



Version 6.30 Release Notes

Accura 6.30 Build 13 compiled on 15th August 2024

Accura Online 6.30 Hotfix 7 compiled on 20th March 2024



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.

About This Document

This document details all **minor features, changes and fixes** in 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 refer to the **New Features** document which summarises the major new features likely to be used by end users. This can be found in the Accura help menu under **What's new**. These technical release notes are aimed at Accura system administrators, advanced users, and Accura support personnel.

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

In the text in this document:

- **FEATURE** refers to a new feature that was not available in the last public release.
- **CHANGE** refers to a change in software behaviour from the previous public release.
- **FIX** refers to a bug present in the previous public release that has been fixed in the latest release.



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Changes in Accura 6.30 Build 13 (15th August 2024)

AccuraSync

FIX: Copying a client or supplier copied the **ExternalID** along with it, so when AccuraSync is enabled, you ended up with both linked to one Client/Supplier in Quickbooks in the mapper.

Delivery Notes

FIX: EasyPost third party billing details were not being sent to EasyPost when using the delivery wizard but were being sent when using a normal delivery.

Estimating

FIX: When a customer did not have AccuraOnline, the 'Delivery Charge' option was incorrectly hidden on Outwork items, preventing selection.

Changes in Accura 6.30 Build 12 (5th August 2024)

AccuraOnline

CHANGE: When placing a product order online the user can enter text for the order title, however when the order was processed in the web console the title would automatically change to the name of the first product in the order. Now when the user changes the title on the website this title is used as the order title rather than the product name.

FIX: When processing a product order in the web console any items added into the order at that point were automatically being set to invoice.

AccuraSync

CHANGE: The tax syncs between QuickBooks Online and Accura now take different taxation layers into account (eg Government and Local taxes) - and will identify and apply those tax layers separately when export Invoices and Credit Notes to the external account systems.

CRM

FIX: In the tickets tab in the view prospect profile window, if you changed the account-type filter from any to one of the other options and then selected a client, none of the tickets for the client appeared in the window.

Delivery Notes

FIX: When applying an office shipping markup adjustment, this was not consistent when creating a delivery note or using the delivery wizard.

Email, Fax & SMS

FIX: Email addresses that started with a tilde (~) were not able to be used in your User Profile.

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FIX: When you output an order acknowledgement to the printer and have *Send email notification to client(s)* and *Show email send dialog* selected, you did not get the email dialog window, but the email was being sent.

Estimating

CHANGE: View Quotes browse will now display a proposal icon (folder) when a quote belongs to a proposal. This will only display for new quotes being added to a proposal.

General

FIX: When printing any Library list or Price list from the estimate library there were no prices being displayed on the printouts.

FIX: New installations of RDC were not generating the user profile correctly. When started for the first time it would not create the required files and folders and you would get a ListFormat manager error.

Order Processing

FIX: Product pricing in an Accura product order differed between an online order & an Accura order.

Sales Invoicing

CHANGE: We have added a new export format for Xero, due to upcoming changes coming on 2nd September 2024.

Scheduling

FIX: When adding an operation to a new or existing resource set, it would not display on the named resource set, however it would still appear on the *<Not assigned>* resource set.

Stock Control

CHANGE: We have added a column for the office into the activity tab on stock-controlled materials to show when offices have been delivered to.

FIX: When selecting the view PO/WO in the Purchasing tab of a product Accura would crash.

FIX: When making a change to the warehouse while selecting an item ref in a stock journal, accura would crash.

FIX: The view stock and view products windows had lost the tag tick box and the buttons for tagging/un-tagging.

Utilities & Security

FIX: When creating a new security group, it was not possible to give the group a name.

Changes in Accura 6.30 Build 11 (4th April 2024)

ACCUPG

CHANGE: The transaction sync from Accura in this build will limit client history to 365 days for quotes, orders, proofs, delivery notes & sales invoices. ACCUPG will set the client history date to today - 365 days when this update is applied, no actual data will be removed from the website automatically, this is preparation for migrating to a new host.

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Accura Online

FIX: When creating an Order from Template and you attempted to process it, it would not open the order dialog window and instead it would be marked as completed.

FIX: Child items for BOM were not being added to online orders when they were being processed in the web console.

Import / Export

CHANGE: Added the ability to control if contacts are created on import of delivery-points.

Purchase Ordering

FIX: When copying a PO the required & received date were being copied from the original.

FIX: When you created a PO the tax code in the item was populated with the purchase tax code from the Accura defaults rather than the tax code set in the supplier.

FIX: When copying a PO with a note set to copy with parent, the note icon was not displayed, however it could be viewed when opening the note within the PO.

Changes in Accura 6.30 Build 10 (11th March 2024)

Accura Online

FIX: Products that were not set up to be combined when processed in the web console were creating blank orders when they were part of an order with other products.

FIX: When adding works-order and purchase-order items that did not have combined basket enabled, the WO would take the description of the PO.

FIX: In the web console, product orders with a mix of work-order and purchase-order products were generating two orders with duplicate order items for those items that were reordered by WO.

FIX: When a works-order was created the invoice price in the order was the product price plus the delivery charge x2.

FIX: Orders were not being removed from Weborders.tps after they had been processed correctly without any issues.

FIX: Items set to not combine were combining into one order.

AccuraShip

FIX: When clicking to view the URL for POD it would generate an error forcing you to close Accura.

FIX: Delivery notes that used the "Other" option rather than Client or Supplier option didn't send the contact name up to EasyPost.

CRM

FIX: The copy quote to RFQ button was missing from the view prospect profile window.

Delivery Notes

CHANGE: Offices now support an additional markup on the shipping tab. This markup is applied to the chosen carrier/service when the invoiced delivery charge is calculated. So, if a specific carrier/service has a markup of say 25%, and an office has an additional shipping markup of 20% the total delivery markup applied will be 45%.

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CHANGE: It is now possible to apply common packing settings to all delivery items which will recalculate the box quantities and weights accordingly, this is located under the **Packing** tab of the delivery note, this does require you to have packaging types to be setup (*Setup > Packaging*).

FIX: The field for the numbering on an order printed on parcel labels LOC:Numbering wasn't being calculated correctly and would display the same combination on all labels.

FIX: When using the delivery wizard and you have insufficient stock the warning message displayed would show an incorrect order number.

FIX: When a delivery note was raised from an order, the delivery method in the order was ignored, and there was no delivery method specified in the delivery note. This also applied to any defaults that might have applied to the delivery method, such as in the client or a field value.

FIX: In some instances on parcel labels the ITM:NoBoxes was returning a value of one for the last label of the run.

Email, Fax & SMS

FIX: The stock re-order email was only attaching the material file and not the product file.

Estimating

CHANGE: We have added a **Template?** button to all quotes which have been created using the **Quote template library** to easily see which quote template that quote is using. This can also be viewed on the quote browse by right-clicking on the quote and selecting **Template?**

FIX: In an estimate in a foreign currency, the price in the analysis tab always displayed in the target currency, and clicking the currency button did not change the price back to the system currency.

FIX: When enabling the "Create specification from workings" on a quote, the Statistics tab where you edit the size was not being updated on the Size tab.

FIX: On the adjust materials/products window the search functions did not filter correctly and would often give incorrect results.

General

CHANGE: We have added the option to show 0 - number transactions for the following browse windows:

- Quotes
- Orders
- Product Orders
- Invoices
- Purchase Orders
- Purchase Invoices

Order Processing

CHANGE: On the stock maintenance window, we have Increased the max quantity to allow up to 9 digits.

CHANGE: We have now expanded the functionality of the **Update status** window (*Right-click > Status*) this will allow you to add/edit multiple orders at once using the following options:

- Order-no
- Subref
- Department
- Deposit paid status

FIX: When printing a worksheet for an order, the items in the same department were sometimes split between multiple department headings.

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Sales Invoicing

FIX: When adding a previously invoiced order into an invoice item, the prompt that warns you that you have already invoiced the order did not display.

FIX: When invoicing multiple product orders by either tagging or manually adding invoice items to the invoice it would only allow you to select a service order.

Stock Control

CHANGE: On Stock Labels the STA & ITM fields have been made available for use.

FIX: When printing stock labels it was not possible to print from the locations tab within an item and when printed from the stock window the print window displayed for a second time when it shouldn't.

Purchase Ordering

FIX: Purchase Orders were not changing the status to **Invoiced** unless the Purchase Invoice was the same value as the PO.

Tables

FIX: When you updated the cost rates of any table items that were included on the auto-includes browse these changes were not being updated unless the task was removed and re-added.

Utilities & Security

CHANGE: There have been numerous changes to system settings, defaults previously included global defaults, and local defaults (user preferences) and it was not possible to know which was which.

These have now been split into two procedures which are under the Setup menu:

- **Defaults** (Setup > Defaults) – These are the global defaults.
- **Preferences** (Setup > Preferences) – These are the local machine login preferences e.g. Theme, Email, Fax, SMS etc...

