

Infusion Software v8.215 Upgrade Notes

These instructions are for v8.215 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 v8.215.

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.

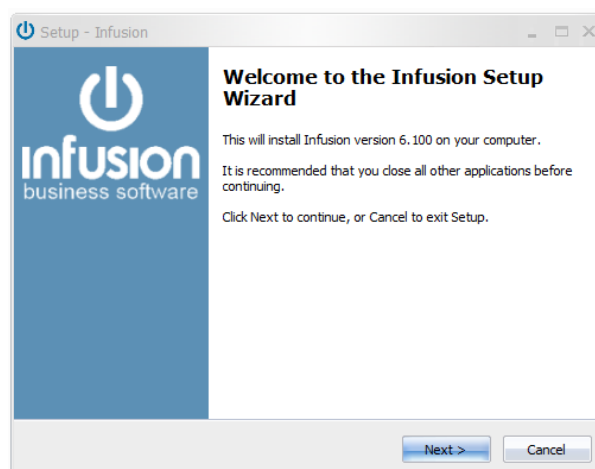
Before Beginning The Upgrade

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

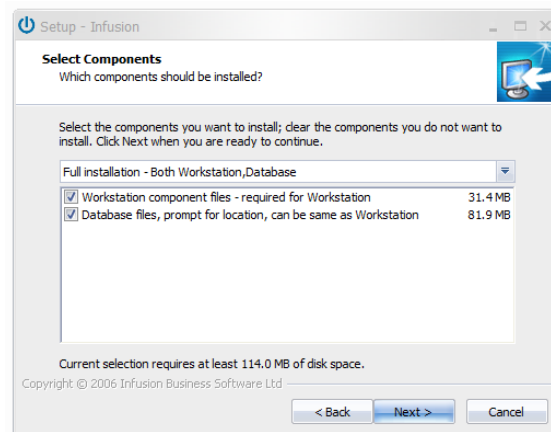
The License Agreement form is next



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

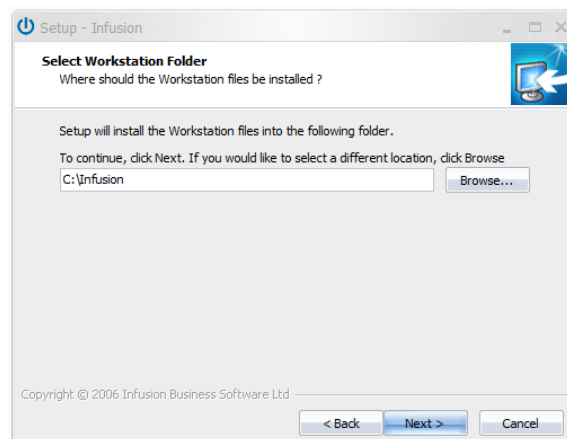
Select **Next**

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



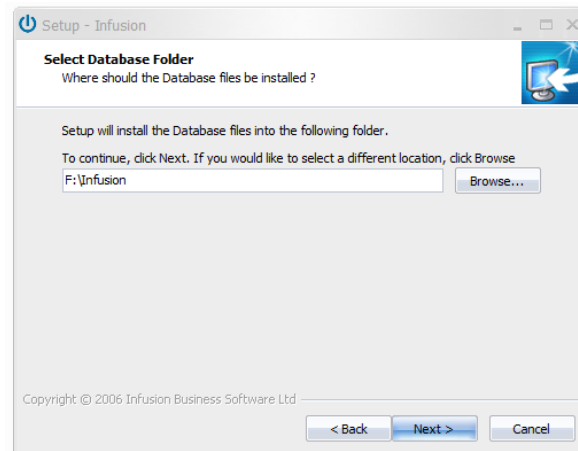
Select **Next**

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.

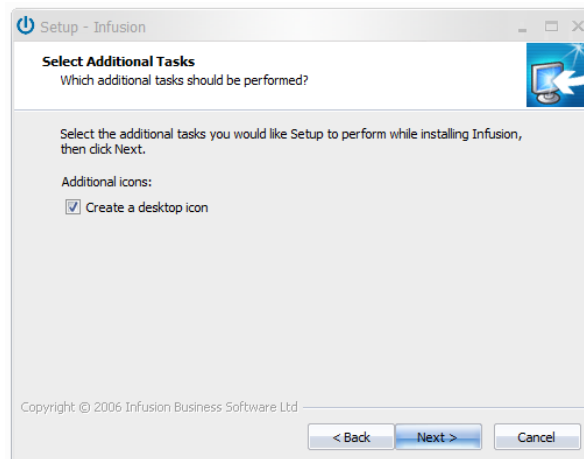


This can be in a different location from the Workstation component files. eg a separate drive possibly on a server location. (the example above shows this as F: drive). Type in our browse to the required location.

