



Version 5.21 Release Notes

Build 1 compiled on 10th November 2017



Introduction

Welcome to Accura Version 5.21

Version 5.21 is the latest release for the Accura MIS and the first to use the latest generation of the Clarion Development platform. The move to Clarion 10 does not affect the way Accura will work but it does support the latest operating system technologies and will allow us as software developers to make use of the latest tools and methods to bring you, the end-user, new features and functionality.

In addition to the upgrade to the latest development platform, Accura 5.21 introduces a multitude of new features and fixes to the MIS and its related applications.

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. If you have not already done so, please [sign up for an account](#) on our website to access protected software downloads, user manuals and other content. 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** between the previous public release 5.01 Build 10 and the latest public release of 5.21.

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 5.21 Build 1 (10th November 2017)

Estimating

CHANGE: The overs breakdown in Advanced material options now displays the running overs percentage that is being applied to each quantity.

Stock Control

FIX: It was possible to create stock journals for non-stock controlled products.

Changes in 5.20 Build 8 (3rd November 2017)

General

CHANGE: The XML option in print preview dialog has been removed as the XML.

CHANGE: File attachment browses now default their File type drop-down to "All Files"

CRM

CHANGE: The way CRM activity attachments has been overhauled and they now work in the same way as attachments do in other areas of Accura.

Stock Control

CHANGE: The Stock type control in stock materials and products has been converted to radio buttons

Web Console

CHANGE: The user interface in web console has been updated to a more modern look.



Changes in 5.20 Build 7 (27th October 2017)

General

FIX: Opening and saving certain windows would make Accura flick to another open application and back again.

FIX: It was not possible to delete a custom tab that had no child tablinks records.

Client and Supplier

FEATURE: Client and Supplier browses have a new category filter.

FEATURE: Contacts and contact office links can now be created and maintained through CSV office imports. New contacts need to have their parent office code in their CSV record and only the contact's name, phone, fax and email can be created. Phone, fax and email can be updated by a subsequent CSV import. Again, the office code will need to be in the record but the contact name must also match otherwise a new contact record will be created. If the office primary contact is updated via CSV import, the matching office fields will also change to match the contact details.

FEATURE: The mapping and route planning function is now available directly on the View Client, View Prospect, View Client Offices, View Supplier and View Supplier Offices browses via a toolbar button and an option on the right-click menu.

CHANGE: To support legacy operating systems, the Accura internet browser was set to emulate Internet Explorer 8. At some point during Google Maps development this started causing issues with Accura's map and route planning feature. Accura will now set the IE emulation based on the host operating system. Users on legacy operating systems will find that maps and route planning will not work correctly if at all. It is recommended all Accura PCs run Windows 10.

CHANGE: The "Is Residential" flag that was previously on the map and routing interface has now been moved to the Client, Supplier and Office maintenance windows. This makes the feature more reliable and is needed for future functionality.

FIX: An internal client related ID was not being set correctly on new clients meaning it would be impossible to select an accounts office into client maintenance.

FIX: An internal client related ID was being incorrectly set by the accupg program during an upgrade meaning accounts offices would not be pulled into invoices correctly.

FIX: The Subcategory drop down in the Select Product browse when called from client maintenance was not working. This was an underlying problem in Clarion 10 and could potential caused problems throughout Accura which should now be fixed.

Estimating

FEATURE: View Pending RFQs now features a Respond button which will generate an email to the RFQ's originator any issues with the request can be clarified.

CHANGE: The number of decimal places used in an internal variable when calculating profit mark-up curve has been increased to increase accuracy for larger quantities and pricing breaks.

CHANGE: Users will now be asked to confirm a quote section delete.

CHANGE: The Quote Proposal User field has been renamed to Signatory and reconfigured to now be populated with the client's default signatory.

FIX: Running overs quantities were being calculated as raw sheet values when the overs strategy was based on Running Sheets.

FIX: An optional extra that had no quantity would cause other optional extras in the same quote not to print their prices on the quote letter.



FIX: Selecting a library template into an RFQ would retain unwanted quantities.

FIX: The system email address was not being populated in quote based layouts

Order Processing

FIX: Works orders were not using the parent product order's delivery address which could cause confusion on the shop floor.

FIX: Changing the status of an order in View Orders would cause Accura to move behind another open application.

FIX: Inserting a manual order item was setting the mark-up value to -100% meaning this would calculate a sell price of 0.

Purchase Ordering

FIX: Sundry-type purchase order items would display seemingly random description text.

