# Infusion Business Software Update 8.203

These instructions are for v8.203 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 www.infusionsoftware.co.nz.

## Upgrade Notes

Run the install as an Administrator

For all upgrades of installs of v8.010 and prior all server and workstation computers require a reboot prior to the upgrade due to user and registry changes in v8.203.

For all upgrades of installs of v8.010 and prior a workstation install is required.

For upgrades of v8.100 and above just a server install on the Server is required.

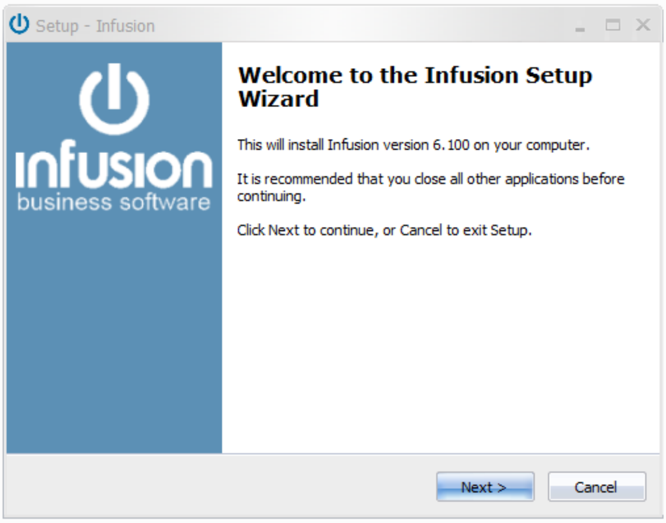
## Before Beginning The Upgrade

Firstly restart the Server/computer the Infusion data file resides on.

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 IBS701-20121211b4upgrade. All external syncing services (eg website) need to be stopped before the backup is made.

If upgrading after hours make sure you have a copy of your v8 license. If upgrading from Version 7 and below you will need to contact Infusion software for a new license.

To start the upgrade **Double click** on the downloaded .exe file to open it. The first form is a Welcome form.



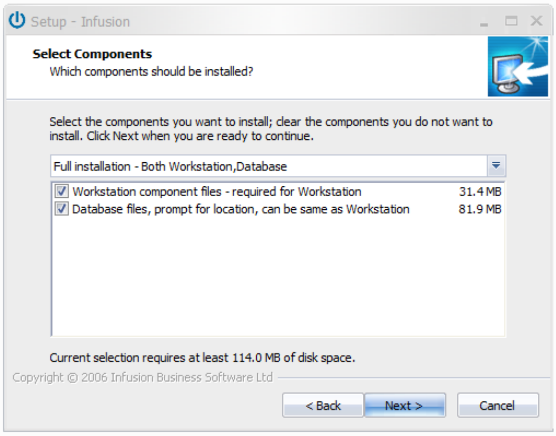

Select **Next** to this

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.

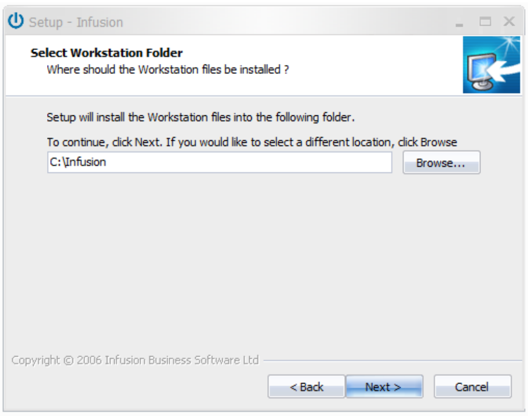
Select **Next**

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



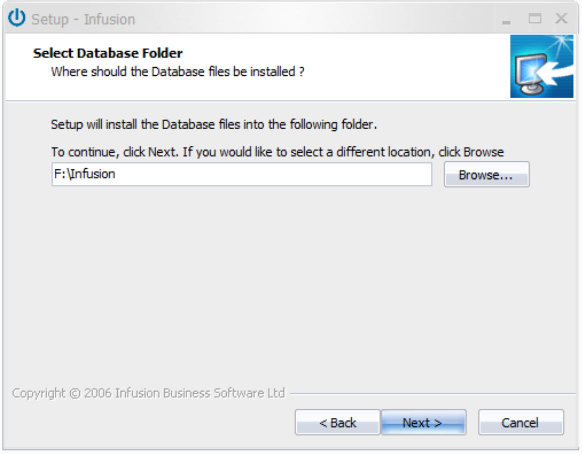

Select **Next**

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.

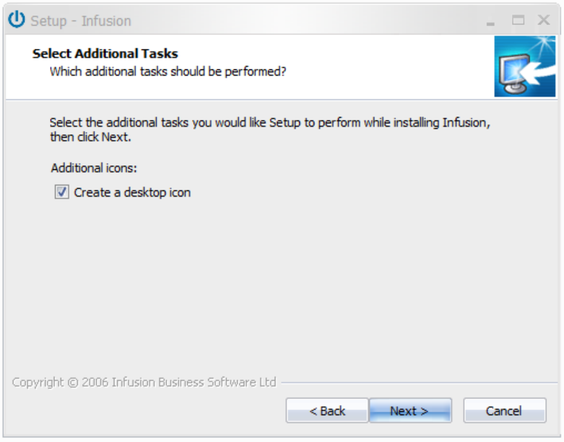



This can be in a different location from the Workstation component files. eg a separate drive possibly on a server location. (the example above shows this as F: drive). Type in our browse to the required location.

Select **Next**

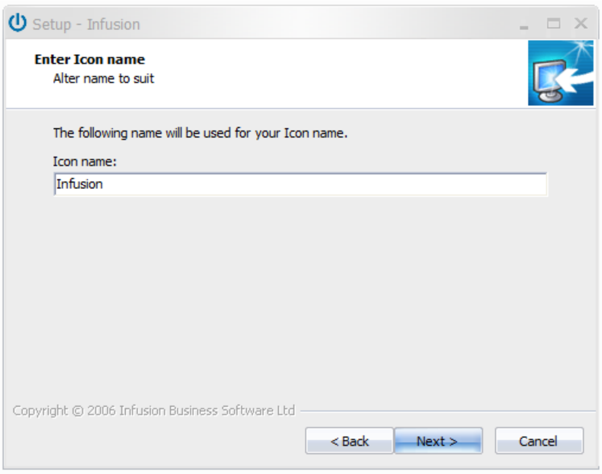
If the "Workstation components files" install was selected  the next form is  Additional Tasks.

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



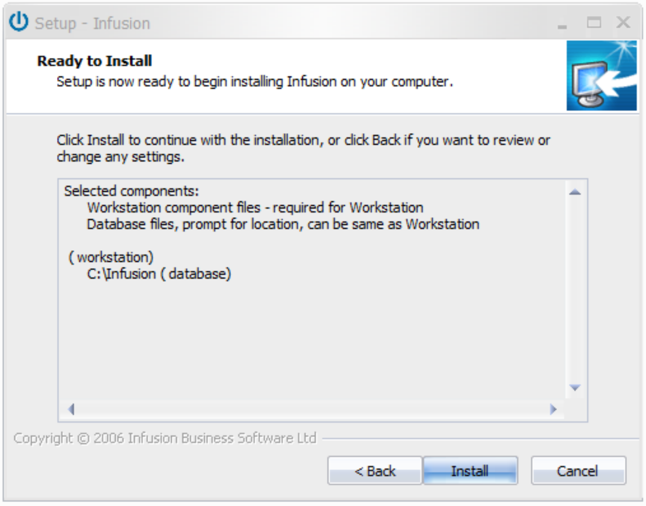

Select the "Create a desktop icon" option to create a shortcut on your desktop.