Previously it was not possible for a user to access their own user profile e.g. to change their Name, or Email. This required another user with **Sys:Security** settings, now a user can access their own profile (Setup > User profile) and change their Name, Signature, Email etc... they can also access their own preferences from here.

If they have **Sys:Security** access they will also see the **Extra** (*Auto-check and Commission*), and **Access** tabs etc... but those tabs are hidden if they don't have this security door.

They can ONLY access their own user profile in this way, **Sys:Security** is still required to see and edit a list of users and groups.

Setup > Communication > User settings remains but will simply open the Preferences window with the Email tab selected, but also allow Fax and SMS settings to be changed i.e. true all communication, not just Email as before.

Changes in Accura 6.30 Build 9 (11th January 2024)

General

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FIX: When creating a custom List Format in certain browses these changes were not being retained on restart.

Changes in Accura 6.30 Build 8 (9th January 2024)

Maintenance Release

Changes in Accura 6.30 Build 7 (3rd January 2024)

Estimating

FIX: The phrases library could not be used in the working notes of a Tender.

Client & Supplier

CHANGE: It is now possible to filter the **CLI:DomainID** field using the query wizard within in the client browse, we have also added a **Send To** button to the domains within **Web > Domains**.

Order Processing

FIX: When you click the Reset button on the Invoice tab, the invoice text of the order did not reset.

Sales Invoice

FEATURE: Multiple product orders and items can now manually be added from within an existing invoice.

FIX: The field ITM:UnitNet wasn't calculating correctly when invoicing a quantity that was greater than the quantity of the order.

Changes in Accura 6.30 Build 6 (5th December 2023)

Accura Online

FIX: The web console was not accurately calculating ad hoc delivery charges when processing orders.

Accura Ship

FIX: Overseas shipments that are charged to a third party were still charging VAT and other customs charges to the sender instead of the third party.

Delivery Notes

FEATURE: Product orders now support multi-drop deliveries.

FEATURE: Enhanced parcel label printing for Delivery Notes.

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Estimating

CHANGE: **LOC:Prices** is populated on you current quote layout(s) to display the quoted prices (including/excluding tax as applicable) for each quantity. The data shown will toggle between the **"job" price and "unit price"** according. However, this **did not allow you to show BOTH total price AND unit price.**

We have added the Text field **LOC:UnitPrices** to always show the unit prices as per the unit-quantity specified in the quote, and have now have added a new Text field **LOC:SellPrices**, which will **ALWAYS show only the total (job) prices** (including/excluding tax as applicable). This means that you can modify your quote letter layout(s) to show **total pricing AND unit pricing side-by-side** on the layout, if you wish.

You can also **switch layout(s) dynamically for each client**, according to their preferences by using the **"Layout Sets" feature added in version 6.30 Build 5** - for example, **some clients may like to see Unit price only, while others prefer to see total price, and some others like to see both. See documentation.**

FIX: The Delivery Point worksheet was not listing the delivery point information.

General

FIX: Pop-up note controls did not work from quote to order - i.e., a note on a quote always copied and displayed to the order, even if the order was not selected in the note.

FIX: The delivery contact in the order was being set to the office primary contact rather than the contact the order was made out to.

Import / Export

CHANGE: You can now export Purchase Invoices and Sales Invoices directly from the browse window without the need to run the Import/Export application.

Order Processing

CHANGE: ORDP:Subref has been added to the multi-point delivery report.

FIX: When raising an order from manually changing the quote to Won, after the order had been processed there was no dialog to print the job sheet etc.

Purchase Ordering

CHANGE: When creating a PO, it is now possible to copy the current line item instead of manually adding a new line item each time.

FIX: When changing the purchase order item *Per:* line, it would always default back to the original set value.

FIX: Part paid purchase orders were changing status to *Invoiced* when only part of the PO was being invoiced.

RDC

FIX: In RDC if you logged a material when ending a task, any other task you ended after that would require a material quantity before you could end the task.



Sales Invoice

FIX: The previous limitation of a 512-character PayPal link URL, which caused problems for invoices with lengthy descriptions and resulted in URL truncation, has been updated to allow a maximum of 2000 characters.

FIX: When an invoice office was set in the client, and you created a sales invoice the details were correct, but the office was not being displayed.

FIX: When printing an invoice and then selecting the printer option, the printer icon in the view invoice window and other places was not being removed.

FIX: When creating an Invoice from the orders window, it was possible to invoice jobs unrelated to that client.

Stock Control

CHANGE: The order close-off/stock close-off window now has additional filters to view Allocations, Issues, Receipts, Journals, Purchases on a per job basis.

Templates and Clarion

FEATURE: Theme support added which adds the ability to apply different pre-defined themes to Accura

Changes in Accura 6.30 Build 5 (15th August 2023)

Accura Online

FIX: Resyncing all size records from Web Console was not removing sizes that had been deleted in Accura

FIX: Voucher discounts from AccuraOnline were not calculating sales tax correctly when orders contained a mixture of products with different tax codes

Client & Supplier

FIX: When creating a new web enabled client without first creating a contact accura would crash once the prompt to add a new contact displayed.

CRM

FIX: When adding an Activity or Appointment to a CRM ticket it would crash Accura.

Delivery Note

CHANGE: Order point note actions have been enhanced to be more flexible:

- Display note - will now display the note, but also allow it to be saved to Clipboard (so it can be copied/pasted into another field on the delivery note)
- Assign to delivery - will assign the note to the delivery note header field **HDR:DNNotes**, this enables it to be printed on the DN, and also any auto-generated parcel labels.

FIX: When using the delivery wizard, it would slow down the processing if you tried to deliver to multiple delivery points and this could take anywhere between 5 minutes to over an hour in some cases.

FIX: When creating a delivery note the to follow quantity in the order was not changing and so the status of the order was not changing either.



Estimating

FIX: When creating a quote from an RFQ which was created using the quote template library when selecting a template into the RFQ, the currency was retaining the setting in the library quote and not using the currency of the client.

Order Processing

FIX: When adding 2 products to an order if the first one has a min quantity, and you change the quantity that min is applied to the second product, and you could not change to your required quantity.

Purchase Ordering

FIX: When raising a PO from an item in an order the supplier was losing the contacts in that PO.

FIX: Emailing a contact from within a Purchase Order it would crash Accura.

FIX: When the supplier was using a different currency from the default set it was not possible to edit the cost-rate of a line item when using enter values in target currency.

RDC

CHANGE: RDC will now use the email profile of the selected operator, and if blank the RDC defaults email profile will be assigned to the user.

Stock Control

CHANGE: The % Adjust button on the Stock, Product, and Materials browses has been expanded to include batch changes to material/stock records to change supplier, warehouse/location combination, group, subcategory, finish, colour, and size-code., as well as the previous price adjustment functionality.

Changes in Accura 6.30 Build 4 (13th July 2023)

Delivery Notes

FIX: When creating a delivery note the town was being populated with the town of the client's main address regardless of the office selected in the general tab or delivery tab of the order.

FIX: When creating a delivery note the line-item on the delivery note was not displaying unless the window was refreshed.

Email, SMS and Fax

FIX: Emailing a contact from within the contact record of the client or supplier would crash Accura.

Estimating

FIX: The reset custom-size warning in a section of a quote did not reset to the quote size if you said yes when prompted.

FIX: Quote run-on figure was printing as the unit price of the run on the quote letter.

FIX: When using the show price including tax option in a quote the unit prices were incorrect (LOC:UnitPrices) on the standard estimate letter.



Purchase Ordering

FIX: Purchase invoices were losing the supplier after being saved.

FIX: When raising a purchase order for items with a custom cost-rate these costs would not pull through and instead display as no cost.

FIX: Changing the PO within a Purchase Invoice did not reset the previous PO and instead would stack each new PO.

FIX: Purchase invoices raised from a PO were blank except for the supplier.

Changes in Accura 6.30 Build 3 (29th June 2023)

Accura Online

CHANGE: Webmon will now no longer send empty child arrays where no records exist for contacts, offices, job-types or product owners. i.e. opening & closing tags will only be created where there is 1 or more child records, otherwise the whole section is ignored.

Client & Supplier

FIX: In legacy versions of Accura it was possible to delete all the contacts from a client with no possible way to re-add contacts, these client records will now add the managing director as the default contact.

CRM

FIX: Sending an email to a contact from the client view. Once the email had sent, if you said yes to creating a CRM activity, Accura would display a runtime error and force you to close the application.

FIX: In the view prospect profile when processing a quote follow up activity as having been won and then proceeding with creating an order nothing would happen and you would instead be prompted to create another activity.

Purchase Ordering

FIX: When creating a Purchase Invoice, the first PI will process correctly but if you continue on to create another for a different supplier you can't select a PO because you get a message saying you need to select a PO for a different supplier.