Stock Control

FEATURE: Multiple products can be web enabled/disabled by tagging them in View Product Database then using the Web-toggle option in the right-click menu.

CHANGE: The initial field focus of a stock or product material window has been changed to Subcategory from the Stock-type field to prevent accidentally changing of this field.

CHANGE: Products with quantity choices will have their minimum and maximum sell values determined by the values of the quantity choices.

CHANGE: Products that have no maximum sell quantity will have this value set to 9,999,999.

FIX: Entry of a thereafter figure was being enforced in products meaning it was impossible to set up a zero-cost product.

CRM

FEATURE: Suppliers can now be viewed from within CRM via the Prospect menu.

Accura Online

CHANGE: Works order quotes and orders will no longer sync to the website to prevent end-user confusion. During the upgrade, web tasks will be generated to remove all existing works order quotes and orders from the website.

FIX: Contact web tasks were not being correctly generated for non-web enabled contacts.

FIX: Print orders were not syncing values for depth and width.

FIX: The web monitor application program would not retry web tasks if the server was offline.



Changes in 5.20 Build 6 (7th September 2017)

General

FEATURE: Default field values now includes a Usage notes section to allow notes to be made on more complex field value setups.

FEATURE: The main toolbars in Accura and CRM can be set to a variety of size in their respective Default - General settings.

FIX: The accupg application was resetting custom tab settings for required tabs to their defaults when updating from an earlier version of 5.20 Beta.

FIX: Email dialogs generated from within other procedures were allowing operation of the toolbar in the parent procedure that could lead to unexpected results.

FIX: Opening and saving a default field value was removing the field name value and preventing saving.

Estimating

FEATURE: Estimating Defaults now has an Overs Basis selection that applies to quotes when an overs strategy has not been selected or manually overridden.

CHANGE: When re-tendering an outwork operation in copied quote, the original supplier will no longer be automatically tagged.

FIX: Ink materials were being added to sections multiple times.

FIX: Changes to Width and Depth in a cylinder-type tool were not being retained.

FIX: The Material column in a quote's section was not display the full material code if it was over 15 characters.

Order Processing

CHANGE: A print button has been added to the View/amend change orders browse.

Proofing

FIX: Recording a response to a proof would change the header record's status as Complete but leave the corresponding item record's status as Pending.

FIX: Updating a proof response was not regenerating the associated proof XML file.

FIX: Some proof related fields were missing from proof XML files. These included Milestone, Proof response fields and External URL.

Purchase Ordering

FIX: Outwork purchase order items were using the table description, not the order item description.



CRM

FIX: Copying quotes and orders from within CRM was not copying the sections and workings correctly.

Import/Export

FIX: Purchase invoice due-date field was always the same as the invoice date value in the Xero export format.

Changes in 5.20 Build 5 (8th August 2017)

General

CHANGE: Various icons throughout the user interface have been updated.

FIX: The Send-to function would post an error after printing or cancelling the print preview.

Estimating

FIX: An RFQ's Rep value could be lost when converting to a quote.

FIX: Press linked materials, labour and outwork were not being pulled through into quotes.

FIX: Commission rates wouldn't display for new quantities added to a quote until it was saved and reopened.

FIX: Private notes being pulled through by a default setting in the Private tab setup would populate quote specification tabs that didn't already have text when a job type was applied.

FIX: The show tax button was not always working correctly on the quote Analysis tab

Order Processing

CHANGE: When copying an order and re-quoting, the user will be prompted if they want to use the quote's specification text or the original order's.

FIX: Invoicing an order would change its UnitPer value.

FIX: Editing an order item in a product order could change the sell price when tabbing across columns.

Purchase Ordering

FIX: Outwork purchase order items used the wrong job specification text when the 'Use full order job specification for purchasing' setting was enabled in the outwork item.

CRM

FIX: The tool tip in Activity profile that would appear when hovering over a record was not working correctly. It now only displays when hovering over the Subject column, doesn't require a record to be highlighted and will trim the text displayed if there is too much to display comfortably.



Accura Online

FIX: Services orders raised for single basket item products were not copying the specification text from the template quote.

FIX: Product order items on store orders were not numbered correctly. The ACCUPG patch will re-synchronise the history of store orders during the upgrade to resolve this.

Changes in 5.20 Build 4 (14th July 2017)

General

FIX: The Select Table Items browse would corrupt when switching to the Options tab.

