

Infusion Software v8.209 Upgrade Notes

These instructions are for v8.103 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 v8.103.

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

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

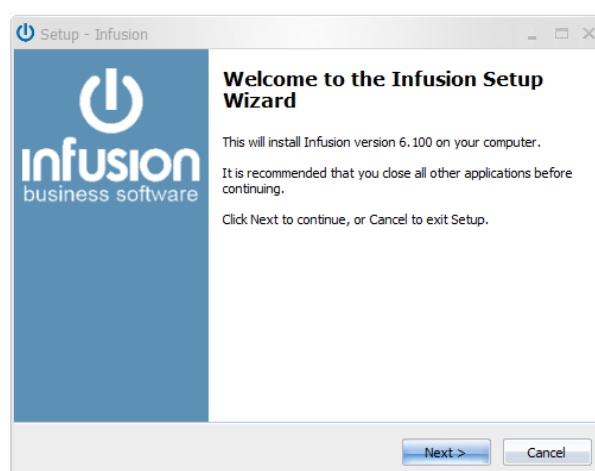
Before Beginning The Upgrade

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

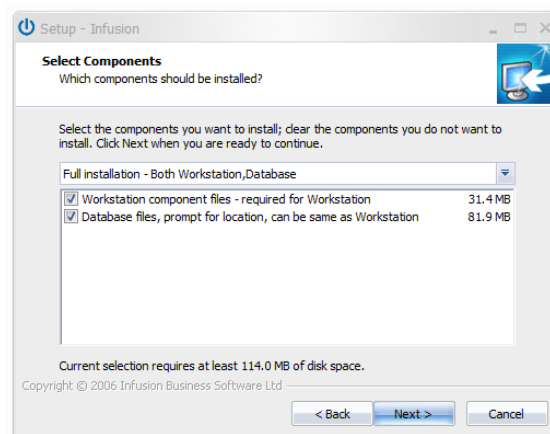
The License Agreement form is next



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

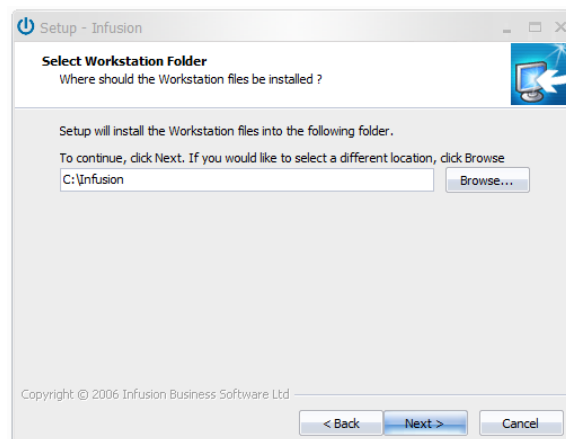
Select **Next**

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



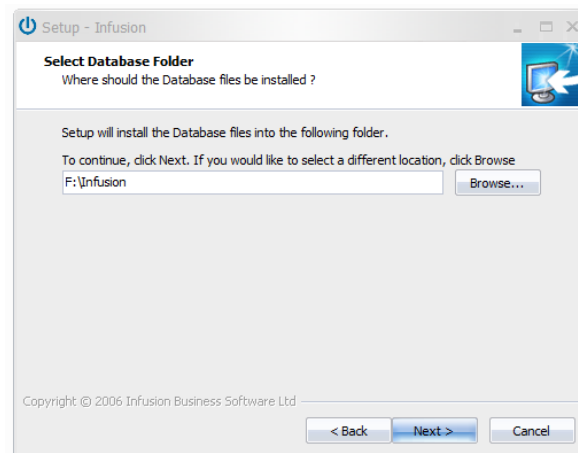
Select **Next**

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.

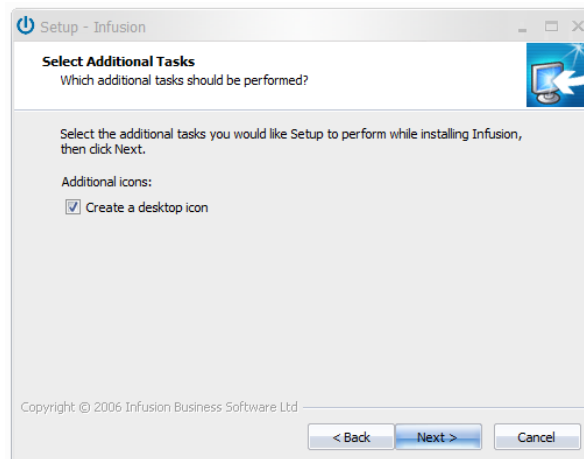


This can be in a different location from the Workstation component files. eg a separate drive possibly on a server location. (the example above shows this as F: drive). Type in our browse to the required location.