Sales Invoice

FIX: Office details not populated on invoice where no invoicing office or contact assigned in client.

Changes in Accura 6.30 Build 2 (28th June 2023)

Delivery Notes

FIX: When creating a new delivery note the contact for the order would not be retained and instead would default to the primary contact of the client.



Estimating

FIX: Final job weight calculation would include weight of paper at finished size including bleed. Now calculating correctly with bleed removed.

FIX: Job costing would ignore any applied discount on Purchase Order or Purchase Invoice for the final cost summary.

Sales Invoice

FIX: If you had a contact set to accounts but no invoicing office set in the client, the contact would not populate into the invoice and this would default to the primary contact.

FIX: There was an extra check box in the invoice printing window which was not required.

Changes in Accura 6.30 Build 1 (5th June 2023)

AccuraOnline

FIX: The contacts array was being sent by Webmon regardless of WebVersion in office sync which resulted in errors being generated in the history log.

AccuraSync

FEATURE: Added support for MYOB AccountRight (Australia & New Zealand ONLY)

CHANGE: Accupg will now disable sync module on processing, and re enable once complete, to prevent unnecessary json files being creating during upgrades.

AccuraShip

FIX: The address validation function would always tick the box for "Residential address" when the new address is used even if that address were not residential.

Client & Supplier

FEATURE: Ability to assign packaging default by Office location within Clients.

CRM

FIX: When clicking the quote button inside a quote follow up activity it would show a runtime error and then it would crash the application.

FIX: Unlinked products did not display on the Prospect Profile, Products tab when the Account-type was set to Any.

Email, SMS and Fax

FIX: Sending an email would only update the default.json on send and not the User communication settings selection.

FIX: The refresh token for Gmail was not updating and would require the user to login every time the token expired regardless of whether or not emails were being sent.

FIX: The alertmon service and/or exe was not being updated when changes had been made in the default email profile, instead it was using the details prior to the system being updated to 6.15 build 6.

FIX: When editing and saving an email profile it would create endless .json at the end of profiles.

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FIX: Custom email profiles which had mixed-case filenames would not be retained in the user communication settings.

Import / Export

FEATURE: Material import now supports NEW Supplier-ref

FIX: The material file import removed the location from stock-controlled products if the field was not included in the imported file.

Stock Control

CHANGE: Automated Stock notification CSV attachment now contains OnHand, Allocated and Projected values.

FIX: The stock cash value total at the bottom of the stock activity report was missing a minus symbol when the total for that report was negative.

FIX: For the automated stock re-order notification emails the spreadsheet was not attached to the email.

Utilities & Security

CHANGE: Unencrypted users table added for the ODBC Driver/reports.

Delivery Notes

CHANGE: It is now possible to add attachments upon creating Delivery Notes, Sales Invoices and Proofs which can either be printed as part of the transaction or attached as part of the email.

FIX: Using the insert button in the delivery labels window of either Accura or RDC caused a runtime error and would crash the RDC window and in Accura it would freeze the label window forcing you to exit Accura.

Estimating

FEATURE: You are now able to raise a product order from a quote.

FEATURE: New base qty's added. SIDES, SIMPLEX, DUPLEX.

SIDES works intelligently in sync with colours on face and reverse within the press room section. Cols on face OR reverse returns a value of 1, cols on both face and reverse return a value of 2.

SIMPLEX returns a value of 1, DUPLEX returns a value of 2 and are designed to work outside of a press section.

CHANGE: In the section wizard the **Advanced** button on step 1 has now been changed to **Matl. Overs** to unify the interface and the user experience.

CHANGE: Works-order products with linked quote templates can now be viewed/modified by right-clicking on the product and selecting Linked-quote.

FIX: Quote letter printing dialog window had lost the close window X button.

FIX: When dragging and dropping sections from the quote library to a new quote, it would retain the sizing of the new quote and not the size of the section being copied.

FIX: When using the **Quote rev.** or **Re-quote** button in view orders window the resultant quote that opens removed the existing contact from the quote. Then when you try to re-select the contact in the contact drop-down it was showing the incorrect contact options even though the correct client code and office and address etc were showing in the quote.



Purchase Ordering

FIX: When leaving the selection blank within the Milestone field on confirming the Purchase Order, it would default to the previously used Milestone which in turn would update the Order with the Milestone that had been populated in the PO.

FIX: When part receiving and then writing off the balance of a purchase order it was not changing the status of the PO from Part to Received.

General

FEATURE: Tabs can now display an icon and/or bold text when filled.

FEATURE: Ability to assign specific layouts to a client or supplier using layout sets.

FEATURE: Ability to add multiple Purchase Orders onto a Purchase Invoice using the tagging feature.

CHANGE: MTL:Sellprice has been added to the summary wizard report.

FIX: CON:Position no longer truncates text longer than 20 characters but has a maximum of 35 characters.

FIX: Expanding the window of a product width ways would cause the grade field to also move.

FIX: Required fields which were currently in focus had a dark background colour which made text unreadable, this had now been lightened for easier readability.

FIX: Manually input CC/BCC contacts within the email options dialog did not append to the CC/BCC email send dialog.

Reporting

FIX: Labour list fields LBR:Speed1, LBR:Rate1, LBR:CostRate1 and LBR:CostRateAfter were not pulling through information in the Labour list detailed report layout.

Technical

CHANGE: Creation of Webmon.ini in a new Accura Online installation now updated to detail Webmon Version as 6.30. Manual update of webmon version will still be required when Accura Online is updated in the future.

RDC

CHANGE: Note entries can now be emailed to the Sales Rep, Account Manager and/or any additional addresses required.

CHANGE: RDC attachment icon is now displayed on all task tabs.

FIX: Email profiles were not displaying in the RDC default settings.

FIX: Adding new labels into RDC.

FIX: Activity window in RDC was not the correct size when using barcode as the interface.



Order Processing

FEATURE: Client requisitions for materials being supplied.

CHANGE: Re-quote button has been added to the Orders view window.

CHANGE: Commission report now has the invoice paid status and paid date.

FIX: When printing a job-sheet the skip print preview did not retain the setting if you had print working sheets/picklist ticked.

FIX: When sending the order confirmation email after printing the job sheet the email was not be populated with an email address.

Sales Invoicing

FIX: When invoicing a delivery note the default invoicing office was not using the correct address information.

FIX: Changing the Breakdown within an Invoice from Summary to anything else would remove the invoice items and would produce an error on re-opening the invoice.

Changes in Accura 6.15 Build 6 (21st December 2022)

Accura Online

FIX: Choosing a different billing address to the default one in the checkout online then removes the office from the contact in Accura when that order is processed in the web console

Email, SMS and Fax

FEATURE: Added Email Profiles and enabled Proof Sync for Microsoft 365 Modern Authentication.

Estimating

FIX: If an RFQ had any attachments and converted it to a quote it would removal all attachments.

FIX: The job type set in the defaults did not change the tabs in a quote when a new quote is first created.

FIX: The component markup profile was ignoring outwork items if the default markup method was set to either Working or Global.

FIX: Incorrect mark up and sell showing in workings for an item that has a minimum charge in a quote where the quantity is such as to trigger the minimum charge.

Changes in Accura 6.15 Build 5 (25th November 2022)

Estimating

FIX: Re-Tender button would appear on multiple tabs within workings of an estimate.

Delivery Notes

FIX: Could not uncheck **Add delivery as extra on invoice** box on a delivery note and the checkbox was always ticked regardless of the settings in the defaults.



Order Processing

CHANGE: Office dropdown on the Delivery tab of an order has been increased.

Email, SMS and Fax

FIX: Certain HTML merge tokens were not displaying correctly and were being converted to text.

RDC

FIX: RDC window had scaling issues on smaller monitors with less than 1280 width.

Stock Control

FEATURE: Sell Price, price adjustment +/- % is now available in both View Products and Price Lists to update prices en masse in all pricing bands. *Access revoked under Setup > Security > Users > Access > Estimating > Maintain Tables.*

Client and Supplier

FEATURE: Offices in Clients and Suppliers now have the option to select a default delivery method e.g Van, courier, collect.

FIX: The dropdown menu to select an office in a contact, was not in alphabetical order based on the office code, this has been corrected.

Purchase Ordering

FEATURE: Validate Address button added to Purchase order delivery tab, to check addresses for suppliers.

General

FEATURE: Notes now have the ability to have a user-defined category, so they can be categorised/sorted.

Changes in Accura 6.15 Build 4 (7th October 2022)

Email, SMS and Fax

FEATURE: Support has been added for Office365 Modern Authentication for SMTP.

NOTE: Modern Authentication should only be used if you are experiencing issues with the Basic Authentication as currently you will **NOT** be able to receive inbound emails (Proof Sync & CRM Activities) we are working on implementation of this, which will be available in the coming weeks.



