



ACCREDITO V8

One Time Password & Password Complexity

- Requires Single Sign On
- Users will have an OTP Status to show if they are connected or not.
- You can also exempt users from OTP, and also set for web clients.
- Password complexity also added, and password reuse setting added.

System Users - ACCREDO - Admin User X

Select User: ACCREDO Admin User

Code: ACCREDO

Name: Admin User

Windows User Name:

Password: *****

OTP Status: None

Last Password Entry:

Last Password Change:

Reset OTP

System Settings X

General Passwords Backup/Restore SMTP Encoding

Use Single Sign On ☒

Minimum password length 0

Password Complexity

Require lower case ☐

Require upper case ☐

Require digit ☐

Require punctuation ☐

Multi-factor Authentication

One-time password enabled ☐

Require one-time password for Win logins ☐

Prompt for one-time password entry every 0 days

Expire passwords every 0 days

Disallow password reuse within 0 months

Exempt ACCREDO from expiry ☐

Allow Windows login ☐

Prompt for password every 30 days

Audit successful logins and logouts ☐

User Session Types

SYS Users - ACCREDO - Admin User X

Select User: ACCREDO Admin User

User Permissions Companies Preferences Email

Code: ACCREDO

Name: Admin User

Windows User Name:

Password: *****

Confirm Password: *****

OTP Status: None

Last Password Entry:

Last Password Change:

Change Password: ☐

Reset OTP

Session types

Allow Win Sessions ☒

Allow Web Sessions ☒

Allow ODB Sessions ☐

Allow Cmd Sessions ☐

Allow COM Sessions ☐

Exempt From OTP ☐

Date Of Last OTP Entry:

Phone No:

Phone No 2:

Phone No 3:

Email Address:

Comment:

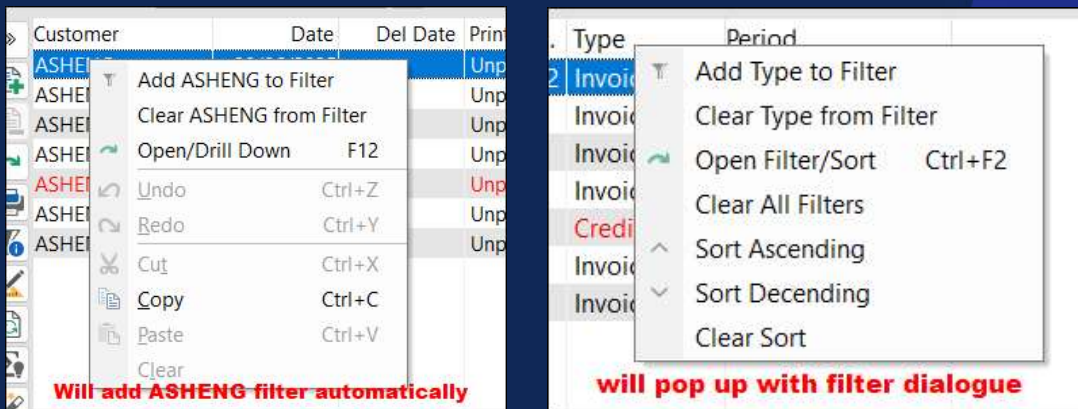
Custom 1:

Custom 2:

Details:

Inactive: ☐

Filter/Sort Grids Right Click Context



ALL - All Modules

- Context (right click) menu for Filter / Sort for Grids with Column glyph indicating if a filter and or sort is applied.
- From Column Headers:
 - Add Field to Filter
 - Clear Field from Filter
 - Open Filter/Sort
 - Clear All Filters
 - Sort Ascending
 - Sort Descending
 - Clear Sort
- From Field in Grid:
 - Add Value to Filter, for numeric values operator defaults to +-
 - Clear Value from Filter

- Added a Grid Total Row colour Preference under View > Preferences > Colour, default is light green.

Totals for List grid can be accessed in MaxBasic via a `GetTotalValue(FieldName: String): Number` method on the grid sub object when `GridTotalled` is true.

