Infusion Business Software Ltd
Software Release Version 8.000
11th September 2013

Infusion Software v8.0 Upgrade Notes

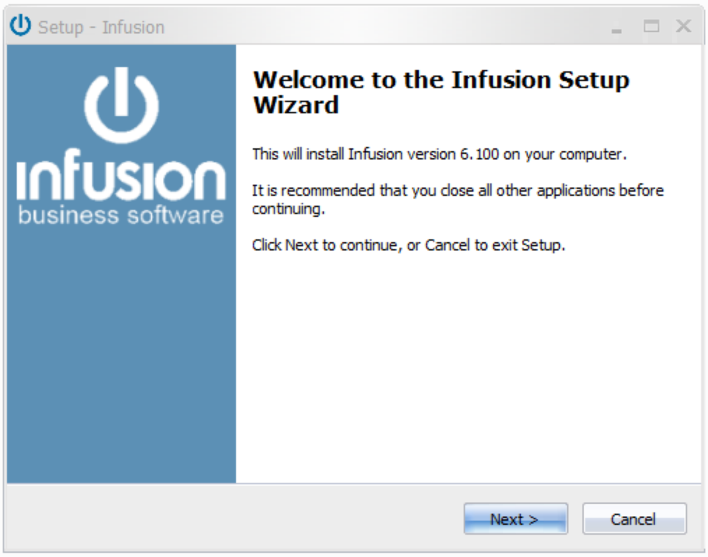
These instructions are for v8.0 of Infusion software and are designed to give an oversight into upgrading an existing installation on a standalone workstation, peer to peer network or LAN.

To install Infusion software firstly download and save the appropriate package from the link provided (or after 01/10/13 from www.infusionsoftware.co.nz).

Before beginning the upgrade re-index the data file then 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 IBS700-20121211b4upgrade. **If the upgrade is being done in a server then this must be restarted prior to installing the update. The install must be done on all workstations.**

Note: Ensure there is no active Stocktake in Infusion when doing the upgrade.

Double click on the .exe file to open it. The first form is a Welcome form.



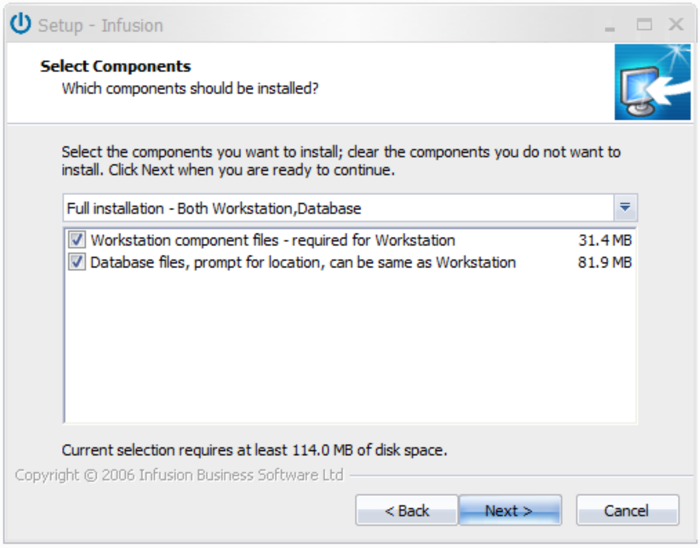
Select **Next** to this

The License Agreement form is next

After having read the License Agreement select the ‘I accept the agreement’ radio button if you agree with it.

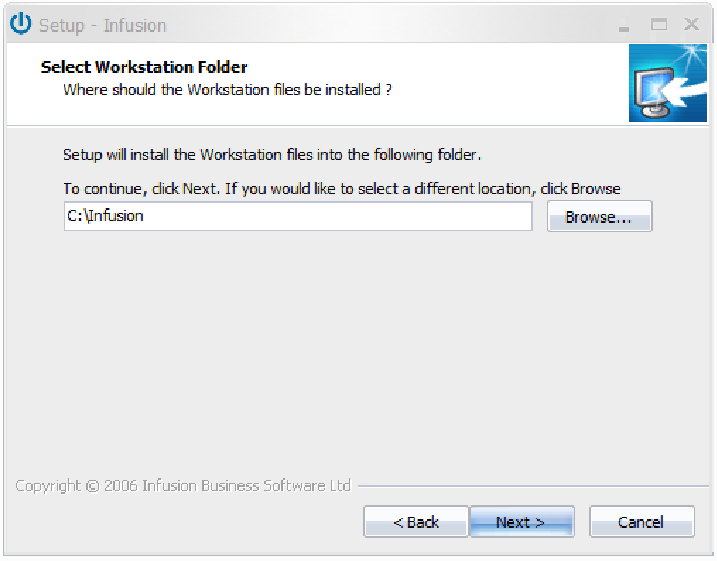
Select **Next**

From the Select Components form select the components that are to be installed.