Select **Next**

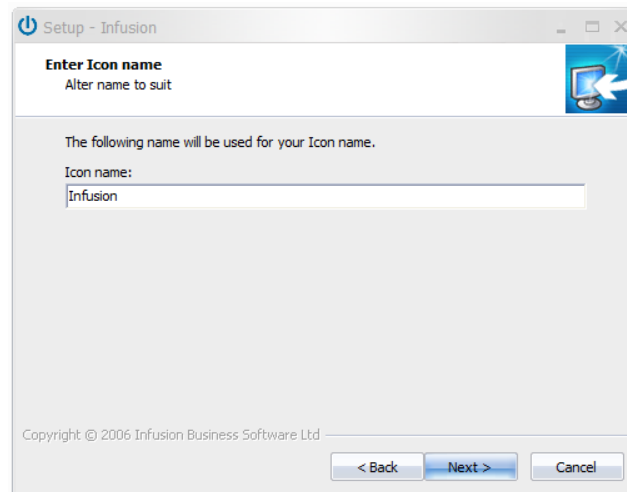
If the "Workstation components files" install was selected the next form is Additional Tasks.

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



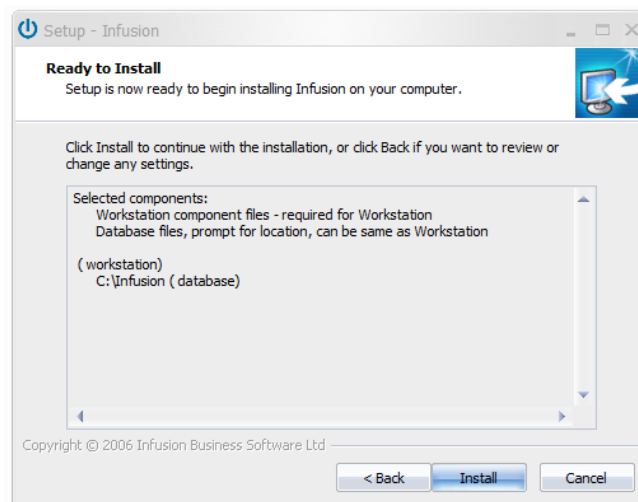
Select the "Create a desktop icon" option to create a shortcut on your desktop.

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

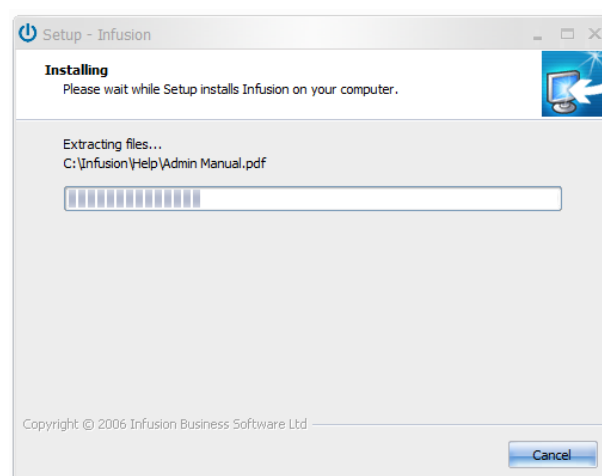


Enter the name you want displayed with the Icon.

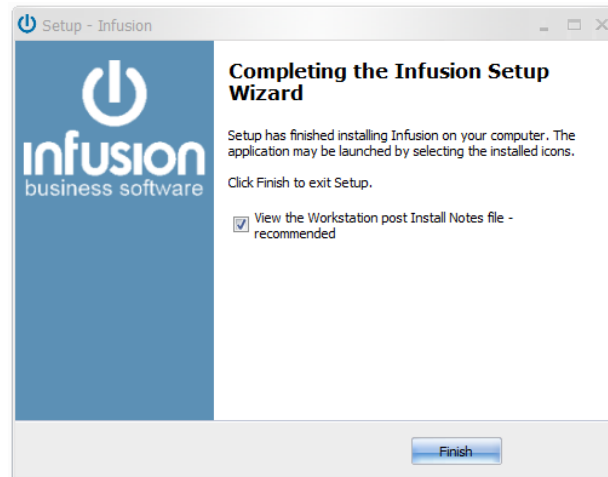
Infusion Setup Wizard will then prompt you to install the software.



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
 Mscomctl2.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
 richbx32.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.

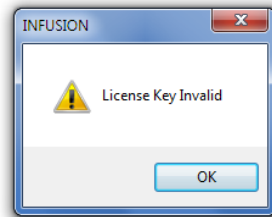
IMPORTANT NOTICE !!!

If you install FULL or both Workstation and Database at the same time, running uninst00.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.