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

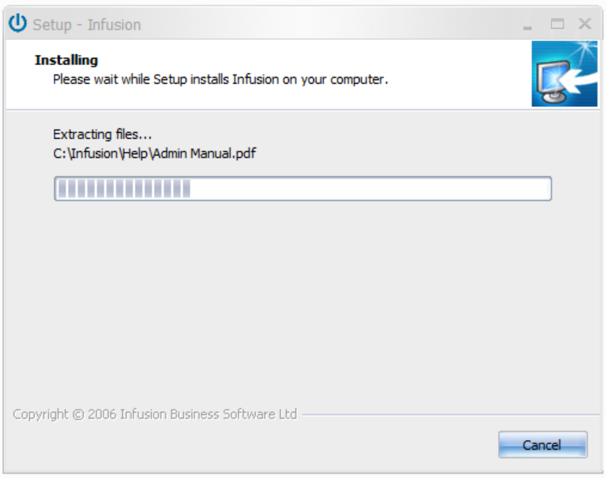


Enter the name you want displayed with the Icon.

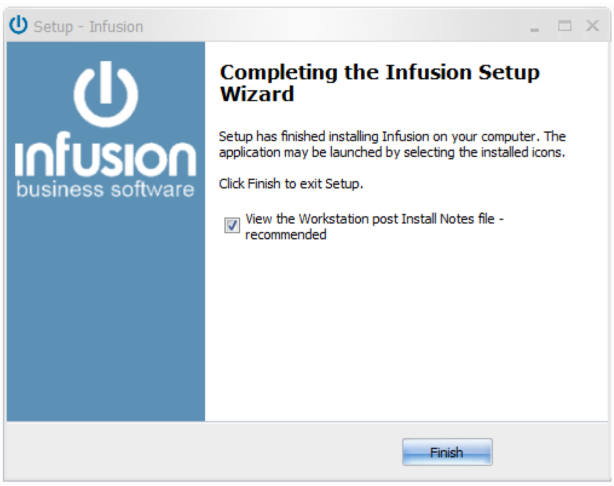
Infusion Setup Wizard will then prompt you to install the software.




Select **Install**




Once the install has completed the following form will display.




Select **Finish**

Technical Notes:

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.

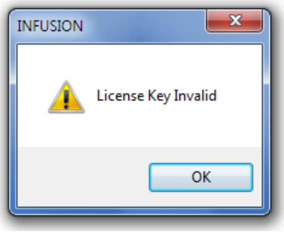
## IMPORTANT NOTICE !!!

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

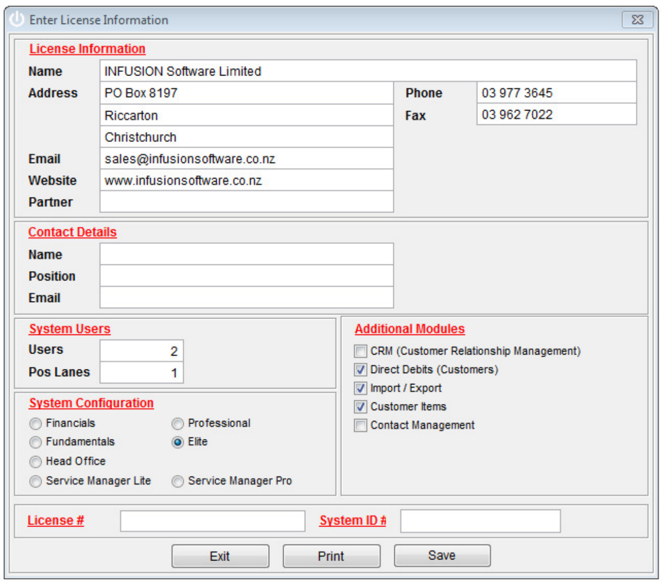
Version 8.2 requires a new Licence.

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.
- 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.



## 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.

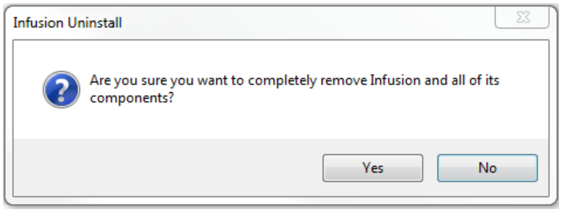
If the system is set to the 2nd radio button option (“Turn on DEP for all ...”) select “Add...” to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

## Server Message Block (SMB2)

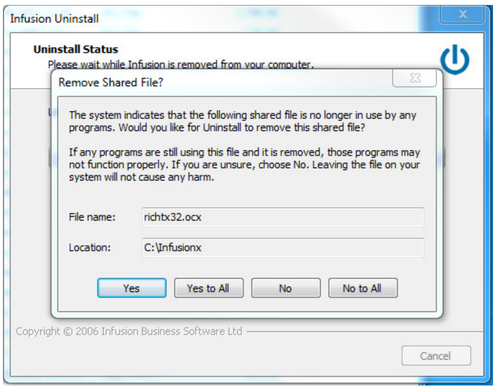
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of http://support.microsoft.com/kb/2535094/en-gb

## Uninstall Wizard

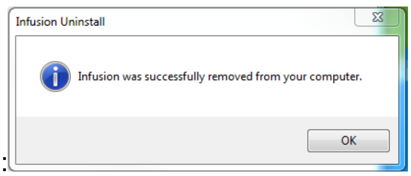
Double click Unins000.exe in the workstation folder.




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




followed by

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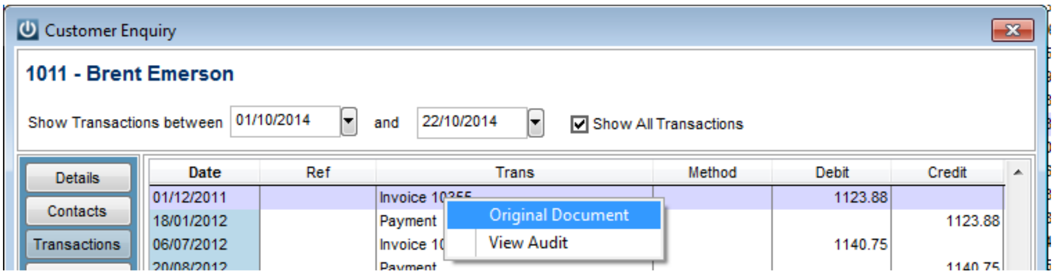
# V8.203 Update Details

## Administration

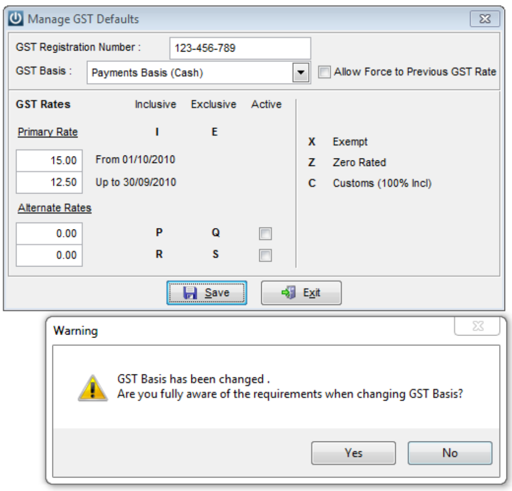
- The re-index process now has an option to complete all the Integrity checks for Customers, Suppliers, Products and Financials along with a History rebuild. **#7185**
- The selection of the layout to be emailed has been updated **#8824**
- As part of the re-index process you can now delete emails and scheduler entries. NOTE: With alterations in 8.200 re-indexing frequency can now be less. Recommended once per month or weekly on very large datasets. **#8903**
- Financial Reports updated to print with no cents so whole dollars only. fin3ybs, fin3yrpl, finbs, finbsly, finpl, finplb, finplbv, finplly, finplytd all print with cents and no cents depending on the flag ticked. Finpl12, finpl12b, finplfc, finplqtr, finplqtrb only print with no cents regardless of the flag due to the space constraint of the report **#8997**
- Right Click drill down on transactions has been sped up and has a menu option for View Audit and Original Document. **#9274**