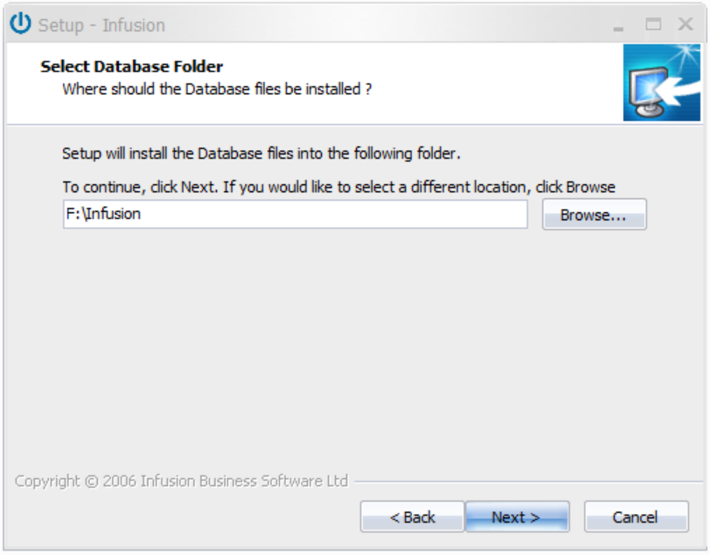
Select **Next**

If the "Workstation component files" option was selected you will be prompted for the folder to install these files into. Type in our browse to the required location.



Select **Next**

If the "Database files" option was selected you will be prompted for the folder to install the Database files into.

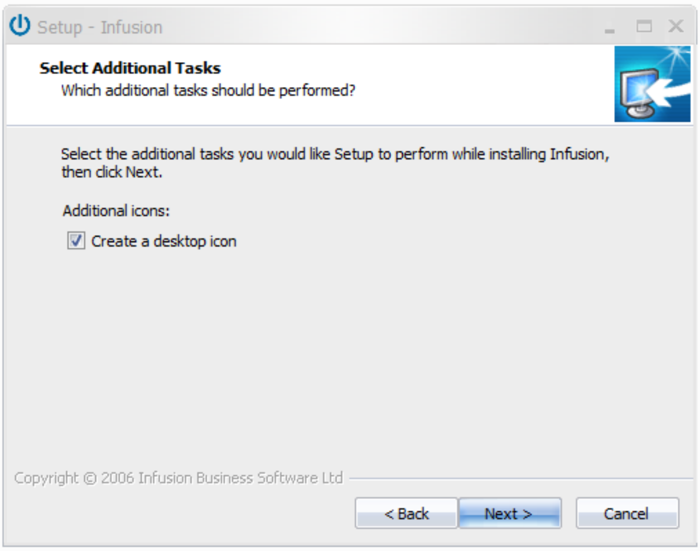


This can be in a different location from the Workstation component files. eg a separate drive possibly on a server location. (the example above shows this as F: drive). Type in our browse to the required location.

Select **Next**

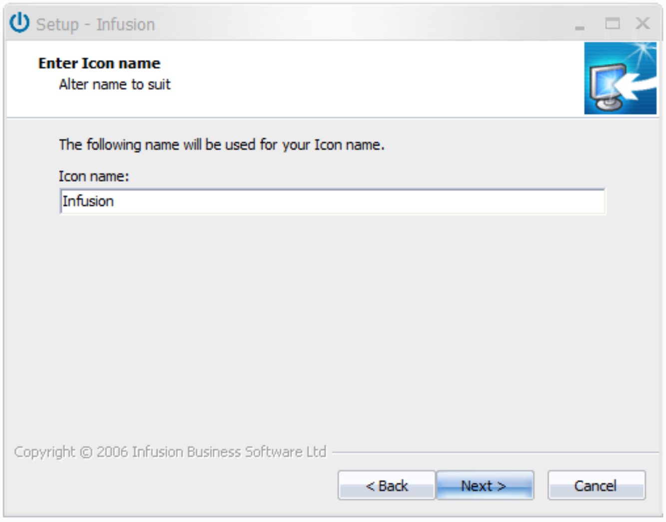
If the "Workstation components files" install was selected the next form is Additional Tasks.

Note: If Database ONLY option was selected, go to the Ready to Install step.



