

Infusion Software v8.212 Upgrade Notes

These instructions are for v8.212 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 v8.212.

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.

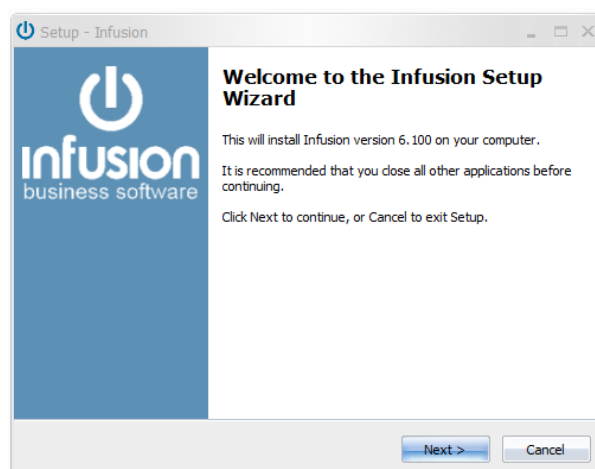
Before Beginning The Upgrade

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 IBS801-20121211b4upgrade. 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

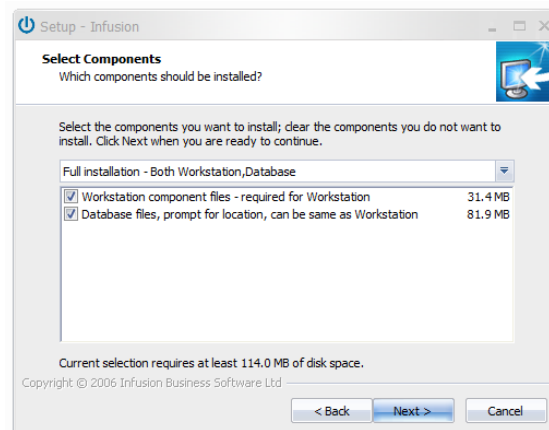
The License Agreement form is next



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

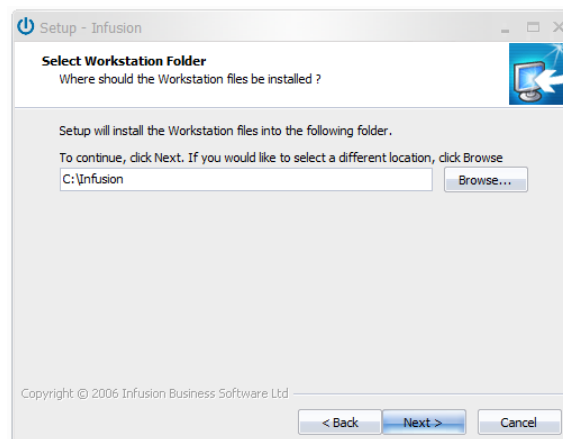
Select **Next**

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



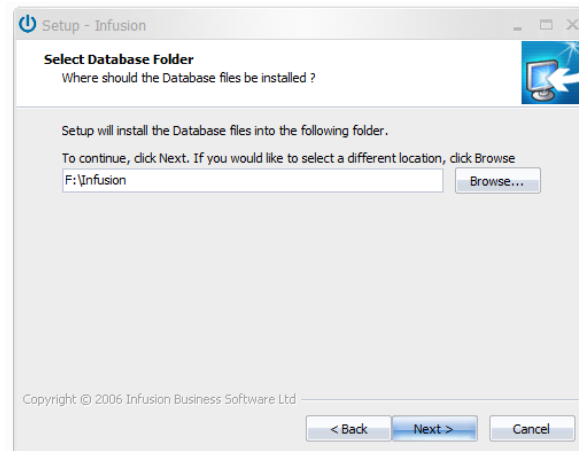
Select **Next**

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.

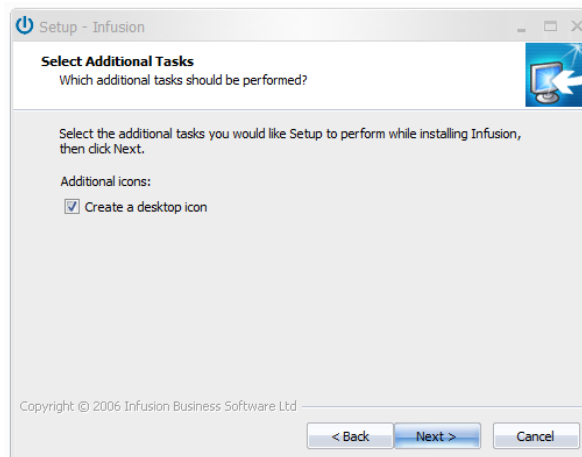


This can be in a different location from the Workstation component files. eg a separate drive possibly on a server location. (the example above shows this as F: drive). Type in our browse to the required location.

