Infusion Business Software Update

For Version: 4.05 26/04/2010

Backup/Restore

- The number of concurrent users Infusion can handle is now 50 (previously 25) 3905

Cashbook

- The Autopay function on Customer Invoices has been limited to only work up to the date of Payment (so Cash Payments don't get allocated to Customer Invoices dated in the future) 3760
- The bank account imbalance issue caused when reversing a banked POS transaction has been resolved. 3855
- The issue in the Bank Reconciliation screen when Hide Tagged Items is selected, you tick off an item then scroll in that column and all items you scroll over are tagged has been resolved. 3650
- Add Receipt and Add Payment buttons have been added to the Bank Rec screen. 3563
- The "Alias CUSTOOPENDDPAYMENT not found" error when exporting direct debits has been resolved. This only happened when Auto Pay can Partially Pay Invoices is selected in Customer Defaults. 3896
- The issue with GST on negative discounts not being recorded correctly (they were treated as zero rated but didn't appear on the GST return) has been resolved. 2717
- The variance issue created when trying to balance a cash drawer caused by selecting a cheque amount then changing the value has been resolved. 3626
- The issue in Supplier Invoices with Customs GST lines having Imported Bank transaction payments with Rules against them being processed incorrectly has been resolved. (End User on GST Payment Basis) 3673

Customer Items

- There is now the ability to Autolink Product custom fields to Customer Item Fields. Mapping options have been added to the Manage Item Type screen. Fields are populated when the Items are created at the point of posting an Invoice. 3137
- The Serial Number and Customer Item Type fields now display in the Enquiry and Manage Customer Items screens. 3962
- When adding a Warranty Type and an existing Type is highlighted, saving the new Type will now not over write the existing Description and Standard Terms text. 3630
- The issue with a Customer Item Service Frequency not updating from Years to Months on the first time the modification is made has been fixed. 3725

Customers

- A Customer's specific Invoice layout is now used when right clicking to preview a Posted invoice in the Invoice screen of a Customer enquiry. 3556
- The "Alias 'CUSTTRANS1' is not found" error message from right clicking on an entry in the Customer Loyalty Scheme screen has been fixed. 3882
- There is now an option to print one off Delivery labels for Customers. This can be done through the Quick Print Product Labels option under the Customers dropdown menu and on the right click option for the Customer. This option allows selection of Quantity, Address and Label layout. 3870
- When in a Customer Invoice, if a Serial Tracked Product is put on Backorder, a pop up doesn't now appear asking for a Serial Number. 3856
- The Contract Rates report has had the percent column widened so as not to print asterisks. 3748
- The speed at which Invoices are printing from data with multilevel kitsets in has been sped up. 3757
- There is now the ability to refund a Customer by Cheque, Direct Credit, EFTPOS or manually. If a negative payment is made to a Customer account a pop up will appear allowing for the above methods of payment to be chosen. This option needs to be setup under the menu option Manage Customer Defaults / Preferences - Prompt for Refund Method when issuing a Refund (Via Payment Screen). 3819
- There is now the ability to sort on the Invoice amount in the Pending Customer Invoice screen. 3723
- There is now an Update Pricing option on the Update Recurring Invoices screen under the Customer / Utilities menu. This updates the invoice for the Customer based on Best Pricing Rules. Buildups are not updated. 3643
- The "Alias 'PRODBCCUSTPRICEENQ' is not found" error when selecting F2 or F3 while in the Code field of a Customer Price Enquiry then Esc, has been fixed. 3639
- There is now a popup warning when trying to Post an Invoice for a Cash Sale Customer from the Pending Invoices screen (using Post 1) telling the user they must do this from the Create invoice screen. This forces a Payment to be put through. 3464
- The issue with a Purchase Order not being created correctly when using the "Prompt to order when Insufficient stock" option has been resolved. 3638
- The order Serial Numbers display in a lookup screen is now in Serial Number order (it was previously the order in which they were entered). 3910
- When creating a new Customer or Supplier there is now the option to set them up as either an Individual or Organisation. For an Individual there is the ability to store their Title, Given Name and Surname. For an Organisation a Business name can be stored. There is also the ability to have the Sortkey auto created based on the details entered (setup in the Manage Customer Defaults / Preferences screen). 3679
- The issue with a discount displaying in the Customer Sales Analysis reports (custsa40) when none had been given has been fixed. 3810
- A Finish Date for Contract Rates is now mandatory if there is a Start Date. If the Start Date is left blank a warning is given that the Finish Date cannot be entered without a Start Date. 3631
- When entering payment details onto a Customer Invoice and Saving then posting through the Pending Invoice screen, the payment now gets processed correctly. 3613

