



# **Version 5.30 Release Notes**

**Build 1 compiled on 6<sup>th</sup> June 2018**



# Introduction

## Welcome to Accura Version 5.30

Version 5.30 is the latest release for the Accura MIS and the first major build since version 5.21 and features 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](mailto:support@accuramis.com).

## About This Document

This document details all **minor features, changes and fixes** between the previous public release 5.21 Build 10 and the public release of 5.30.

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 5.30 Build 1 (6th June 2018)

## General

**FEATURE:** Report Designer tabtext fields will now work on order related header and item reports.

**CHANGE:** All reports when converted to Excel will now generate their temporary files in the user's Documents folder. This should prevent issues for users with locked down Windows profiles.

**CHANGE:** Default field values for material would previously only get applied to paper materials. They will now be applied to any material category. Due to this change, if a default field value only needs to be applied to paper materials, a CHOOSE statement should be used in the Expression field e.g. CHOOSE(MTL:Category = 'Paper', 'My notes go here: ', '')

**CHANGE:** Both material and product colour list options have been expanded to support up to 25 characters.

## Client and Supplier

**FIX:** The client 'Send order confirmation email' flag was not shown in the client maintenance UI. New contacts inherit this setting for their order confirmation preference.

**FIX:** Adding a supplier contact would attempt to send a fax if the system had faxing is enabled.

## SMS and Email

**FEATURE:** It is now possible to change an SMS template in the Send SMS dialog.

**FEATURE:** Obfuscated passwords can now be revealed as plain text for easy verification.

**CHANGE:** Email password fields now support up to 128 characters.

**CHANGE:** The 'Setup - Email' menu item has been replaced with 'Setup - Communication' menu. The Settings sub-menu item allows users to select custom settings for both Email and SMS.

**CHANGE:** The Email send log has been change to being named 'Communication send log' and now logs SMS text messages as well as SMTP emails. Its location has been moved from the Setup - Email menu to the File menu.

**FIX:** SMS option was missing from the contact tree right-click menu in View Client and View Supplier.

## Import Export

**CHANGE:** The 'Select fields to export' window for material export now has an Options tab. This is only enabled for stock systems using inventory tracking and enables the user to produce a summary export of materials rather than one that exports every stock balance record.

**FIX:** Updating paper prices via CSV import could fail when a stock enabled material was encountered in the import file.

**FIX:** Stock enabled material prices were not being updated by CSV imports when inventory tracking was not enabled.

**FIX:** Selecting a parent account for contact or office imports would open the browse behind the Select Fields to Assign window.

## Estimating

**FEATURE:** Clients and job types have a new 'Do not apply commission on jobs' option which when enabled prevents automatic calculation of commission. For maximum flexibility, this can be manually overridden in quotes by estimators with the correct permission.



**FEATURE:** Four new base-quantities are now available in labour, material and outwork operations:

TWIDTH (width x job quantity)  
TWIDTH2 (width x job quantity x 2)  
TDEPTH (depth x job quantity)  
TDEPTH2 (depth x job quantity x 2)

**FEATURE:** Quote Enquiry report can now be filtered by job types.

**FIX:** Forcing a material reselection in the section wizard could apply some characteristics of the first material listed in the material table to the currently selected material.

**FIX:** Tooling cylinders were displaying as Finishing materials.

**FIX:** MTL:Subcategory was not supporting the full 25 characters in the user interface that were available in the database structure.

**FIX:** To prevent issues with the section wizard, ink material codes have been restricted to 20 characters.

**FIX:** Linked labour prompt would not display for labour items linked to ink materials.

## Order Processing

**FEATURE:** It is now possible to change the due date and time of orders from the right-click menu and selecting Status. This will work on just the highlighted record or a tagged selection and the order(s) must have a Movable value of Yes.

**NOTE** - This will not change any current Scheduled events.

**FEATURE:** A query wizard has been added to the Order Status and Production reports.

**FEATURE:** Order Enquiry, Order Status and Production reports can now be filtered by job types.

**FEATURE:** The job sheet and work sheet print dialogs now contain an option to produce to Generate PDF version. This is a per computer setting and when switched on, PDF versions of job or work sheets will be automatically created. These PDFs can be found in the Accura Data folder in the jobsheets and worksheets folders.

**CHANGE:** ORD:Deposit and ORD:DepositPaid fields have been added to the order and job costing report wizards.

**FIX:** Orders and order items were not obeying the tax code order of inheritance rules. This was most evident when creating product quick orders but could also be seen in other scenarios.

**FIX:** Selecting a new client into an order was not updating the nominal and tax code values.

**FIX:** The View PDF and View buttons in an order's Invoicing tab were not validating on the presence of an associated invoice or invoice document.

**FIX:** Selecting a job type with its own nominal and tax code into an order was not respecting the order of precedence.

**FIX:** Copied orders where the tax rate differed from its parent quote would set the tax to be that of the quote rather than retain that of the original order.

**FIX:** Report Designer tabtext text fields were not working on order acknowledgment layouts.

**FIX:** Works orders that have their status automatically changed by status changes of their parent product order were not being marked as approved when changed to Invoiced. As a result, these works orders would remain on the Order Status report.