[illegible]

Memo Reminders

1 Reminder

Party Code	Party Name	Account File	Code or ID	Due At	Subject
ASHENG	Ash Engineering Ltd	INHEAD	415	29/05/2025 1:55 pm	

5 minutes ▼ Snooze Snooze All Dismiss Inactivate ▼ Dismiss All Dismiss

Inactivate
To Memo

ACCREDITO - Admin... X Global Memos X CO Memo - CO Global - GLOBAL X

Account CO Global ▼ ID 0

Memo Recurrence

Recur Every 1 Days ▼

Day Of Month

Weekday Offset Unchanged

End Date

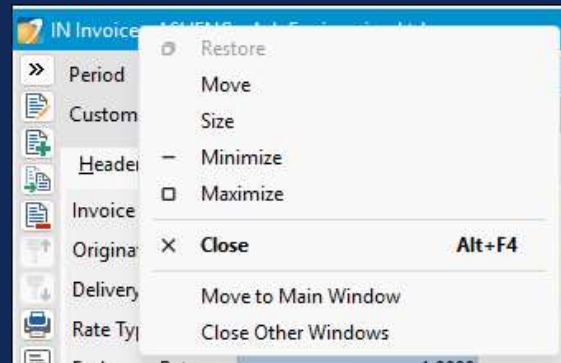
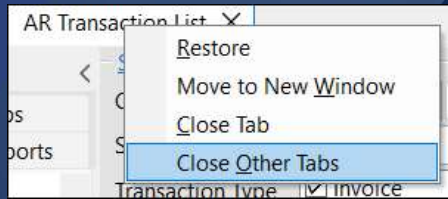
Reminder 15 minutes

Timezones

- Add support for Timezones for Created and Modified DateTime. Created and Modified Date and Time fields converted into DateTime and stored as UTC. Calculated Created Date, Created Time, Modified Date and Modified Time return values in Local Time.
- New functions for converting times to and from UTC.

```
1 LocalDateTimeToUTC(LocalTime: DateTime)  
2 UTCDateTimeToLocal(UTCTime: DateTime)|
```


Close Other Tabs/Windows



Special Characters for Branch, Dept and Location Codes

CO Branch Code Special Characters	<input type="text"/>	Allow Space	<input type="checkbox"/>
CO Department Code Special Characters	<input type="text"/>	Allow Space	<input type="checkbox"/>

IC Location Code Special Characters	<input type="text"/>	Allow Space	<input type="checkbox"/>
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Names in Lists/Grids

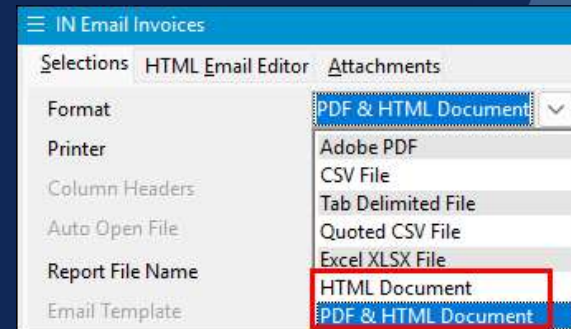
- Added to various grids/lists ie:
 - AR Transaction List
 - Job List
 - Job Transaction Tab
 - Invoice List
 - And more...

The screenshot shows the 'AR Transaction List' window. The 'Selections' tab is active. The 'Customer' field is empty. The 'Period' is set to 'Sept 2025'. The 'From Date' is '1/09/2025'. The 'Transaction Type' is set to 'Invoice', 'Credit', 'Receipt', and 'Journal'. The 'Auto Select' checkbox is unchecked. The list of transactions is displayed with columns for 'Customer', 'Customer Name', and 'Branch'. A red box highlights the 'Customer Name' column.

Customer	Customer Name	Branch
CASH	CASH SALE	AK
CASH	CASH SALE	AK
CASH	CASH SALE	AK
CASH	CASH SALE	AK
ASHENG	Ash Engineering Ltd	AK
ASHENG	Ash Engineering Ltd	AK
ASHENG	Ash Engineering Ltd	AK
BOWEN	Bowen Paint & Paper Ltd	AK
CHESTER	Chesterfield Fine Furniture Ltd	AK
COLLIER	Collier & Sons Limited	AK
DALTON	Dalton Furniture Wholesalers	CH
DUGG	Robin Dugg Interior Design Ltd	CH
JONESAK	Jones & Co. Furniture (AUCK) Ltd	AK
JONESAK	Jones & Co. Furniture (AUCK) Ltd	AK
ROBINSON	Robinson Natural Wood Furnishings	AK
SMITH	Smith & Son	CH

Email and HTML Editor

- Batch emailing for invoices now has option for sending HTML Document, and HTML & PDF
- 'Edit Before Send' option on single print dialogs