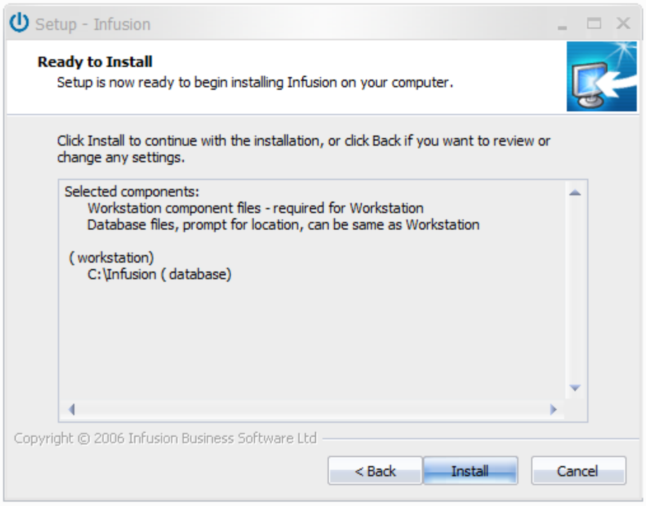
Select the "Create a desktop icon" option to create a shortcut on your desktop.

Select **Next** to be shown the "Enter Icon Name" form.

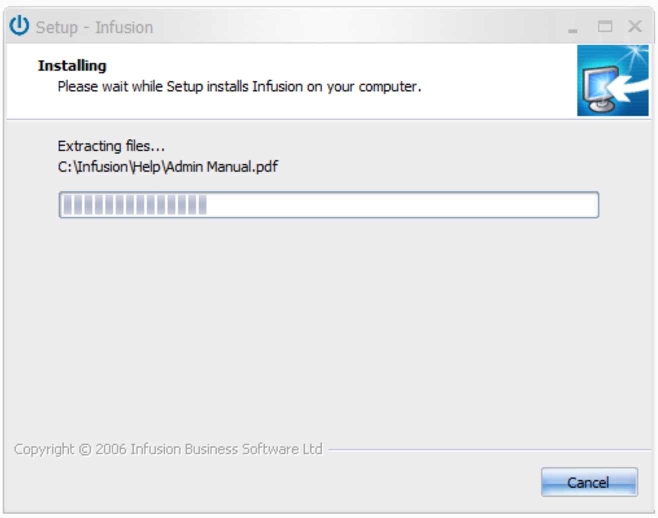


Enter the name you want displayed with the Icon.

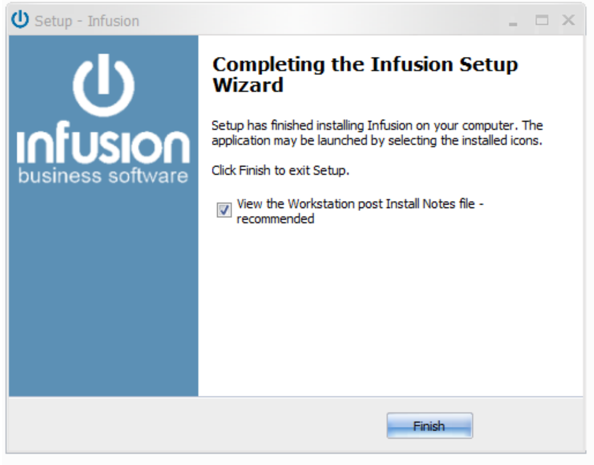
Infusion Setup Wizard will then prompt you to install the software.



Select **Install**



Once the install has completed the following form will display.



Select **Finish**

Technical Note:

If you only select the "Workstation component files" option, only the files required to run Infusion and Help files are installed (plus two Unins000.* files).

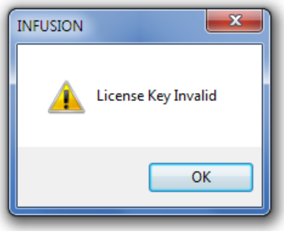
Name	Date modified	Type	Size
ChadoSpell.dll	9/10/2003 4:37 p.m.	DLL File	52 KB
ChadoSpellEditor.ocx	5/12/2006 9:25 a.m.	ActiveX control	1,236 KB
ChadoSpellText.ocx	26/07/2004 11:48 ...	ActiveX control	868 KB
ChilkatHttp.dll	3/03/2011 7:01 a.m.	DLL File	2,024 KB
ChilkatMail_v7_9.dll	24/08/2008 3:05 p....	DLL File	1,640 KB
ChilkatSsh.dll	27/08/2010 3:22 p....	DLL File	1,836 KB
ChilkatZip2.dll	24/01/2005 1:34 p....	DLL File	1,308 KB
gdiplus.dll	22/06/2011 12:28 ...	DLL File	1,708 KB
hndlib.dll	13/11/2007 3:23 p....	DLL File	128 KB
ibsgw.dll	10/05/2011 9:14 a....	DLL File	110 KB
Infusion Support.exe	8/02/2011 2:46 p.m.	Application	261 KB
io.ocx	15/03/2005 7:04 p....	ActiveX control	76 KB
license.rtf	18/11/2011 1:54 p....	Rich Text Format	48 KB
Mscomct2.ocx	9/03/2004 5:45 p.m.	ActiveX control	647 KB
Mscomctl.ocx	9/03/2004 5:45 p.m.	ActiveX control	1,057 KB
Mscomm32.ocx	24/06/1998 12:00 a....	ActiveX control	102 KB
msvcp71.dll	18/03/2003 8:14 p....	DLL File	488 KB
msvcr71.dll	8/04/2006 10:52 a....	DLL File	340 KB
Post Install Notes.rtf	18/11/2011 5:38 p....	Rich Text Format	3,048 KB
riched20.dll	14/04/2008 6:30 p....	DLL File	424 KB
riched32.dll	14/04/2008 6:30 p....	DLL File	4 KB
richtx32.ocx	9/03/2004 2:00 a.m.	ActiveX control	208 KB
SMS_COMAPI.dll	10/03/2005 9:57 a....	DLL File	140 KB
unins000.dat	21/11/2011 2:10 p....	DAT File	9 KB
unins000.exe	21/11/2011 2:10 p....	Application	812 KB
wwipstuff.dll	28/10/2005 2:26 a....	DLL File	82 KB
zlib.dll	12/12/2005 3:43 p....	DLL File	71 KB