**FIX:** Numbering details could not be added to order or purchase order specification since tabs were separated from being contain in order records. Now if the default Printing tab is included in the specification and there is data contained in the number from, number to and number colour fields, these will be included in the printing specification entry

## Delivery Notes

**FEATURE:** It is now possible to select a Supplier as the delivery note address. This selected in the delivery note header from the Deliver to drop-down. There is also the option for Other where one-time ad-hoc addresses can be manually entered.



## Stock Control

**FIX:** Stock on-hand validation could be bypassed by editing a material cost entry before it was committed to the database.

**FIX:** Transferring non-stock code assigned order could generate an erroneous on-hand exceeded error.

**FIX:** Item ref was being validated when a non-assigned service order was being transferred to stock as a product.

**FIX:** There was no Item-ref browse in 'Transfer orders to stock' window

**FIX:** The Reason/description field in the Stock Journal adjustments window didn't stay relative to the top of the browse when the window was resized vertically.

## Purchase Ordering

**CHANGE:** When receiving a tracked stock material in the stock receipts window, it is no longer necessary to enter the View Stock Balances window. The item ref, ware house and location can all be entered in the receipt line item and the stock balance record will automatically be created.

**FIX:** After selecting a job number into a purchase order header, the order specification would not display in any items created.

**FIX:** Discounts applied to purchase order items were not recalculating the currency net value.

## Job Costing

**FEATURE:** The Profit Summary report can now be filtered by job types.

**FIX:** Editing a material job costing entry from Materials By Job Number would commit the transaction on save. This would mean that if the entry was subsequently deleted, the costing and stock activities would exist although the parent had been deleted. Now these changes will get reversed if the item is edited or deleted.

**FIX:** Adding a material entry in a costing summary where the Code field was pre-populated was not displaying that material's stock balance records.

## Sales Invoicing

**FEATURE:** Invoice exported date, time and user fields can now be viewed on the History tab of a sales invoice.

**FIX:** Adding a manual item to an itemised type invoice could duplicate all the invoice items.

**FIX:** Invoicing a delivery note was not changing the status of the delivery note to Invoiced.

**FIX:** Invoice line items raised from delivery notes weren't formed correctly.

**FIX:** Ad-hoc invoices were not using the client's specified tax and nominal codes.

## CRM

**FEATURE:** Activity types support reminder emails. This feature was designed to work with Appointments but can be set up on all activity types. The feature can be switched on in the Templates tab of your appointment activity type where you should also select a default email reminder template. The reminder email will then be sent out in the background at the notice period you've set.

**FIX:** System defined Assign-to codes were being truncated in Activity types.

**FIX:** Follow-on CRM activities were not including any linked campaign code.

**FIX:** The status field in new CRM activities would be blank.



# Accura Online

**FIX:** Web commission rates weren't being applied to live online quote and order template calculations.

**FIX:** Size codes created by web monitor were being given an invalid size unit. The accupg utility will correct any incorrect size records during the upgrade.

**FIX:** Web-enabled quotes with an incomplete status would create erroneous web tasks.

**FIX:** Dead orders were generating web tasks that could never be resolved and so would remain active.

**FIX:** Custom delivery details in an order being processed in web console would get overwritten if the invoicing details were changed. Now the user is prompted as they would be in Accura proper.

## Security

**FIX:** Users denied access to the SYS:File door could still edit job types when the job type browse was called from quotes, orders or the template library.

## Technical

**FEATURE:** A new service, Alert Monitor, will be installed on the server machine. This service is responsible for posting appointment reminder SMS and emails when Accura clients are not running. One Alert Monitor service is required per database but will only be installed by default to the primary database. If other Alert Monitor services are required, Accura support should be consulted with regards to configuration.

**FEATURE:** The installer will now automatically install the web monitor service regardless of whether the web module is activated. On multi-company install, the web monitor service will only be installed for the primary database. If the service is required for other databases, it must be set up manually.

**CHANGE:** The Chilkat and Codejock code libraries no longer need to be registered in the operating system registry. They will be unregistered during the upgrade.

**CHANGE:** Commission related fields are now included in quote and order output XML.

**CHANGE:** Removing multi-company databases by running the installer will now remove any corresponding alert and web monitor services.



# Changes in Accura Online 5.30 (6th June 2018)

## Filtering

**FEATURE:** Renaming or disabling product filters will rename and/or disable the values displayed in product details in the store.

**CHANGE:** Size filters on quotes, orders and templates are now based on depth and width values instead of size text.

**CHANGE:** Colour store filter expanded to support up to 25 characters.

**CHANGE:** Product 'finish' expanded to support up to 25 characters.

**CHANGE:** Filter 'Reset' buttons are now displayed in the title of each filter instead of at the bottom of the filter entries.

**FIX:** Resolved various issues in website filters caused by special characters in the filter values.

## Address Management

**FEATURE:** Account default billing address is now synced from Accura based on default invoicing office.

**CHANGE:** References to 'office' have been changed to 'address' throughout the website to simplify terminology.

## General

**CHANGE:** Various minor user interface improvements.

**FIX:** Fixed problems with pop-up shopping basket on secondary domains when certain themes and widgets were used

**FIX:** Orders were displayed in the quotes area after sorting by 'required' column.

**FIX:** Exceptions were triggered when sorting the orders list by 'quantity' or 'price' columns.

**FIX:** UTF-8 character encoding at database level to resolve various display issues with special characters.

**FIX:** Various minor bug fixes and corrections to 'bad' legacy data that caused problems.