IC Transfer Print Log

The screenshot displays the 'IC Transfer' application window. The main form contains fields for 'Transfer ID' (37), 'Source Location' (AKL), 'Transit Location' (TRANSIT), 'Destination Location', 'Date' (30/09/2025), 'Period' (Sept 2025), 'Store Person' (MARY), 'Dispatch' (Unposted), 'Reference', 'Comment', 'Print Status' (Printed), and 'Receipt' (Unposted). A red box highlights the 'Print Status' field, and a red arrow points from it to the 'Print Log for IC Transfer ID 37' window. The 'Print Log' window shows a table with the following data:

Print ID	Docum...	Type	Destination	File Format	Created Date	Created T
982	ICTRANS	IC Transfer	Screen		20/05/2025	12:22:57 p

IC Pend Flow Through

- ICPEND/JCPEND is extensible and custom fields can flow through from source table as done for ICTRAN/JCTRAN.

Bin Tracking Locations

- The outwards tracking generator will select bins with the smallest or greatest quantity available first.
- Bins will have a selection, selected by default, you can untick to have the bin be excluded from the Generating Outwards tracking
 - Can still be selected manually from the Lot and Bin picker.

IC Bin - AKL

Location: AKL

Bin Code	Bin Name	Priority	Picking Sequence	Generate From	Custom 1
0000	Unspecified	9			
S-A-01	Stockroom Aisle A, Bay 01	9	1	✓	
S-A-02	Stockroom Aisle A, Bay 02	9	2	✓	
S-A-03	Stockroom Aisle A, Bay 03	9	3	✓	
S-A-04	Stockroom Aisle A, Bay 04	9	4	✓	
S-B-01	Stockroom Aisle B, Bay 01	9	5	✓	
S-B-02	Stockroom Aisle B, Bay 02	9	6	✓	

IC Settings

Memos Integration Links Words

General Prices Stocktake Misc Period Display Labels

Valuation Basis: Latest

Allow Negative Stock: ☐

Allow IC Sourced Receipts: ☐

Allow IC Sourced Issues and Credits: ☐

Allow IC Manufacturing: ☒

Allow IC Manufacture Transactions: ☐

Use Coded Bins: ☒

Post Zero Quantity Lines: Prompt Delete Selected

Allow Edit For Posted Documents: ☐

Generate Outward Tracking: ☒

Generate From Bin With: Smallest Quantity Available

Serial No Special Characters: ☐ Allow Space

Lot No Special Characters: ☐ Allow Space

New Product Defaults

IC UOM

- UOM Codes can be both Base and Other UOM codes with a variable multiplier. BaseUOM now an explicit selection in UOM Code Maintenance rather than implicit for a fixed multiplier of 1.
- Manufacture UOM Code added to IC Products to specify default UOM for manufacturing.

The screenshot displays two overlapping windows from the IC system. The top window, titled 'IC Units of Measure', shows a list of UOM codes and their properties. The bottom window, titled 'IC Product - DRESSTABLE - 4 Draw Dressing Table', shows the UOM configuration for a specific product.

IC Units of Measure Window:

UOM Status	Code	Name	Description	Group Co...	Decimals	Multiplier	Fixed Multi...	Add'l Wei...	Add'l Vol...	Pep...	Base	Inactive
Active	BOTTLE	bottle	Bottle	BOTTLE	0	1.000000	✓				✓	
	CASE	case	12 Bottles	BOTTLE	0	12.000000	✓					
	BOX	box	Box	COUNT	0							
	EA	each	Each	COUNT	0	1.000000	✓				✓	
	INNER	inner	Inner	COUNT	0							
	LAYER	layer	1 layer in a Pallet	COUNT	0						✓	

IC Product - DRESSTABLE - 4 Draw Dressing Table Window:

Select Product: DRESSTABLE

Base UOM	Multiplier	UOM Deci...	Comment
EA	1.000000	0	

Other UOM	Multiplier	UOM Deci...	Comment
LAYER	12.000000	0	

Default Sale UOM: EA

Default Purchase UOM:

