

Infusion Business Software Update

For Version: 4.03

20/11/2009

Cashbook

- The export file format for ANZ Money Transfers has been changed to ANZ Direct Online as this is what ANZ call it. 3402
- Columns can now be sorted on in the Bank Rules screen. 3426

CRM

- A CRM (Customer Relationship Management) module has been added. 3160

Customer Item

- A Customer Items import routine now creates the Item ID instead of leaving it blank. 3227
- The issue with the Upcoming Services - Listing report not picking up the Customer Account range data has now been resolved. 3471
- Customer Item Types can now be duplicated from the menu option Admin / Settings / Manage Customer Item Types / Duplicate. 3353
- There are now totals at the end of the Customer Item Invoice History by Item Detail and Summary reports. 3399
- The Item type for a Customer Item can now be changed (from within the Modify screen of a Customer Item). In doing so there is an attempt to retain the data as long as there are fields for it to be inserted into. The data type must be compatible ie. numbers can't be saved to a Date format field or a Date to a Logical format field. Anything can be saved to a text field and the numbers 1 and 0 are converted when coming from a logical field. Change will likely cause some data loss. 3230
- The error message when adding a Service to a Customer Item that has no Purchase Date has now been fixed. There is now a prompt to add a Purchase Date before entering the Service. 3424
- Customer Items can now be edited from the Manage Job screen using the Modify button next to the Customer Item field. 3442
- The issue when creating a Customer Item from the Customers left hand menu, selecting an Item type other than first on the list and the Type defaulting to the first Item Type has been fixed. 3205
- Customer Item Types can now have default Services set up against them. Default Customer Item types can be set against Products, Product Types, Product Groups and Product Sub Groups. The hierarchy of which Customer Item type is used is : the Item Type set against the Product Code (when not set to "Default Item Type"), Product Sub Group, Product Group and finally Product Type. When a Customer Item is created automatically the default services for that Customer Item Type are also created. To set Products to use the default Item Type, you can either edit each code and select from the dropdown or in Command Mode type REPLACE ALL ASSETTYPE WITH "*DEFAULT*" - then run a Product Integrity to resolve any old Services attached to Products. 3148
- When you go in to the Manage Customer Items screen for the very first time the fields in the "Fields" section now display. 3416
- The Upcoming Service Events report and screen now exclude Services where the Item is set to Inactive. 3190

Customers

- There is now the ability to send text messages. To do this you must first create an account at www.clickatell.com and purchase message credits. The Username, Password, and API ID supplied for the account need to be entered in under Admin / Defaults / SMS Defaults. An SMS Messages can be sent from the following locations within Infusion: Customers - Manage and Enquiry (both on the details tab), Jobs - Manage and Enquiry (both on the details tab), Upcoming Service Events, Scheduled Service Events. The number the SMS will be directed to is the mobile number listed next to the button or the mobile number assigned to the Customer in the case of Service Events. Templates for each of these types of SMS messages can be set up under the Admin / Settings / Manage SMS Templates menu. Each has a preset number of fields which can be inserted based on the type of message being sent. This will allow a generic template to be created which can be sent to a number of Customers for example or a Service Reminder. The Audit Log for texts sent can be printed from the Admin Menu. There are no registration requirements in Infusion for the SMS functionality to be activated. A log of SMS Messages sent can be kept. 3262
- There is now the ability to credit a Customer by Cheque or Direct Credit. If set under Customer Defaults, a prompt for a Payment Method will appear if a negative payment is received. Payment options are Print Cheque, Direct Credit, EFTPOS or Manual Payment. 3406
- There is now a Direct Debit file option for Westpac. 3172
- A link to the NZ Post website has been added to Customer and Supplier Address Detail screens to help in finding a Post Code for an address. 3364
- There are new settings under Manage Email Defaults for Invoices, Packing Slips, Quotes and Purchase Orders. There is now the option to use the email address of the Sales Rep selected on Invoices, Quotes and packing Slips as the sending email address. There is the option to send a BCC copy of an email to the Sales Rep selected on Invoices, Packing Slips and Quotes. There is also a flag to send an email to the Contact selected on an Invoice / Quote. This is additional to any email links setup against the Customer. Contacts with an email address loaded now have (email) added to the end of their name in the dropdown lists on Invoices and Quotes. 3438
- The issue causing the Customer Verification report to go out of balance through processing a payment (from within the Payments tab) for normal Invoice while logged in as a POS user has been fixed. 3439
- The Customer Prompt Notes now appear when right clicking on a Customer account and selecting Create Job. 3440
- The issue when assigning Customer Types then using the Next and Previous buttons (<< and >>) to go to the next customer record to do the same and the Type not holding has been resolved. 3174
- The issue when a new Customer is created with the Default Payment Terms set to Cash Sale Only and the cash sale field not being set to true (ie.T.) has been resolved. 3235
- The issue when running a Customer Verification or ATB report prior to a date of an Invoice with a Deferred payment and the Deferred amount still being included in the report has been fixed. 3394
- The Customer Enquiry / Details screen has had the "Category" heading corrected to read "Group". 3384
- The GST on a POS transaction is now recalculated correctly when the transaction is changed to an International Customer. 3463
- The issue with Account balances of a previous Customer showing on BBF statements has been fixed. 3367
- The Customer Contract Rate report now has the option to include / exclude Inactive Customers. 3481
- The F6 key (Total Weight/Cubic) now works on the Customer Price Enquiry screen after using the F9 key to look up a Product Code. 3510
- File names with apostrophes in are now accepted in the Document Path name in the Documents tab for Customers, Suppliers and Jobs. 3441

