Infusion Software v8.300 Upgrade Notes

These instructions are for v8.300 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

V8.300 will require installation on the server and all workstations.
For all upgrades, all server and workstation computers require a reboot prior to the upgrade due to user and registry changes.

Before Beginning The Upgrade

Firstly, make a **full backup** of the existing version of the software (i.e. 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 e.g. IBS801-20121211b4upgrade.
All external syncing services (e.g. website) need to be stopped before the backup is made.

Restart the Server/computer the Infusion data file resides on.

Upgrading to v8.300 will require a new licence. If upgrading after hours, ensure you request your new v8.300 license beforehand, inside Infusion office hours.

To start the upgrade, **Double click** on the downloaded .exe file to open it.

The first form is a Welcome form.

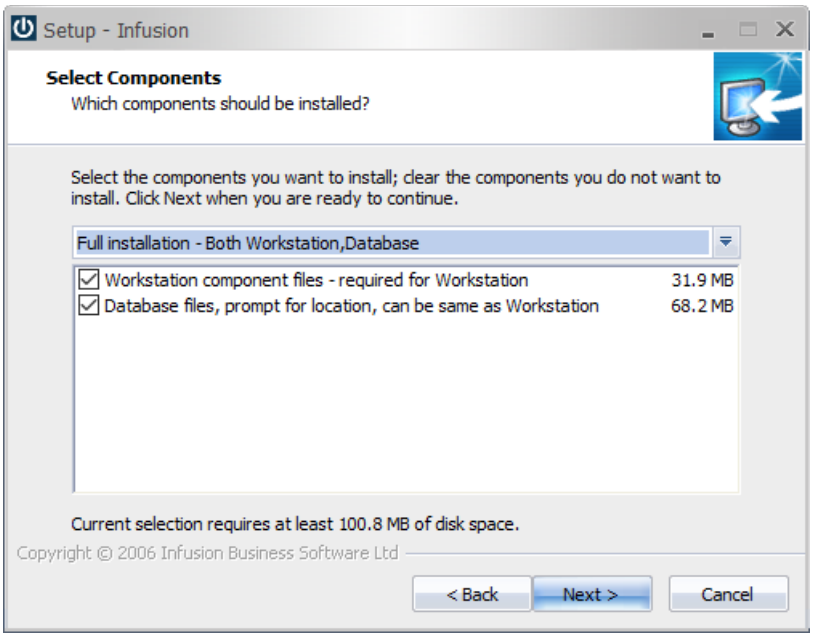
Select **Next**

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.

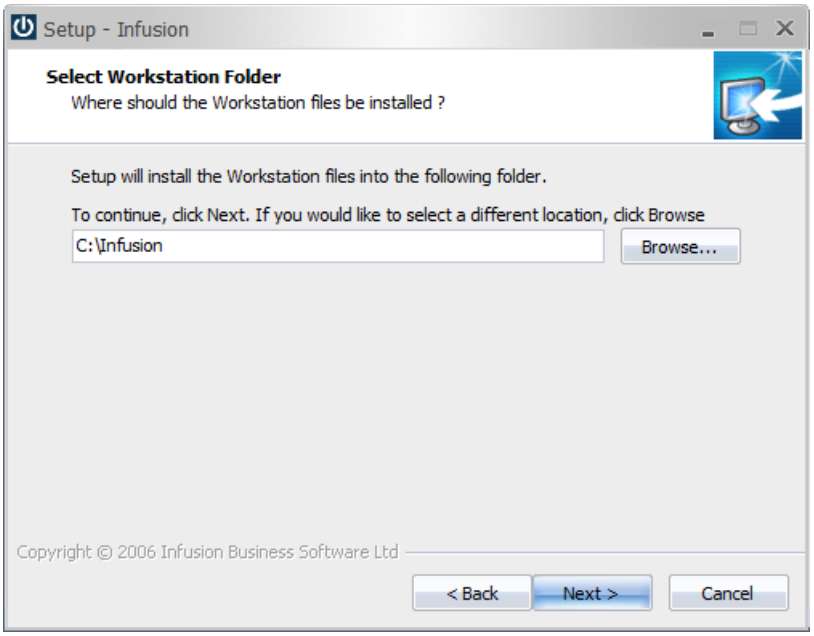
Select **Next**

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



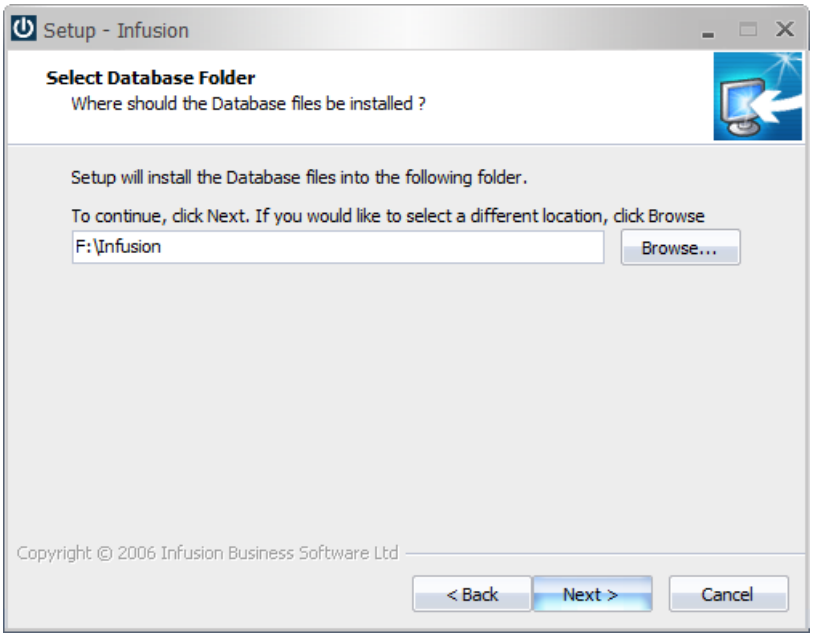
Select **Next**

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



Select **Next**

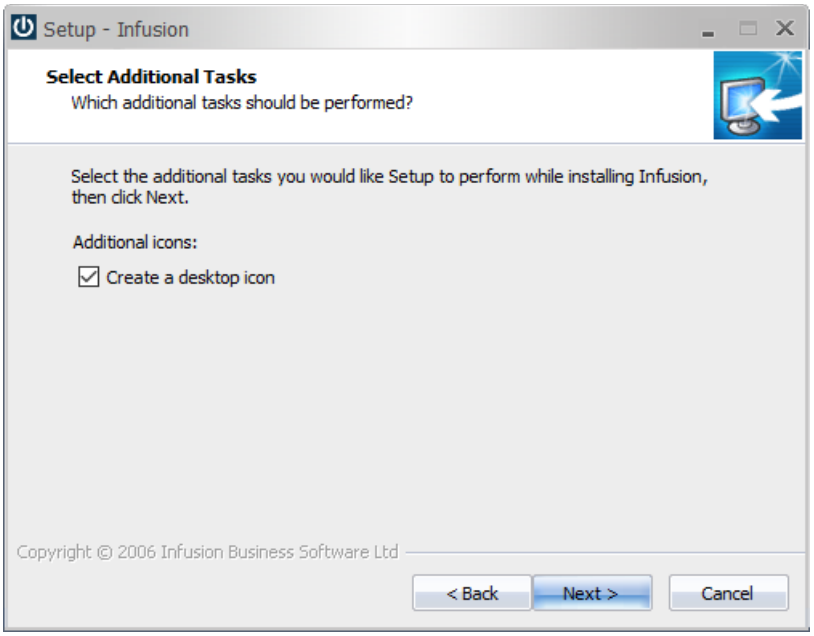
If the "Database files" option was selected you will be prompted for the folder to install the Database files into.



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

Select **Next**

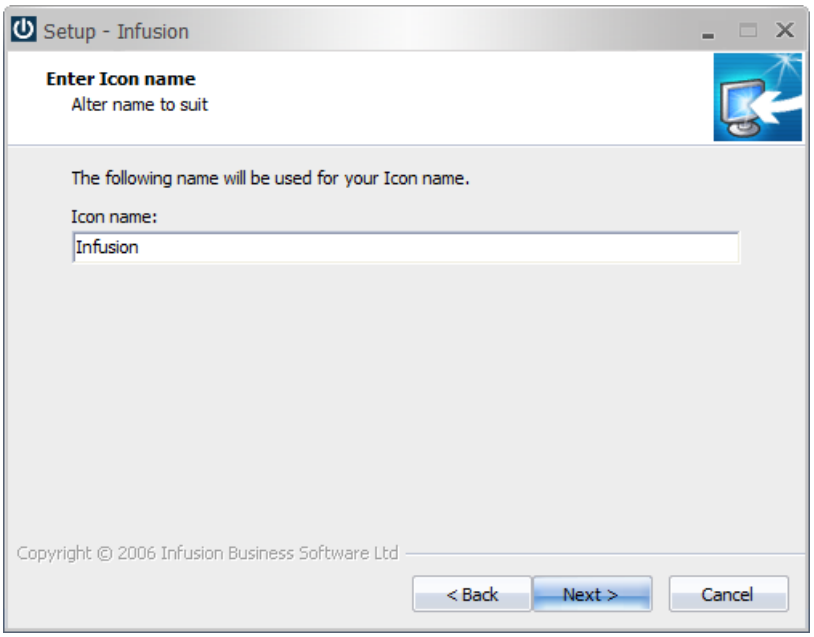
If the "Workstation component files" install was selected, the next form is Additional Tasks.
Note: If Database ONLY option was selected, go to the “Ready to Install” step.