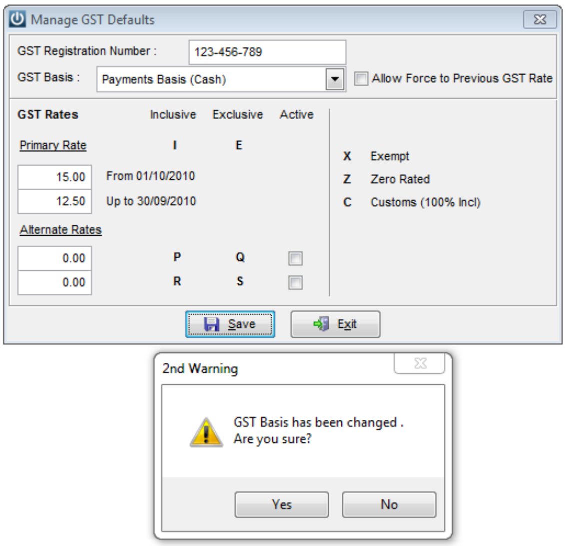



- A new email option to allow use of the user's local email application to send emails to Customers, Suppliers, Invoices , Purchase Orders, Quotes has been added. When this option is used a pop a list of recipients is available for selection. **#9348**

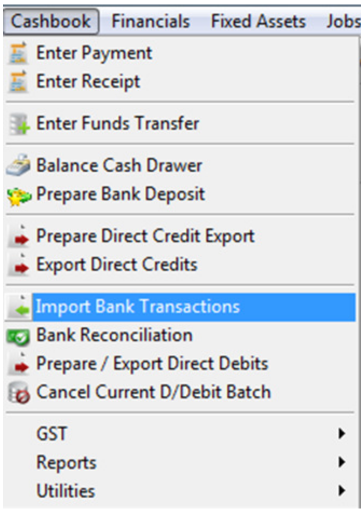
## Cashbook

- A large warning has been added to the Cashbook if a User elects to change their GST method.**#8679**



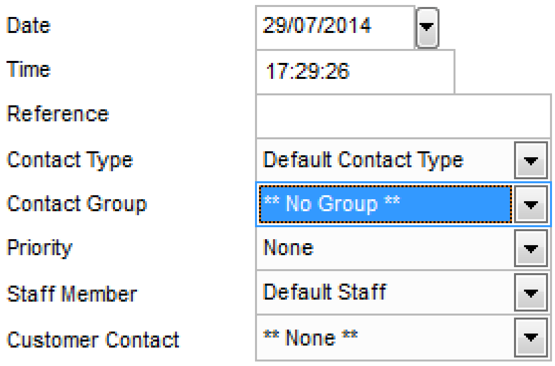



- The Cashflow Analysis report has been updated to display POS Receipts. **#8816**
- Infusion will now allow you to process a Cashbook payment with a zero value where the transaction may have a positive line and a negative line value. This enables 'Journal entries' which includes GST.**#8924**
- The DCBATCH report has been amended to now print alphabetically by Other Party. **#8933**
- Direct Debit processing has been sped up.**#9216**
- The Menu Item to Import Bank Transactions has been moved from the Utilities menu to the main cashbook menu

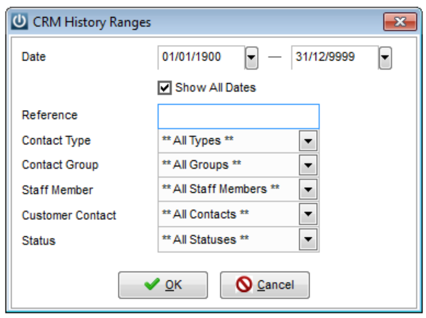


# Contact Management

- The Assigned To field in the Contact Management tab now defaults to the User logged in.**#7693**
- When an individual Customer Contact is selected their contact details are displayed including DDI, Mobile and Email address. **#7694**
- When using a Contact Follow up Event you can now create a further Follow up Event from the same screen. **#8042**
- A Contact Group has been added to Contact Management across Customers, Staff and Suppliers. **#8762**




- A Contact History list now shows on the Contact Event screen. This list can be filtered.




- You can now create a new Customer Contact when creating a Contact Event. **#7593**
- A Priority drop down list has been added to Contact Management. 1 - 5 (Urgent, High, Medium, Low, None) are the system set values. The user can set colours against each Priority. A default value can be set for each module (ie Customers, Staff, Suppliers) **#8761**

# Customers

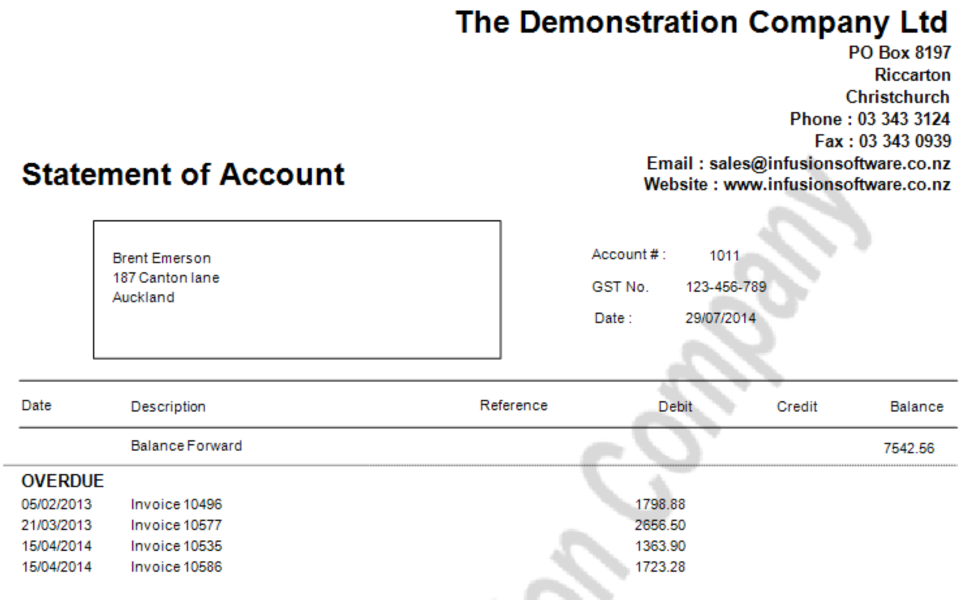
- The ESC function has been added to the Customer Enquiry screen when the search by date option is selected. **#1024**

- You can now no longer delete a Customer with active Jobs **#4145**

- Once a Customer on Stop Credit has paid their account a pop up message will appear reminding the user to take them off Stop Credit **#5669**

- Freight and Rounding options are now included on the Quote and a Job **#8699**

- A new Customer Statement layout has been included. This statement is a balance brought forward style with the overdue items listed after the monthly transactions. **#8772**



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Email : sales@infusionsoftware.co.nz
Website : www.infusionsoftware.co.nz

**Statement of Account**

Brent Emerson
187 Canton lane
Auckland

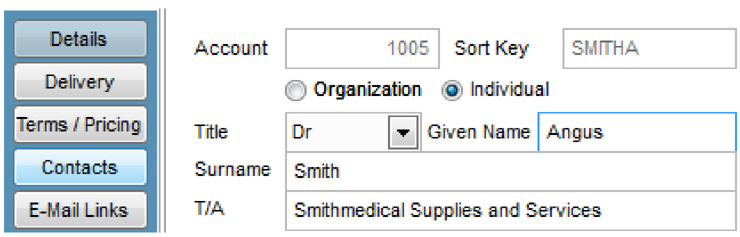
Account # : 1011
GST No. 123-456-789
Date : 29/07/2014

| Date | Description | Reference | Debit | Credit | Balance |
|---|---|---|---|---|---|
| | Balance Forward | | | | 7542.56 |

