
Hampshire  
SO14 0BH

[Set Billing](#) | [Set Delivery](#) Edit | Remove

**BURGER - Burger King**  
98 Above Bar Street  
Southampton  
Hampshire  
SO14 7DT

[Billing](#) | [Set Delivery](#) Edit | Remove

**DDS-001 - Data Design Services Ltd**  
Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

[Set Billing](#) | [Set Delivery](#) Edit

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



## Billing Details

**Jeff Botwood**  
McDonald's Southampton Esplanade  
Harbour Parade  
West Quay Retail Park  
Southampton  
Hampshire  
SO15 1BA

## Delivery Details

**Jeff Botwood**  
Data Design Services Ltd  
Lakesbury Mews  
Hiltingbury Road  
Chandlers Ford  
Eastleigh  
Hampshire  
SO53 5SS

**Phone:** Jeff Mobile  
**Email:** jeff@accuramis.com

## Order Details

Food menus  
**Required by:** 21/10/2021  
**Sub reference:** ABC12345  
**Our ref:** 2434364

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

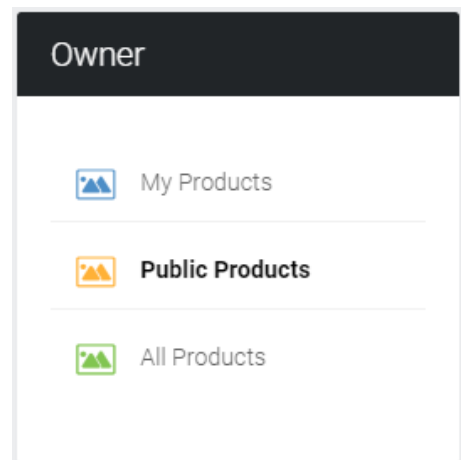
# General Product Features

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:



Support portal



Email support



Templates help

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
<b>Version 6.20 (latest)</b>	<b>Version 6.20 New Features</b>	<b>Version 6.20 Release Notes</b>

Versions 6.10 to 6.11

Version 6.11 New Features

Version 6.11 Release Notes

UK: +44 (0)23 8024 0470

US: +1 (0) 8473 938 731

© Data Design Services Ltd Mar-24

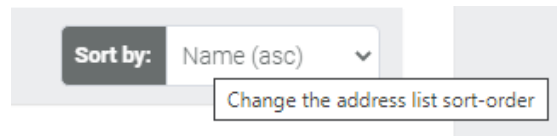
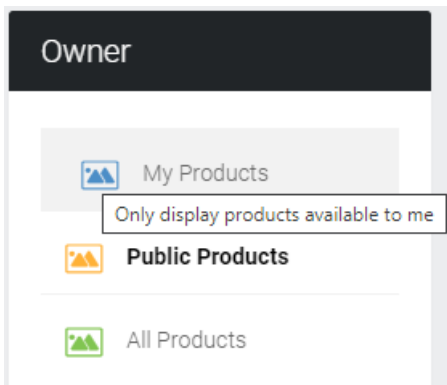


@ [support@accuramis.com](mailto:support@accuramis.com)

[www.accuramis.com](http://www.accuramis.com)