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

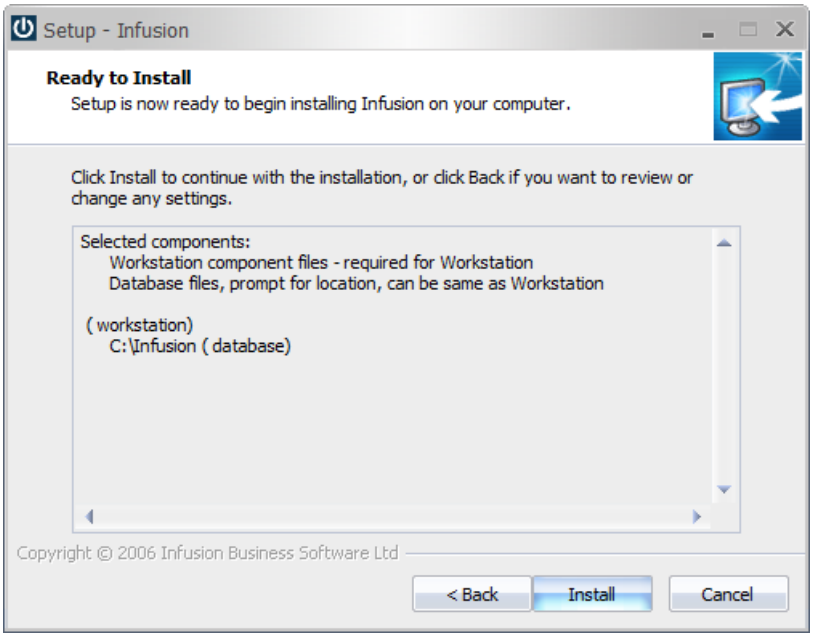
Select **Next**

Enter the name you want displayed with the Icon.

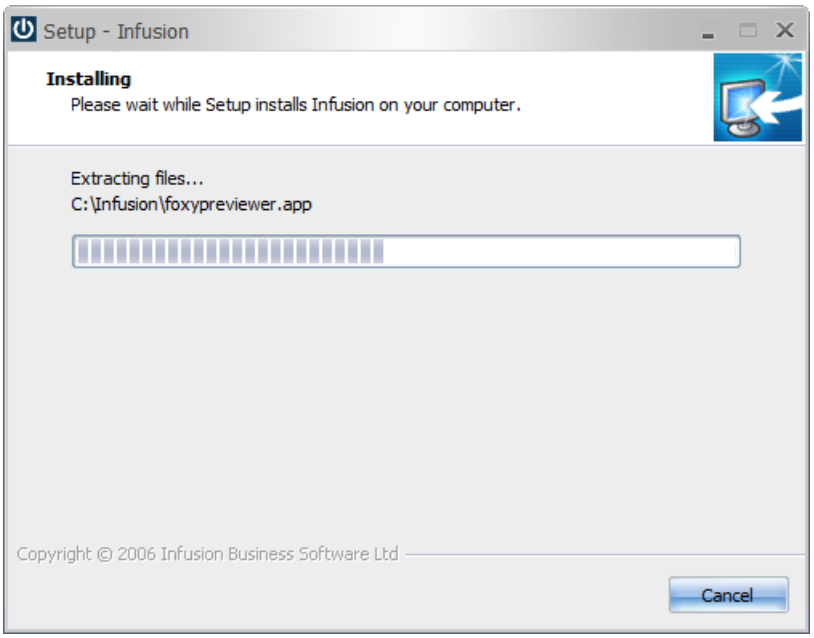


Select **Next**

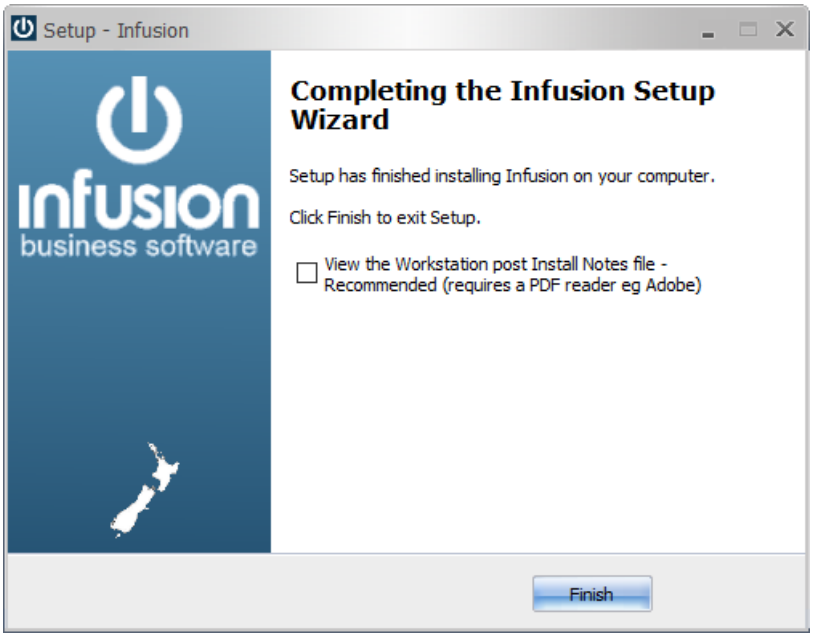
Infusion Setup Wizard will then prompt you to install the software.



Select **Install**



Once the install has completed the following form will display.



You can select to view the Workstation post Install Notes if you tick the box.

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
ibsmain.exe	23/08/14 10:55 AM	Application	1,074 KB
ibsreg.bat	02/07/15 1:26 PM	Windows Batch File	2 KB
IBSversion.txt	25/08/15 11:26 AM	Text Document	1 KB
IBSWhite.ico	08/08/11 8:35 AM	Icon	364 KB
Infusion Support.exe	11/12/14 9:43 AM	Application	490 KB
io.ocx	15/03/05 7:04 PM	ActiveX control	76 KB
libhpdf.dll	25/08/15 3:56 PM	Application extens...	768 KB
license.rtf	18/11/11 1:54 PM	Rich Text Format	48 KB
Main.ico	23/08/14 9:42 AM	Icon	87 KB
MainLogo.png	16/12/11 11:54 AM	PNG File	13 KB
MainLogoReverse.png	24/03/13 1:14 PM	PNG File	19 KB
Mscomct2.ocx	09/03/04 5:45 PM	ActiveX control	647 KB
Mscomctl.ocx	09/03/04 5:45 PM	ActiveX control	1,057 KB
Mscomm32.ocx	24/06/98 12:00 AM	ActiveX control	102 KB
msvcp71.dll	18/03/03 8:14 PM	Application extens...	488 KB
msvcr71.dll	08/04/06 10:52 AM	Application extens...	340 KB
mxobj.fll	27/05/07 10:32 PM	FLL File	56 KB
Post Install Notes.pdf	18/11/11 5:38 PM	PDF File	121 KB
regexp.fll	14/01/06 5:51 AM	FLL File	148 KB
ReportBuilder.app	10/03/13 2:50 AM	APP File	892 KB
ReportOutput.app	10/03/13 2:42 AM	APP File	1,252 KB
ReportPreview.app	15/10/07 11:30 AM	APP File	145 KB
RepWriter.exe	15/06/15 12:05 PM	Application	648 KB
riched20.dll	14/04/08 6:30 PM	Application extens...	424 KB
riched32.dll	14/04/08 6:30 PM	Application extens...	4 KB
richtx32.ocx	09/03/04 2:00 AM	ActiveX control	208 KB
scheme.CDX	12/09/12 12:43 PM	CDX File	4 KB
scheme.dbf	27/02/14 11:12 AM	DBF File	4 KB
scheme.FPT	27/02/14 11:12 AM	FPT File	3,039 KB
SMS_COMAPI.dll	10/03/05 9:57 AM	Application extens...	140 KB
support.exe	04/06/14 8:18 AM	Application	255 KB
system.app	15/03/13 10:51 PM	APP File	822 KB
Sysupdates.DBF	25/07/15 10:31 AM	DBF File	29 KB
unins000.dat	29/08/15 12:34 PM	DAT File	445 KB
unins000.exe	29/08/15 12:28 PM	Application	758 KB
vfp2c.h	22/05/11 4:54 PM	H File	22 KB
vfp2c32.fll	04/02/12 7:11 AM	FLL File	272 KB
vfp9r.dll	03/04/09 1:01 PM	Application extens...	4,624 KB

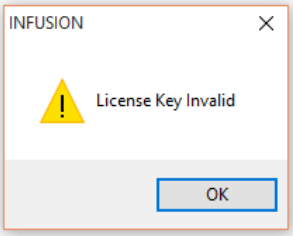
If you run unins000.exe (with the Infusion logo) it will Uninstall and de-register the install. The unins000.exe is only created when you select Workstation as part of the Install.

IMPORTANT NOTICE!!!

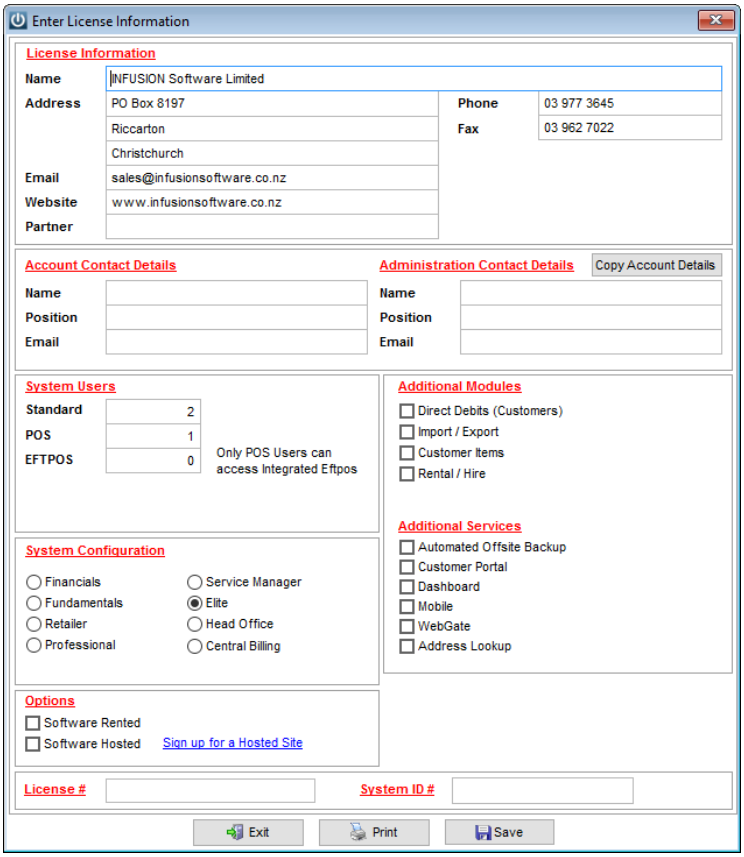
If you install FULL or both Workstation and Database at the same time, running unins000.exe will uninstall both the Workstation AND the Database so it is recommended that two installs are done: firstly install the Database then run it again to install the Workstation.