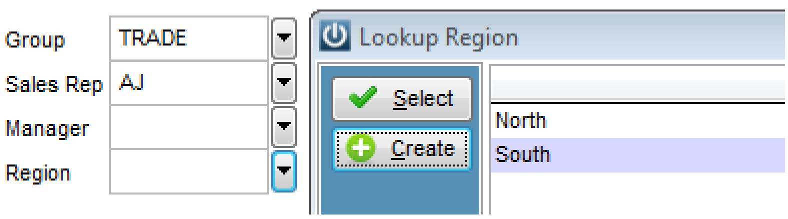
**OVERDUE**

| | | | |
|---|---|---|---|
| 05/02/2013 | Invoice 10496 | | 1798.88 |
| 21/03/2013 | Invoice 10577 | | 2656.50 |
| 15/04/2014 | Invoice 10535 | | 1363.90 |
| 15/04/2014 | Invoice 10586 | | 1723.28 |

- A new T/A (Trading As) field has been added to the Customer screen and to the standard layout forms. Customised Invoice, Quote, Statement and Packing Slips will need to be updated to use this feature. **#8786**

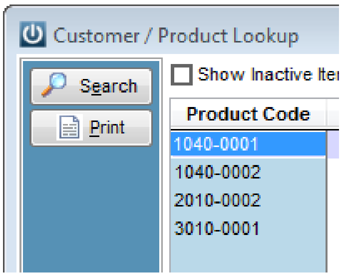



- An additional field has been added to the Customer screen for Region. The End User may set up the Regions as required. The Region field has also been added to the ranges for the Sales Analysis reporting. **#8787**



- The ability to re-open a Pending Invoice and use the F9 key on the Qty field to review the line Quantity Build Up has been reintroduced. **#8835**

- A report can now be printed from the Customer Product History screen showing the Products purchased by that Customer. **#8838**

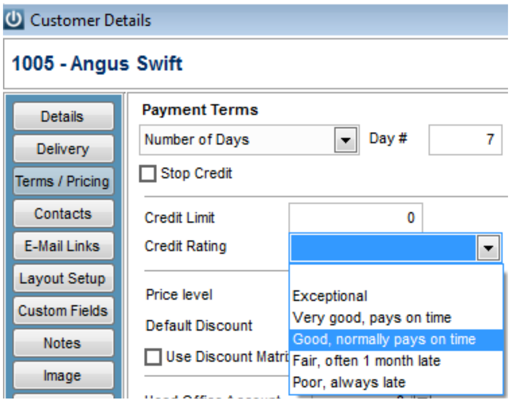



- You can again produce a Quote for a Customer that is on Stop Credit. **#8848**

- Creating a Customer Price Enquiry has been sped up.**#9058**

- You can now store a Default Delivery Method against the Customer to be used whenever an Invoice or Quote is generated - the selection can be overridden at the time if required. **#9067**

- An additional field called Credit Rating has been added to Customer Details \ Terms and Pricing tab. Selection options for this field range from A to E. A - Exceptional, B - Very good, pays on time, C - Good, normally pays on time, D - Fair often 1 month late, E - Poor, always late. **#9068**



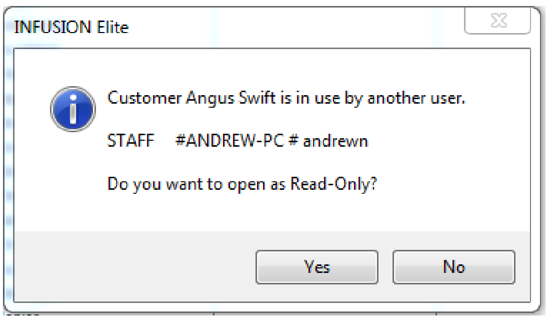

- All of the Invoice, Statement, Packing Slip, Quote layouts have been updated to utilize the new format for name and address output allowing for lines to be moved up if line above is blank. **#9138**

- A Customer Remittance can now be previewed before printing. **#9196**

- Opening a Customer account has been sped up. **#9205**

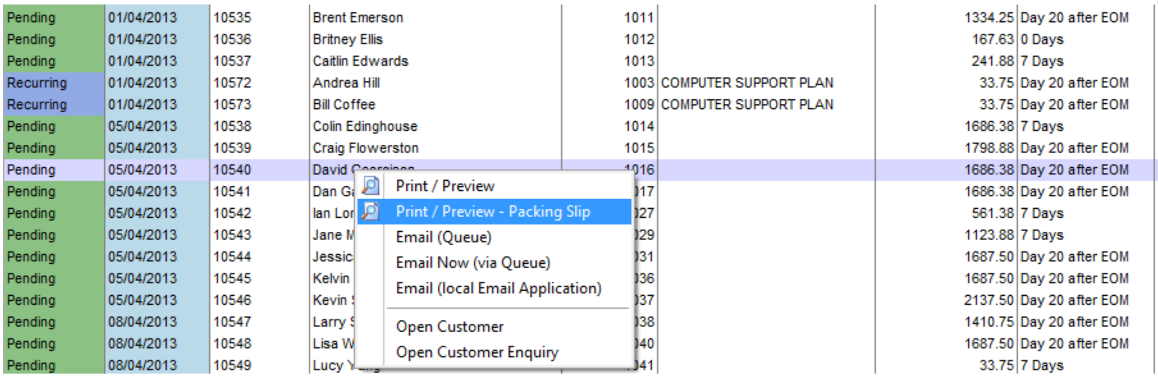
- The Customer Region can now be added to Customer reports as a selection criteria **#9290**

- There is now the ability to open a Customer in *Read Only mode when another user has the Customer open. **#9352**



- Customer Sales Analysis Reports 01-05 have been updated to include the new Sales Budgets for Staff and Customers **#9465**

- A Packing Slip can now be printed from the Manage invoice Screen by right clicking on the pending invoice




- The Customer Region Field can now be set as a required field.

- The Customer Sales Analysis report – Date Range now includes the ability to select a range of preferred Suppliers

# Customer Items

- A Customer Notes pop-up menu now appears when you right click on a Customer Item and select Create Job **#9013**

- The Links tab in Customer Items module has been renamed Documents **#9160**

# Financials

- The Customer / Supplier name has now been added to the description on the G/L Enquiry under Notes. **#1558**

- The Australian GST Descriptions have been increased in size.**#8400**

- The 12 Month Profit and Loss reports have been updated to correctly report the Opening and Closing stock **#8977**

# Invoices

- When using F12 to look up previously sold items in the Invoice window, there is now an option to print this list. **#1887**

- A tick box has been added to the Admin \ Defaults \ Manage Customer Defaults \ Invoice screen to "Hold / Unhold the Invoice Date used on the previous Invoice" **#5115**

- The Customer Invoice now displays the associated Head Office account on the Invoice screen. **#7815**

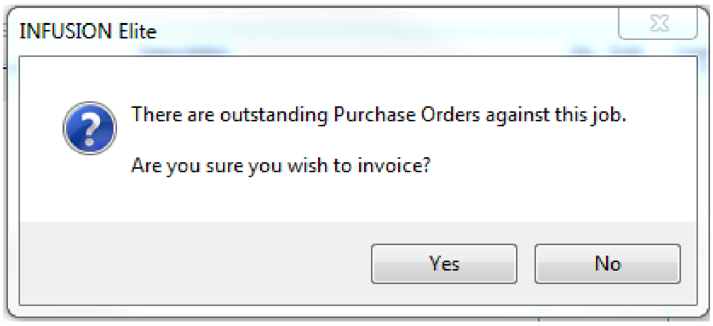
- Opening a new or Pending Invoice has been sped up.**#9040**

- A Manage Invoices screen has been introduced which combines the Pending Invoices and Posted Invoice Register screens. Delivery Address Lines 1, 2, 3, Delivery Method, Customer Payment Terms, Total Weight and Cubic have now been added to the screen. The screen can be filtered by Delivery Method and Invoice range. A tick box option allows Invoices dated for today only to be displayed. **#9287**