Changes in Accura 6.15 Build 3 (9th September 2022)

Order Processing

FIX: When selecting a quote within a Quick-order it did not display the sections for that quote unless you reselected the Client or refreshed the window.

FIX: You could bypass fixed quantities in a product when adding it to an order if you clicked out of the row, instead of hitting tab or enter.

FIX: If the combine basket items box is unticked in a product, single item online orders lose the order items when the order is processed in the web console.

Utilities & Security

FEATURE: Live-chat widget has been added which appears at the bottom right of Accura by default, Clicking the widget will open a live chat widow. Alternatively, the new live-chat conversation button can be found on the help **Toolbar** and within the **Help > Live chat!** menu.

RDC

FIX: The OK and Cancel buttons on the RDC start activity window were barely visible at any window size

Email, SMS and Fax

FIX: Job-sheets and other attachments were not being included when an email was sent internally

FIX: If you specified a custom email for the Invoice from address, but you had an email populated within the logged in user, it would always use that users email address.

Changes in Accura 6.15 Build 1 (2nd August 2022)

Accura Online

CHANGE: AccuraOnline exceeded the memory buffer size limit in Webmon which was 2MB this has now been increased to 4MB.

Delivery Notes

FIX: When creating a delivery note on a selected order which had used the component markup, the delivery note would not display the current job information.

FIX: When using the custom packing/consignment option with Easypost on a delivery note, it was ignoring the custom package settings and using the weight provided from the line item.



Estimating

FEATURE: Estimator/CSR's can now filter pending RFQ's by JobType.

CHANGE: When Outwork operation working options, **Optional extra** and **Create invoice line-item** are predefined, the selection was for all extras to be set as invoice line-items, there is now a button on the optional extras window to easily select which items you want to include as an invoice line-item.

FIX: RFQ Priority selection did not display BLANK, if you had selected another Priority

Job Costing

CHANGE: A button has been added to the Cost Centre table which now open the Cost-centre analysis report.

FIX: If you add an item through a change order on the changes tab of an order and apply a markup, when you look at cost summary for that order the extra that was added in the change order is showing the cost amount as being the selling price and this is then reflected in costing analysis.

Order Processing

FIX: Orderitem wizard reporting did not create a preview of the report regardless of the configuration used.

FIX: Editing order item qty within a product order would duplicate an order artwork attachment where an attachment existed.

Email, SMS and Fax

FIX: When using .txt email templates and going to preview, the preview was not available.

Stock Control

FEATURE: All stock activity can now be viewed from within an order from the Orderitems tab, which has been redesigned to accommodate a Stock-activity button, which can also be accessed from the Stock main menu. The contents can also be printed or exported to Excel using the Send-to feature.

FEATURE: Domain links can now be managed in the Stock items window via the Web tab. By default, no domains will be tagged.

FEATURE: Where required, user now has the ability to break out multi-item web product orders into separate product orders. Products must be defined as web activated products, purchase-order re-order method and "combine basket items into one order" = 0.

Utilities & Security

CHANGE: The password limit has now been adjusted from 9 to 15 characters.



Changes in Accura Online 6.30 Hotfix 7 (20th March 2024)

Web Server Maintenance

FEATURE: Suspended (web-disabled) clients and all associated data can now be deleted from the Admin client branding page. This will remove up to 25 suspended clients at a time (to avoid web server resource drain). Any clients in Accura that have been suspended / web-disabled because of non-payment should be re-enabled before running this action, otherwise the client would lose all their accounts, branding, and historical data

A small number of customers are using an excessive amount of shared web server disk space, which causes loss of general website performance for all other customers, and this is unfair. Customers and Accura support are encouraged to proactively start using this feature to clear unwanted data from the AccuraOnline web servers. Also, removal of suspended client data from the web server will be a prerequisite for the upcoming release of AccuraOnline 7.00 and migration to the new hosting platform

CHANGE: Added support for the 1-year limit of client website data released with Accura 6.30 Build 11. Note it is strongly recommended that any customer with large datasets should be using the above feature to delete suspended client data BEFORE running transactions sync from Accura to avoid web server resource drain

CHANGE: Resetting client branding customisations in the Admin area did not previously delete slides, tiles or logos. It was also not made clear that a client branding reset applies to all domains the client is configured to access in the case of multi-domain websites. These changes have now been implemented and the warning message rewritten accordingly

FIX: Performing a products Sync all from Web Console created a duplicate set of product images on the web server, causing disk space wastage. Now, all previous duplicate sets of product images will be deleted on a new re-sync of products from Accura

Changes in Accura Online 6.30 Hotfix 6 (4th March 2024)

General

FIX: Header logo images on all themes were not displaying in their correct positions on Apple platforms; desktop Safari, iPad & iPhone etc.

Store

FIX: Product images were not displaying in their correct positions on Apple platforms; desktop Safari, iPad & iPhone etc.

FIX: Add to basket from product details page did not work on B2C websites when not logged in

FIX: The 'Reload' button in the shopping basket page did not work properly

Emails

FIX: Approval reminder emails (both automatic and triggered by Admin accounts action) sent missing order approval account emails for all clients with outstanding approvals when they should only be sent for clients who have missing approval accounts



Accura Data Sync

CHANGE: Client updates will limit processing to 100 contacts to improve website performance

CHANGE: Client suspension and unsuspension has been optimised to improve website performance

CHANGE: If accounts on the website have been modified to set their billing address to match their delivery address, and this address is different to the client default office address, AOL will maintain this behaviour during client and contact sync from Accura. Previously, the billing address was being reset to the client default office address

Changes in Accura Online 6.30 Hotfix 5 (16th January 2024)

Store

CHANGE: Alert pop-up messages displayed to users before editing eDocBuilder artwork have been removed to improve the end user experience

Searches

CHANGE: Search field names have been revised throughout the website to resolve some reports of recent versions of the Google Chrome browser from auto-populating the header or menu search with previously saved email addresses which should only be auto-filled in the login in form. This would result in confusing empty product lists in the store after doing something like adding or removing products to the basket, but also affected other searches including some in the admin area

FIX: Office address searches in the “My account” area did not work

FIX: Header or menu searches were not operating correctly in various areas throughout the website and could have returned product records instead of searching on the current page

Accura Data Sync

FIX: New products created in Accura were not correctly linked to all website domains

Technical

FEATURE: Added config/deployment folder. This folder contains documentation and files required to deploy a new installation of AccuraOnline, to be used by Accura support. This folder includes various config.yml and database.yml examples, default browser icons, Ruby on Rails installation files and procedures for Windows, and scripts & shortcuts to automate sales & development environments for AccuraOnline

CHANGE: Various undocumented technical changes & fixes have been applied in readiness for the upcoming Rails 7 release of AccuraOnline

CHANGE: Custom delivery contact details entered into order requests are now split into first and last names (when possible) when the data syncs into Accura

FIX: Various fixes from automated crash report emails



Changes in Accura Online 6.30 Hotfix 4 (14th August 2023)

Admin Area

FIX: Using the pop-up logo colour picker in client branding hung on the loading animation and generated a crash report

Quotes & Orders

FIX: Page navigation controls in the quotes and orders lists did not work properly after the CSS glitching issue was addressed in the hotfix 2 release

Checkout

FIX: Checkout price calculations were adding sales tax for non-taxable products

FIX: The changes introduced in hotfix 1 allowing users to edit unsaved checkouts made it impossible to remove items from draft orders. This has now been fixed

Vouchers

CHANGE: Vouchers with no threshold value are now displayed as 'n/a' instead of 0.00 in the vouchers list

CHANGE: Improved display and formatting of voucher form amount, percentage and threshold values

FIX: New vouchers could not be created unless the Restricted to drop-list had been triggered

FIX: Editing a draft, modify or approve status store order with an inactive/expired voucher applied did not remove the voucher

FIX: Removal of inactive/expired vouchers on print order requests did not update pricing correctly

FIX: Vouchers applied to store order requests were not validated or recalculated on basket quantity changes when editing draft requests

FIX: If a voucher only applied to specific products on an order, and those products were removed from a draft, the voucher was still applied at order level with a zero value

FIX: Various technical improvements and bug fixes to voucher processing

Technical

CHANGE: Further refactored order & request pricing methods which were originally submitted in the hotfix 1 release

CHANGE: Refactored voucher processing code



Changes in Accura Online 6.30 Hotfix 3 (2nd August 2023)

Orders & Checkout

CHANGE: Technical improvements to the single-step checkout form coding

FIX: Print order and single-step checkout order requests did not save due dates in USA date format correctly, resulting in swapped DD and MM up to the 12th of each month, and missing due dates after the 12th of the month which were populated using Accura's defaults instead of the dates selected on the website by users

FIX: Editing a 'rejected' via approval single-step checkout order request did not display the rejection reason text flash message at the top of the page