Requesting / Entering an End User License

Note: v8.300 will require a new licence. If upgrading after hours, ensure you request your new v8.300 license beforehand, inside Infusion office hours. Once the upgrade installation is completed and the data has upgraded, re-opening Infusion will display the following message:



- Click OK: to open the Software License Agreement window
- After carefully reading Infusion Software Limited Terms and Conditions, click I Agree: the Enter License Information window will appear.
- For users on a Maintenance or Support Plan, the new License and System ID number will be supplied by email. Enter these numbers on the form and select Save. This is all that is required. If you have not received the new licence by email or need a copy, please follow the steps below.
- **Click** Print: complete the necessary information on the printed form and sign it. The signed form can be faxed through to 03 962 7022, or scanned and emailed to registrations@infusionsoftware.co.nz (If upgrading after hours, ensure you request your new v8.300 license beforehand, inside Infusion office hours).
- 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 anti-virus software packages slow the speed and performance of Infusion as well as lock files. Because of this the Infusion root folder must be added to any exclusion folder available within the anti-virus 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.

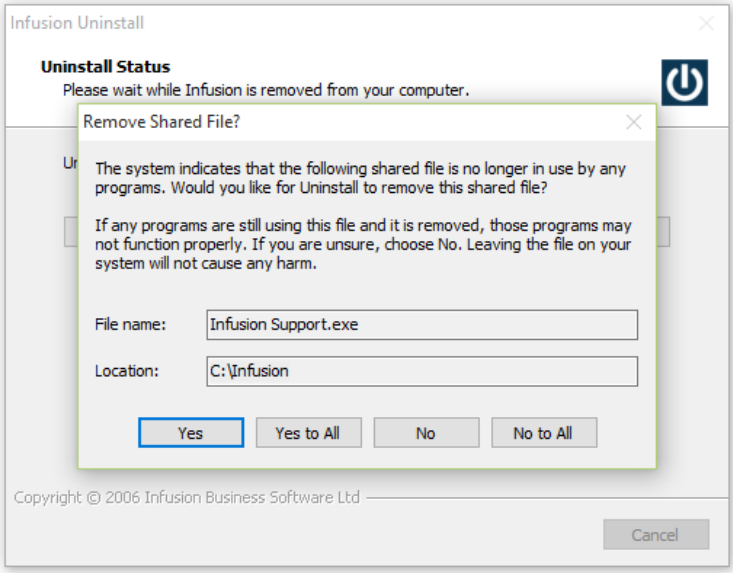
If the system is set to the 2nd radio button option ("Turn on DEP for all ...") select "Add..." to include Infusion (ibsapp.exe) as a program to exclude. When selecting this file make sure it is located through the same path as that on the user desktop shortcuts. If the first radio button was shown as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

Server Message Block (SMB2)

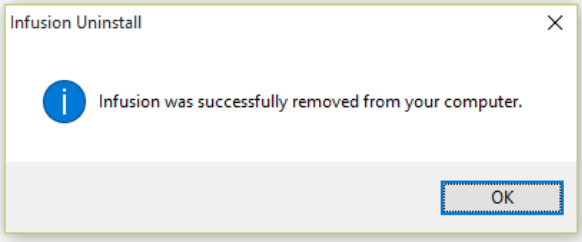
Networks with computers having operating systems of Vista and above (ie support SMB2) will require disabling of SMB2. For assistance with this see the Workaround section of http://support.microsoft.com/kb/2535094/en-gb

Uninstall Wizard

Double click Unins000.exe in the workstation folder.
If any files are no longer needed you may be presented with the following.



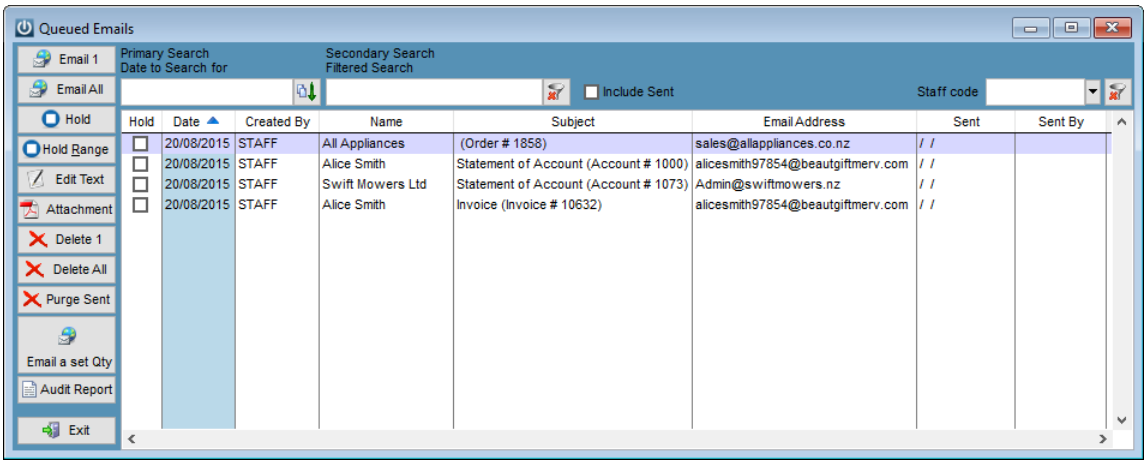
Followed by:



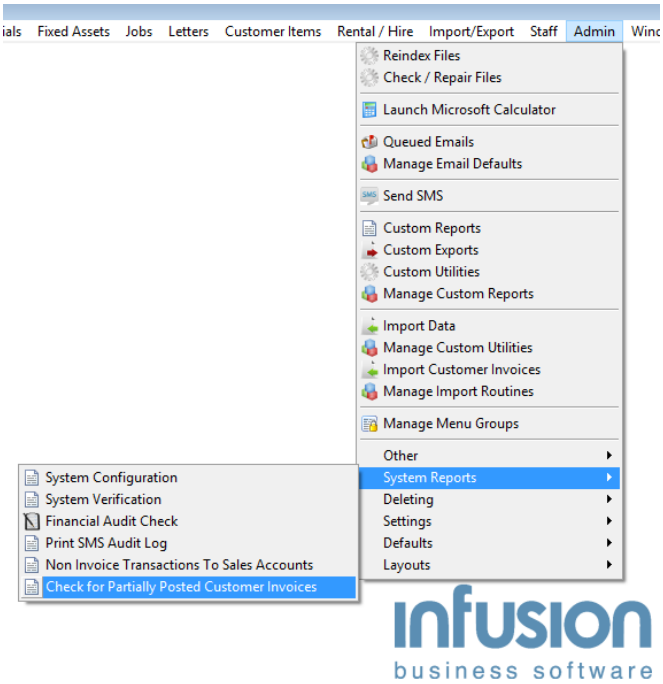
Key Features

Admin

– There is now filtered Searching on Queued emails. This applies to the Name, Subject and Email Address columns. Emails can also be filtered by Staff code. Additionally the Queued emails can now default to the logged on User by setting the 'Show only my emails in the Email Queue' under Manage Staff / Login. A new Tick box has been added to show 'Sent' emails, so sent emails can be resent without recreating the email. This applies to emails that have been sent but not purged. 9968



– The report "Check for Partially Posted Customer Invoices" has been moved from the Partner menu to Admin / System reports menu. 10455



– An issue where an inactive customer account could not be made active again has been resolved. 10638

– The cursor is again highlighting the Customers button on the left menu instead of the Products button at the time the user logs in. 10639

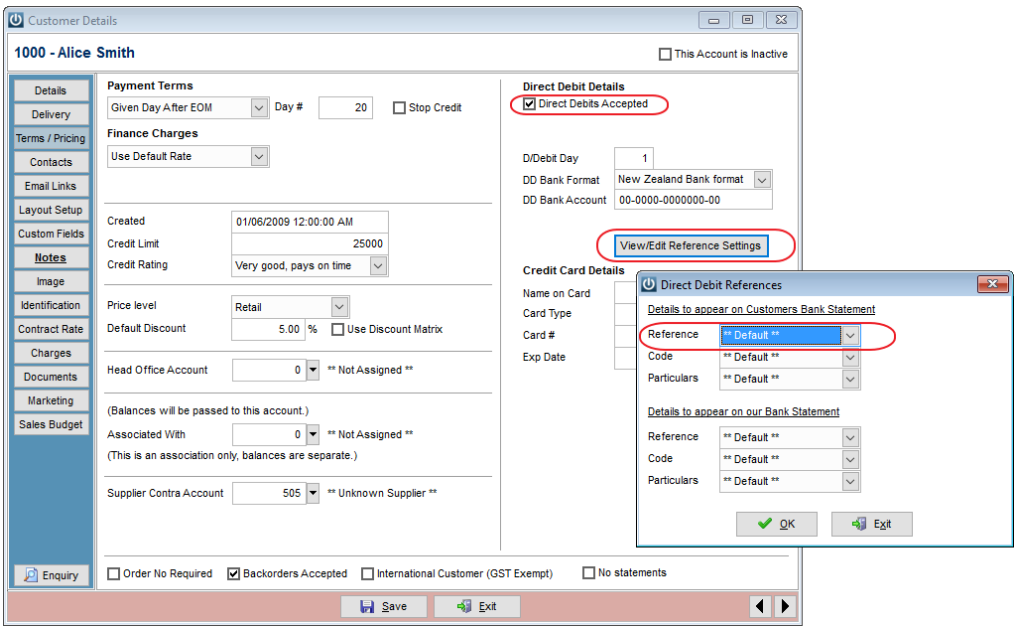
Cashbook

- An issue where GST reported incorrectly on the GST detail/summary report for a payments basis company when calculated from a Job Invoice including build-ups has been corrected. 4842