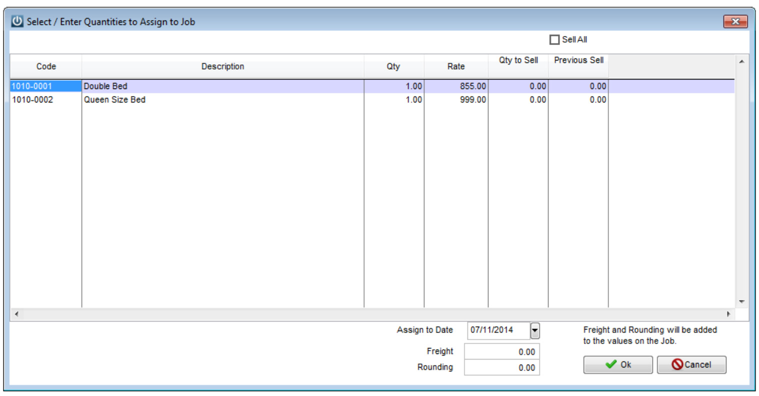
- There is now the ability to add Delivery Method and Delivery Instructions to the Invoice under the Delivery Tab **#9355**

# Job Management

- Infusion will now warn you if there are Outstanding Purchase Orders on a Job at the time of invoicing.  **#1307**

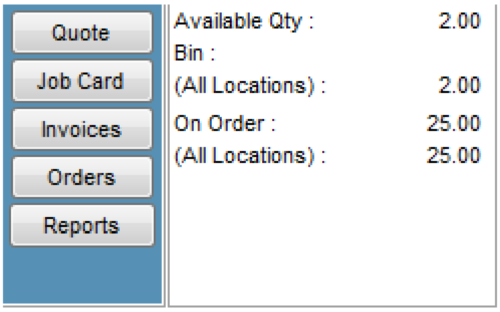



- The Combined Manage Job screen can now be maximised. **#2790**
- The 'Prompt to load kitset components individually onto a Job' option now works when you use the Combined Modify Job screen.**#4503**
- You can now sort by all columns in the Manage Job screen. **#4563**
- The Department column is now displayed on the Combined Job screen.**#4631**
- When you are in the Enquiry / Modify screen for a Job you now have the ability to sort the Products by Description instead of just Date order. **#4709**
- The ability to insert a line on the Job Enquiry / Modify screen has been added. **#5344**
- The Job screen now has a separate field for the entry of a freight charge in line with the Quote and Invoice screens. Freight added to the Quote will now transfer to the Job when using the Assign Quoted option. **#5416**
- In the Job screen, when using the Assign Quoted option a new screen displays allowing the User to select specific lines to bring through from the Quote and also to select the required quantity to bill at this time. **#5856**

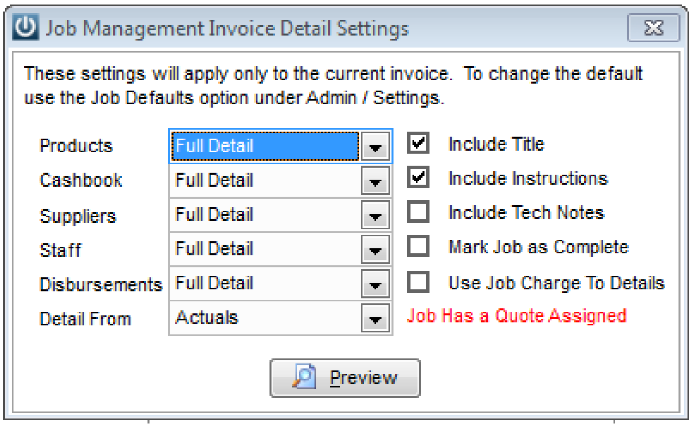



- Lockout dates are now checked when adding costs to a Job **#6849**
- Rounding functionality has been added to the Job Screen **#7387**
- The Job Management Schedule can now be updated to restrict the Jobs that display by Job Type or Status. **#7535**

- When using the Start / Stop clock on Job Costing the times are now stored in 24 hour clock format. **#8672**
- Notes are now available for entry when starting and stopping the time clock. **#8755**
- Customer Pop Up Notes now appear when creating and invoicing a Job **#8874**
- You now have the ability to stop users changing the Price Level a Job is set to. A tick box has been added to the Staff \ Login screen.**#8899**
- The Manage Job screen will now display the quantities for the currently highlighted product line at the bottom left of the screen. **#8968**




- Opening a new or existing Job has been sped up.**#9053**
- You can now set up Project numbers to group related Jobs together. Create and Modify Projects using the menu option Manage Projects on the Jobs drop down menu then assign a Job to a Project via the Job form. **#9079**
- When invoicing a Job a red warning will appear if there is a Quote assigned to the Job. **#9147**



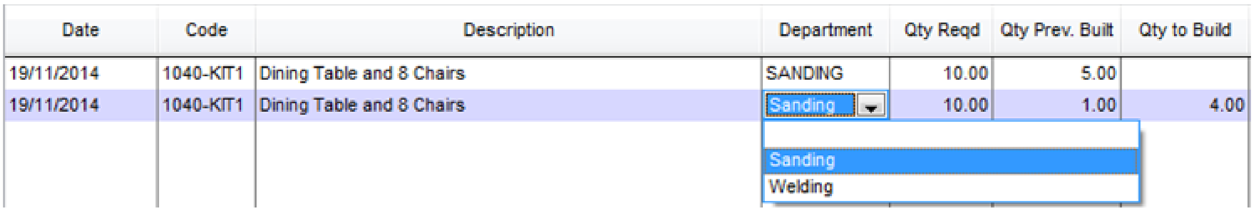

- Running of the Job Management Detail report has been sped up. **#9179**
- Saving a Job has been sped up.**#9183**
- You can now set the default quantity to be used on the Job screen from the Manage Product Defaults screen - by default it is set to 1 **#9237**
- You can now open a Job in Read-Only mode when it is in use by another User. **#9284**
- There is now the ability to add a Delivery Method and Delivery Instructions to the Job Screen from under the Site Details tab. **#9329**
- The option to bring details from a Quote when invoicing a Job is now not an option when there is no Quote. **#9359**

- Selecting Create Job then selecting the X at the top right of the Job screen won't now create a Job with no Customer - no Job will be created at all. **#9361**

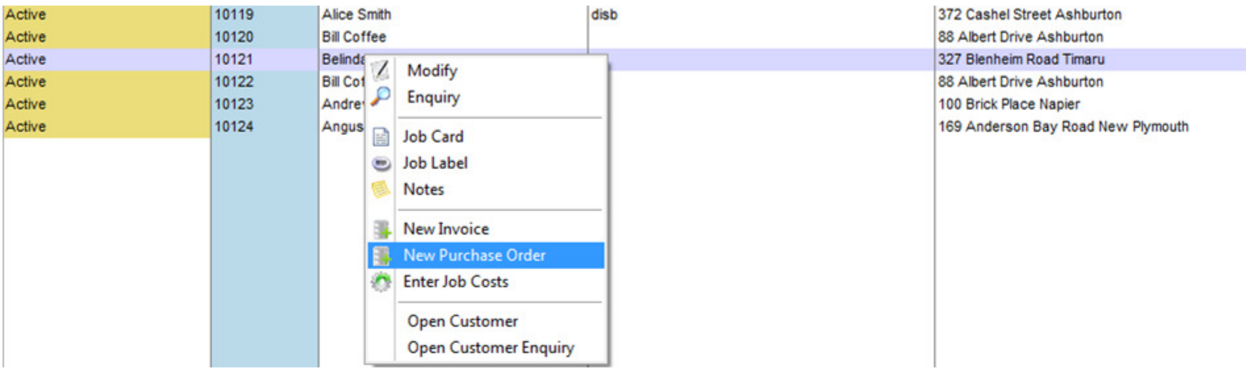
- The Customer Order Number has been added to the Primary and Filtered Search options in the Manage Jobs screen. **#9390**