Select **Next**

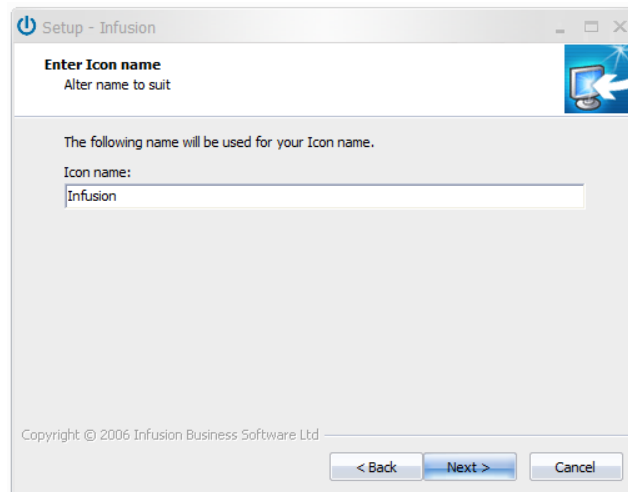
If the "Workstation components files" install was selected the next form is Additional Tasks.

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



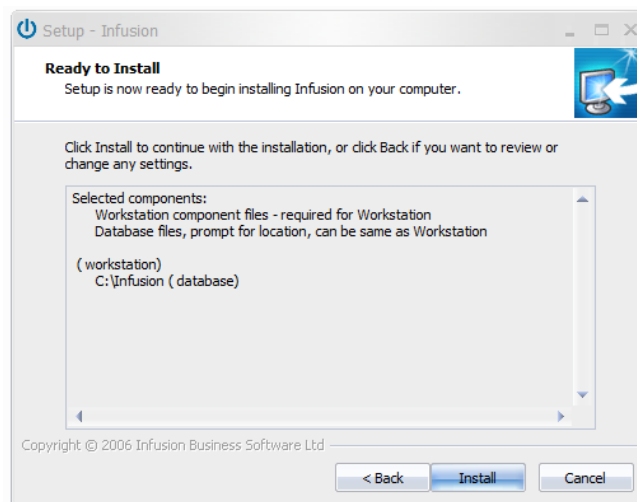
Select the "Create a desktop icon" option to create a shortcut on your desktop.

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

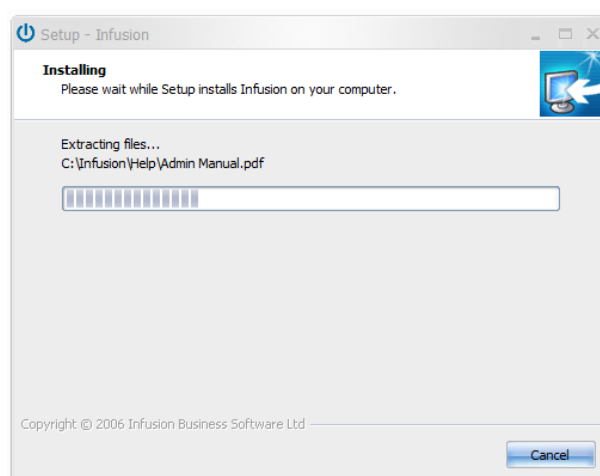


Enter the name you want displayed with the Icon.

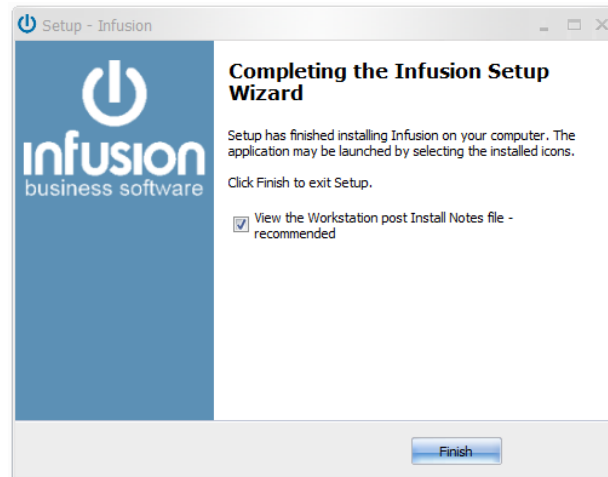
Infusion Setup Wizard will then prompt you to install the software.



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
gdipplus.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
Mscmct2.ocx	9/03/2004 5:45 p.m.	ActiveX control	647 KB
Mscmctl.ocx	9/03/2004 5:45 p.m.	ActiveX control	1,057 KB
Mscmm32.ocx	24/06/1998 12:00 a...	ActiveX control	102 KB
msvc71.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.