- A date is required now at the start of the following processes: Create a Bank Deposit, Start a Bank Reconciliation, Export a Direct Credit batch. The corresponding screens will only show available transactions as at the date entered at the start. These changes are to avoid using future dated transactions on these processes, enabling better reconciliation of GL accounts to bank accounts at end of financial year. 7215

- Deleting Payments: A problem with the deletion of reconciled negative payments, where a zero value entry was created on the bank rec, has been resolved. 7649

- The issue of the Direct Debit Batch not including the necessary information on the exported file (when this field was set to *Default* on the Customer setup) has been corrected. 7864



- When a Cashbook Payment is saved, the Date and Reference details are now saved. 9664

- When a Cashbook Receipt is saved, the Date and Reference details are now saved. 9665

- When re-printing the Bank Reconciliation report, it now lists the GL balance, the presented and un-presented items, the Undeposited Bankings and the un-exported DC transactions up to the time of that bank reconciliation. 10136

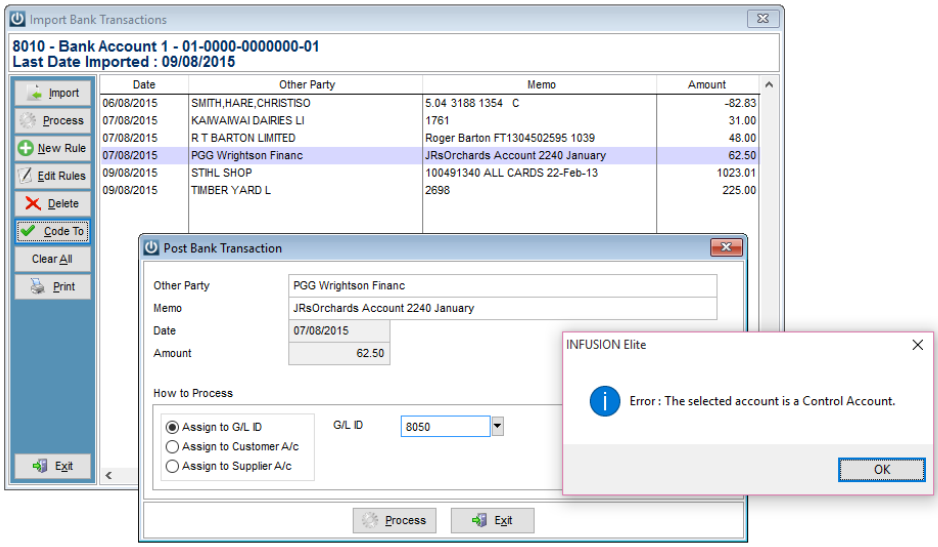
- Undeposited Bankings now show consistently with that name on all reports. 10138

- An issue where pressing the TAG ALL button on the bank rec screen was tagging and including future dated transactions into the balance to reconcile has been resolved. 10630

- An error when running the "Cashbook Analysis - 12 Months" report when having an invalid date in the parameters screen has been resolved. 10644

- A problem with the Bank Reconciliation report printed at the time of closing off a bank reconciliation not showing the date has now been resolved. 10650

– The 'Code To' option under Import Bank Transactions in Cashbook no longer allows coding of a transaction to a Control Account, a Bank Account or a Header or Totalling account. Appropriate warning messages will show if the user attempts to do so. 10134



Contact Management

– All Emails sent from the Infusion Email Queue now update the Contact Management module. 8558

Customer

– A Customer Account cannot now be made Inactive if it still has Recurring Invoices against it - appropriate warning is shown. Pending Invoices cannot be Posted when a Customer account is Inactive - appropriate warning is shown. 4598

– It is now not possible to delete a Customer with an Active Job. 5455

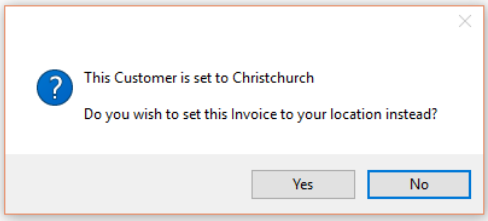
– Customers with outstanding Quotes can now no longer be deleted. 5457

– Customers' Periodic Charges no longer remain in the Process Periodic Charges screen once the Customer Account is deleted. 6753

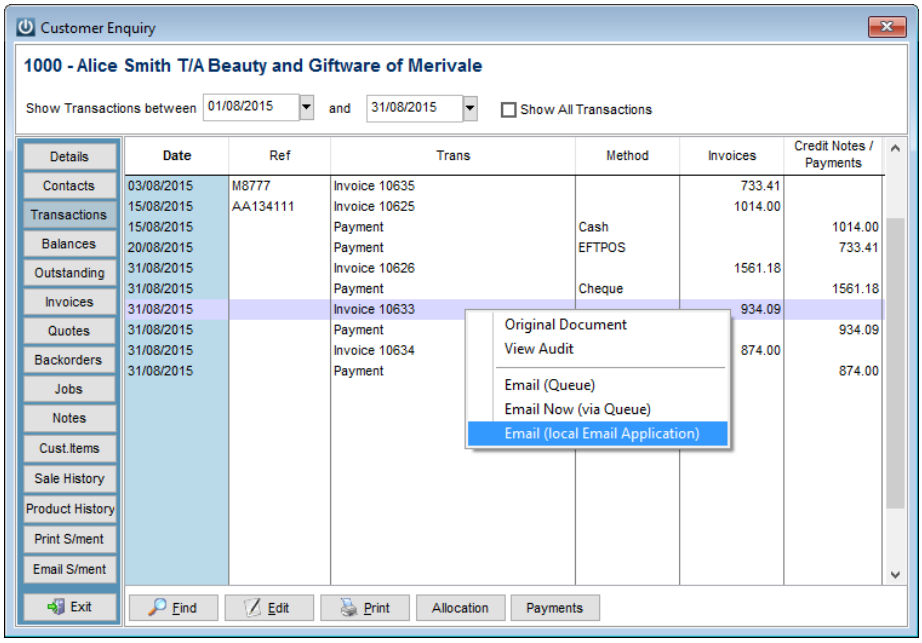
– The issue with deleting Contacts from a Customer and the Contact1 name in the Manage Customers screen still showing has been fixed. 7320

– The issue where Backorders were consolidating lines with different discount amounts incorrectly has been fixed. 8852

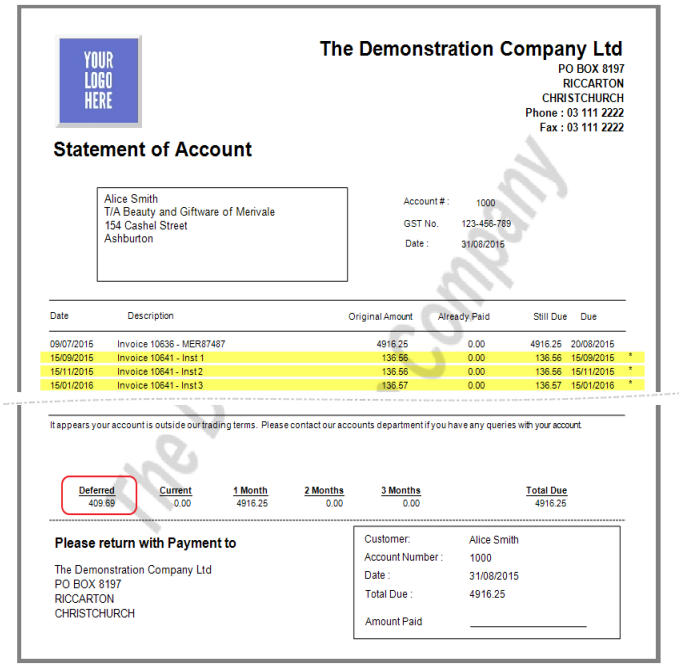
– The option to have the Location of a Customer Quote or Invoice change to match the Location set for the Staff Member has been added. A prompt will appear when starting the transaction giving the user the option to retain the Customer's Location on the transaction or to change it to match the user's Location. 9071



– The ability to email a copy of an Invoice from the Customer Enquiry screens to one of the Contacts instead of the main email address has been added. This is done by right clicking on the Invoice and selecting the option to email using local email application. The "Allow email using local Email Applications" option under the Manage Staff / Login menu needs to be activated for this. 7470



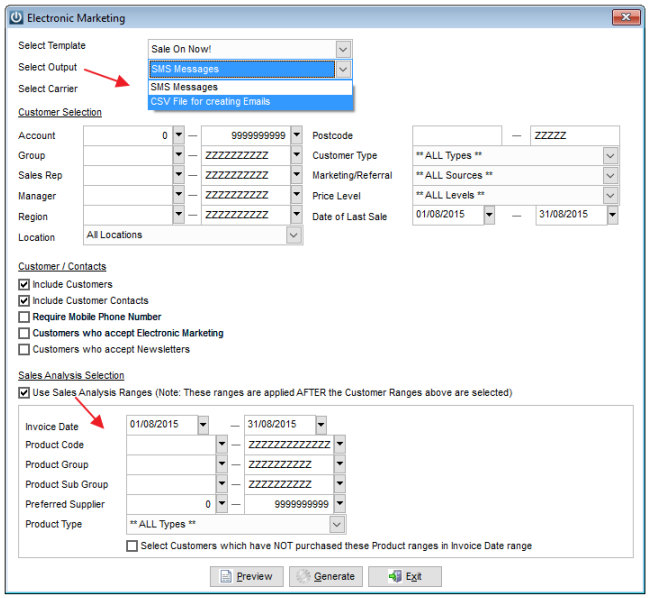
– A new Customer Statement layout that shows Invoices with Deferred Payments has been added. It is called "Open Item - with Deferred Invoices" (stopen4.FRX) 10019