Customers/Suppliers

- Integrity Checks on Customers, Suppliers and Products now check that Groups are in upper case (a number of reports weren't picking up lower case text). 3233

Financials

- When the Financial Integrity Check is run it now warns if accounts are 'adding up' the chart. 3317
- Australian Bank accounts can now be added to Suppliers and G/L Bank accounts allowing payments to be made to. This requires the file 'ausbank.txt' to be sitting in data folder for the company wishing to utilise this (nothing needs to be in file). When paying by Direct Credit you can only pay an International bank account from an International bank or a NZ account from a NZ account. An export for Corporate Online (WestPac) has been created under Export Direct Credits. This option only shows up if it is an International bank account. 3178
- Reversing Journals (Accrual) now have an audit number. 3499
- Deletion of a G/L ID now checks all Control Links first. If there are any Control Links set up using this ID a prompt will notify the user of this and not allow the deletion to proceed. 3411

General

- The Management Console is now available in Professional and above (previously it was only available in Service Manager Lite and above). 3277
- All Enquiry screen buttons now read "Create" rather than "Add". 3354
- Filtering Search functionality has been added to Customers, Suppliers, Products, Jobs, Financial and Customer Items. The fields searched on are :- Customers: Account, Sort Key, Name, Address 1, Address 2, Phone. Suppliers: Account, Sort Key, Name, Address 1, Address 2, Phone. Products: Code, Description, Barcode (Primary). Jobs: Name, Job ID, Title, Phone, Mobile. Financials: ID, Description. Customer Items: Serial Number, Description, Customer Name. 3264
- The SAM converter now converts GST, Bank Rec and G/L data. 3427
- There is now a Calendar module in Infusion. This requires a separate .NET installer file (Infusion Utilities) which is available from the Software Updates section of the Infusion website or available on disk. It is 200MB+ in size. The utility allows viewing of a Calendar displaying details of Jobs set up against staff members. 2768
- There is now the option to email the Audit files and System Configuration files to help@infusionsoftware.co.nz (from under the Help menu). 3204
- The issue with the margins on the Sales Summary in the Management Console being incorrect has been resolved. 3181

Invoices

- Previously when a Backorder was edited or partially filled a new backorder was erroneously created. Now if the order is a Backorder created Invoice, no backorders will be recreated. This does mean that if Backorder quantities are changed or new lines added then new Backorders will NOT be created. 3199
- There is now the ability to email Packing Slips to a Location. An option is able to be selected under a Location for this (an email address and contact details can be set for a Location). Emailing of a Packing Slip needs to be selected under the Manage Customer Defaults menu. 3523
- The Delivery and Attn details on a Quote now correctly flow through to the Invoice when the Quote is converted to an Invoice. 2816
- The issue with Trade-ins when a Product is created, where costing fields are not populated correctly has been resolved. The value was going into the Latest Landed and Average Landed but not the Latest Purchase or Average Purchase fields. 3348
- The problem with not being able to back out of the Payment Methods screen when logged in as a POS user and creating an Invoice from a Job for a Cash sale Customer has been resolved by being able to exit out of the screen. 3315