Financials

- The "Variable 'THEN' is not found" error from running the Check GL Integrity utility has been fixed. 3730
- The "Variable 'Z_PVAL11' is not found" error when running the 12Mth Budget report has been fixed. 3940
- The issue with duplication of G/L IDs not creating the account in the correct place on the chart (on every second duplication) has been resolved. 3879

Fixed Assets

- When Increasing the Value of a Fixed Asset or doing a Fixed Asset Adjustment, if data is entered and the Process button selected without selecting an Asset an error now doesn't occur. 3647

General

- When Record Locking occurs within the software the prompt appearing at the top right of the screen now displays the database and record number it is trying to get access to. This will help users who get a lock and don't understand why. 3761
- The error message "Alias 'Z_CUSTJOBDATA' is not found" from selecting the Credit column in the Delete Customer Payment option has been resolved. 3651
- The issue where characters are entered into the Filtered Search field then another option selected (eg Receive Payment) and the new screen doesn't have focus has been resolved. 3755
- The Filtered Search issue where back spacing in the text box after entering a string of text caused nothing to display in the Manage screen has been resolved. 3614
- An import routine can now be created for a single field (eg. Product code) 3911

Import / Export Module

- A Supplier Invoice Import routine has been added for Oakleys Plumbing. 3919
- The Export screen now displays when selecting Export Data from the Import/Export module while the Manage Customer or Supplier screens are open. This has also been corrected for the Admin / Settings / Manage Import and Export menu. 3926
- An Infusion Invoices Export routine has been added to the Import / Export module. Freight and Rounding are not part of the standard Invoice import function. 1927
- A Supplier Invoice Import routine has been added for Fulton Hogan. 3920
- There is now a Purchase Order export routine for DeLaval available in the Import / Export module. 3918
- There is now a Supplier Invoice Import routine for Mitre 10 Invoices available in the Import / Export module. 3917
- There is now a Customer Invoice Export for Wholesale Distributors Limited (WDL) available in the Import / Export module. 3916

Invoices

- There is now a Posted Customer Invoice Register screen under the Invoices/Quotes dropdown menu. This screen allows Searching on, Printing, Emailing and Editing of Customer Invoices. 3849
- The Backorder column has now been disabled in the Backorder Invoice screen. This has been introduced to overcome issues with creation of Pending Invoices caused by altering the Backorder quantity in the Backorder Invoice screen. 3667
- The issue with entering a Tradein onto an Invoice then not being able to change the quantity of a item entered on the next line has been fixed. 3982
- The Edit Posted Invoice option has been moved to the new Posted Customer Invoice Register screen. 3869
- The "Alias FLDNAMESINVEDIT not found" error when editing a posted Invoice's lines (requires User Fields to be active on Invoice lines) has been fixed. 3861
- The issue with getting a very large logo displaying when printing Invoices from the Pending Invoices screen and selecting Print 100 has been fixed. 3824
- When entering a Buildup, if you change the component quantity to zero there is a prompt now stating that the component will be cleared. This has been introduced to overcome issues with recalculation of the Buildup pricing when quantities are changed. 3775

Job Management

- The On Charge box in the Combined Modify Job screen now shows the name of the company covering the warranty. 3624
- The issue on Jobs where the data was Saved (by eg previewing a Jobcard) and the Tab or Enter keys couldn't be used to enter new data has been resolved. 3815
- When duplicating a Job with costs assigned, the costs are now taken out of stock. 3875
- The "Alias name is already in use" error from selecting a Cost when in the Job Cost entry screen that has a Department code against it has been fixed. 3966
- When selecting the Preview option in the Bulk Invoice Job screen and the All Authorised Costs option is selected the report now doesn't repeat the same Job. 3695
- Forward dated Invoices and Job Transactions are now not included in the WIP Detail report. 3835
- There is now a flag (Don't Prompt (use Defaults) when invoicing from Combined Modify / Cost Entry screen) in the Invoicing tab of the Manage Job Defaults menu so the Job Invoicing defaults won't display when creating an Invoice from a Job. 3683
- There is now a tick box against Staff to "Include Staff Member in Calendar Display". This allows only certain staff to be set up to display on the Infusion Utilities 3841
- The cursor now goes to the next line when entering Job costs in the Combined Modify Job screen and using Enter or Tab to move through the line (an issue only in 3658
- The Serial Number and Date of Purchase of a Customer Item now show on the Combined Modify Job screen. 3684
- The issue with Serial Numbers not being allocated correctly by costs being entered into the Combined Modify Job screen through Assign Quoted and Supplier Invoices has been resolved. 3737
- The "Object jcmaint2serial not found" error from selecting the Esc key to exit the Combined Modify Job cost entry screen when entering a Serial Number for a Product when Departments and Locations are active has been fixed. 3950
- The Mobile Phone number from a Customer now copies over to a Job when creating the Job by right clicking on the Customer account. 3625
- GST settings for Products are now carried correctly through to Job Invoices from the Job. Previously GST Exempt items weren't being handled correctly. 3922
- The issue when using the Summary by Dept setting when creating an Invoice from a Job and the Staff type products being ignored (marked as billed but not Invoiced) has been fixed. 3822
- Customer Payments processed at the time of invoicing from a Job now ask for the name on the Cheque. 3811
- When Saving a Job that has been changed from Active to Complete the cursor now locates to the next entry on the Manage Job screen (as opposed to going to the last record on the screen). 3942
- When the Start Time on a Job is edited the calendar will now update to reflect this. 3655
- When creating a Job Invoice by using the Job lookup dropdown menu in the Jobs/Servicing section of the Invoice, the user doesn't now have to select the Create Invoice button twice to create the Invoice. 3762
- The issue with Product not being put back into stock correctly when overwriting a Product already entered onto a Job has been fixed. 3766
- The "Table has no index order set" error message in program FRMASSETLOOKUP.CMDGOSEARCH.CLICK when trying to sort Customer Items in the lookup screen from within a Job has been fixed. 3653
- Appropriate data tables are now updated with the new date when the date of a Cost Entry on a Job is changed. 3555