Client and Supplier

FEATURE: View Clients and View Suppliers can now show all contacts for all records when "Primary contacts only" is unticked. This means column-sorted keyboard location can be used for all contact records making it easier to find specific contacts.

FIX: Custom queries in View Clients using CON fields would not resolve.

Estimating

FEATURE: Overs profiles now have a setting to add extra material for each plate in a section.

FIX: Quitting Accura when a quote needed re-calculating and saving would cause the application to loop.

Order Processing

FIX: The header bar of a Quick Order would not resize correctly.

FIX: Recording a milestone in a proof response wasn't updating the parent order's In Department field.

Stock Control

FIX: Manually ordering works-order products were not creating stock records or creating the order as a works order.

FIX: Copying and cancelling a stock material or product could create a rogue table entry.

FIX: Products linked to template quotes were not using the quote run on price as the thereafter rate

CRM

FEATURE: Activities raised after completing another can be unlinked from the parent record i.e quote by using the reset button.

Import/Export

FIX: Xero export date formats were hard-coded to DD/MM/YYYY meaning Xero versions that require other date formats would reject the import files. The Xero format now using the Windows locale to format dates.



Changes in 5.20 Build 3 (19th June 2017)

General

CHANGE: We have updated our network communication library DLLs and added new options to some browses to address certain issues presented by using Office 365.

CHANGE: The Send-to template has been updated and now includes more export options.

CHANGE: US and Canadian translation files have been updated.

FIX: The 'Use an overs profile' hotspot was too large in the Defaults – Estimating

FIX: Selecting a job type into a quote or order after the specification tabs had been populated would blank out the specification values.

Estimating

CHANGE: Two quote workings fields have been renamed – QTW:Rate is now QTW:CostRate and QTW:Total is now QTW:Net. Customers who use these fields in custom Accura workings reports or ODBC queries will need to amend field names accordingly.

FIX: Quote proposal item records were not correctly formed and so layouts using the ITM:Description field would print incorrect information.

Order Processing

CHANGE: The order section material browse has been changed to the select table items format.

FIX: The View Attachments - Folder button wasn't working when the window was called from Update Change Order.

Deliveries and Invoicing

FEATURE: Fields have been added to the Report Designer to support the new number of pallet fields in delivery notes and delivery note items, HDR:NoPallets and ITM:NoPallets.

FIX: Service-type delivery notes and invoices would print two pages regardless of the number of items.

Purchase Ordering

FIX: Purchase Invoice validation was including the current record in the validation routine.

Stock Control

CHANGE: When linking a product to a template quote, Accura will offer to assign pricing as per the linked quote.

CHANGE: When linking a product to a template quote the price sync is chosen, Accura will set the cost per and sell per to match the quote's unit price. If the unit price is job, the per fields will be set to the first quantity of the quote.

FIX: Products were having their minimum pack quantity set as the pack quantity value which could be an issue for non-Accura Online users as this field would not display in the UI.

FIX: Products linked to template quotes will now offer to synchronise quote prices when changing the cost per or sell per values.



CRM

FEATURE: There is now a button to view the order linked to a CRM service ticket in view-only mode.

RDC

FIX: The activity progress bar in the RDC console was not working.

Time and Attendance

FEATURE: The Attendance report now has the option to display users who have no data in the specified date range to allow for calculation of holiday and sick pay.

AccuraOnline

CHANGE: Post-upgrade synchronisation of data to Accura Online has been changed from one 'syncall' webtask to individual webtasks to prevent overload of bandwidth.



Changes in 5.20 Build 2 (30th May 2017)

General

- FIX:** Some field labels for overs types in Defaults - Estimating weren't aligned correctly with their entry fields.
- FIX:** A rogue mark-up rate record could be created when switching a mark-up profile to use multiple rates.

Client and Supplier

FEATURE: It's now possible to view client and supplier office notes from their respective browses by clicking the Notes button.

- FIX:** Clients who had no contact marked as the primary contact would not display in View Clients.

Estimating

- FIX:** Phrase drag and drop to quote specification was not working as the spec fields were not switching focus correctly.
- FIX:** Quotes specification text was not retaining any changes after the quote was first created.
- FIX:** Copying an RFQ was displaying debug messages.

Order Processing

- FIX:** Reprinting a job sheet could clear the order record of the next order in the database.
- FIX:** Copying an order with a unit price would not set the unit per correctly on the copy.
- FIX:** The Attachments browse when called from a Change Order was displaying all non-order related attachment records.
- FIX:** The "Print this line item" label in a Change-order item window was unreadable.