If you run unins000.exe (with the Infusion logo) it will Uninstall and de-register the install. The unins000.exe is only created when you select Workstation as part of the Install.

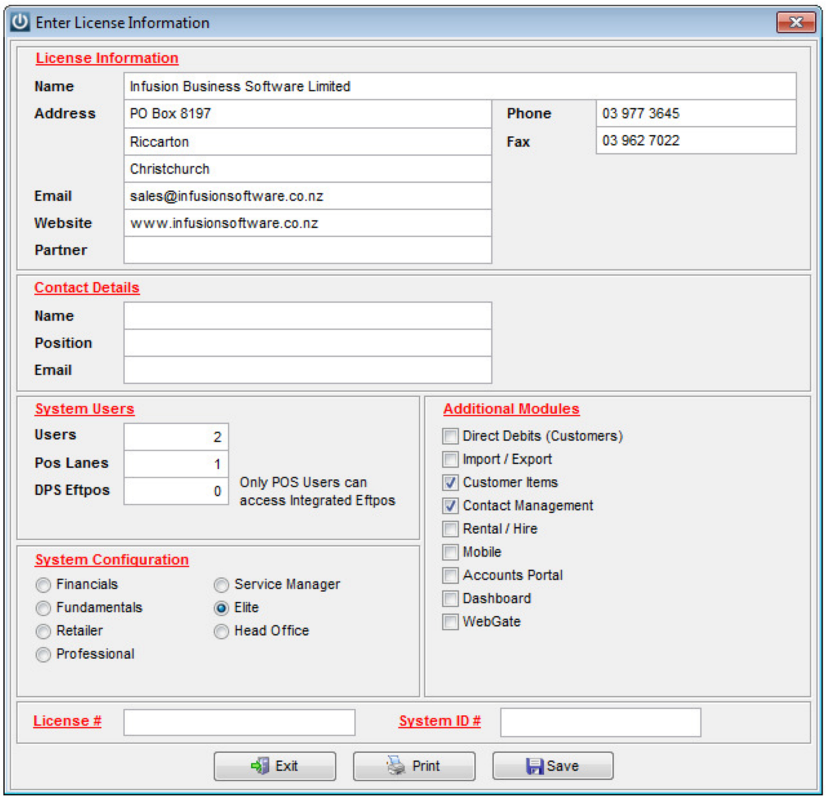
IMPORTANT NOTICE:
If you install FULL or both Workstation and Database at the same time, running unins00.exe will uninstall both the Workstation AND the Database so it is recommended that two installs are done: firstly install the Database then run it again to install the Workstation.

Requesting / Entering an End User License

Once the upgrade file has been run and the data has upgraded re-opening Infusion 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.
- **Click** Print: to print out a faxable copy. Fax the License Request to 03 962 7022.
- This form must be signed by the End User and their associated Certified Partner
- 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.



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.

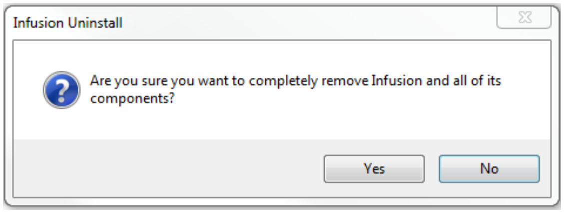
If the system is set to the 2nd radio button option ("Turn on DEP for all ...") select "Add..." to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

Server Message Block (SMB2)