Select **Next**

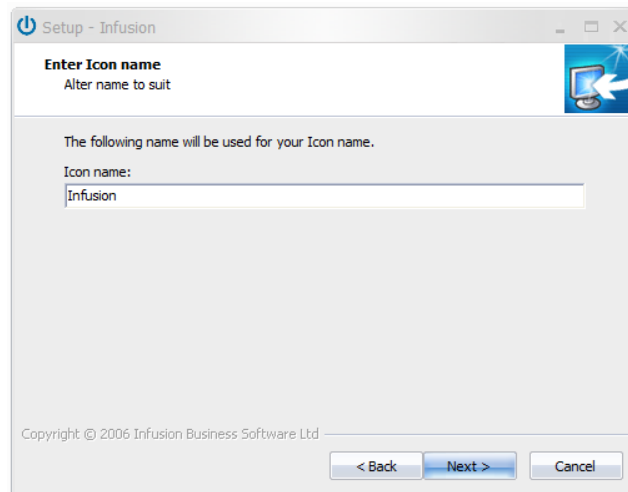
If the "Workstation components files" install was selected the next form is Additional Tasks.

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



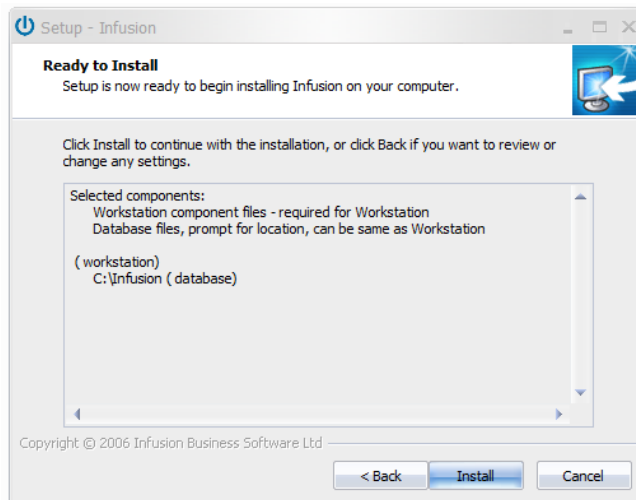
Select the "Create a desktop icon" option to create a shortcut on your desktop.

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

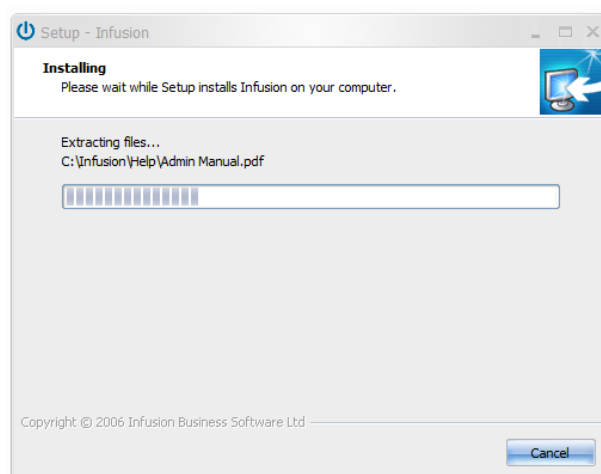


Enter the name you want displayed with the Icon.

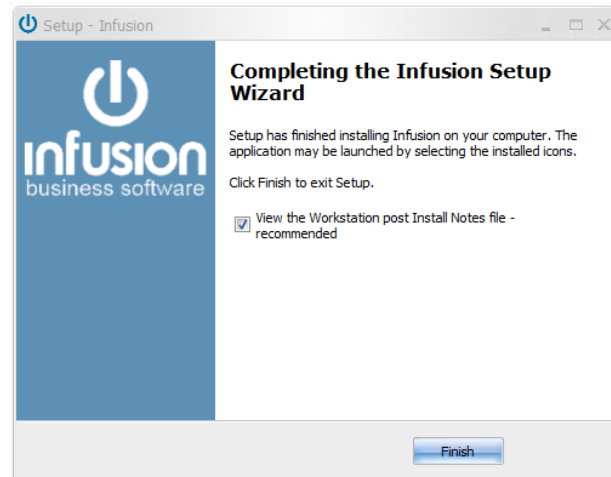
Infusion Setup Wizard will then prompt you to install the software.