- The sorting options of Products on the Stocktake Sheet has been increased **#8461**

- The Department Drop Down has been altered to appear on the Job Grid, rather than as a pop up box




- The ability to create a purchase order for a job has been added to the right click menu




# Other

- Emailing options have been updated allowing individual users the ability to send emails directly, or via their local email client. These are set up in the Staff \ Login menu **#2125**

- When Deleting a Job the Job Number and Customer Name now display. **#4953**

- The Email Password in Manage Email Defaults is now displayed as ********** **#4962**

- The selected layout for Purchase Orders and Quotes are now correctly emailed rather than the default **#6046**

- A tick box has been added to the "Duplicate to Product Code" pop up screen when duplicating a Product to allow the Preferred Supplier information to be copied. **#7369**

- The Default Location can now be selected when setting up an import routine for Customers under Manage Import Routines **#8724**

- Drop down selection boxes have been added to the Contact Management reports **#8738**

- The Stock Transfer report now includes the Bin Locations **#8746**

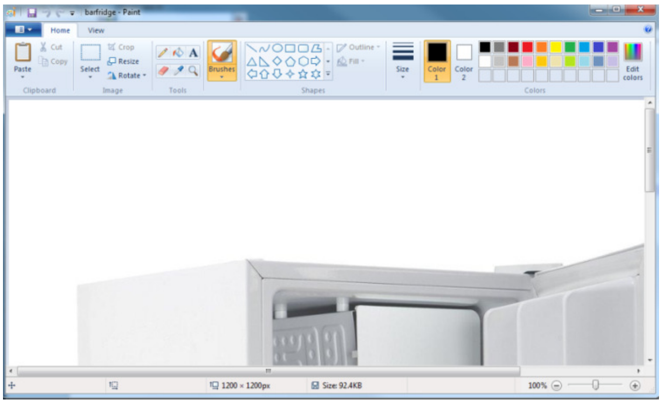
- The backup and restore process has been updated to include Images and Documents stored in the new individual locations. **#8758**

# POS

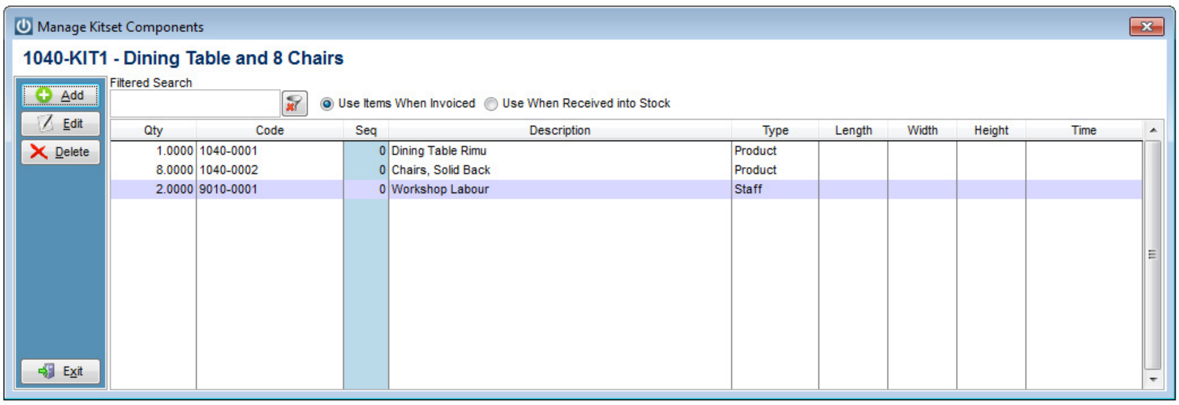
- Freight can now be added to the POS Screen, additionally a default freight value can now be set up and applied to all sales. **#6166**
- POS quick keys can now be copied to other POS Users. **#8145**
- Opening POS has been sped up. **#9044**

# Products

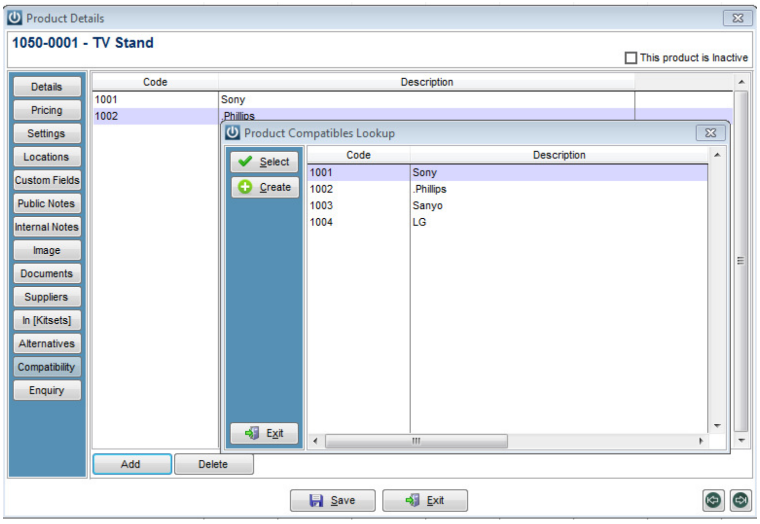
- The Product Ratio field can now store 4 decimals for both the Rate and Quantity. **#4683**
- The Product Code for a Kitset now displays with surrounding square brackets e.g. [ABC1003] The brackets are not required to be entered, these purely indicate the Product is a Kitset. **#5027**
- The Product Description field has been increased to 80 characters - previously this was 40 characters.**#5328**
- A warning message has been added when the User tries to change the type of Kitset to When Invoiced if there is still stock on hand. **#8454**
- Images can now be opened for editing. Double click an image and it will open in Microsoft Paint or your default Image Viewer/Editor.**#8756**



- You can now store an unlimited number of images against each Product. **#8789**
- The Kitset screen has had a major update and now includes additional fields from the product file and a Sequence field showing which order the components should be used in. The screen can now be re-sized.**#8827**



- A new Compatibility tab has been added to Products to indicate which makes or models this Product Code will be compatible with. **#8967**




- Alternative Product codes can now be added under the Products \ Alternatives tab. This provides options \ alternatives when a product is not available. Alternatives can be viewed from the Product Lookup screen by highlighting a Product then selecting the Alternatives tab from the left hand menu. An item can then be selected to add to an eg Invoice from the Alternatives Lookup screen. **#8970**

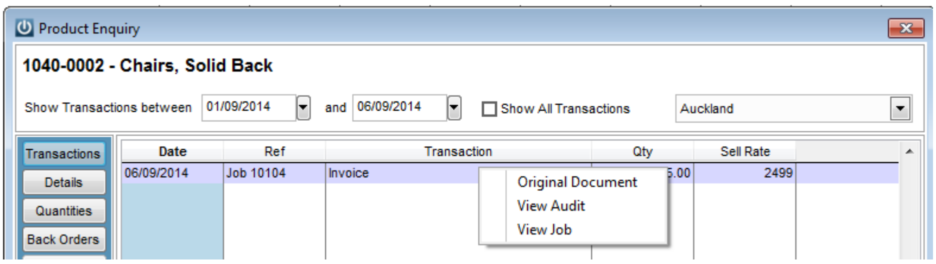
- Inactive Products can no longer be added to a Kitset.**#8976**

- Opening the Product screen has been sped up. **#8986**

- The Modify Product screen now has an extra tab called "In [Kitsets]". This will display a list of the Kitset codes that use this component. **#8987**

- A Discount can now not be applied to a Build Up header line. **#9276**

- Right clicking on a Transaction in the Product Enquiry screen now enables you to view the Job the item was put on to **#9275**