FIX: Changing the billing or delivery office, or entering customised delivery details on the single-step checkout order request form did not validate & recalculate delivery charges and changes in sales tax associated with office tax codes or office location

Accura Data Sync

CHANGE: Product sync has been updated to make it impossible for products to appear when they have invalid client ownership due to legacy data in Accura, and also supports the improved product sync format in Accura 6.30 Build 5

Admin Area

FIX: The 'Use custom company details' checkbox pop-up validation messages in Edit settings – Company tab on the first domain did not work as expected. Minor UI changes made in this area

Changes in Accura Online 6.30 Hotfix 2 (12th July 2023)

Quotes & Orders

FIX: Resolved visual CSS glitching in quotes and orders area when selecting the quotes & requests tabs, or filtering the views by status/size

FIX: The pre-saved quote/order/request status was not always displayed in bold text when re-loading the quote & order views

FIX: Date fields synced back to Accura were in the wrong format; causing issues with the required by date on quotes and orders

Client Branding

FIX: Client branding logos did not display throughout the website unless you had a custom domain logo

FIX: Removing an existing logo from client branding did not always re-display the 'Upload logo' button

Technical

CHANGE: Optimised date methods throughout the app coding



Changes in Accura Online 6.30 Hotfix 1 (6th July 2023)

Checkout & Store Orders

CHANGE: Editing an unsaved store order request from the orders request tab will now restore previously removed basket items on that request (basket items are not deleted from the database, they are hidden), otherwise it was impossible to complete the request. It should be noted this will result in the items re-appearing in the user's shopping basket if they navigate away from the checkout without submitting or cancelling it

CHANGE: Starting a new store order after previously navigating away from the checkout without cancelling or saving it will no longer cancel all previous unsaved store order requests. These two changes mean that store orders and print orders behave in the same way when they are left 'unsaved', and provides recovery of lost eDoc artwork editing when the user navigates away from checkout without submitting it and then empties their basket for whatever reason, which is an old customer request/complaint

CHANGE: Request reminder emails now include step2 status store orders (since they can now be edited properly), which is a reversal of the changes in the original v6.30 release

FIX: Unsaved store order requests could not be edited from the orders requests tab when the checkout wizard setting was enabled

FIX: Editing draft & modify status store order requests did not start out at the shopping basket stage, so users were not able to modify the products on their orders

FIX: Store orders that did not originate from the website displayed zero net totals on line items

FIX: Single product works orders crashed when displayed on the website

FIX: Free delivery charge thresholds were not handled correctly in the checkout wizard. The voucher discounts were being applied before testing the delivery threshold

Orders

FIX: Order lists were displaying \$ symbol as the currency regardless of the actual currency in each order

FIX: Pricing on various order lists did not include voucher discounts or delivery charges. This meant that viewing the orders showed different pricing than the lists

FIX: Print orders that did not originate from the website displayed zero pricing in the order lists and order details pages

FIX: Run-on pricing in new print order requests was displayed as tax-inclusive or exclusive when it should be net after we added sales tax breakdowns in v6.30

FIX: Pricing on non-calculable repeat order requests with no quote was displayed as tax-inclusive or exclusive when it should be net after we added sales tax breakdowns in v6.30

Technical

CHANGE: Re-factored order & request pricing methods to remove a substantial amount of unnecessary code after we added sales tax breakdowns to print orders in v6.30

CHANGE: Re-factored quote, order & request link methods in the quotes & orders lists to support the v6.30 changes in order request tab behaviour and reinstating the store form



Changes in Accura Online 6.30 (16th June 2023)

Customer Provided Page Content

If you want to design your own custom page content, you need to follow these guidelines. You should provide your content to us in a **zip file** which is constructed in the **correct format**, otherwise we may reject it. The format we require is rather detailed, so you will need some competency in designing web pages to provide us with valid content

Basics

- All content you provide to us must be in a single folder in ZIP format
- You can provide multiple HTML files at the same time
- Each file should have a .HTML or .HTM extension
- All HTML files must be in the root of the folder
- All HTML file(s) must be properly constructed with a complete and valid [HTML declaration](#)

iFrame Resizing

You must add a line of JavaScript to the HEAD tag of each HTML file you provide:

```
<script type="text/javascript" src="/js/iframeResizer.contentWindow.min.js"></script>
```

This enables AOL to correctly adjust the height of the iFrame to fit the contents you have provided and should adjust correctly on mobile devices

Links

- Your content will be uploaded by Accura support into the **/custom_pages** folder of your website. This means all images and content you provide must be referenced from /custom_pages, ideally as absolute links rather than relative links; for example, an image SRC attribute could be `src="/custom_pages/myfolder/myimage.jpg`, a CSS file could be loaded as `<link rel="stylesheet" href="/custom_pages/my_css/mycss.css">` and so on
- Links to websites that do not match your AccuraOnline domain must be configured to open in new browser tabs. For A HREF links this means adding the [target="_blank" attribute](#) to open in a new browser tab, and the [target="_parent" attribute](#) to navigate within your AOL domain
- For DIV DATA-HREF links this means adding the `data-target="_blank"` attribute to open in a new browser tab, and the `data-target="_parent"` attribute to navigate within your AOL domain, however this is NOT recommended practice and may not be supported by all browsers and platforms
- Links created via JavaScript must adhere to the same guidelines

Supporting Files

- All **supporting files** must be in one or more subfolders, and can contain images, JavaScript, fonts, CSS files, PDFs, videos such as MP4 and so on
- Please do not provide an excessive amount of large video files or downloadable content as we may not have enough disk space to host everything
- If you provide multiple custom content files to us, make sure there are no conflicts between previous content you have provided

Please do not assume that the formatting of your custom content as specified here is included in your Accura support contract



Previously Supplied Custom Content

Web server source control issues have been resolved in 6.30 allowing for detection of where Accura support has previously uploaded customer-specific data in **non-supported** public subfolders

The **definition** of a **non-supported public subfolder** is:

- Any folder that already exists on a clean installation on AccuraOnline with the **exception** of public/images. If we uploaded any of your content to these folders, it will be deleted during the 6.30 upgrade, however we will take a backup of your files in case this has occurred
- Any new folder that has been created inside the public folder **unless** the folder is called public/user_images

All identified content must be moved into the **/user_images** folder or **removed** from the website. This means pages that link to this content will need to be updated accordingly

Once all custom content has been identified and moved into the /user_images folder, and the associated pages have been amended, you should run the **Create retina user images** action from the admin dashboard settings page. This will create additional images that are required to support mobile devices using screen scaling

Themes, Widgets & Previews

FEATURE: The colour picker pop-up used throughout the admin area (theme, widgets, slides, tiles etc) has been replaced, mainly for DRY (don't repeat yourself) code optimisation. It has all the same functionality as the previous colour picker. The colour picked from the logo/slide image can be tweaked in the top-left corner HEX box. The previous picker allowed you to do this in the bottom-right colour field

FEATURE: A fake shopping cart is now displayed in theme & widget previews so the admin user can see and test hover colours in headers and menus

FEATURE: In slider widget previews, if no slides exist to be previewed, the default slider is displayed and the slider type cannot be changed

FEATURE: 8-colour widgets contain numerous undocumented improvements and bug fixes. Mobile responsive is greatly enhanced. We have deliberately avoided making any of these improvements to 4-colour widgets as these are extensive changes and could make customised theme and client branding look quite different to the design intended

CHANGE: Social media icons have been added to Minimal footer as they are not displayed anywhere when minimal footer is used with certain combinations of header and menu widgets

CHANGE: Abstract header when used with modern, basic and minimal themes used to have two different layouts; one with the logo left-aligned and another with the logo centre-aligned, which changed based on your choice of menu widget. The left-aligned design has been dropped so now Abstract header will always display the logo in the centre (8-colour widgets only)

CHANGE: General undocumented UI changes & fixes on 4-colour widgets (headers, menus, and footers)

CHANGE: The 'requires logon' and 'published' checkboxes that previously displayed on the edit widget pages have been removed

CHANGE: Improved display of products on the flex slider

FIX: Basic layout with abstract header and modern menu: search was missing from the menu

FIX: Abstract theme with basic header did not centre-align contact on mobile devices (8-colour widgets only)

FIX: Modern header did not centre-align contact details on mobile devices (8-colour widgets only)

FIX: Menu button was not visible on mobile devices when menu background colour = theme colour (8-colour widgets only)



Miscellaneous

FEATURE: The pathway element that appears directly below the menus and is designed to provide meaningful navigation around the website has been completely re-worked, removing it where it provided no useful navigation or resulted in bad navigation such as OOPS pages or asking for administrative logins, and adding multiple levels of navigation in complex areas such as Admin client branding or end-user quote and order creation

FEATURE: Improved access denied behaviour when URLs require logon. If a client account tries to access an admin page they get a different error, the login prompt will hide the signup UI in B2B modes, and admin logins will now correctly navigate to the intended page after login