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
 msucr71.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.

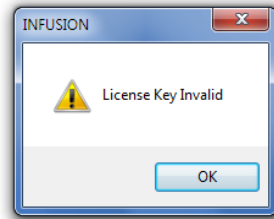
IMPORTANT NOTICE !!!

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

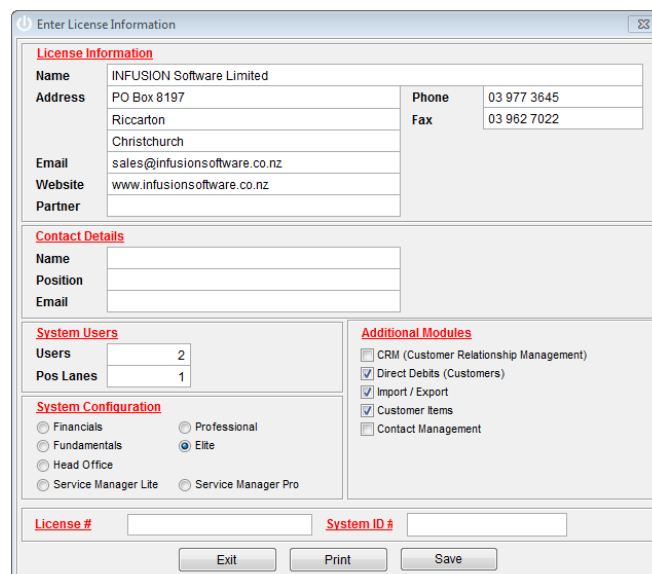
Requesting / Entering an End User License

Note : If you are already running version 8.103 or below a new Licence (as outlined below) will 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.



The 'Enter License Information' window contains the following sections:

- License Information:**
 - Name: INFUSION Software Limited
 - Address: PO Box 8197, Riccarton, Christchurch
 - Email: sales@infusionsoftware.co.nz
 - Website: www.infusionsoftware.co.nz
 - Phone: 03 977 3645
 - Fax: 03 962 7022
- Contact Details:**
 - Name: [Empty field]
 - Position: [Empty field]
 - Email: [Empty field]
- System Users:**
 - Users: 2
 - Pos Lanes: 1
- System Configuration:**
 - Financials: [Radio button]
 - Fundamentals: [Radio button]
 - Head Office: [Radio button]
 - Service Manager Lite: [Radio button]
 - Professional: [Radio button]
 - Elite: [Selected radio button]
 - Service Manager Pro: [Radio button]
- Additional Modules:**
 - CRM (Customer Relationship Management): [Unchecked checkbox]
 - Direct Debits (Customers): [Checked checkbox]
 - Import / Export: [Checked checkbox]
 - Customer Items: [Checked checkbox]
 - Contact Management: [Unchecked checkbox]
- License #:** [Empty field] **System ID #:** [Empty field]
- Buttons: Exit, Print, 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.

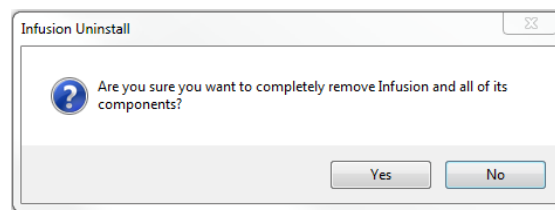
If the system is set to the 2nd radio button option ("Turn on DEP for all ...") select "Add..." to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

Server Message Block (SMB2)

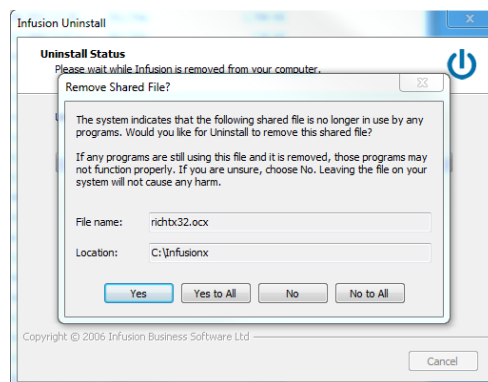
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of <http://support.microsoft.com/kb/2535094/en-gb>

Uninstall Wizard

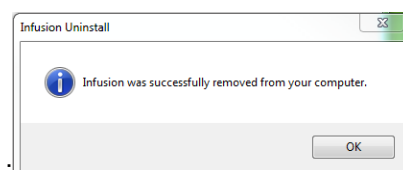
Double click Unins000.exe in the workstation folder.