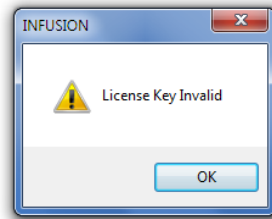
IMPORTANT NOTICE !!!

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.

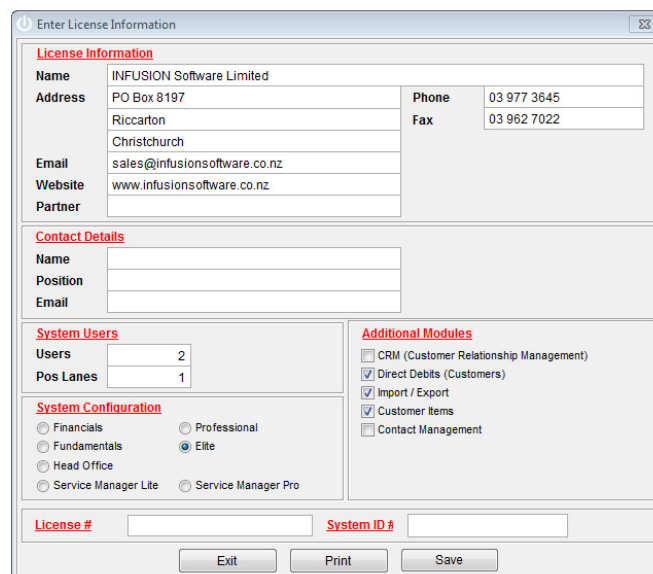
Requesting / Entering an End User License

Note : If you are already running version 8.103 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 is a multi-section form. It includes sections for 'License Information' (with fields for Name, Address, Phone, Fax, Email, Website, and Partner), 'Contact Details' (with fields for Name, Position, and Email), 'System Users' (with fields for Users and Pos Lanes), 'System Configuration' (with radio buttons for Financials, Fundamentals, Head Office, Service Manager Lite, Professional, and Elite), and 'Additional Modules' (with checkboxes for CRM, Direct Debits, Import / Export, Customer Items, and Contact Management). At the bottom, there are fields for 'License #' and 'System ID #' and buttons for 'Exit', 'Print', and '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.

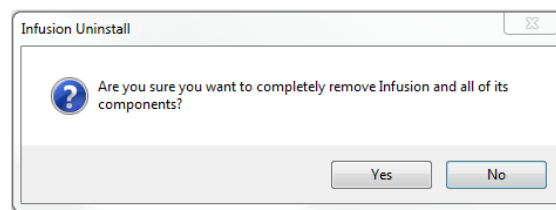
If the system is set to the 2nd radio button option ("Turn on DEP for all ...") select "Add..." to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

Server Message Block (SMB2)

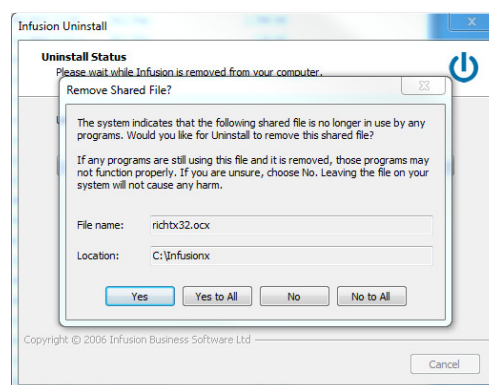
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of <http://support.microsoft.com/kb/2535094/en-gb>

Uninstall Wizard

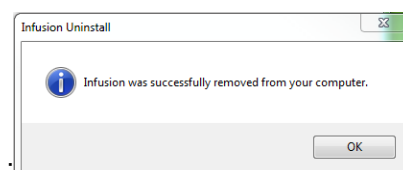
Double click Unins000.exe in the workstation folder.



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



followed by



Key Features In 8.215

Version 8.215 includes various Bug fixes across the system including the following

Admin

- The selection of the default backup path and option to cancel path selection has been fixed.

Cashbook

- A new Cashbook Report has been added - Unexported Direct Credits. Please note this is set at Group 1 by default.

Financial

- The Financial reports Profit and Loss with Budgets have been updated to calculate correctly when multiple departments are used with Opening and Closing Stock.

Job

- 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.
- When using Latest Cost as the Price Level on a Job, the Sell rate now populates when receiving a Purchase Order onto the Job.
- A SELL ALL button has been added to the Job Screen. This is only visible when Production is active.

Product

- When multiple Suppliers are set against a Product, deleting one now won't remove the code for the Second supplier as well.

Purchase Orders

- The Date 1 field is now visible and working.