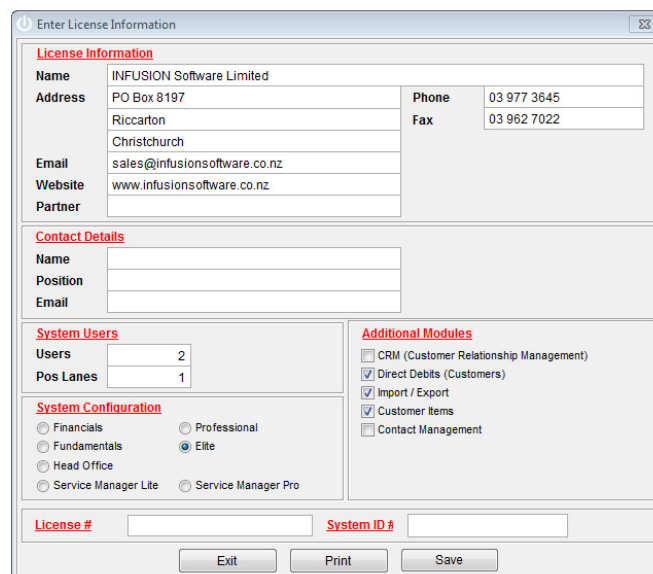
Requesting / Entering an End User License

Note : If you are already running Version 8.000 or above a new Licence (as outlined below) will not be required.

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.



A screenshot of the 'Enter License Information' dialog box. It contains several sections for user input:

- License Information:** Fields for Name (INFUSION Software Limited), Address (PO Box 8197, Riccarton, Christchurch), Email (sales@infusionsoftware.co.nz), Website (www.infusionsoftware.co.nz), Phone (03 977 3645), and Fax (03 962 7022).
- Contact Details:** Fields for Name, Position, and Email.
- System Users:** Fields for Users (2) and Pos Lanes (1).
- System Configuration:** Radio buttons for Financials, Fundamentals, Head Office, Service Manager Lite, Professional, Elite (selected), and Service Manager Pro.
- Additional Modules:** Checkboxes for CRM (Customer Relationship Management), Direct Debits (Customers) (checked), Import / Export (checked), Customer Items (checked), and Contact Management.
- Bottom:** Fields for License # and System ID #, with Exit, Print, and Save buttons.

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.

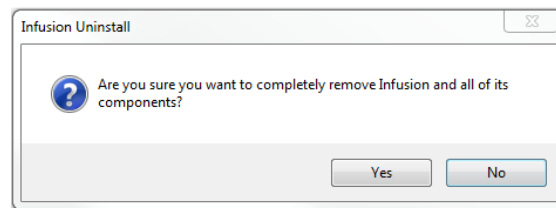
If the system is set to the 2nd radio button option ("Turn on DEP for all ...") select "Add..." to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

Server Message Block (SMB2)

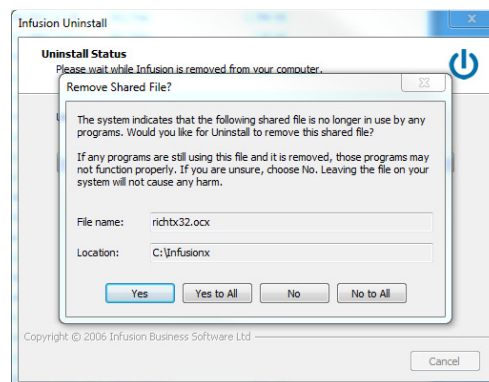
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of <http://support.microsoft.com/kb/2535094/en-gb>

Uninstall Wizard

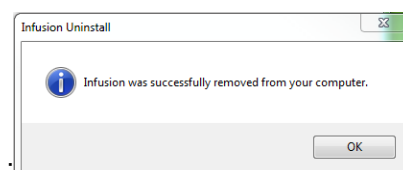
Double click Unins000.exe in the workstation folder.



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



followed by



Customer

1. Trading As - name has been added to Manage Customers Filtered Search **#9799**
2. There is now an option in the Customer \ Defaults menu to require a contact to be added for Organisations before the record can be saved. **#9841**

Job

3. An Additional Button has been added to the Job Screen, When production is Active, a button will display enabling all items being built to be transferred to the sell column. **#9751**
4. A new Field has been added to display total sales value of job (yet to build), this is only active when production is turned on. **#9766**

Other

5. Display the Preferred Supplier name on the Detail screen of a Product **#4027**

Product

6. Additional Security has been added to the Staff Login Screen, allowing staff to modify the Product Settings TAB **#9765**
7. On the Manage Products Screen the colour of the instock field is now RED if the stock on hand is negative. **#9796**
8. On the Manage products Screen the Sell prices 1,2,3,4,5,6,7 and 8, will display in red if they are equal to Zeror, or if the Sell rate is less than or equal to the latest cost price **#9797**
9. The Supplier TAB Under the product Enquiry Screen

Purchase Orders

10. There is Now A Default to Only use the preferred Supplier when creating an auto order Purchase order **#9615**
11. A new Column has been added to the Manage Purchase order Screen to display the Purchase Order type. **#9713**
12. Purchase Order Management has been sped up. **#9772**

Quotes

13. The Ability to Sort By Status has been added to the manage Quote Screen **#9731**

System

14. The Ability to Add notes to the Job Cost Entry Screen with /N has been introduced.**#9749**

15. The Ability to add a ruled line across the length of the description field using //**#9750**