Job Management

- There is now a message box prompting to save changes when selecting Exit on the Combined Job screen. 3239
- The Supplier Details and P/O Number now show in the Unreceipted P/O section of a Job Detail report. 3288
- The issue with duplication of a Template Job (created initially from a Combined Job screen Job) creating a new Job that has the standard Job screen format has been fixed. 3210
- The issue with the Markup Percentage not displaying correctly in the non combined Job enquiry screen for an Item on a Job when the Job has been changed to Cost Basis after costs have been added has been resolved. 3266
- There is now an option under Manage Job Defaults to allow Customer Contact Details to be updated from the Manage Job screen when the Job is saved. 3358
- When a cost entry from a P/O is selected in the Combined Job screen the Order Number and Supplier Name of the Supplier now display at bottom of the screen. 3173
- As a result of a "Record is in use by another user" error, multiple users can now not access the Job screen for the same Job. The Waiting for Access Retrying message cannot be skipped, cancelled or escaped out of. The other user needs to exit out of the Job to release it. 3296
- There are now Time Clock Entry and Time Clock Management options on the Job Management dropdown menu that allow for entry of staff time against Jobs using Start and Stop buttons. Costs are entered against a Job and any text entered added to the time entry line. Staff need to be set up under a new Product Map tab on their account for the Labour rates they can use for their entries. By default a Staff member / user will only be able to manage their own time entry but an option under the Staff Login tab allows viewing of all Staff set up. The Infusion Utility files need to be installed to enable this functionality. 3544
- The issue with a Customer Invoice that used a G/L code with a GST Rate of X and that was Posted immediately, still having a GST component, has been rectified. 3478
- The issue with costs being assigned to a Job (eg through a P/O) while a second user is in the Job and the costs not being saved against the Job when the second user exits out of the Job has been fixed. 3330
- When a Job is set to a Price Level of Average Cost the Sell prices are now calculated as per the percentage markups set. 3487
- The issue with Printing a Job Card or Job Detail Report from within the Combine Job screen and multiple reports printing out (eg print reports for Job 4 will trigger 41 to print as well) has been resolved. 3401
- The issue with being able to duplicate a Job number by having both Auto Numbering and the ability to edit job numbers turned on has been resolved. 3323
- The Job Detail report from the Combined Job screen now has the Show Supplier Details option set as the default. 2708

Letters

- The issue when trying to create a Customer Letter and getting a window popping up asking for a .dbf table has been resolved. The issue was caused by there being no Attachments folder. This is now checked as the software opens. 3183

POS

- POS Invoices can now be emailed. This will only be enabled if emailing Invoices is setup in the Customer account. A "Send Invoice by Email" tick box has been added to the main POS screen. There are two tick boxes on the POS Defaults / Receipt Printer tab. Selecting the "Email POS Invoice when possible" option will automatically tick the POS screen box if the Customer is setup for emailing. This uses the Invoice layout not the POS Layouts. The second tick box is "Prompt to Print when Emailing" which, if selected, will after emailing an Invoice prompt to print a docket (based on the docket layout specified in POS defaults).

3408
- Multiple users use to be able to open a closed cash drawer and balance it causing issues. There is now a prompt that a user is already balancing the drawer and it is not available to be balanced.

3532
- The issue with selecting reprint from the Cashbook Balance Cash Drawer screen and not selecting a drawer to reprint causing any unclosed drawer contents to be included in the Summary or Itemised Cashup Docket report has been resolved. The screen now advises that you have not selected a drawer to reprint and nothing is printed.

3428
- The POS Summarised Cashup report is now summarising the Payment methods correctly.

3237
- The text under Manage POS Defaults / Preferences has been changed to "Round Cash Sales to" from "Round sales to".

3385
- The POS2 Invoice layout now displays Product Codes.

3290
- The Invalid Subscript Reference error from POS when a Location could not be found has been fixed. If a Location cannot be found when creating or recalling an Invoice in POS then the first Location that is active is used instead.

3349
- The Customer Account Name can now be edited in the POS screen (like it could be in v3).