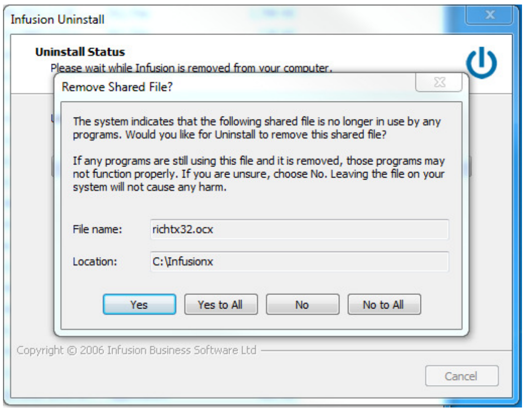
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of http://support.microsoft.com/kb/2535094/en-gb

Uninstall Wizard

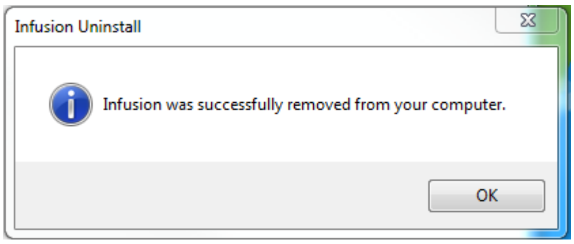
Double click Unins000.exe in the workstation folder.



If any files are no longer needed you may be presented with the following.



Followed by:



Infusion Business Software Update

For Version: 8.0 11/09/2013

Admin

- There is now an option to import Supplier Invoices from the Admin / Manage Import Routines menu. 7834
- Validation has been added into Product import routines so a Supplier account can't be entered if it doesn't exist. Also the Product import routine will now accept a Selling Unit with up to ten characters in it. 5875
- Alterations have been made to the System Verification report and the Aged Trial Balance reports for Customers and Suppliers so variances are highlighted and the differences displayed. 7594

Cashbook

- Bank file formats for importing banking transactions and Direct Credit batches have been updated for ANZ and National CSV formats as they have changed. 7126
- Corrections have been made to the calculation of fields G5, G11 and G12 of the BAS report. 7679
- When importing a .CSV format ANZ bank file a prompt now appears asking if the file has been created from Direct Link Online or Internet banking - there are now two different formats for these. 7980
- The issue in v7 where a Credit or Debit in the Bank Rec screen could be changed has been fixed. 7883
- When a Cashdrawer is balanced a record is now created in CBREPS storing the audit number used on the BANKING records and in FINTRANS. This information is to be used in reports that will be created to help track where money has gone. 7721
- When creating banking rules Totalling and Header accounts are no longer available to be selected. 7796
- ANZ is now a supported bank format for Direct Debits 6455
- The number of lines is now shown on a Direct Credit batch report. 7911
- The Bank Rec screen now always opens showing the transactions from the top of the list, regardless of the column it is sorting by. 7913
- Kiwibank is now a Direct Credit Export file option. 3121
- It is now mandatory to enter the Financial Institution, UPS Name and APCA Number when setting up an Australian bank account. These fields are required for a DC batch to work. 7309

Contact Management

- The Contact Management screen will now open maximised if the screen is set to this and the Saved option under the Fields button is selected. 7512
- A Contact Management To Do list/screen has been added for Staff. This screen can be setup to display when logging in from under the Staff \ Login menu or manually activated from Staff dropdown menu. The list will display Follow Ups assigned to the Staff Member 7613
- A New Contact Management report has been added - Contact Analysis By Staff 7660

Customer Items

- The issue with service invoices not being linked to Customer Items when scheduled through the Regular Services screen has been resolved. 7520
- The Customer Items Detail Listing report now shows the Item's Serial Number on it. 5191
- The History button in the Customer Item Modify screen has been moved to the Enquiry screen. 7926

Customers

- There is now an option under Manage Customer Defaults to select if the Country details are pre-populated on line four of the Postal Address when a new Customer is setup. 7999
- A tickbox option under Customers Details titled Exclude from Accounts Portal has been added. 7749
- Customer Sales Analysis reports now process faster. 7782
- Validation has been added to the # Days or # Months Payment Terms fields to avoid an error when specifying large numbers. Also negative numbers can't be entered. 7316
- The Contract Rate report (CUSTSPEC) now shows the Product Group lines as well. 7425
- On Customer and Supplier Invoices if Account payment terms are set to 30 days after the end of the month, for February these invoices are dated 28/02. 7422
- The processing of Statements has been sped up 7667
- Finance Charges are now not included in the Customer Sales figures. 7678
- ABN and GST numbers can now be entered against a Customer account in an Australian install of Infusion 7242
- A tickbox option titled No Statements has been added to the Terms / Delivery screen for Customers. This will be used to exclude Customers from having Statements sent to them. 7644
- The Customer with No Sales (Custnosl) report has been amended to pick up the correct transactions for the date range specified. 5653
- A number of tickbox options have been added to the Customer Defaults to require certain Customer account information when creating a new account. The required fields display with a coloured fill. Those not having data entered in show in red. 7779
- The Customer Survey question fields have been increased in size and display in full on the screen. 7615