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



followed by



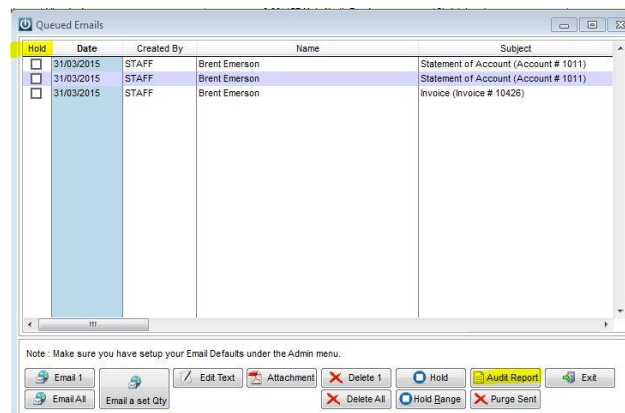
Key Features In 8.212

Admin

#9915 The Location Colour Indicator (Admin / Settings / Products / Manage Locations menu) has been increased in size to run along the bottom of each form



#9932 The error "Record Is In Use By Another User" on Queued emails has been fixed. A new button has been added to put emails on Hold rather than selecting the Tick box.



Hold	Date	Created By	Name	Subject
<input type="checkbox"/>	31/03/2015	STAFF	Brent Emerson	Statement of Account (Account # 1011)
<input type="checkbox"/>	31/03/2015	STAFF	Brent Emerson	Statement of Account (Account # 1011)
<input type="checkbox"/>	31/03/2015	STAFF	Brent Emerson	Invoice (Invoice # 10426)

Note: Make sure you have setup your Email Defaults under the Admin menu.

Buttons: Email 1, Email All, Edit Text, Attachment, Delete 1, Delete All, Hold, Hold Range, Audit Report, Exit

#9943 An issue with selection of the default folder for the backup path and cancelling the backup has been fixed.

Customers

#9886 In the Admin / Defaults Manage Customers Defaults / Invoices the "Stop overwriting Invoice #" option has been reworded to "Stop overwriting Invoice # and Quote #" as it applies to both cases.

Invoices

#9865 The process for checking if an Order Number Has Already Been Entered on Customer Invoice has been sped up.

#9892 The Manage Invoices screen now allows for the ability to Sort / Search on the Reference field when "Include Posted" Invoices is selected

Jobs

#9760 Items on an Invoice generated from a Job now display in the same order as the items on the Job. Previously items on an Invoice where be in code order.

#9975 An option has been added to the Right Click menu when on the Code column only in the Manage Job screen to see the Original Document on a Job line eg. Supplier Invoice.

Product

#9881 Decimal places can now be entered for Supplier Latest Cost (under the Suppliers tab of a Product).

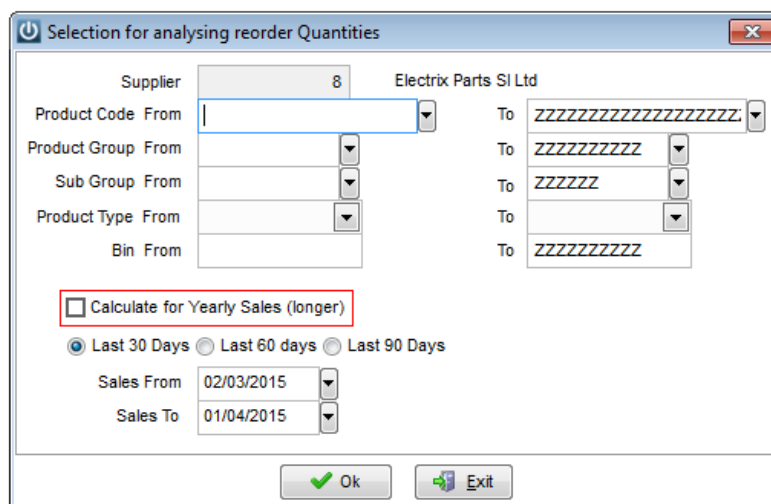
#9921 Changes have been made to the structure of the Prodbals file which will reduce its size by up to 75%. This will improve the speed, size and operation of the backup.

Purchase Orders

#9871 The Supplier Purchase Order screen can now be resized vertically and the system will retain the size and position next time it is used.

#9883 Purchase Orders which have the same Order number now show separately in the Manage Purchase Orders screen.

#9911 Auto Order Sales - an option to Calculate Reorder Quantities On Yearly Sales has been added.