Page 47 of 56

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

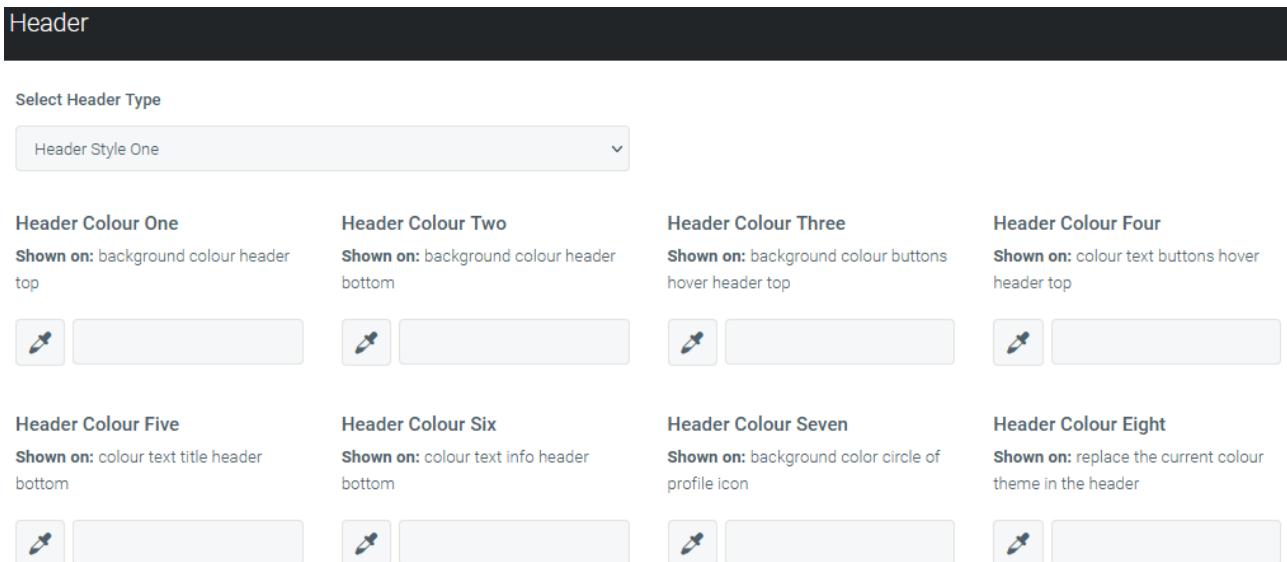


To view the tooltips, hold the mouse cursor over the various buttons, links and options on each page. This is a work-in-progress; more tooltips will be added in each future release

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

## STOCK LEVELS:

**Accura stock level:** 0  
**Website stock level:** 0  
**Website availability:** Out of stock  
**Lead time:** Not specified  
**In baskets (clients):** 6000 ⓘ  
**In baskets (B2C accounts):** 3000 ⓘ  
**In baskets (B2C users):** 0 ⓘ  
**Total in baskets:** 9000



- 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

**Product Details**

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

Use the **Pictures** list to manage additional images for this product.

Use the **Basket Items** list to correct stock levels and/or access artwork PDFs.

Use the **template** actions to attach, change or remove an artwork template.

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

**Artwork Templates**

Attach template

---

Design templates

---

Online help

---

Adobe InDesign Plug-in

## 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

**Actions**

Products
Basket Items

Sort by: Date (desc)

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	

Page: 1 of 2 | Quantity per page: 10

**Basket Items**

**Active** status items have not been ordered or synced into Accura.

**Pending** status items are in the process of being ordered; for example in draft requests, in the approval process, or waiting to be processed in Accura's Web Console.

Use the **Product Code** links to drill down to a specific product.

Use the **Account Name** links to drill down to a specific account.

Use the **Account Email** links to send emails to accounts.

Use the **Download artwork** links when you see the PDF icon in the Artwork column.

Use the **Remove** links to delete basket items. This will correct stock totals.



- 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

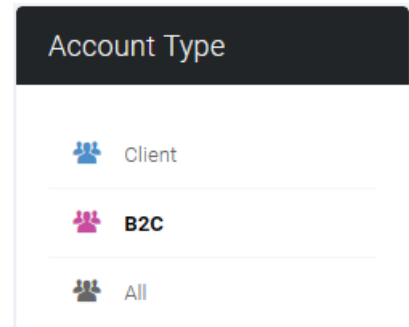
Accounts					
<input type="text" value="dds"/> <input type="button" value="↻"/>				Sort by: Name (asc) ▼	
Status	Name	Email	Client Code	Client Name	Security Profile
	Gavin Spooner	<a href="mailto:gavin@accuramis.com">gavin@accuramis.com</a>	DDS	Data Design Services Ltd	Full access to own data. Cannot approve orders or view data from other users
	Jeff Botwood	<a href="mailto:jeff@accuramis.com">jeff@accuramis.com</a>	DDS	Data Design Services Ltd	Full access