File

- The Management Console has been updated to run a lot quicker. 7415

Financials

- The P&L - YTD report has been amended so the YTD column is on the right hand side of the report. 7742
- The Batch Description has been added to the Transaction Journal report. 7675
- The Financial Transaction journals screen has been modified from v7.0 so that there now isn't a message at the end of each line asking to "Add a new record", if the date for a line is changed it won't revert back to the old date when tabbing through it, arrowing down from the date field will work correctly and the year of a date can be changed without having to change the whole date. 7324
- For the Balance Sheet reports (FINBS and FINBSLY) lines do not now appear if there is a nil value in the % column. 7268
- The last two characters of the date field are now not truncated on the Financial Transaction batch report (finbatch) 7326

General

- A number of reports have been edited so the selection screen has the date range at the top. 7045
- If a user logs on and the system is outside the lockout dates a pop up message now appears warning of this. 7857
- The Price Lookup on the Job Management line entry now uses 15% GST as opposed to 12.5% GST when using the Date control to enter the Date. 7270
- There is now a button on the Queued Emails screen called "Email a set Qty" that when selected allows for entry of a number which determines how many emails will be sent at once. 7789
- There is now a prompt option to remove all .tmp, .bak, .tbk and .fte files from a data set when Re-indexing. 7775
- An option (Excel button) has been added to the Fields section of Manage screens to allow for exporting of filtered and sorted data. 7785
- Manage Customer, Manage Supplier, Purchase Order, Invoice, Quote and Job screens now show negative values (eg balances) in red. 7766
- When a record has been locked by a user and another user tries accessing it, the message displaying will now say which PC and the User the record has been locked from. 7550
- Proper case formatting has been removed from Email fields 7646
- When Re-indexing, a warning will now be given if the Logo file size is large ie greater than 120kb as this may slow printing and emailing. 7774
- In address lines RD (Rural Delivery) is now made uppercase when Proper formatting is turned on. 7335
- There are now options for each search type (eg Customers) under Manage System Defaults to default to using the Filtered Search option when searching. 7788
- The Accounts Portal option has been added to the Registration Screen. 7609
- The GST Detail report for Australia totalling issue has been addressed. 7638

Import / Export Module

- Three new tick box options have been added to the Defaults screen when setting up a Supplier Invoice import under Manage Import Data to replace the previous option of "Create Products in Infusion when importing". The new options are 1) "Don't Search associated Supplier Pricebooks when Importing", "Create new Products when associated Pricebook is present" and "Create new Products when associated Pricebook is not present". For more details on what these options do see the Manage Exports section of the Admin Help manual. 7894
- The issue with the Mitre10 invoice export file having a double up in the Freight costs has been fixed. 7652
- Lower case characters in the Product Code field of a Supplier Invoice import file are now being matched / converted to a Product Code in Infusion. 7895
- The CRT Invoice export routine has been updated so there is a selection option for where the CRT account number is stored ie any of the Char or Text Customer Custom fields as well as the Sortkey. There is also now a default location the file is saved to. 6388
- An import option has been added for Chesters P/Os / Supplier Invoices. 7650

Invoices

- If a Recurring Customer Invoice is created and then Deferred Payment selected as the Payment type, the Invoice will now Post. 7803
- When two or more Trade In items are on one Invoice all will now be coded to the Trade In Purchases GL code under Financial Control Links. 7524
- The Trade In process has been modified. 1) Two new Job Types come with standard software (Pre Delivery and Trade In), 2) Post sale processing for the item has been added - Trade In account and Product Type, Group and Subgroup settings can be specified, 3) Fields have been added to the Product Details screen for Trade In / Refurbishment costs, 4) Under Manage Product Defaults additional Trade In defaults can be added for the Trade In account, Product Type, Group and Sub Group. See the Trade In Support Notes for more details. 6446
- A Pending Invoice created from a Customer Special Order for an International Customer now doesn't include GST. 6508
- When the "Prompt for Staff Code before accessing Invoicing/Quotes" option from under Manage Customer Defaults is selected the Entered By field in the Invoice or Quote is now automatically populated with the Staff member's code. 7691
- The error created when Posting an Invoice from the Pending Invoices screen for an Invoice with a Deposit on it has been fixed. 7311
- The Bin Location for a highlighted item will now display at the bottom of the POS screen 7643
- A Warranty document can be printed with an Invoice if the item being sold is set up as a Customer Item Type (ie will create a Customer Item against a Customer when sold).This is done by manually ticking the Warranty box on the Invoice screen and having a layout called "WARRANTY" in the custom folder. A file of this name is in the Reports folder in a standard install. 7668
- Invoice and Quote layouts have now been split so there is a standard layout and one with Deferred Payment terms. The Deferred Payment layout name has a "D" suffix eg INV01 and INV01D. Also Invoices and Quotes can now have Terms and Conditions chained to them. The tick box "Print Terms and Conditions (incl Quotes)" under Manage Customer Defaults / Invoices activates this. The text for it comes from the file TERMS which is in the Custom folder so can be edited from the Report/Label Editor menu. A template TERMS file is in the Reports folder. With this change the Summary section of Invoice and Quote layouts is now available when customising layouts. 7580
- Users will receive a warning if they enter only freight or rounding at the bottom of an invoice; a GL code on a line must be used instead. 7655