Letters

- Service Letters can now be printed for a Customer Item by right clicking on the Item from the Manage Customer Items screen and selecting Print Letter. Previously Service Letters would not display in the pop up selection box from this option; now they will (if a Service has been set up for the Item). 3726

POS

- The Sales History (F12) for a Customer is now updated when a POS Sale is made. 3702
- When entering payment details on a POS method screen (Invoice or POS) the user is now stopped from continuing until the total matches the invoice/sale total. This fixes an issue with Deferred Payments processing incorrectly when a total above the sale amount is entered. 3833
- A Hold Docket prompt now appears whenever a POS transaction is held (previously this only happened the first time it was held). 3781
- There is now a tick box preference under Manage POS Defaults / Preferences to "Prompt for Account on each Sale". With this option on a Customer account needs to be selected before a POS Sale can proceed. 3941
- The POSUDF database is now being reindexed as part of a normal reindex. 3759

Products

- When a Product is Ordered and the order is Saved it now shows as being on order in the Purchase Order screen of a Product enquiry and (not Saved) in the Pending Purchase Order screen. 3603
- Product Codes for unbilled Products on Jobs are now updated when the Swap Product Code utility is run. 3949
- When in a stocktake Enter Stocktake screen and the Batch Entry button is selected, a pop up looking for a table doesn't now appear when the Select button is chosen without entering a Product code. 3977
- When setting up a Subgroup for Products there is now the option to associate it with ALL Groups or a specific group. In the Product setup screen, the Sub Group lookup only shows those that are valid for the current group. The Swap Product Group utility will remove any invalid Sub Groups set against Products and report these on an exception report. Swap Sub Group only shows valid Sub Groups to swap to. 3956
- Purging Products (Admin / Other / Purge Data) now removes items for the Products2 table. 3707
- Percent Margin calculations now display in the Product / Terms/Pricing screen as well as Percent Markup. 2058
- There is now an EOQ (Economic Order Quantity) field for Products. No standard reports use this yet. 3527
- The Product Valuation Detail - By Group report now has a tick box option to display only negative quantity Products. 3452
- The issue with the Sub Group sorting on the Product Price List report not working correctly has been fixed. 3939
- Stocktake Sheets - Serial Numbered Products show very large Allocated numbers using Stihl Shop McLarens data. Looks to be in the conversion as figures in prodsn table. Despite quantities being present in Serial# screen none showing in stock. 3934
- There is now an option to print one off labels for Products. This can be done through the Quick Print Product Labels option under the Products dropdown menu and on the right click option for the Product. This option allows selection of Quantity, Label layout and Price to print on the label. An option to select how Product labels are to schedule has been added under a new tab (Label Printing) under Modify Product. The five calculation formulas available are: Selling Units Received, Purchase Units Received, Set Quantity, Set Quantity per Purchase Unit Received, Set Quantity per Selling Unit Received. On the Receive Products from Purchase Order screen, an F11 option has been added on the Supplied column to overwrite the Quantity of labels to be printed (as per above). Custom Barcode Label layouts wishing to take advantage of the price selection dropdown should change the Price expression to : '$'+alltrim(str(getbcprice(),14,2)). 2269
- The issue with the Price List - Selected Price with Margin/Markup report showing the wrong values if the pricing is GST Inclusive has been resolved. 3756
- The Product Analysis report has been updated as the YTD figures were not calculating correctly 3915
- The Product import logic has been changed to ensure that if Serial Tracking is on Track Quantities is also on. 3863
- An issue with Additional barcodes not being converted over correctly when the Swap Product Code utility is run has been corrected. 3892
- The Product Transaction by Type report now allows the option of selection of just Stocktake Adjustment as the Transaction Type. 3652
- The Swap utilities under the Products / Utilities menu now won't allow entry of lowercase letters. 3909
- A new converter has been created to import Serial Numbers from Aurora One. It is called AURSNIMP.EXE and resides in the Converters folder. This is a separate converter called AURSNIMP.EXE and resides in the Converters folder. It should be run after the normal Aurora Converter is completed. 3820