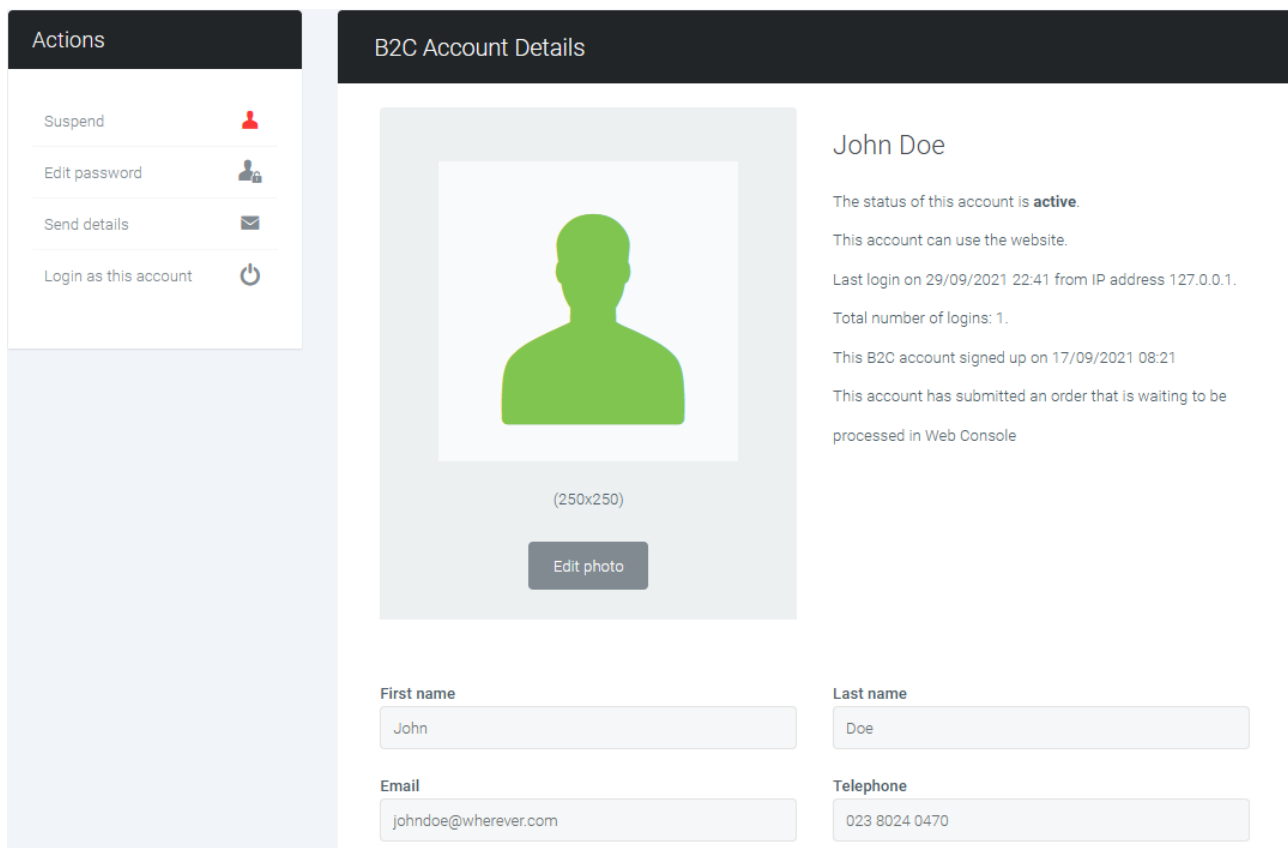
A number of new actions are available for email reminders and management of old requests; these will be covered in the *Emails, Automated Reminders & Clean-ups* section of this document

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 to 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

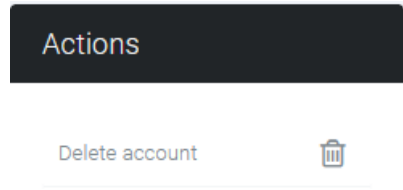


- B2C accounts will display dashes (-) in the client code and name columns because they do not belong to clients
- B2C accounts do not have security profiles, but use a built-in (hidden) profile providing basic store access only
- B2C accounts will have 'active' status by default, unless they are manually 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'



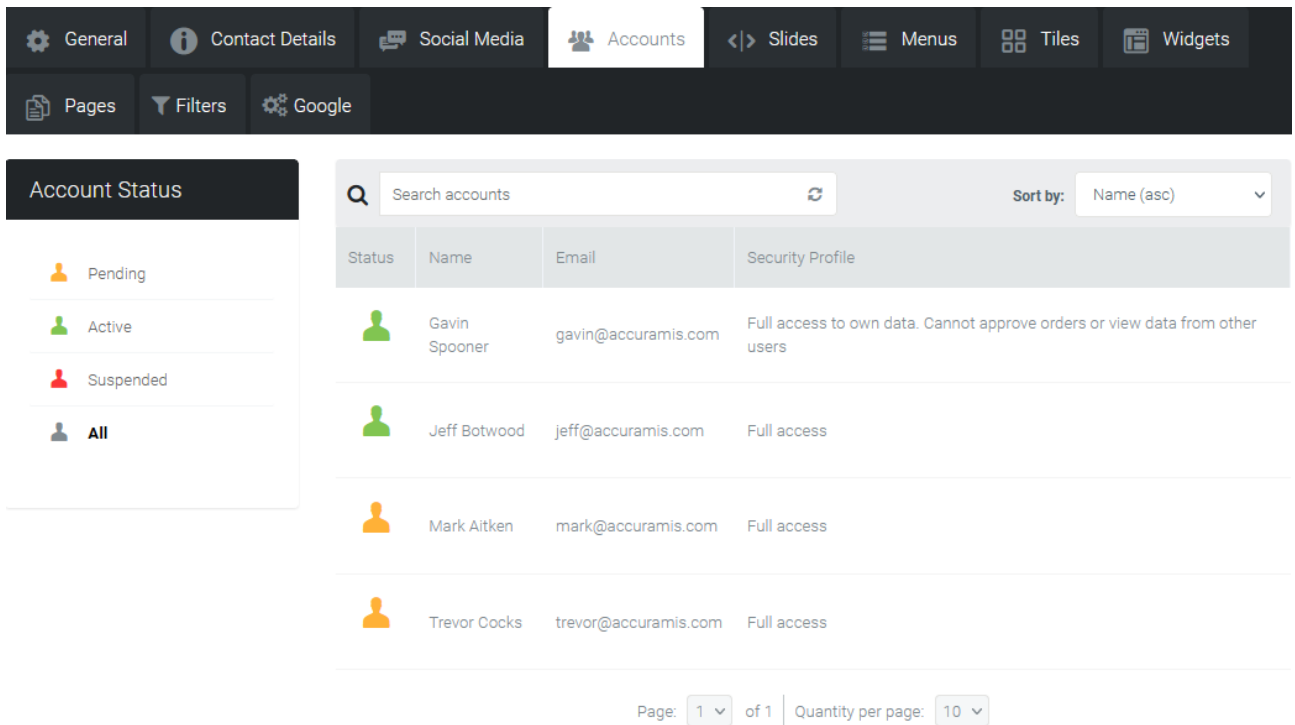
Certain types of website **accounts can be deleted** from the account edit page by using the *Delete account* action