CRM

- FIX:** CRM activities tab was available in Quotes and Orders on systems that did not have the CRM module enabled.



Changes in 5.20 Build 1 (18th May 2017)

General

FEATURE: To support regions that use many different tax codes, tax rates are now displayed in the user interface in addition to the tax code. Effected areas are Delivery notes, Sales invoices, Purchase orders and Purchase invoices.

FIX: Changing the default email template wasn't retained when saving the Defaults window.

FIX: It wasn't possible to copy a Volume as an auto-increment error would be posted.

FIX: The Print button on the pop-up notepad would cause a View Open Error

FIX: Copying a job type would not copy auto-includes or field defaults

Tables

FEATURE: Tools can now have quote specification text. A new field has been added to a tools Extra tab.

FIX: Importing tools into the material database was setting an incorrect base quantity for each record.

FIX: Inactive materials were showing by default in the Adjust Material Prices window. Now they will no longer display unless the "Include inactive items" checkbox is ticked.

FIX: Copying an ink material and removing the rate would retain some of the cost information that was not editable in the UI.

Estimating

FEATURE: A date stamp button has been added to the Quote - Notes specification tab

FEATURE: An ellipsis button has been added to the quote section wizard where the users can easily add a long, ad-hoc section label. This functionality is in mind for systems that may use unique section labels. To this end, these ad-hoc labels are not stored in the database.

FEATURE: A Send To option has been added to Quote - Notes tab.

CHANGE: The RFQ window is now resizable meaning it's now possible to view all specification tabs at one time.

CHANGE: The way Optional Extras print on the estimate layout have been changed to use two fields instead of one. This will improve the layout of the Extra on the estimate layout. The LOC:Extras field should be replaced with LOC:ExtrasText and LOC:ExtrasPrices.

CHANGE: The origination field LOC:OrigPhrase is now available to be used on quote proposal layouts.

FIX: Custom press speeds could be reset to the default on certain circumstances.

FIX: A space at the end of quote quantity text would cause an unhandled exception.

FIX: Trying to close a minimised quote or RFQ would hang the application.

FIX: It was previously not possible to copy quote workings that were marked as an optional extra.

FIX: The open attachment button in an RFQ would open the attachments parent folder rather than the attachment itself.

FIX: Mark-up profile expiry validation was not working correctly in certain situations.

FIX: If a tender email was cancelled and the quote text amended and the tender regenerated, the PDF would retain the original quote spec text.



Quote Library

FEATURE: Creating a quote from the Quote Template Library now starts a new thread for each quote. This means that now it is possible to drag sections from other library quotes to the new quote to quickly build new quotes. Previously this was not possible as the new quote would open on the same thread as the library.

CHANGE: Quote template quotes will no longer be numbered by using the internal quoteid number and instead using a sequential number stored in the system configuration file as other record numbers are.

CHANGE: The Quoteid column in the Quote Template Library has been replaced by a Reference column which displays the new template number.

Order Processing

FEATURE: A date stamp button has been added to the Order - Notes specification tab

CHANGE: The Numbering tab in an order has been moved away from the main specification area the top-right sub-tabs. This is done for technical reasons pertaining to the new user definable tab functions.

CHANGE: Orders manually changed to Invoiced that had previously had an invoiced raised but with no delivery note raised would overwrite the order invoiced value with the quote value.

CHANGE: Outwork operations that have the 'Outwork item used as click-charge' flag set to true will no longer print on the job sheet layout.

CHANGE: Various improvements have been made to the way sub-office contacts are selected in order related records.

FIX: The client type filter was not greying out the clients list when set to Any in View/amend change orders browse.

FIX: The status filter in View/amend change orders was a radio button selector instead displaying status icons.

FIX: The application would crash if an email was sent from the View Attachments browse.

FIX: The status filter in View/amend Change Orders browse was non-functional.

FIX: Invoicing a different amount to a job's quantity value would change the order's unit price value. The unit price value should always remain constant regardless of invoiced quantity.

FIX: Copying an order would set the pack quantity back to the system default value rather than retain the original's value.

Proofing

FEATURE: A note record will now be added to a proof when a proof reminder email is sent.

FEATURE: View Proofs now features a proof number locator similar in function to those found in other browses.

CHANGE: The proof acceptance note window has been redesigned to make the artwork area clearer.

FIX: Proof attachments were not being saved to disk with the correct name when the proof response was synced in from an email.

FIX: Proofs could be saved with no description which could cause issues with Accura Online.