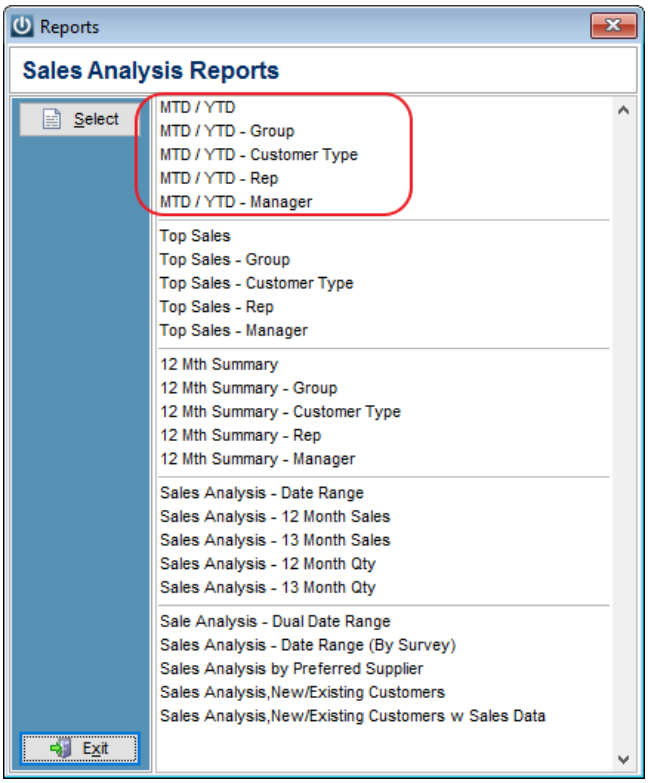
– An issue where Emailed Invoices from the Customer Enquiry screens were using the system default invoice layout instead of the Customer's default layout has been resolved. 10058

– An issue causing duplicated records in CUSTPAID when paying instalments out of order for a Deferred Payment Invoice with regular payments has been resolved. Also, a problem with the deletion of payments allocated to instalments of deferred payment Invoices creating an imbalance on Aged Trial Balance reports has been resolved. 10175

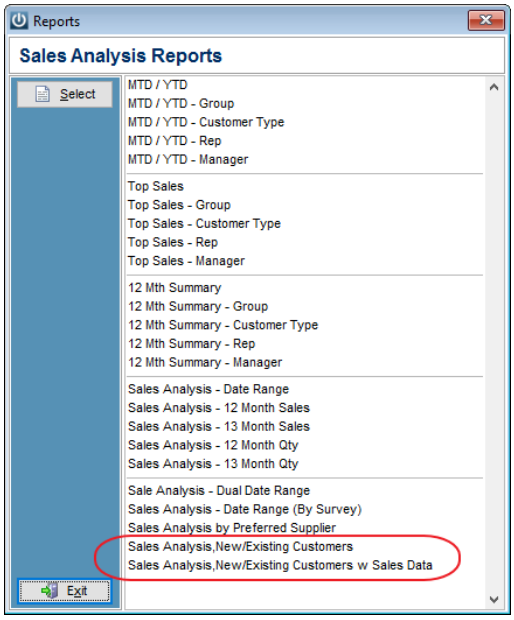
– The Electronic Marketing screen under the Customers menu now has the ability to filter using Sales Analysis ranges allowing for filtering of Customers who DO NOT meet the selected criteria (e.g. Not Sold to in the specified ranges). The new screen allows for a CSV file to be created with the same format as the Export Email List option in Customers / Utilities but with the data filtered according to the parameters selection. There is also the ability to use either of (or both of) the Customer's Main Details (Email or SMS) or those of the Contacts associated with the Customer. 10272



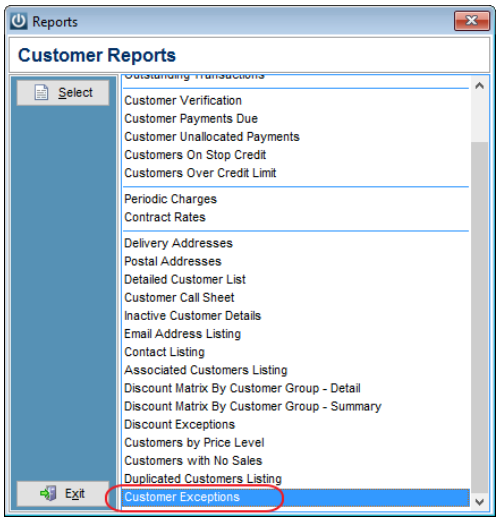
– All five Customer Sales Analysis MTD / YTD reports now display the correct Customer budget amount on the correct month. 10291



– Two new reports have been added to the Customer / Sales Analysis menu. These compare the percentage of sales in a given period between New and Existing Customers. A New Customer is identified as having a date created within the given time frame. 10340



– A new report “Customer Exceptions” has been added. This is located under the Customer / Reports menu. It lists: 10425
1) Organizations without "Ltd", "Limited", "Pty", "Partnership", "Trust" in the name,
2) Organizations without at least one contact name,
3) All Customers without an email address.

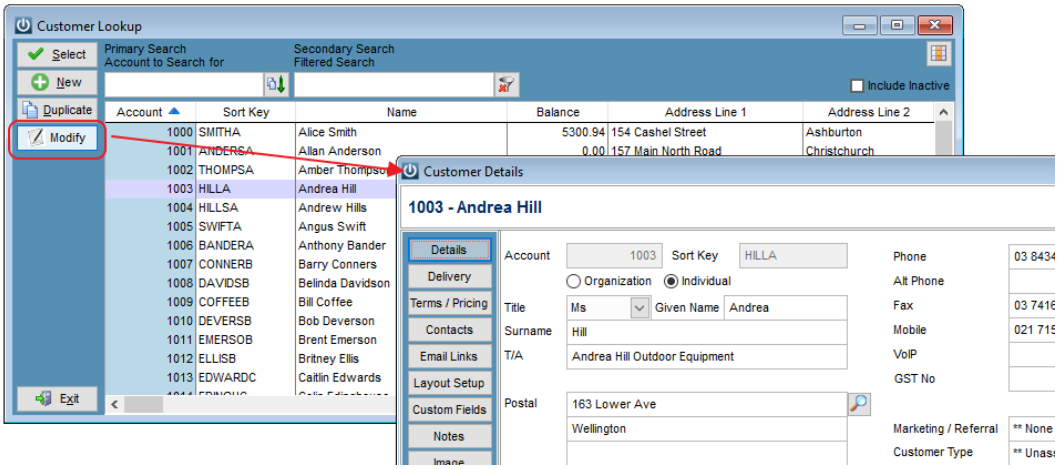


– New short cut Options to open an Invoice in Read-only mode from Customer Enquiry and NEW Details Panel are now available. To open an Invoice double click on an Invoice from ether the Transactions, Outstanding or Invoices tab. 10432

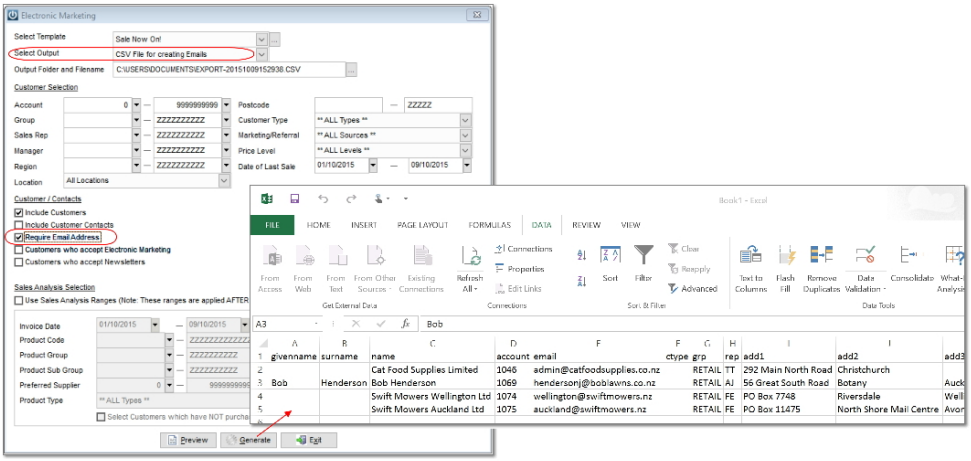
– New Address Lookup functionality has been added to the software and is available for the Customers module. It will allow the searching of postal and physical addresses from an online database. To be able to use it, this functionality needs to be licenced. 10435
For more information, please refer to the Address Lookup Functionality Knowledgebase Article

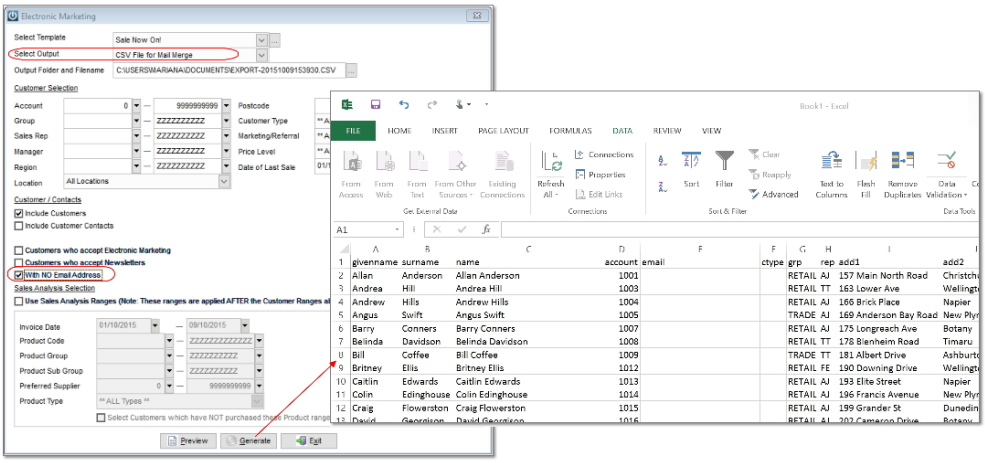
– The Last Payment date is now correctly updating Customer records when a POS Invoice or Rental Hire Invoice includes a Payment. 10452