- 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



Status	Name	Email	Security Profile
Active	Gavin Spooner	gavin@accuramis.com	Full access to own data. Cannot approve orders or view data from other users
Active	Jeff Botwood	jeff@accuramis.com	Full access
Pending	Mark Aitken	mark@accuramis.com	Full access
Pending	Trevor Cocks	trevor@accuramis.com	Full access

- 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:**

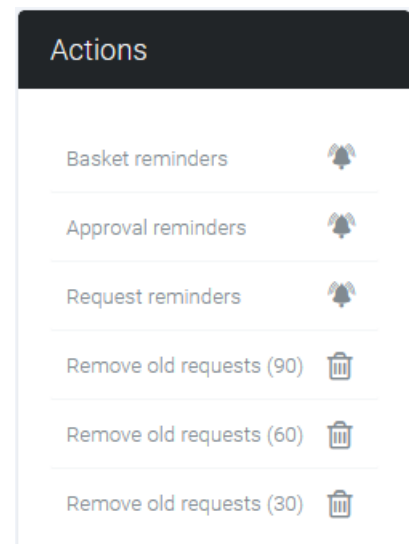
- This is an old reminder sent to approval accounts to remind them to approve orders submitted by users who lack permissions to approve their own orders. The email has been renamed from 'requests stuck at approve status' to 'outstanding request approvals reminder'
- The requests table in the email now 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)



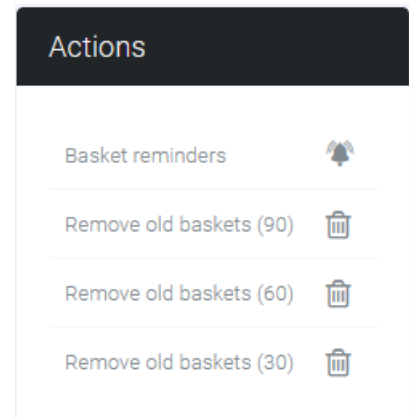
**Remove old requests (days) actions:**

- 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 at 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 or 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

### Quote Permissions

- View quotes
- Create manual quotes
- Create repeat quotes
- Create template quotes
- Reject quotes

### Print Order Permissions

- View print orders
- Create manual orders
- Create quoted orders
- Create repeat orders
- Create template orders

### Proof Permissions

- View proofs
- Respond to proofs

### Store Permissions

- View products
- Use checkout
- View store orders
- View stock levels

### Address Permissions

- Manage addresses
- View Accura offices
- View billing details
- Edit billing details
- Edit delivery addresses

### General Permissions

- View data owned by other accounts
- Save and approve order requests
- View delivery notes
- View invoices
- View prices



- 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 Accura 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

<p><b>Store Permissions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> View products</li> <li><input type="checkbox"/> Use checkout</li> <li><input type="checkbox"/> View store orders</li> <li><input type="checkbox"/> View stock levels</li> </ul>	<p><b>Address Permissions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Manage addresses</li> <li><input checked="" type="checkbox"/> View Accura offices</li> <li><input type="checkbox"/> Edit delivery addresses</li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p>Displays Accura office addresses that do not belong to any users in checkout and my account. Also displays the locations filter in the store which filters products by delivery address</p> </div>	<p><b>General Permissions</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> View data owned by other accounts</li> <li><input checked="" type="checkbox"/> Save and approve order requests</li> <li><input checked="" type="checkbox"/> View prices</li> </ul>
---	--	---

## 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

Branding mode

Business to business with homepage

Hide signups in B2B modes

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