Job Management

- On the Job Deposit reports (JMDEPOSITPAYMENT & JMDEPOSITPAYMENT2) there is now a date field for when the Deposit was received. 7286
- There is now a filter at the top of the Manage Job screen allowing the user to select to show only one Job Type. The selected Type can be saved per user from the Fields / Save option. 7441
- The Modify Job screen can now be sorted by all columns. 7376
- An Insert button has been added to the Modify Job screen so the user doesn't have to scroll to the bottom of the entered Costs to add a new one. 6659
- When Entering Job Costs the message "Warning: You have insufficient stock available" will now display if appropriate after a Location is selected. 7213
- A Selling Units field has been added to the Enter Job Costs screen. 7283
- The Selected Jobs to Invoice lookup screen on Bulk Invoicing can now be sorted by Job Title and Site Address. 7339
- The opening up of Jobs has been sped up. 7773
- Location Quantities are now not adjusted when entering a non-reducing Product onto a Job from a Location different to the default Job location and a transfer is done. 6258
- The issue with cancelling out of making a Job Deposit payment and not being able to add the Payment again has been resolved. 6943
- When using Latest Cost as the Price level on a Job the Sell rate now populates when receiving a PO onto the Job. 6977
- A Date and Time have been added to Pinned Notes in the Job Scheduler. This is used to reschedule / move the Pin. 7288
- When in the Product Code field of a Job and entering costs, if the "Skip to the Code field after each cost added" option is selected, Tab will now take the cursor to the Description field. 7628
- When in the Modify Job screen the Quote button text now displays in a red if there is a Quote on the Job. 7480
- Two staff logged in to the Calendar can now not drag the same Unassigned Job to different staff members to create a double up. 7683
- The cost entry columns in the Modify Job screen can now be sorted. 7907
- The Bestrate warning when entering costs in the Enter Job Cost screen with the system set to hold Cost Date, Cost Code but not hold Job ID, does now not appear. 7304
- When entering a Staff code onto a Job through Enter Job Costs the type **STAFF** is now stored in JobIn. 7711
- Where staff are working on a Job that hasn't been assigned to them the Job Scheduler will display with green clocks at the beginning and end of the entry (as opposed to clear for the Staff member assigned to the Job) 7618
- On the Staff Timesheet Analysis - 7 Day report a small error with totalling on one day has been fixed 7622

Letters

- Inactive Contacts are now not used when sending out Customer Item type Letters. 7478

POS

- The Cash Drawer Contents report (POSCONTS) has been fixed so that if you have a Drawer ID set in the POS Defaults you can now see the sales for This Drawer Only. 7790
- Buttons can now be setup to display at the bottom of the POS screen for use in selecting a Product for a sale. Buttons can be assigned to a Product Code or Group. They can be clicked on using a mouse or touched when set up on a touchscreen. See the POS Help manual for more details. 7752
- When using the POS Cash Out option the correct GST rate for the GL account selected is used. 7632
- There is now the ability to enter a date when a Cashdrawer is removed. There is a prompt with a date selection defaulting to the current day. 7720
- The POS Sales By Staff report now works correctly when entering a Sales Rep code in to limit the report to a single staff member. 6768

Products

- Two new fields have been added to the barcodes.dbf file - Origin and Reference. Having these fields allows the Invoice number or Order number to be stored when records are created via invoicing or receipting goods from a Supplier meaning they can be used on Product labels. 7532
- A tick box option has been added to the Products / Settings screen called "Include in Infusion Mobile". This field is also available when setting up a Product import. 7642
- When using the Swap Product Group option the G/L codes set against the Locations are now updated 7205
- Pricebooks now work with 80 character descriptions. 7930
- There is now an option to select a Preferred Supplier for the range of Products when creating a Stocktake. 7909
- The Inactive Products report has been updated to include a unit cost (Latest), an Extended Line Total and a Grand Total. 7684
- The Product Sales Analysis reports have been sped up. 7781
- The Description field on Products has been increased to 80 characters. 7551
- The A4 and A5 Product Specification sheet reports have been tidied up. 7517
- The Update Pricebook Prices function now works correctly when selecting the Include Inactive Items option. Also the Type dropdown option has been corrected to display the Pricebook (not Infusion) Types. 7340
- When updating Pricebook prices to Products (PBUPDATETOPRODUCTS), if the pricebook prices are GST inclusive the selling Price fields for the Product are now updated correctly. 7442
- A tick box option "Update Average Cost when receiving Products" has been added to Product Defaults. This is set to be selected by default. It will allow the Average Cost of Products to be updated if the Latest Cost isn't. 6938
- The Product Top / Bottom report (PRODTOPG) has now the option to sort by Sales value or Quantity sold. 7375
- The pop up screen appearing when using the Find button on Reference field of the Customer Enquiry / Invoices screen now allows 20 characters to be entered. 7852
- The two Top/Bottom Product Sales Analysis reports now don't pick up summarised MISC lines from Job Invoices 7892
- When manually receiving Products the tick box to 'Update Cost Price' now works correctly. 7664
- When transferring Products that are set to track only SOLD serial numbers, the system will now not prompt and require serial numbers for the transfer. 7611