Manufacture UOM: EA

Enquiry Default

CO Users, Groups and Roles - ACCREDO - Admin User

Select User: ACCREDO Admin User

User Permissions Roles Settings Preferences Email Image Links Memos

☐ Use machine date on startup

☒ Update date at midnight

☐ Prompt for date on startup

☒ Show created and modified status bar on records

☒ Show period status bar

☒ Show detailed hint on lookup controls

☒ Show extra buttons on lookup controls

☐ Always show buttons when editing

☒ Hide usages by default

☒ Prompt for Delete Line On by default

☒ Show Memo Preview

☒ Enable Delete on document and batch forms

☐ Hide completed OE lines by default

☐ Hide completed PO lines by default

Ctrl+ Left & Ctrl+Right move to Next/Previous: Word

Reminder Interval: 15 minutes

Dismiss Reminder: Inactivate

Contact Lookup ordering: LastName/FirstName

Memo Tab Ordering: Descending Date

UOM Enquiry Default: Base UOM

Base UOM

Sale UOM

Purchase UOM

Manufacture UOM

Show users

IC Product - BRASS52LOCK - Brass 52 Lock & Key

Select Product: BRASS52LOCK

Product Information UQM Supplemental Quantity Loc

Stock Value: \$25,246.00

Quantity UOM: EA

Period: All Periods

From: Apr 2023

Quantities

In Stock: 971

Pending Stock Mo

Quantity In Q

CreditorInactive Field

IC Product - DEMOLOT - Basic Lot Tracked Product

Select Product: DEMOLOT

Product	Information	UQM	Supplemental	Quantity	Locations	Ima
» Creditor Code	Creditor Inactive	Supplier C...	Supplier ...	Vendor Code		
AATEST						
CONWAY						
HARDWARE		\$11.6400				

IC Product - DEMOLOT - Basic Lot Tracked Product

Select Product: DEMOLOT

Product	Information	UQM	Supplemental	Quantity	Locations	Ima
» Creditor Code	Creditor Inactive	Supplier C...	Supplier ...	Vendor Code		
CONWAY						
HARDWARE		\$11.6400				
AATEST	✓					

- Field that shows if a creditor is marked inactive in Product Supplemental tab.

AR – Cashbook Rule

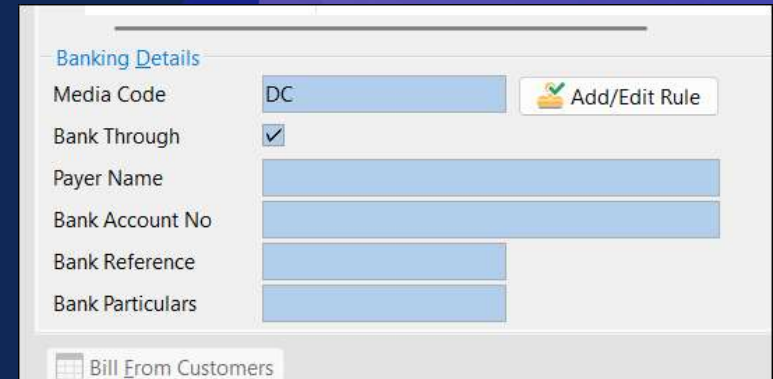
- Button for Add/Edit Cashbook rules

Trading Name

- Added Trading Name to Company Details, AR Customer and AP Creditor.

Hiding Tabs

- Hides AR Customer and AP Creditor's Balances and Graph tabs if the user has None permission



Banking Details

Media Code DC Add/Edit Rule

Bank Through ☒

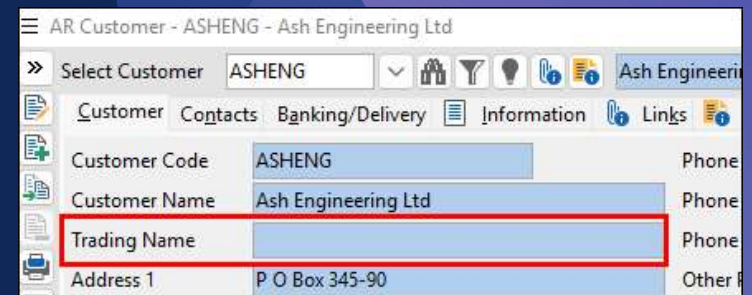
Payer Name

Bank Account No

Bank Reference

Bank Particulars

Bill From Customers



AR Customer - ASHENG - Ash Engineering Ltd

Select Customer ASHENG

Customer Code ASHENG Phone

Customer Name Ash Engineering Ltd Phone

Trading Name Phone

Address 1 P O Box 345-90 Other

AR/AP – Hide Transactions from Statement Printing

Ability to Hide Transactions in AR and AP where the transactions Contra and are Unallocated.
Hidden transactions are marked Inactive and excluded from Statement printing