CHANGE: Product weight now displays as 'Pack weight' or 'Unit weight' in product details

CHANGE: News URLs are now blocked in B2B branding mode because we do not have any UI to display news in B2B mode

FIX: Resolved mis-aligned and/or mis-sized buttons throughout the client and admin areas of the website. This was particularly obvious on the quote and order request forms, which have been updated to match the checkout wizard button styles

FIX: B2C login did not redirect to the account landing page

FIX: Offices could be created with duplicate codes in My Account

Quotes, Orders & Checkout

FEATURE: Cookie handling in quotes and orders has been completely re-worked so that quotes, orders and their associated requests tabs now retain their own setting, whereas previously these settings were shared. This resolves a number of bugs, such as the size filter contracting when the quote or order tab was switched to the requests tab. Status & size filtering on the quote/order and requests tabs will now be remembered. Pagination choices (thumbs/list etc) and page numbers are also now remembered

FEATURE: Quotes and orders now respond directly to the ?request=true or ?request=false URL parameter to control whether the quote/order or request tab will be displayed

CHANGE: Resetting the quote or order list will now retain the tab you were previously on and only reset the cookies/settings relating to that tab

CHANGE: Cancelling template quote & order requests now redirects to the templates list instead of the main quote or order lists

CHANGE: B2C guest accounts that have not completed checkout will now automatically return to checkout on login instead of displaying homepage which is more logical

FIX: The account price threshold (which is a net value) was being applied in print orders as a gross (tax-inclusive) value for clients in Accura that were configured to include tax. This is now applied at net subtotal level

FIX: Delivery option free delivery threshold (which is a net value) was being applied in print and store order as a gross (tax inclusive) value for clients in Accura that were configured to include tax. This is now applied at net subtotal level

FIX: Store orders with statuses of draft or in the approval process could not be submitted if there were unedited eDoc items in the current user's basket

FIX: Client branding date format was not used correctly in requests when domain date format was MM/DD/YYYY and client date format was DD/MM/YYYY

FIX: Print order form subref field moved below the reference when validation failed which did not look good

FIX: Quote and print order forms did not filter offices from drop-lists based on security permissions

FIX: Job types were visible without being logged in and displayed broken UI



Admin Area

FEATURE: Online help and info icons have been updated in the admin area product pages, and the admin toolbar icons have been updated

FEATURE: Improved the Search and Sort by UI in admin accounts, products and basket items

FEATURE: Settings UI for domains and client branding has been improved and updated. The domain 'view settings' area is now grouped into settings categories, and some additional technical settings have been added

CHANGE: Uploading a logo in the Client branding Settings tab now removes the 'upload' button; removing the logo re-displays the 'upload' button

CHANGE: Admin account will no longer see logged in menus when viewing the website outside of the dashboard area. They will only see the 'Admin' menu that takes them to the dashboard

CHANGE: Admin menu items and pages default quantity per page has been increased from 5 to 15 records, with alternative values of multiples of 25 up to 60 records per page

CHANGE: Admin domain tiles actions toolbox has been removed to ensure that 4 tiles will always appear on medium browser widths. The New tile button now appears beneath the font settings

CHANGE: Banner settings in Admin area have been renamed to 'Welcome banner'

FIX: Client branding pages did not allow creation of new pages once 4 pages had been created for the client, and also did not display the page navigation controls

FIX: Client branding tab displayed reference/subref label fields when no client settings existed

FIX: Viewing the client branding Tiles tab messed up the formatting on the Integrations tab

FIX: Account landing pages were not removed unless they were first set to 'home' before subsequently changing them to something else

FIX: If account landing page was set in the security profile it was applied at login, but did not apply on subsequent homepage navigations

FIX: You could view the admin dashboard & pages list by logging in with a client user account via direct URL to /pages

FIX: When editing a top-level menu, newly created sub-menu items were not displayed until the 'Click here to reset cookies' link was selected

FIX: Multiple undocumented changes & bug fixes have been applied for correct operation of admin area menus

FIX: Domain tiles were not reading/displaying the previously saved font settings

FIX: Deleting a domain did not delete linked tiles. Improved domain delete warning

FIX: The settings action 'Create legacy retina images' was not displayed after running the 'Upgrade database' action. This is required to support screen scaling on laptops and mobile devices without slowing down the website performance

FIX: Cookie handling throughout the website has been re-worked resolving multiple undocumented bugs in the admin area

Emails

CHANGE: Account email actions in Admin edit account page are now hidden when client email notifications are disabled

FIX: Outstanding request reminder emails no longer include unsaved store orders as they cannot be seen in the request list. They were also being sent to B2C accounts who had not yet completed a checkout and cannot access the order requests list. These scenarios are already covered by the Outstanding basket items reminder emails

FIX: Basket item reminder emails did not convert currency values or display currency symbols

FIX: Suspend and unsuspend email notices sent by Accura client sync were not always sent from the correct domain

FIX: Rejecting a quote or order request in Web Console with more than 255 characters in the rejection reason did not send the rejection email from the website



Accura Data Sync

FEATURE: Accura office sync now includes a contacts array which will be used in future releases to support multiple contacts linked to a single office

FEATURE: All client-linked data in the AOL database is now mass-updated on client sync to correct errors in legacy data where domains do not exist

CHANGE: Client domain links for domains that do not exist are now removed from the AOL database during Accura client sync

FIX: Domains that did not exist in legacy Accura data triggered crashes during client data sync

FIX: Offices were not updated with the correct domain_id during Accura data sync

FIX: Delivery charge descriptions that sync back to Accura when free delivery thresholds are met did not convert currency values or display currency symbols

Technical

FEATURE: Numerous DRY (don't repeat yourself) code optimisations have been applied throughout the app. Many of which could provide performance benefits or resolve unknown bugs, but are mainly to improve the stability, readability & subsequent maintenance of the code

CHANGE: Much of the old code remaining from version 3 has been deleted from the codebase

CHANGE: Legacy support for browser cookie crashes on V5.3x websites has been removed to improve performance on first load

FIX: Missing settings records could trigger app misbehaviour

FIX: Various undocumented technical changes & fixes



Changes in AccuraOnline 6.20 Hotfix 3 (31st October 2022)

Performance

CHANGE: Some performance optimisations have been back-ported from rails6 development branch to the public release:

- Admin user dashboard loading time reduced from 4 to 0.4 seconds. Approx 10x faster!
- Admin user homepage reduced from 5.4 to 0.5 seconds. Approx 10.8x faster!
- B2C homepage reduced from 2.2 to 1.2 seconds. Approx 1.8x faster
- Client account homepage reduced from 1.6 to 0.7 seconds. Approx 2.2x faster

User Accounts

CHANGE: Removed minimum character requirement on user account first and last names in My Account

CHANGE: Added additional error messages to password reset forms for non-active status accounts

FIX: My Account displayed the administrative filters for the landing page if a landing page was specified. These should only be available to the Admin account when editing user accounts

FIX: Resetting a user password in B2C branding mode did not add existing basket items to the user's basket

FIX: B2B branding mode reset password validation did not display error messages

User Interface & Themes

CHANGE: Top-level menus with links did not trigger on mobile on modern, minimal and basic themes. They will now display a new item to 'show' the top-level menu

FIX: Theme colour picker pop-up UI fixes. Wrong default logo was used on some 8-colour widget combinations

FIX: Client branding footer widget primary background colour assignment applied to secondary text/button colour

Store, Checkout & Print Orders

CHANGE: Prepaid products are now hidden from the B2C store when not logged in. This avoids the 'This product is unavailable' message

CHANGE: Required by date in print orders and checkout is now automatically populated according to the minimum lead times configured in Admin settings and Accura products

FIX: Contact drop-lists in print orders and checkout wizard were not disabled when the current account did not have the 'View data owned by other users' permission

FIX: Order invoicing tab was broken when view deliveries permission is denied

FIX: Editing store orders for approval checkout wizard step1 basket item deletion did not work

FIX: Cancelling draft store orders with missing basket item records triggered a crash

Technical

CHANGE: Added custom HTTP 403 (forbidden) page to render an empty browser when malicious IP addresses have been blocked at Apache web server level

FIX: Resolved issues with database table creation during migrations and initial setup on MySQL 8.0

FIX: Various undocumented technical changes & fixes



Changes in AccuraOnline 6.20 Hotfix 2 (1st February 2022)

Products / Store

FEATURE: Added support for Accura product descriptions containing HTML coding. HTML is now converted to pure text where required for correct website functioning

CHANGE: Improved handling of product list filter accordions to prevent ticked filters from being hidden by collapsed accordions

FIX: Product list applied filter browser cookies in error when URL parameters were present, resulting in potential empty lists

FIX: Product owner filters displayed the 'all products' option when all client owned products were filtered out by the use of other filters