– The ability to modify a Customer while in the Customer Lookup form has been added. 10477



– The Electronic Marketing Output has been updated for exports, which will include an additional field for the FIRST NAME and an additional field for the SURNAME. These fields will have information on them if the customer account has been setup as Individual and with name and surname in the software. Also, in order to filter accounts with or without email address, now there are two different export options: 1- CSV File for creating Emails - this will include all accounts on the selected range, with or without emails, unless the box 'Require Email Address' is ticked, resulting in an export for only the accounts of the range that have email. 2- CSV File for Mail Merge - this will include all accounts on the selected range, with or without emails, unless the box 'With NO Email Address' is ticked, resulting in an export for only the accounts of the range that DO NOT have email. 10671

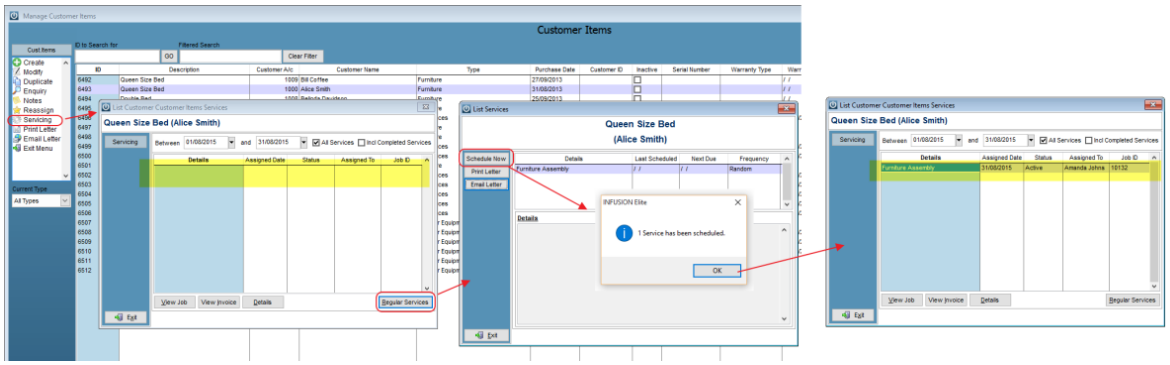




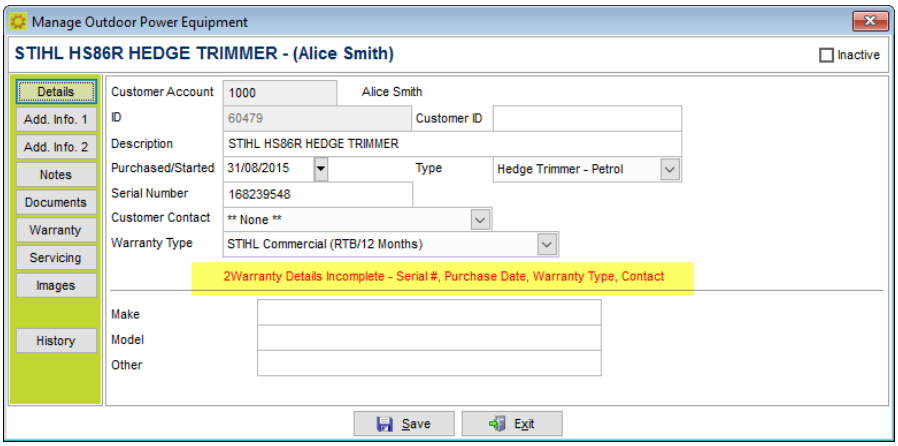
– An error occurring on the Customer "Sales Analysis New/Existing Customers w Sales Data" report when using the filters to narrow down the parameters has been corrected. 10681

Customer Item

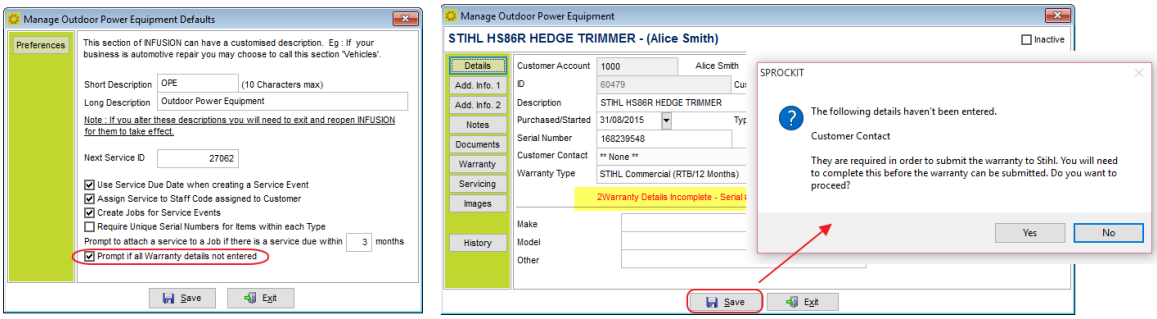
– When using the "Servicing" option on the left side menu of the Manage Customer Items screen to go to the 'Regular Services' list and use the 'Schedule Now' button, the newly created Job now automatically refreshes and shows on the List Customer 'Customer Item' Services window without having to click on the grid or close it and re-open it. The Job will automatically be set to the standard (*STD*) Job TYPE. This can be modified later on the Job. 6920



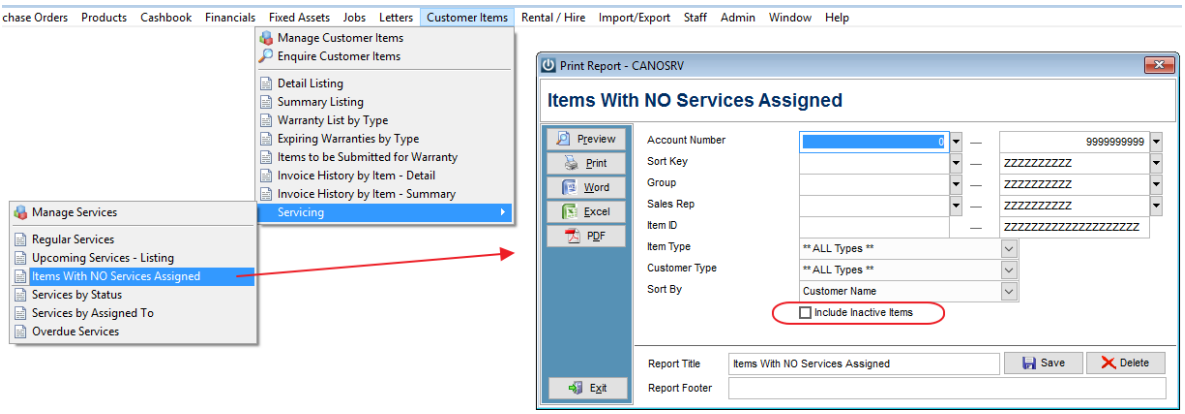
– <u>Sprockit only:</u> If a Stihl OPE item is sold, processing the Invoice will bring up the Customer Item screen where the software will show if any of the critical information is missing. A new Customer Contact can be created from the Customer Item screen and will update the Customer record. 9706



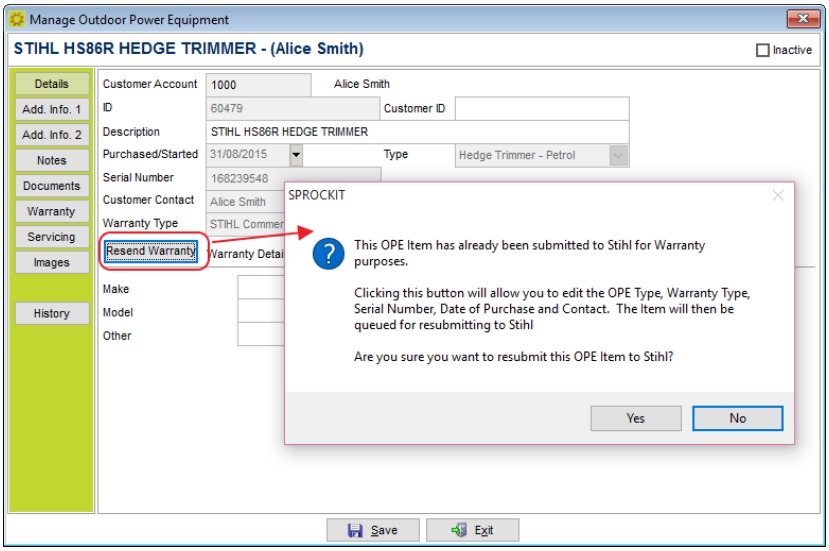
If the option to "Prompt if All Warranty Details Not Entered" is selected from under the Customer Items Defaults menu a message will pop up if the user tries to save the Customer Item without completing the information, giving the option to return to the screen to fill in the details.