- The Volume of a Kitset is now not recalculated when the Kitset is edited or the Recalculate Kitsets option is run. 3813
- When Duplicating a Product and Exiting without Saving, a message now pops up stating that the Product will be deleted (as per Customers and Suppliers). 3838
- The Swap Group, Sub Group, Sales G/L ID, Purchase G/L ID and Closing Stock G/L ID utilities have been updated so they can handle swapping Products with blank data to a new setting. 3768
- When entering stocktake figures through the Batch Entry option, one of three messages will now display if the Product Code is not in the current stocktake: 1) This Product Code is not within the bounds of the current stocktake. 2) Product Code does not exist. 3) This is a serial tracked item. Please use Stocktake Serial Tracked Products. 3851
- The Audit Log now records when the Update Prices option is run for Products. 3733
- The issue with Products repeating on the Manage Products screen (after selecting a specific combination of keystrokes and settings around the Product Search option) has been resolved. 3717
- The Inactive Products utility has been amended to update the Products2 file correctly 3696
- The Swap Product Code utility has been fixed so that it writes back to the SUPPPROD table when it is run. 3671
- The Stocktake Variance reports have previously not been displaying items with no Prodbals records. This has been fixed. 3662
- The issue when importing Product - Location data through an import routine causing two Prodbal entries for the same location if the Product Code already exists has been resolved. 3844
- A tab has now been created under Modify Products called Financials. The G/L and GST settings for the Product are now set/stored here. 3788

Purchase Orders

- Notes lines (ie. /N text) are now not deleted from a Purchase Order that has been created and a Supplier Invoice import file imported into it. 3386
- The Purchase Order layouts Grouped by Job ID and Grouped by Job ID No Prices have been updated so the Notes added have a Job ID and index associated with them. This allows the Notes to display on the layouts next to the associated item 3333
- The "Invalid subscript reference" error occurring when creating a Multi Location Purchase Order and the first thing selected when in the screen is the Location dropdown box has been fixed. 3799
- The issue with the volume on a Purchase Order not calculating when an Auto Order is created has been fixed. 3908
- The function key list used when Receipting in a Purchase order now correctly advises selecting F9 to look-up a product code (instead of F10) 3895
- When creating an Order the total already on order as well as Quantity at that location now displays just below the entry screen. The total shown for a recalled order is what is on order including this order (when it was recalled). 1947
- The issue with losing the volume calculation for a newly created Purchase Order when it is Saved has been fixed. 3906

Quotes

- The heading on the Pending Quotes Summary and Detail reports now reads "Quoted By" instead of "Sales Rep" as the Sales Rep range on the selection screen doesn't relate to this column. 3571
- The Quoted By range selection is now available for the Pending Quotes - Summary and Detail reports along with the Expiring Quotes report. 3569

Staff

- Labour Codes now display first then the Description in the Staff / Manage Staff / Product Mapping screen. 3729

Suppliers

- There is now an option to print one off Delivery labels for Suppliers. This can be done through the Quick Print Product Labels option under the Suppliers dropdown menu and on the right click option for the Supplier. This option allows selection of Quantity, Address and Label layout. 3871
- An issue caused by emailing a Letter to a Customer (from right click on a Customer) causing a loop between the Code and Supplier Code fields in the Create and Receive Products from Order Purchase Order screens has been resolved. 3912
- The tab order in the Supplier Invoice screen has been changed so it now goes from the Name/Address fields to the Date field. 3718
- The Supplier Invoice Rounding issue when the cursor is in the Rounding field and Process is selected has been fixed. 3657

System

- Errors are now logged when they occur from Right Clicking. 3836
- When a program error now occurs the error handling routine within Infusion will automatically email the audit files to the Help email box of Infusion Software Limited 3850
- The Infusion software License printout has had fields added for Partners to enter current and new user numbers in if Additional User licenses are being purchased. There is also now a text box to enter in the software package the User is coming from 3952
- Fax details on the header of the Software License Agreement has been changed to 03 962 7022. 3601
- The default file naming of Infusion backups has been changed to include the Version number, Date and Time. 3846
- The Search+ option has been removed from the Customer Items and Jobs left hand menus. 3907
- The Management Console screen data can now be printed. 3242