3480

Products

- When a Pricelist report from the Pricebook menu is run and there are no Pricebooks available there is now no "File Not Found" error message. 3206
- Stocktake Sheets now ask for the Stocktake date so onhand and allocated figures for forward dated invoices can be handled correctly. 3226
- The use of the Swap Product Code utility is now recorded in the Audit log. 3484
- Stocktake Variance reports now have the option to use either Latest Cost or Average Cost in their calculation. 3414
- There is now a second Notes field to allow for Internal and Public Notes on a Product. 3516
- There is now the ability to convert Groups, Sub Groups and Product Types on Pricebooks Items to Infusion Product Groups, Sub Groups and Product Types when Pricebook Items are created as new Products in Infusion. 3356
- The Pricebook Lookup screen now displays the date the Pricebook was last imported. 3182
- The Combined Job screen now warns when there is Insufficient Stock Available when assigning Product to a Job (Job Defaults / Cost Entry / Warn when Insufficient Stock Available set). 3130
- The issue with the Product Movement report not including the In Stock quantity into the closing balance for a Location having no movements for the month has been resolved 3412
- A Documents library has been added for Products 3521
- A sixth barcode layout has been added for a label 54 x 40mm in size. 3459
- The Preferred Supplier (if one is set up) will now display as the default when the Supplier tab under a Product is selected. 3522
- There is now the ability to handle barcodes which include pricing as part of the barcode. Scanners need to be configured to allow this. Zebex scanners need to be set up so "EAN-13 country code first: "0" can be transmitted" is enabled. 3373
- The "Alias 'STOCKMAINT' is not found" error message from trying to exit out of a Modify Product screen when there is a "Waiting for access to record" message has been resolved. 3344
- For a Product, if there are quantities allocated, instock, on order, on back order etc then it cannot now be modified to be Serial Tracked. If prior to upgrading to v4.03 a Product was setup to track Serial Numbers yet Not Track Quantities and an upgrade is done, the Track Quantities option will be greyed out. If this needs to be changed to track quantities enter the following in command mode: Replace All Nonred with .F. For Nonred = .T. And Serial = .T. 3291
- Sub Group and Product Type fields have been added to Pricebooks. 3355
- Updating Product Prices now works when copying the Latest Cost to the Average Cost. 3517

Purchase Orders

- When Importing Supplier Invoices from Plumbing World using the Import/Export menu any variances in GST (from calculations on large orders) are now automatically accounted for in the Rounding field. 3321
- A Supplier Prompt Note can now be set to display when a Purchase Order for that Supplier is Edited. 3337

Quotes

- The Duplicate a Template Job process has been revamped. A new screen now pops up and prompts for all questions on the one screen. The quote and costs can now be optionally repriced when the Job is duplicated (to match the Price Level of the new Customer). NOTE: G/L, Pricebook and Buildups are NOT repriced. 3212

Reports

- Special fonts are now being picked up when a document is emailed. 3369
- The issue with printing Openitem Inv/Statements in bulk and the total just overlapping to an additional page causing the next Customer's details to display on the next page has been fixed. 3299
- Printing a Product Sales Analysis Top / Bottom reports to PDF now won't give an error when opening the PDF file generated. 3396
- The Recommended Reorder by Supplier report now has the same logic as the standard Recommended Reorder report. 3310
- The issue in v4.02 with the Recommended Reorder - By Supplier report picking up Products that have Track Quantities unticked and zero minimum and maximum levels set has been resolved. 3188
- Customer Sales Analysis Date Range reports are now not printing Notes from the Customer Invoice. 3189
- The Staff Timesheet Analysis Print Report screen has been amended to now display a Product Group range selection instead of Category. 3208

Suppliers

- The Supplier Cheque report (SUPPCHQ) now has the same fields / information available to print as the Supplier Remittance Advice (SUPPREMIT). 3548

System

- There is a tick box option under the System Defaults menu to Default to Filtered Searching. 3413
- The issue caused by trying to delete a Default Cashbook Receipt Method (causing Infusion to hang) has been resolved by not allowing the Default Method to be deleted. 3514
- The Orion and SAM Converters now pick up the Supplier's phone number. 3312
- The issue with Infusion Service Manager Pro - Manage Menu Groups displaying two Staff menus has been resolved. 3311
- The error from running Infusion Single Click for the first time on a fresh install has been resolved. 3214
- YTD figures have been added to Recent, Last Year and 2 Yr Prior Totals on the Management Console screen. 3251
- The System Lockout Dates now work when receiving an Invoice with the Purchase Order 3258
- The 'GSTCODESMMC' error in the Management Console caused by having no Freight Code set up in Financial Links has been resolved. 3302
- The Report Editor now deals with Labels. The menu name has been changed to Report/Label Editor (this will only happen on new installs). Also the Edit Layout button on the Set Label Size screens has been removed. 3378
- The Retail Manager converter now uses the Company Name for a Customer as the priority. If the company name is empty then the first and last names are used to populate the Name field in the Customer database. 3140
- The following text has been added to the License agreement relating to acceptance of the compulsory Maintenance Plan for the Professional, Elite and Service Manager packages: "The compulsory Maintenance and Hosting charges detailed in the Infusion Software Price List on the Infusion software website." 3186
- The tables PRODUCTS2, SUPPLIER, CUSTOMER, INFDATA and INFFLAGS are now open when logging in to Infusion. To access them in command mode the command SELECT should be used and not USE. 3554