– The Customer Items report "Items With NO Services Assigned" now prints only Active items by default unless the 'include inactive items' box is ticked on the parameters screen of the report. 10403



– Sprockit only: The ability to edit and re-send to Stihl the warranty information of a Stihl OPE item has been added. The button "Resend Warranty" becomes visible on the OPE screen of a Stihl OPE item if the information has already been submitted. Clicking on this button unlocks the greyed out fields allowing editing the details and leaving it ready for the Warranty Service to re-send it on the next batch. 10463



Financials

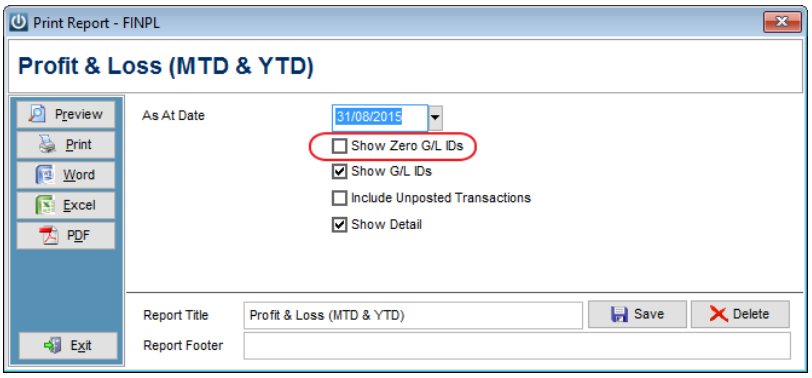
– The process of Swapping GL codes is now completed when swapping a bank GL account i.e.: Undeposited Bankings, unpresented items in bank reconciliation screen and Unexported Direct Credit batches will also be moved to the new account. 7182

– File locking in a multi-user scenario when one user tries to exit from Manage GL ID: the background process of re-paging all accounts does not occur if the user closing the Manage GL ID has made no changes on the data, reducing the conflict with other users. 8711

– The speed of the Bank Reconciliation process has been improved. 10356

– If the Integrity Check from Financials generates *Auto-Created* GL Accounts it will no longer create them with blank ID if it was not able to identify the GL ID at the time. 10369
Blank ID *Auto-Created* accounts will now be given a system generated ID composed of the word "AUTOGEN" and a number that will be increasing to individually identify the transaction line, for example AUTOGEN1, AUTOGEN2, AUTOGEN3, etc., so the user can fix these with the Swap GL ID utility.

– The parameter screens of all Financial reports where there is an option to "Show Zero G/L IDs" now have the option unselected by default. 9540



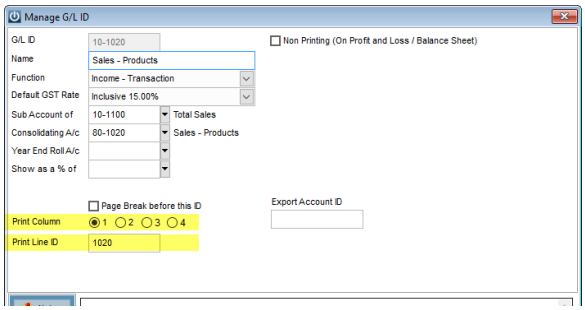
– Four new fields have been added for the setup of GL Accounts 10027

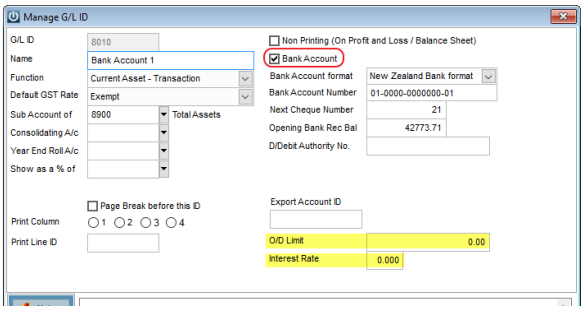
* Print Column: this field has to be set in order to use the P & L By Branch reports (refer to #10424 on next page).
It defines what column (branch) the account is to print in the grid of the report. Each branch General Ledger account will print out in either columns 1, 2 or 3. Column 4 is to be used for the consolidation account.

* Print Line ID: this field has to be set in order to use the P & L By Branch reports. It defines what line (row) the account is to print in the grid of the report. In order to see the same account printing each branch side by side, the GL accounts need to have the same Print Line ID to show on the same line.

* O/D Limit: this field is intended for information purposes to store the Over Draft limit of a bank account. It is visible only on GL Accounts set as Bank Accounts.

* Interest Rate: this field is intended for information purposes to store the Interest Rate of a bank account. It is visible only on GL Accounts set as Bank Accounts.





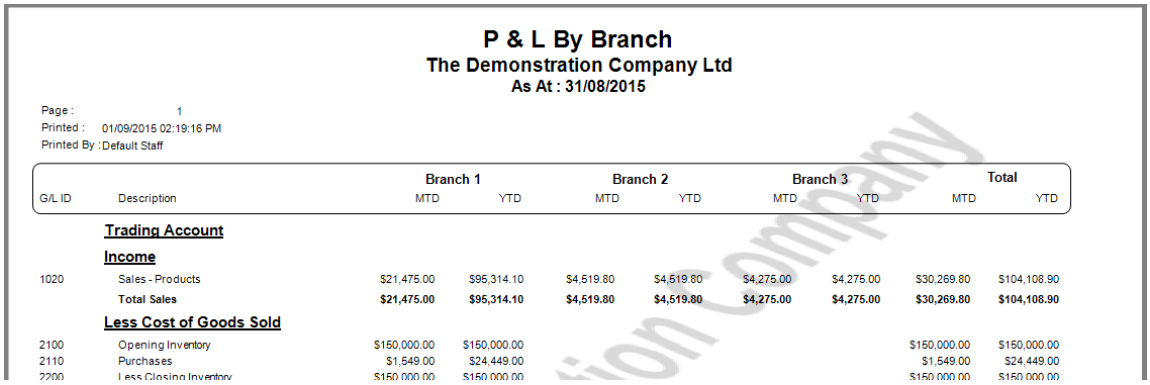
– The Financial Year Close Off will not be processed if there are no GL Codes setup for Default Sales, Default Purchases and Default Closing Inventory accounts under Admin / Defaults / Manage Financial Defaults menu. 10440

– Consolidated Closing Inventory GL accounts cannot be set up as a Closing Stock account on Products settings. 10482

– Financial Transaction Journals cannot be posted to Consolidated Closing Inventory Accounts 10483

– An error generated when running the Profit & Loss with Budget report has been corrected. 10617

– Two new financial reports have been added: “P & L by Branch” and “P & L by Branch with Budget”. These reports print three columns for branches and one column for a consolidation section. The four radio buttons in the GL code setup screen are to classify which of the four columns each account will display in (see #10027 above). 10424



P & L By Branch
The Demonstration Company Ltd
As At : 31/08/2015

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Printed : 01/09/2015 02:19:16 PM
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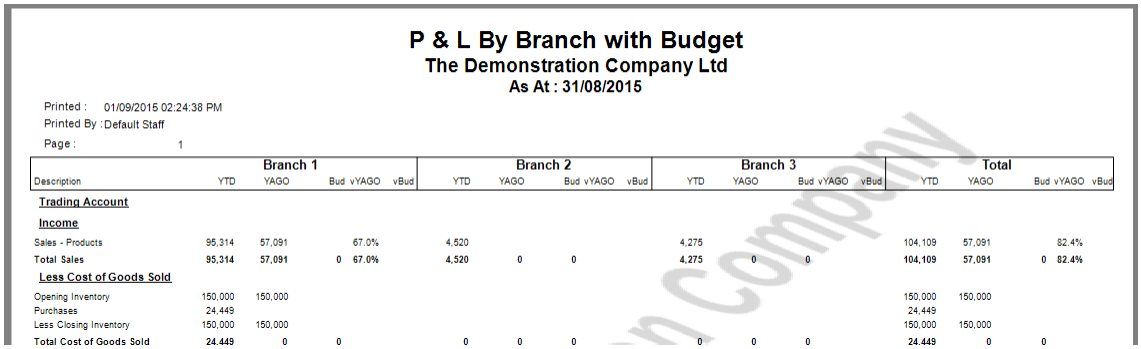
G/L ID	Description	Branch 1 MTD	Branch 1 YTD	Branch 2 MTD	Branch 2 YTD	Branch 3 MTD	Branch 3 YTD	Total MTD	Total YTD
	Trading Account								
	Income								
1020	Sales - Products	$21,475.00	$95,314.10	$4,519.80	$4,519.80	$4,275.00	$4,275.00	$30,269.80	$104,108.90
	Total Sales	**$21,475.00**	**$95,314.10**	**$4,519.80**	**$4,519.80**	**$4,275.00**	**$4,275.00**	**$30,269.80**	**$104,108.90**
	Less Cost of Goods Sold								
2100	Opening Inventory	$150,000.00	$150,000.00					$150,000.00	$150,000.00
2110	Purchases	$1,549.00	$24,449.00					$1,549.00	$24,449.00
2200	Less Closing Inventory	$150,000.00	$150,000.00					$150,000.00	$150,000.00



P & L By Branch with Budget
The Demonstration Company Ltd
As At : 31/08/2015

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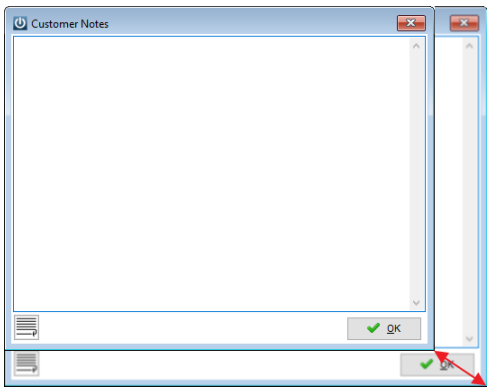
Printed By : Default Staff
Page : 1

Description	Branch 1 YTD	Branch 1 YAGO	Branch 1 Bud	Branch 1 vYAGO	Branch 1 vBud	Branch 2 YTD	Branch 2 YAGO	Branch 2 Bud	Branch 2 vYAGO	Branch 2 vBud	Branch 3 YTD	Branch 3 YAGO	Branch 3 Bud	Branch 3 vYAGO	Branch 3 vBud	Total YTD	Total YAGO	Total Bud	Total vYAGO	Total vBud
Trading Account																				
Income																				
Sales - Products	95,314	57,091		67.0%		4,520					4,275					104,109	57,091		82.4%	
Total Sales	**95,314**	**57,091**	**0**	**67.0%**		**4,520**	**0**	**0**			**4,275**	**0**	**0**			**104,109**	**57,091**	**0**	**82.4%**	
Less Cost of Goods Sold																				
Opening Inventory	150,000	150,000														150,000	150,000			
Purchases	24,449															24,449				
Less Closing Inventory	150,000	150,000														150,000	150,000			
Total Cost of Goods Sold	**24,449**	**0**	**0**			**0**	**0**	**0**			**0**	**0**	**0**			**24,449**	**0**	**0**		