FIX: Product owner filters were enabled when public products existed but were all suspended status

Miscellaneous

CHANGE: Removed large proof image preview and clarified function of proof download button on proof view page to avoid user confusion

CHANGE: B2B password and activation forms UI standardised to match the login form style

CHANGE: Minor UI changes and fixes to the various password and activation forms

FIX: Changing passwords for users or admin accounts could result in bad URL navigation, such as resetting the Admin dashboard to the first domain, losing the current tab in My Account, jumping out of client branding and in one scenario crashing the website

Admin Area

FEATURE: Added subref field tokens `{{subref}}` and `{{subref_bold}}` to request, order, delivery and invoice email notifications. Added `delivery_email {{delivery_email}}` to request email notifications. These new fields can now be applied using the Email notifications editors

FEATURE: Admin accounts list now supports search on the `account_id` and `client_id` values

CHANGE: Improved admin accounts list record selection to work on full row select instead of clicking directly on data values

CHANGE: Admin product link & landing page filters are now hidden when they have no entries to display. If all filters are hidden the 'select filter options' area will disappear

CHANGE: Admin product basket item lists description column is now truncated to a maximum of 50 characters to improve layout

CHANGE: Updated the hidden Admin offices list with client name and office address columns

FIX: Resolved various issues with page navigation on the client branding accounts tab

FIX: Client branding accounts tab could display an empty list after previously viewing a client with multiple pages of accounts

FIX: Admin product link & landing page filters did not appear when editing data that was previously saved before the 6.20 upgrade

FIX: Outstanding basket items reminder emails contained product descriptions instead of basket item descriptions

FIX: Fixed issues with creating new offices and editing existing offices from the hidden Admin offices list



Quotes & Orders

- FIX:** Free delivery was not calculated in print orders or checkout wizard when the initial order value exceeded the default delivery method free price threshold
- FIX:** Quote, order and request lists tab switching did not work on Abstract theme
- FIX:** Fixed typo in print order custom delivery address form
- FIX:** View store order page crashed when products were missing and display product codes was enabled
- FIX:** Reverted checkout permissions change introduced in 6.11 to potentially improve app stability

Accura Data Sync

- CHANGE:** Accura order request data sync will no longer send the text "(free if over xx)" in delivery charge information unless the delivery charge was actually free
- FIX:** Accura order request data sync crashed if orders had missing delivery charge records
- FIX:** Accura order request data sync sent an erroneous delivery method of 'value' when delivery options were in use. The delivery method is now blank when delivery options are in use

Technical

- CHANGE:** Removed upgrade support for versions of AccuraOnline prior to 6.03
- CHANGE:** Technical changes to office paginations to retrofit improvements from rails 6 (version 6.50)
- CHANGE:** Technical improvements to page navigation controls on accounts, basket items and products
- CHANGE:** Renamed default session cookie value for rails 6 (version 6.50) cross compatibility
- CHANGE:** Removed unused https_protocol port setting from config.yml documentation
- FIX:** Cookie prefix setting in config.yml was not documented correctly
- FIX:** Retina image actions in Admin settings should not appear on new databases
- FIX:** Debug text appeared on Finish your Upgrade section in settings between upgrading the database and creating retina images
- FIX:** Resolved various website issues reported by automated crash reports



Changes in AccuraOnline 6.20 Hotfix 1 (4th November 2021)

Products / Store

FIX: Public products were not displayed in the store or Admin product lists on domains running in B2B or B2BH branding modes

FIX: Product filter checkboxes in domain settings and client branding could not be checked or un-checked

FIX: The client branding setting 'hide public products in store' was visible in B2B branding modes when it should only be visible in B2C branding mode

Checkout / Addresses

FIX: Office address cards in the checkout billing and delivery steps could not be selected on mobile devices

FIX: Searching the office lists in checkout billing and delivery where only one office was returned would cause the office search/sort header to disappear after selecting the office

Miscellaneous

FIX: Resolved a number of issues that could trigger crashes on Accura data sync when expected data was missing from the database



Changes in AccuraOnline 6.20 (11th October 2021)

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

Address Areas (Checkout & My Account)

CHANGE: Minor wording changes have been applied throughout the addressing areas

CHANGE: The heights of address cards have been reduced as much as possible based on the address format (UK or overseas) and also if phone and email details are being displayed. This minimises wasted screen space, especially for non-UK users

CHANGE: Global search via the website header or menu area can still be used to perform address searches in the 'checkout billing/delivery' and 'my account addresses' areas as in previous versions. The Address search text entered via the global search feature will automatically populate the address list search text field in 'checkout billing', 'checkout delivery' and 'my account', and vice versa

CHANGE: In the 'checkout billing' and 'checkout delivery' steps, the currently selected address is always excluded from the list of addresses below the search and sort header (if these are being displayed in the first place). This design felt more intuitive than having the address display in two places. My account does not behave in the same way as there are multiple actions available on addresses such as "set delivery", 'edit' and so on

CHANGE: Checkout delivery step: contact phone and email values are now displayed for client accounts in the current address details card. Previously this only worked on B2C accounts

CHANGE: Checkout delivery step: phone and fax are now both required fields in custom addresses

CHANGE: Checkout billing step for a B2C account that had previously submitted a store order request no longer requires you to select the previous address card to go to next step

CHANGE: Extensive code refactoring and rewrites have been made to the addressing areas of the website which may bring about undocumented changes

FIX: Resolved broken layout issues in the custom address forms when empty fields triggered validation messages

FIX: Entering custom delivery details without entering a company name, or selecting an office without a company name did not use bold text for the first address line displayed in the current address card

Website Searches

FEATURE: All admin searches now display a reset icon on the right of the search entry text box to reset search text

FEATURE: Added text search to Admin news which returns matches on date and title

FEATURE: Added text search to Admin job types which returns matches on ID, code and description

FEATURE: Added text search to Admin pages which returns matches on name, title and last update

FEATURE: Added text search to Admin security profiles which returns matches on ID, name and description

FEATURE: The Admin accounts list now supports searches on client code, client name, and security profile name

FEATURE: The Admin client branding list now supports searches on ID

FEATURE: The Admin delivery options list now supports searches on charged by

FEATURE: The Admin domains list now supports searches on ID and name

FEATURE: The Admin email notifications list now supports searches on comments values

FEATURE: The Admin product list now supports searches on the eDoc template name

CHANGE: All searches throughout the website have been standardised to trigger automatically 0.5 seconds after the user stops typing

FIX: Text searches in 'checkout billing', 'checkout delivery', 'my account', Admin 'products', and Admin 'accounts', have been fixed to avoid problems with special characters or spaces causing invalid searches, incorrect address formatting on specific search terms, and browser refreshes triggered by pressing return in the search field. This will be expanded to other search areas (mainly the admin searches) in a later release

FIX: Admin accounts list searches did not highlight the search text in search results

FIX: Admin spec options searches did not retain the currently selected type filter value

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Mobile Responsive Support

FEATURE: Improved performance on high resolution displays using screen scaling (e.g., mobile phones and high-end laptops) by generating 'retina' images for all website images. Retina images will be created during upgrades and will be maintained automatically from then on

FIX: It was not possible to enter new addresses on small mobile screens that were not tall enough to display the full contents of the address form. The layout of the form has been widened for mobile users, and allows vertical scrolling when it still doesn't fit on the mobile screen

FIX: The checkout wizard B2C user sign-up form displayed the fields in the wrong order on mobile screens

FIX: Resolved issues with the 'back' and 'next' buttons on mobile screens overlapping each other during checkout wizard sign-up and existing account logon

FIX: Improved the layout of the B2B signup form for mobile devices

Retina Image Creation

Retina images are created using the 'Create retina images' action displayed in Admin settings after an upgrade. This generates images for products, quote/order templates, user account photos, logos/banners, slide, tiles, and (if you have the eDocBuilder module) product order artwork thumbnails. In order to prevent excessive amounts of image processing and use of web server disk space, these images are limited in various ways:

- Retina images are only generated for data that is likely to be accessed frequently by end users. Images relating to legacy data that is not likely to be viewed are not processed
- There is a default limit of 500 images that will be processed at a time. If there are more than 500 images, the 'Create retina images' script will need to be run multiple times until it processes all applicable images. This will be reported to the Admin user when running the action
- The limit on images processed can be overridden by entering a direct URL specifying a new limit, for example to process 1000 images instead of 500 you would enter `/create_retina_images?limit=1000`
- It is possible to process retina images for all legacy data regardless of its age by running the website in debug_ui mode via config.yml. This will cause an additional action to appear 'Create legacy retina images' that will perform an exhaustive image conversion on all images stored in the database
- An alternative to using debug_ui mode to create legacy images is to enter a direct URL specifying legacy mode, for example `/create_retina_images?limit=500&legacy=true`