Purchase Orders

- When in Purchase Order (Creating and Receiving Product) screens the On Hand quantity text on the bottom left of the screen has been changed to Available Quantity to reflect that the value is the total On Hand less the Allocated quantity. 7315
- When Saving a Purchase Order generated from right clicking on a Supplier and selecting Create a Purchase Order, the screen now goes back to the Manage Suppliers screen as opposed to asking for another Supplier account. 7568
- The "CODE is not unique and it must be qualified." error seen when running the Purchase Orders Not Yet Processed report (SUPPUPO) with the report sorted by Product Code has been fixed. 7419
- A new report called Purchase Order Receipt/Invoice Date Check (PINVLM) has been added. This report will show Purchase Orders that have been receipted in one month and the Supplier Invoice processed in a different month. 7797
- The error seen (only in v7) when using the Auto-order option in a Purchase Order screen for a multi-location data file has been fixed. 7432
- Notes can now be added to the Description of an Item on a Purchase Order at the Create, Receipt and Process Invoice stages as it did in v6.21. The F11 function key is now used to do this. 7501
- Users are no longer able to enter invalid General Ledger accounts onto Purchase Orders eg keying in /NS had resulted in an auto created GL account (user had intended to use N/S product code). 7538
- The Purchase Order screens will now save any resizing. 7995

Quotes

- When creating a Quote, Department information is now saved. 7378
- The issue when a Pricebook item is added to a Quote and not being able to be Discounted after the Quote is saved has been resolved. 7349

Rental Hire

- A Rental / Hire module has been added to Infusion software. See the Rental Hire support manual for notes on how this operates. 7035

Reports

- The Overdue Services report now filters by Customer Type. 7412

Staff

- Opening up of a Staff member account (from the Manage Staff screen) has been sped up. 7784
- A Location field and colour option can now be added against a Staff member from under the Staff / Login screen. 7777

Suppliers

- Deferred Payment terms can now be set up for Suppliers (on Enter Invoices (No Products) and Purchase Orders) 3223
- Running of the Supplier Sales Analysis reports has be sped up. 7783
- The network performance issue created when two users are simultaneously processing Supplier Payments has been resolved. 7553

System

- The following message has been added to the lockout date pop up screen: Please review your Transaction Lockout Dates settings on the Admin / Defaults / Manage System Defaults screen. 7572
- The dbf repair tool CMRepair has been added to Infusion (Admin menu) to assist in the repair of corrupt files. 7521
- A tickbox option has been added to the Manage System Defaults screen called "Don't display cents on reports". This setting will be used to progressively update reports causing issues with asterisks due to the data being too wide for the field. 7754
- The error message screens in Infusion now pick up the entered Certified Partner details to direct the end user to who should be contacted if assistance is required. 7234
- The Customer Invoice and Supplier Purchase order screens have been set to not use Proper formatting by default. 7322
- Bank Reconciliation Summary and Check reports have been added to the Partner menu. These reports assist with finding issues in the Bank Reconciliation. They are guides only and will only highlight potential issues. 7297
- The Aurora convertor has been updated to accommodate the new SRCE field in 7207
- The way filtered searching works has been changed. See associated support notes 7826
- Due to issues with Infusion data files being locked when backups were being done (and consequently missed) the Infusion Gateway file has been updated. The Gateway file now requires a third party application to logon and record when it is used to access Infusion data. Unless the Logon function is called, none of the other functions within the DLL are able to be used. While a third party application is logged on to the DLL a prompt to backup Infusion on exiting the software won't appear. Third party applications currently using the Gateway file will need to be updated to use the new version. Applications will still be able to run using the old gateway file (ibsgw.dll) if the End User upgrades to v8. 7457
- You can now display a Chart/Graph of historical data using the ‘to’ date in the Management Console screen. It shows 12 months inclusive of ‘to’ date month. 7614
- Location(s) can now be colour coded which affects the display of the following screens - Job, P/O, Customer Invoice, Supplier Invoice 7616
- Customer Invoices can now be exported cleanly to RTF/Word, Excel and PDF. 7619