Deliveries and Invoicing

FIX: The Delivery Wizard 'Create one delivery note per location' function was not working correctly.

FIX: The client browse format in a Sales Invoice's Delivery tab was incorrect.



Purchase Ordering

CHANGE: Purchase Invoices will flag a duplicate number should another PI exist with that number. This flag is purely to bring the user's attention to the existence of a duplicate but they will be able to proceed.

FIX: Creating a purchase order from within a material or stock view when the material had no default supplier would delete the purchase order item when selecting in a supplier.

Stock Control

FEATURE: The database field MTL:Imagefile has been enabled in the Report Designer to allow product images to be printed in order-based reports such as product acknowledgment and pick lists.

CHANGE: Stock allocations will now round to 2 decimal places instead of 4 to match stock issues and thus avoiding discrepancies.

FIX: Closing off an order that had no outstanding allocations would not remove that order from the stock close-offs window.

Job Costing

FEATURE: The job costing approval wizard now features a "Stock-close off order" checkbox which will enable any outstanding stock allocations to be zeroed out when the approval is saved.

FIX: The Job Costing Work in Progress print dialog Query Wizard was missing in the version 5.01 release.

CRM

FEATURE: A Follow-up notes field has been added to the Prospect activity profile browse.

CHANGE: Campaign, Opportunity and Ticket print dialogs would need to the user to select records after applying a filter. Now the report will print only the records returned after applying a filter.

FIX: The To Do list priority filter would change to Low if the View Orders browse was opened.

FIX: The number column in the RFQ/Quotes tab of CRM Activity Profile was only displaying 5 characters meaning longer numbers were being truncated.

FIX: Assigning a quote to an existing order would not mark the Quote Follow-up activity as Complete.

FIX: Follow-up activity status would be left as To Do when a revised quote was converted to an order.

FIX: Changing the status of a revised quote to Lost was not closing off the quote follow-up activity.

FIX: Orders made from revision quotes weren't generating a CRM Order activity record.

FIX: The date was not appearing correctly in CRM appointment planner.

FIX: The email template designer couldn't be opened from a standalone CRM.

RDC

FEATURE: The RDC context menu now has an action to allow users to view an order's attachments.

FIX: A pop-up note added to an order through the Scheduling tab of the RDC console would not be saved to the database correctly.

FIX: Orders could be corrupted by RDC users using the Scheduling tab and Notepad functions in a certain order.



Time and Attendance

FEATURE: User records now support a 9-character employee number. This field is available in the Layout Designer and can be added to customisable user reports.

FIX: View attendance was available on systems where Time and Attendance wasn't enabled.

Accura Online

FEATURE: Quote, Order and Signup requests now show which domain they originated from.

CHANGE: Order icons in Web Console could be confusing so now only product orders will show an icon

FIX: Materials created through the Stock menu would not validate on the description field which could cause potential problems in Accura Online.

FIX: Formatting text on the Web tab of a product would cause the entire HTM file to be removed from disk.

FIX: Products could be linked to template quotes that had an Incomplete status which could cause problems on the website. This behaviour has now been prevented.

FIX: Copying a product that had office owners would sync to the AccuraOnline as being owned by all offices for each client.

FIX: It was previously possible for a material to be uploaded to the website with no description value.

FIX: Proof delete web tasks were not being created correctly.

FIX: A check on template quote status is now performed on when a product that is linked to a quote is synced to the website. If the linked quote has a status of Incomplete the upload will fail.

A list of other features, changes and fixes in Accura Online can be found in the Version Info page in your website's Admin area.

Technical

CHANGE: Specification fields have been removed from quotes and orders and move to their own set of tables. This process is done automatically during the accupg stage of an upgrade. This change will significantly reduce the size of the quote and orders table and potentially make browses on network databases quicker to scroll as the data-packet sizes will be reduced.

CHANGE: Topscan.exe has been reverted to the C6 version to improve usability.

FIX: Header record print dialog windows now display records using the ReferenceNo key which resolves issues where records were sorted in alphanumeric order instead of numeric order.

ACCURA SUPPORT ONLY:

Topscan mass update syntax for Office IsLocal flag based on Postcode example:

```
CHOOSE(INLIST(OFF:Postcode[1:2], 'SO', 'PO', 'BH') > 0, 1, OFF:IsLocal)
```

MYSQL syntax for similar update:

```
UPDATE offices set local = 1 where postcode like 'SO%' or postcode like 'PO%' or postcode like 'BH%';
```

