

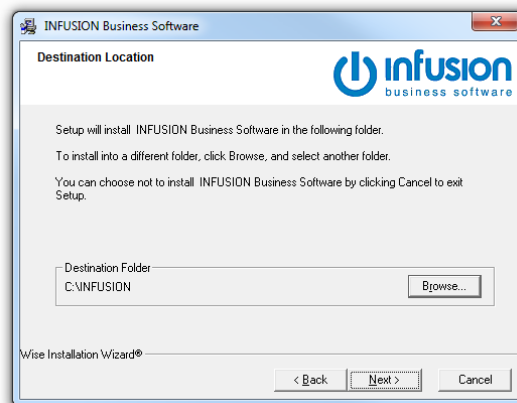
Infusion v6 Upgrade Notes

Introduction

- ⚡ This document is designed to give an oversight into upgrading an existing installation of Infusion software on a standalone workstation, peer to peer network or LAN.
- ⚡ For upgrades of Versions 3.04 and below a full install is required on the Server and all Workstations accessing the software. For upgrades from Version 3.05 a SYSTEM install MAY be required on work stations. This will be dictated by the permissions of the user installing the upgrade on the data file. As a test, if the Customer's account can be modified, a local install is not required.

Upgrading Infusion:

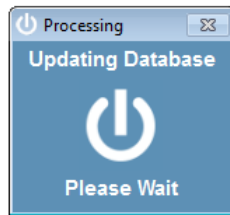
- ⚡ Before beginning the upgrade make a **full backup** of the existing version of the software (ie. Data, Custom and Images folders). Modify the name of the backup to include a note signifying it is a pre upgrade backup and what version is being upgraded eg IBSDATA20100211b4upgrade403
- ⚡ Make sure no one else is in Infusion then run the installer file (from a CD or downloaded from www.infusionnz.com) and install it over the top of the current install:



- ⚡ A quick way to find the Infusion directory is to right click on the Infusion icon and use "Find Target" ("find File Location" in Windows Vista). If you use the browse function, take care as the path will include \Infusion at the end of it. The result may be to install a fresh copy of the Infusion underneath the existing system. If done correctly a pop up will appear as per below stating that the folder already exists:



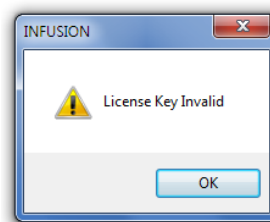
- ⚡ Logging back into Infusion again will cause the data to be upgraded:



Let this process complete before accessing it from any other computers on your network.

Requesting / Entering an End User License

Upon completing the initial steps of the upgrade you will be prompted to re-open Infusion. Doing so will display the following message:



- ⏻ **Click** OK: to open the Software License Agreement window where upon after carefully reading Infusion Software Limited Terms and Conditions.
- ⏻ **Click** I Agree:
- ⏻ The Enter License Information window will appear.
- ⏻ For those on a Maintenance or Support Plan they will be supplied by email their new License and System ID number. Enter these and select **Save**. This is all that is required. For all other End Users follow the steps below.
- ⏻ **Click** Print: to print out a faxable copy. Fax the License Request to 03 962 7022.
- ⏻ Once Infusion Software Limited has processed the request and faxed / emailed it back:
- ⏻ Enter the License # and System ID. **Click** Save.
- ⏻ Your Infusion software will now be licensed for use.

License Information	
Name	INFUSION Software Limited
Address	PO Box 8197 Riccarton Christchurch
Phone	03 977 3645
Fax	03 962 7022
Email	sales@infusionsoftware.co.nz
Website	www.infusionsoftware.co.nz
Partner	
Contact Details	
Name	
Position	
Email	
System Users	
Users	2
Pos Lanes	1
System Configuration	
<input type="radio"/> Financials	<input type="radio"/> Professional
<input type="radio"/> Fundamentals	<input checked="" type="radio"/> Elite
<input type="radio"/> Head Office	
<input type="radio"/> Service Manager Lite	<input type="radio"/> Service Manager Pro
Additional Modules	
<input type="checkbox"/> CRM (Customer Relationship Management)	
<input checked="" type="checkbox"/> Direct Debits (Customers)	
<input checked="" type="checkbox"/> Import / Export	
<input checked="" type="checkbox"/> Customer Items	
<input type="checkbox"/> Contact Management	
License #	System ID #
<input type="button" value="Exit"/> <input type="button" value="Print"/> <input type="button" value="Save"/>	

Anti Virus software

A number of antivirus software packages slow the speed and performance of Infusion as well as lock files. Because of this the Infusion root folder should be added to any exclusion folder available within the antivirus software setup on all computers running Infusion.

Windows Data Execution Prevention (DEP)

Infusion (v5.0 and above) requires that it is **excluded** from Windows Data Execution Prevention (DEP)

This setting can be located (on Windows 7) by right click on Computer, Properties, Advanced System Settings, Advanced, Settings tab. Select the Data Execution Prevention tab.

If the system is set to the 2nd radio button option (“Turn on DEP for all ...”) select “Add...” to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as selected when the window was opened, change it to the second option, follow the process above then restart the computer.

Server Message Block (SMB2)

Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of

<http://support.microsoft.com/kb/2535094/en-gb>