User Images Folder Support

FEATURE: Added a standard folder '/public/user_images' that we can use to upload customer-provided content when requested. We need to use a standardised folder that is excluded from the source code management. If images are found in this folder, the website offers to create retina images for them on the Admin settings page

Note: user-uploaded images will need to be moved to this folder during upgrades to 6.20 and all links to these images (for example in custom page records) will need to be updated to point them to this new location. ***This should be flagged up by Accura support prior to installing upgrades***

Online Help

CHANGE: Most of the new online help content is only visible when logged into the Admin account. Only the currently installed AccuraOnline version remains visible when not logged in, or when logged into a client or B2C account. This version information can also be accessed via the manual URL: `/version`

CHANGE: Version history for AccuraOnline releases between 5.00 to 5.35 has been removed from the Online help area. This information is available upon request from Accura support and is contained within the historic Accura new features and release notes guides

FIX: Outdated default logos appeared on the Admin area toolbar when a website was not using a custom logo image

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User & Admin Products

FEATURE: The product 'lead time' from Accura now displays on the product details page for both Admin and end users. Previously lead times were only visible when items were out of stock. This requires the 'View stock levels' permission

FEATURE: The product owner (client or public) displays on the Admin product details page when running the website in B2C mode

FEATURE: The product ID as used in Accura now displays on the Admin product details page

FEATURE: The last selected tab (products or basket items) is stored for the Admin user account

CHANGE: The Admin view products thumbs view has been removed as it wasn't useful to display items in baskets and stock levels

CHANGE: It is now easier to click in what appears to be empty space around product details in the end user product lists to go to the product details page

CHANGE: The upgrade script that runs during upgrades will delete legacy basket items for deleted products and deleted accounts to prevent them from appearing in the new basket item lists

CHANGE: Extensive code refactoring and rewrites have been made to the products areas of the website which may bring about undocumented changes

FIX: The Store menu did not automatically disappear when the logged in account did not have the view products permission. The quotes, orders and proofs menus however did behave like this in previous versions

Custom Product Filter URLs

The new **Product Owner** filter can be used in manually entered URLs when creating custom links in the Admin area. The 'owner' parameter should be added to the custom URL with one of these three values: 'client', 'public' or 'both'

When building product filter URLs, the first parameter must always be `?filter=true`, and you can specify the remaining parameters (which correspond to the filters you are applying) in any order prefixed with an ampersand (&). Each filter name is followed to an equal sign (=) and then the value for that filter

There must be no spaces in the entire URL. If any of the filter values have spaces in them, you must replace the spaces with '%20'. Values must be entered in proper case. You cannot use non-alphanumeric characters in values otherwise you will create an invalid URL unless you are technical enough to work out (via the internet) what the correct URL encoding is for whatever non-standard characters you are using, which is beyond the scope of this document

For example, to display only client owned products and not filtering by any other settings you could use this URL:
`/products?filter=true&owner=client&category=&group=&colour=&finish=&depth_and_width=`

Or, to display publicly owned products filtered by the group value 'Stationary' and size value 'A4 Portrait' (note the space in the size value) you would use the following URL:

`/products?filter=true&owner=public&category=&group=Stationary&colour=&finish=&depth_and_width=A4%20Portrait`



Emails, Automated Reminders & Clean-ups

FEATURE: When running the 'Outstanding basket items reminder', any accounts that do not have permission to use the checkout will NOT be emailed because it would be impossible for them to access their basket items. The same applies to the automated daily basket reminders. If there are any issues with permissions, running the 'Basket reminders' action from the Admin area will report back to the Admin user how many accounts have been skipped due to missing permissions

FEATURE: Similar permission validation is performed when running the 'Outstanding requests reminder' email, except in this scenario each outstanding request is tested against the account permissions and then removed from the email content if the account does not have the required permission to submit or cancel the request. The email will not be sent if the account lacks permission to respond to any of their outstanding requests. This also applies to the daily reminder emails and is reported back to the Admin user when running the 'Request reminders' action

CHANGE: The permission handling and reporting of the old 'Outstanding request approvals reminder' has been updated to reflect the behaviour of the two new reminder emails as described above

CHANGE: All emails including request tables now contain user-friendly values for the request 'status' and 'type' values, which can be cryptic and mean very little to end users. This also includes the table displayed when using the 'check payments' action in Admin settings

CHANGE: The 'guest order request confirmation' email has been renamed to 'B2C order request confirmation' to clarify terminology (the word 'guest' was considered confusing)

CHANGE: The 'outstanding basket item reminder' will automatically delete basket items for deleted products each time it runs to avoid sending emails about products that would be impossible to order

CHANGE: The upgrade script that runs during upgrades will delete invalid store orders with no items on them as a result of their basket items belonging to deleted products. This ensures that request reminders cannot be sent for empty store orders

CHANGE: The upgrade script that runs during website upgrades will remove any invalid permissions that happen to exist on legacy security profiles to avoid issues with automatic basket item and request notifications for accounts that do not have the necessary permissions to respond to the reminders

CHANGE: All automated email reminders are now triggered on the **Accura Webmon active user list download**, which defaults to once every 10 minutes. Previously these emails were triggered either by homepage views or the Webmon pending requests interval which is typically set between 1-3 seconds, causing high website load. Provided Accura's Webmon link is running for a 30-minute window after the expected time for the email to be sent, it will trigger. Failing this, the email will not trigger again until the following day. It should be noted that if the account list download is disabled in Web Console by setting 'Check for active users lists every (seconds, 0=never) then ALL automated emails will be disabled including the tests for a working Accura link and requests that have failed PayPal payment

CHANGE: Extensive code refactoring and rewrites have been made to the automated and on-demand email capabilities of the website which may bring about undocumented changes

FIX: The 'outstanding requests approval reminder' email did not work as expected on multi-domain websites

Custom Clean-up URLs

The **Remove old requests** and **Remove old baskets** actions listed in Admin accounts & products can be run with a user-specified number of days instead of selecting from the 30, 60 and 90 day options available. After logging into the Admin area, enter a direct URL after your website domain specifying how old in days the data should be to get deleted

For example, to remove requests over 7 days old you would run this URL:

```
/remove_old_requests_action?days=7
```

And to remove basket items over 7 days old you would run this URL:

```
/remove_old_basket_items_action?days=7
```



Admin Area: Accounts

CHANGE: The client branding accounts tab no longer displays the client code or name, as this was pointless information when you already know which client you are editing

CHANGE: The layout of the Admin account editing page has been tidied up and now displays account images properly

CHANGE: Deletion of accounts has been substantially revised to remove all associated data that is safe to delete. Previously, large amounts of orphaned data were left behind when accounts were deleted by web-disabling contacts in Accura. Some account data has to be left behind to allow artwork thumbnails to appear correctly in store orders that have been processed via Accura

CHANGE: The upgrade script that runs during website upgrades will now test for and remove orphaned data left behind where accounts have been historically removed via Accura

CHANGE: Extensive code refactoring and rewrites have been made to the accounts area of the website which may bring about undocumented changes

Admin Area: General

CHANGE: The Admin 'check payments' table has been visually improved by adding spacing

CHANGE: The 6.20 upgrade script (which appears in the Admin settings area directly after an upgrade and disappears once it has been run successfully) can now be run manually when it is not displayed in the Admin settings page. This will execute all of the upgrade script settings relevant to the very latest version, such as recreating 6.20 email templates, running database maintenance and do on. Previously it was necessary to edit the config.yml file to enable debug mode and then restart the website, now it can be done via the direct URL:
`/upgrade_database?debug_ui=true`

FIX: The menus list page control 'quantity per page' did not work as expected making it impossible to move menu items up or down if they were at the top or bottom of the current page

FIX: Check-box settings at domain-level that do not apply to clients were being created during client branding settings save, which could cause unexpected behaviour on the website. Any invalid settings caused by this bug will be removed during the upgrade

Rails Caching Preview

Rails caching is a **performance improvement** that caches frequently accessed data on the web server so it can be read from cache instead of created from scratch every time the same website request occurs. Caches of various aspects of the website are built-up over time through general end-user usage, so the website should get faster over time as more end-user requests can be fetched from the cache

There are many forms of cached data. One example would be the list of products and their corresponding filter values (group, category, size etc.) displayed for a specific client account which is based on the products the account is able to see, and extracting all of the group, category, size (and so on) values from these products to build the list of filters. Without caching, the product and product filter lists are built from scratch every time the account goes to the products page, which incurs a significant delay. Once this data has been cached, then future visits to the store page by the same account will load faster. Other areas that are cached include quotes, orders and proofs

Caching is a *preview feature* in the 6.20 release (similar to the new widget design supporting 8 colours), meaning it has not been fully tested when enabled. Caching will be disabled by default during upgrades, but can be manually enabled by Accura support by setting the cache enabled: true option in config.yml

This feature will be fully documented and tested in a future release, which will enable the cache by default