#9912 Auto order Sales has been extended to allow entry and update of Bin locations. The Sales Value for the selected period has been added. Sorting of all columns is now available.

Auto Order - Sales

Auto Order for - All Appliances

Filtered Search

Auckland

Show only Products with Sales

(Double click item for Product History)

Total Weight

0.0000

Total Volume

0.0000

Total Value

2863.0000

Product Code	Description	Bin	Landed Cost	Freight Cost	Latest Cost	Ratio	EOQ	Min	Max	On Hand	On Order	On Saved	Back Order	Allocated	Sold Value (Excl)	Qty Sold	Last 12 mths	Prev 12 mths	Year Before	Yearly Avg	Lead days	Rec Order	To Order	Ref	Loc
1010-0003	King Size Bed		625.00		625.00	1.00				8	1				\$3597	3	1	1	1	1					Auckland
2010-0001	Fridge Freezer		1098.00		1098.00	1.00				4		4		1	\$2998	2		1	1	1					Auckland
2010-0002	Fridge Freezer - Stainless Steel Left Dr		1054.00		1054.00	1.00				8	4			1	\$60762	38	3	35	13			2	2		Auckland
2010-0003	Fridge Freezer - White		1098.00		1098.00	1.00				5		4		1	\$11992	8	2	6	3						Auckland
2010-0004	Chest Freezer		755.00		755.00	1.00				2		2		2	\$999	1		1	1			1	1		Auckland
2010-0005	Bar Fridge		295.00		295.00	1.00				5	3			3	\$499	1			1	1					Auckland

Order #

Ordered

Received

Job #

Status

Location

1888

4.00

0.00

Saved

Clear "To Order" Values

Update Products with Min/Max/Bin

Update Products with EOQ

Create Order(s)

Quotes

#9681 The ability to delete a single Quote from the Manage Quotes screen has been reintroduced.

#9775 The Quote Screen has been updated to include a Documents tab.

Details

Delivery

Notes

Custom Fields

Payment

Servicing

Internal Notes

Documents

(Drag and Drop Item(s) onto above list to Add. Double Click to Open.)

+ Add - Delete Notes

Open Folder: C:\INFUSION\8212-DEMO--\Documents\Quotes\15443

Quote # 15443

Date 18/04/2009 Expiry 18/05/2009

Location Auckland

Ref

Quoted By AJ

Entered By STAFF

Invoice #

Job Id

Status Active

Type Quote

Order #

Code	Description	Qty	Cost	Mark Up	Rate	Disc	Extend
2010-0005	Bar Fridge	1.00	257.3100	37.50	353.80	5.0000	336.11

#9776 An Internal Notes tab has been added to the Quote Screen. This has been added to allow users to record notes specific to the follow up events for this Quote. The information is not printed on the Customer's Quote.

Details

Delivery

Notes

Custom Fields

Payment

Servicing

Internal Notes

Documents

Insert Standard Description

Quote # 15443

Date 18/04/2009 Expiry 18/05/2009

Location Auckland

Ref

Quoted By AJ

Entered By STAFF

Invoice #

Job Id

Status Active

Type Quote

Order #

#9876 The width of the Quote screen has been increased to include the Cost price and the Margin columns for each product line. You can now adjust the Cost, Margin, and or Sell price per line item for this Quote. The "Show Costs / Profit" option at the bottom of the screen will toggle these fields on and off. The visibility of these fields is controlled by the option to see / hide cost prices.

Quote #	15443	Ref		Invoice #		Status	Active
Date	18/04/2009	Quoted By	AJ	Job id		Type	Quote
Location	Auckland	Entered By	STAFF	Order #			
Expiry	18/05/2009						

Code	Description	Qty	Cost	Mark Up	Rate	Disc	Extend
2010-0005	Bar Fridge	1.00	257.3100	37.50	353.80	5.0000	336.11

Available Qty :	2.00 / 2.00	Total Sell Price :	336.11	Delete Line	Insert Line	Freight	0.00
Bin :		Total Cost Price :	257.31			GST Exclusive	336.11
On Order :	3.00 / 3.00	Gross Profit :	78.80	Hide Costs/Profit	Remove all Discounts	GST	42.01
Min :	0.00	Margin :	23.40%	Re Cost		Rounding	0.00
Max :	0.00	Markup :	30.62%			GST Inclusive	378.12
EOQ :	0.00						

☐ Send By Email

#9889 If a Quote has an associated Job # or Invoice # this now shows on the Quote - both on the Quote and in the Manage Quotes screen.

#9898 The ability to Search for associated Job# and Invoice # has been added to Quote Management.