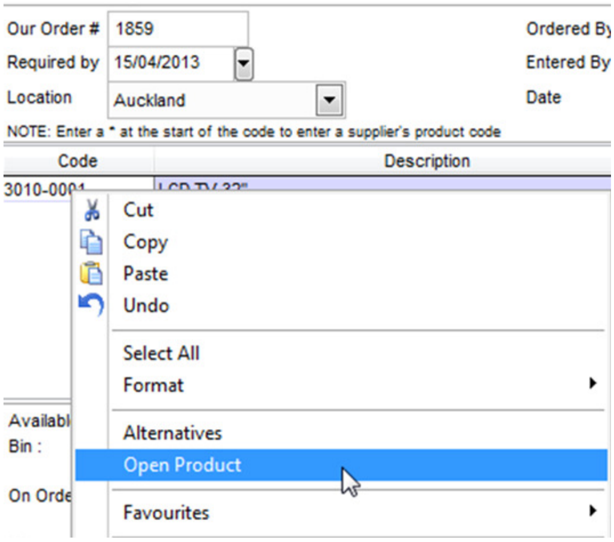

- When setting up a new Product Code you can now set the Product Job Management Type to Product , Staff, Disbursement, Resource or Consumable. The two additional options have been added as part of the changes for the Job Production functionality. **#9293**

- There is now the ability to open a Product in *Read Only mode when another user has the Product open. **#9353**

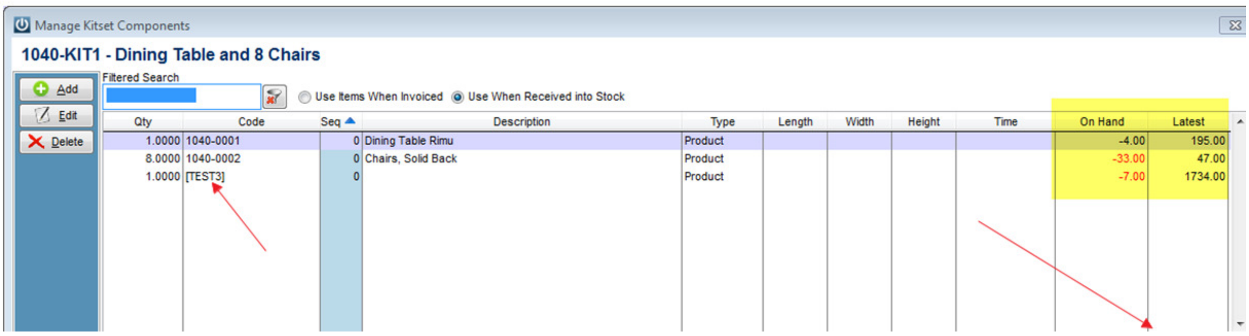
- FIFO (First in First out) has been added as a method of stock valuation and sales analysis margin reporting. **#9391**


- The Location in a Product receipt will now default to that set against a Staff member **#9480**

- The Ability to edit a product has been added to the Purchase Order, Invoice, POS, product Receipt, Transfer and Quote screen, enabling the product code to be edited and modified. This will assist users who wish to update product descripts, bin Locations and pricing details for the product without having to leave the screen.

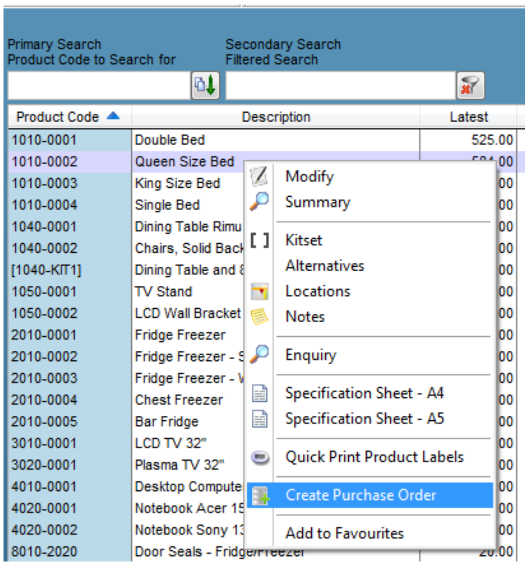



- The Kitset Screen has been updated to include the Quantity of components on Hand and also the latest cost for the components.



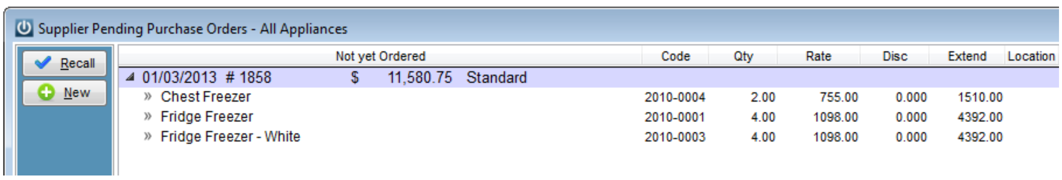
# Purchase Orders

- The ability to create a Purchase Order for a product has been added to the Product right click menu. The Purchase Order will be created for the Preferred Supplier. If there is more than one Supplier of the Product a Supplier selection list will pop up to choose from. **#2787**




- Labels can now be printed for Job Management Purchase Orders when the Purchase Order is receipted in. There is a tick box option for this under Manage Supplier Defaults \ Orders **#8935**

- The Pending Purchase Order screen (which displays Saved orders already created for the selected Supplier) allows you to drill down on a Pending Purchase Orders.**#8953**




- Selecting Auto Order on a Purchase order now no longer overrides items added manually. **#8993**

- Opening a new or existing Purchase Order has been sped up. **#9045**

- Opening Receive Products (from Order) has been sped up. **#9046**

- Supplier Receive Invoice (from Order) has been sped up. **#9047**

- Entering a Supplier Invoice (No Products) has been sped up. **#9048**

- When you delete one line from the packing slip at the Supplier invoice stage, Infusion will remove the entire packing slip from the Suppliers invoice **#9340**

- Min, Max and EOQ values are now displayed per line item when in Order Entry forms. **#9489**

- Users can now only add a Packing Slip to a Supplier Invoice once **#9379**

- There is now the ability to open a Purchase Order in *Read Only mode when another user has the Purchase Order Open. It also opens in Read Only when the Purchase Order is 'Completed' on the new Manage Purchase Orders screen. **#9381**

- There is now a Manage Purchase Orders screen which displays all Saved. Ordered, Part Fill and All Received Orders. Purchase Orders can be created along with Packing Slips and Invoices processed from this screen.

- A facility to copy an existing Purchase order that is **Saved, Ordered or Part Filled** to another supplier has been added. This will copy Items **Not Received** to a new Saved Order. The copy will need details such as freight etc altered to suit.

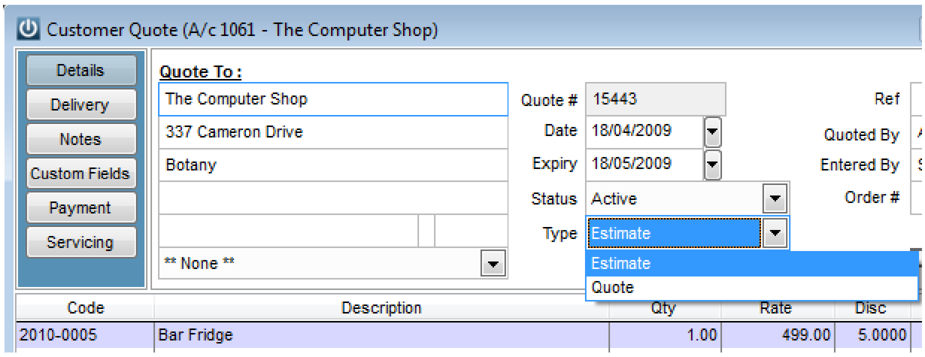
# Quotes

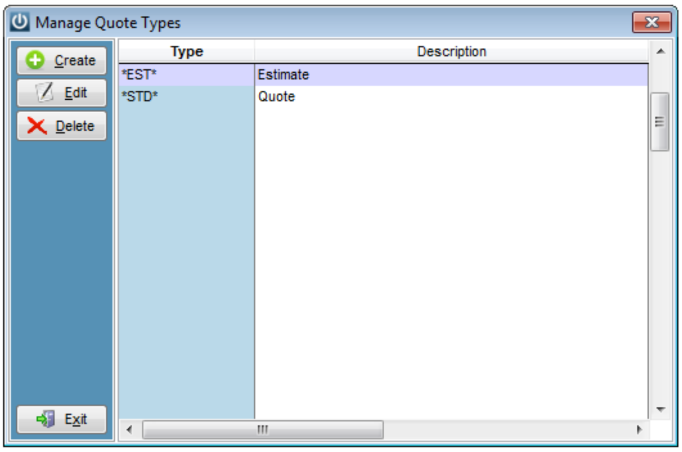
- Creating and opening an existing Quote has been sped up. **#9057**

- A Manage Quotes screen has been created. This combines the previous Pending and Accepted Quote screens. **#9347**

- A Quote Status has been added

- Quote Types have been added. When producing a Quote, the user now has the ability to change the wording from Quote to Estimate. Standard Type options are Quote and Estimate. Additional Types can be added from Admin \ Settings \ Customers \ Manage Quote Type. **#2503**




# Rental Hire

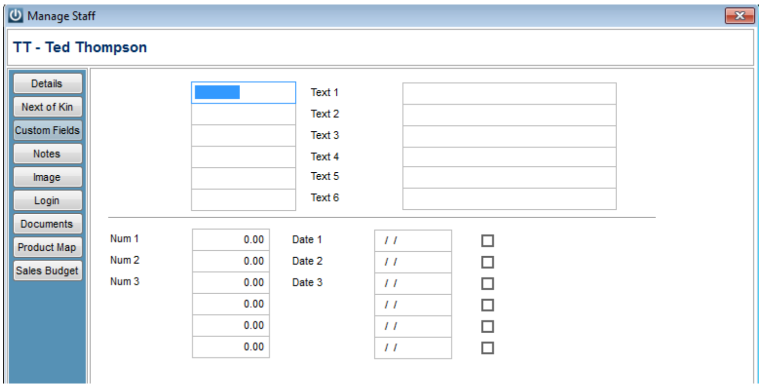
- Opening a Rental Hire has been sped up. **#9054**

- Extending a Rental Hire has been sped up. **#9055**

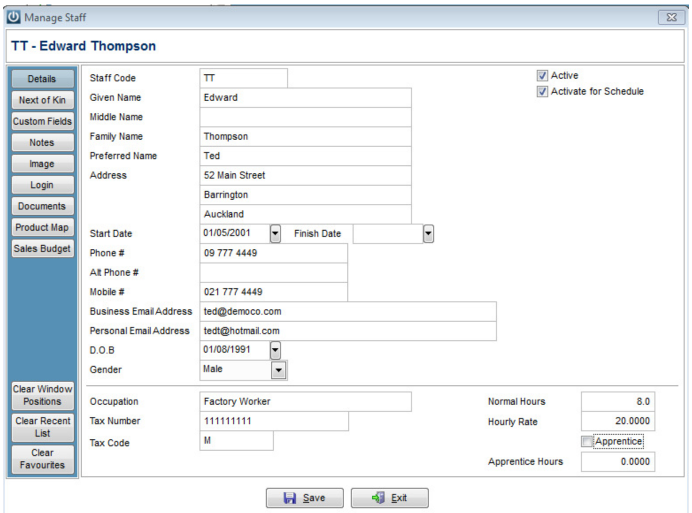
- Rental Hire Return has been sped up. **#9056**

# Staff

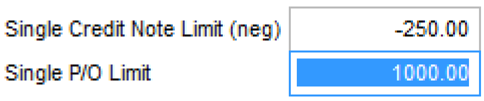
- Additional Custom Fields have been added to the Staff module. **#9042**




- The Staff record has now been updated to include Preferred Name, Gender, Occupation, Tax Number, Tax Code, Normal Hours Worked Per Day, Pay Rate, Apprentice and Apprentice Hours. **#9149**




- Individual Staff members can be assigned a Price limit to which they may create Purchases Orders up to. This is set in the Staff \ Login screen **#9388**




- Each individual Staff member can now be assigned a Credit Invoice limit. Infusion will not let them exceed this limit but instead save the Credit Note for approval by another staff member. It is set under the Staff \ Login menu. The Credit Note cannot be printed by the Staff member either **#9389**

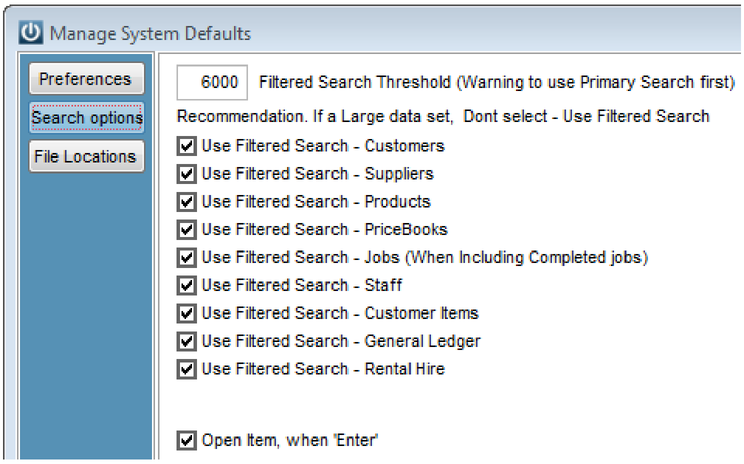
## Supplier

- Functionality has been added to be able to delete a Payment made against a Supplier. **#2815**
- The cursor on the Supplier Invoice now starts in the Date field. **#4875**
- The ability to swap a Pending Order to another Supplier has been added (in the Manage Purchase Orders screen). **#6069**
- A tick box default to "Use Economic Order Quantities for Purchase Order Auto Orders" has been added under the Manage Supplier Defaults \ Orders screen. When the Auto Order option is selected from the Purchase Order screen the calculation for how many to order will use multiples of Economic Order Quantities not just the amount that will bring the stock holding back to maximum level (set under the Locations tab of the Product). **#6145**
- The Purchase Order Status of "All Received" has been added indicating that the user is awaiting the Supplier Invoice. **#6171**
- The questions prompted at the completion of a Purchase Order / Supplier Invoice ie Packing Slip Number, Date of Receipt, Invoice Number, Due date, are now all asked on the main screen. **#6443**
- The Debit and Credit heading under the Supplier Enquiry Window have been updated **#7119**
- Contact Management has now been added to the Suppliers module. **#7704**
- Supplier Bulk Payments now handle Invoices with Deferred Payments correctly **#8681**
- The Supplier Remittance can now be previewed before printing. **#9197**
- Opening a Supplier has been sped up. **#9206**
- You can now store the Default Delivery Method against the Supplier Account **#9291**
- There is now the Ability to open a Supplier in *Read Only mode when another user has the Supplier account open. **#9354**

## System

- The SMS Password is now displayed as ******** **#4612**
- The registration screen has been updated to include options for Automated backup, Software Rental, and a link to the Hosted Server Sign up screen **#8704**
- System wide, drop down combo boxes have been increased in size. **#8737**
- The Management Console now displays the count of both GST Inclusive and GST Exclusive Invoices. **#8748**
- Fixed Assets, Products, Customer Items, Staff, Customers and Suppliers all now have the ability for multiple images. **#8757**
- The ability to drag and drop Images and Documents (and Multiples) into Infusion from external files has been added. **#8785**

- Search options have been updated so that the highlighted item in a Filtered Search will open if the Enter key is selected. **#8810**




- A new refresh mechanism has been added to Infusion to increase speed on grids when there are multiple users in Infusion. It will also dramatically reduce data polling on a LAN. NOTE: The compromise is that Users may not see changes being reflected in the grids that another user makes on another Workstation for up to 60 seconds. **#9416**