General

– Forms where serial numbers can be entered have been made consistent so they accept the 26 characters that the software stores for a serial number. 7139

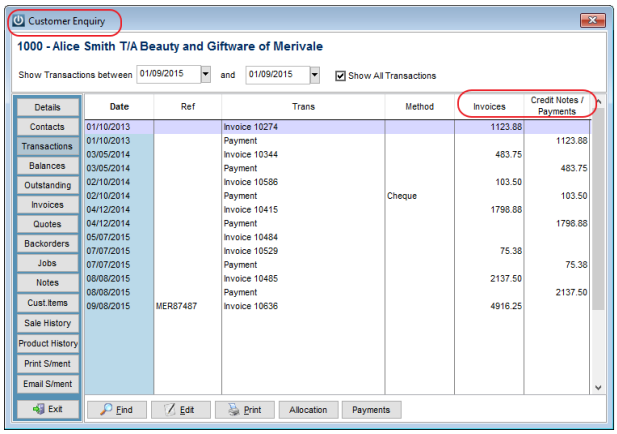
– The Notes form (the one that opens from left menus or from /N on transaction lines) now allows users to enter more information and it can also be stretched to display more text. The “Insert Standard Descriptions” has been replaced with an icon button on the left. 7862

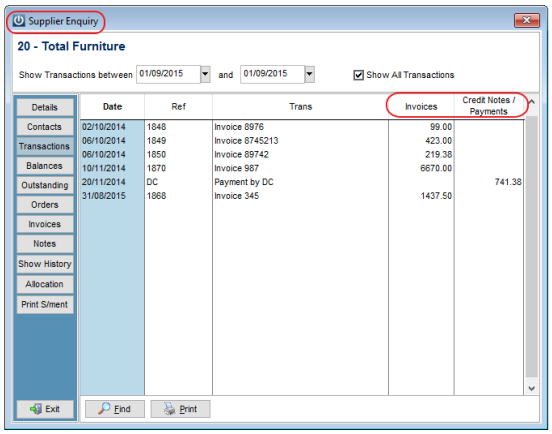


– Customer Invoice, Customer Quote, Purchase Orders, Supplier Packing Slips, Supplier Invoice forms have increased in size and have been altered to accommodate more information and provide better visual data entry (refer to #10233, #10234, #10236, #10046, # for examples). 9861

– A new 'Details Panel' has been added to Customers, Suppliers, and Products to provide quick access to information and charts while navigating through management grids. For more information, please refer to the Details Panel Knowledgebase Article 10095

– The column headings on Customer and Supplier Transaction screens previously read "Debit" or "Credit" and have now been updated to "Invoice" and "Credit Note/Payment" 10055





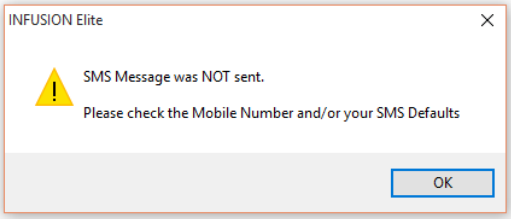
– The Confirmation message of Emails being sent to the Queue has been reinstated on Quotes. 10169

– The System Help Files have now been replaced by a new Online Help available from the Help Menu. PDF help files are no longer distributed through the Installation process. 10184

– The “Save” on the Change Columns option of the Management screens for Quotes, Invoices, and Purchase Orders when displaying current transactions now holds the sort order for when the user reloads the grid. 10295

– The Aged Trial Balance reports for both Customers and Suppliers have been sped up. 10363

– A failure message is now displayed if an SMS is not able to be sent. 10415



– The Company Name field on the licence form has been extended to accommodate 60 characters. 10548

– Ability to use the shortcut Alt+O to close the Notes screen when using /N on a transaction has been reinstated. 10606

– An issue where the main screen was hiding the user name and the software version in the title bar has been corrected. 10686

Import / Export

– The ability to export and email a file with customer invoices via EDI directly to Farmlands has been added under the Import/Export module. 10687

Invoices

– Serial Tracked items being carried through to a Recurring Pending Invoice now require the serial number to be entered before the newly created Recurring Invoice can be posted - previously the same serial number was being used. 6520

- An inconsistency with the warning message "You are selling below Cost" not appearing on Invoicing if the Customer Default was not set to 'allow discounts' has been corrected. The warning will now appear whenever appropriate, regardless of the discount setting. 7330

- An issue with the warning "This customer is flagged cash sales only" not appearing if the Customer already had a Pending Invoice and the new Invoice was being created from the Pending Invoices lookup screen has been corrected. 9198

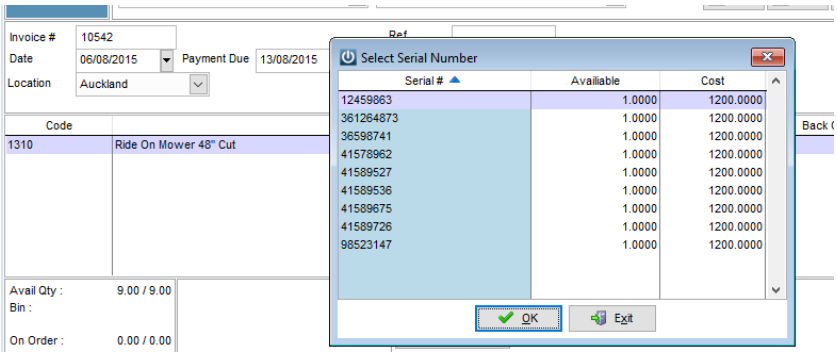
- Delivery Address 1 column can now be searched using Filtered Search in both Manage Invoices and Manage Quotes screens. 9901

- The issue where Date filtering on Invoices is lost in the Invoices Management screen after searching has been fixed. 10087

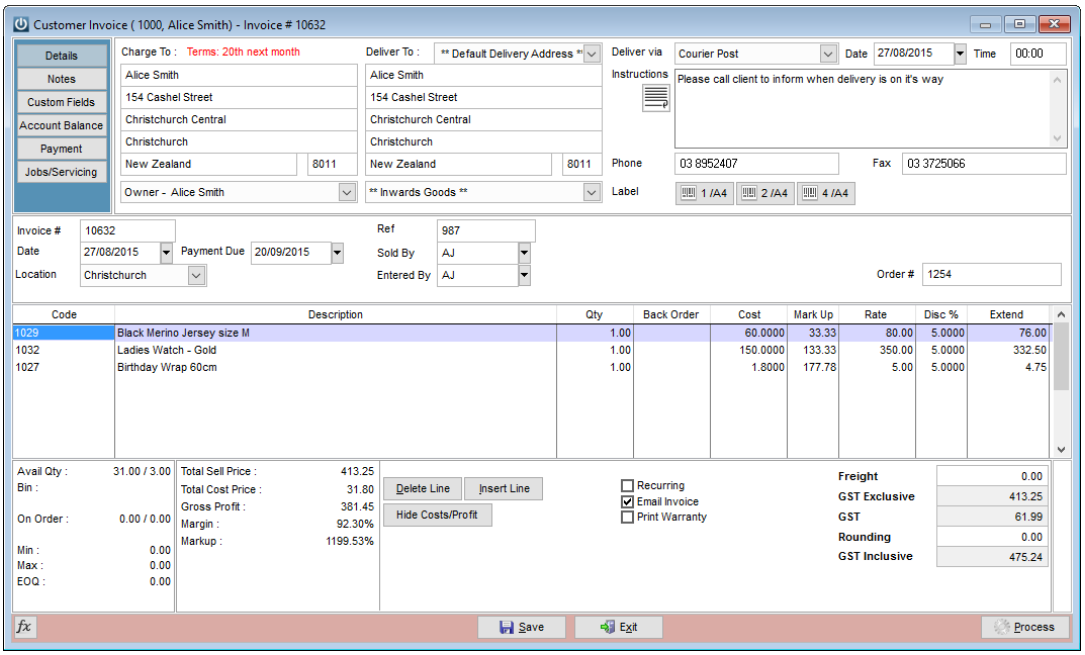
- An issue with a Product quantity being reduced when opening a posted Invoice in version 8.212 has been fixed. 10113

- The issue where "prompt for printer" needed to be selected for the Print All option from the Manage Invoices screen to work has been resolved. 10143

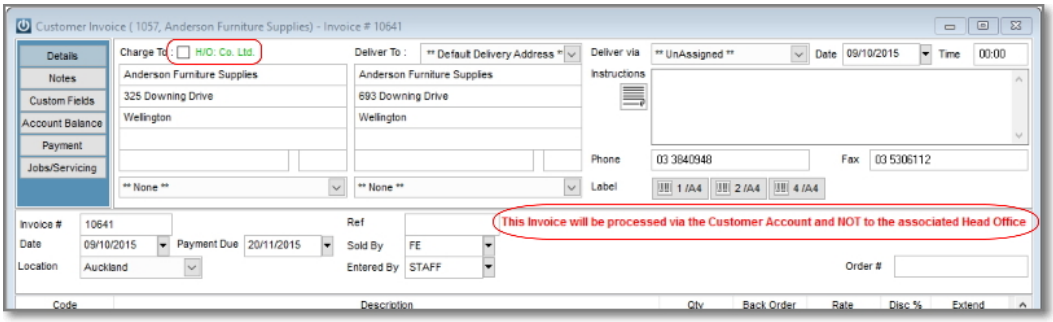
- When selling a serial tracked product, the serial number lookup screen now also displays the Cost and Quantity available next to the serial number. 10177



- The Delivery information on a Customer Invoice has been moved to the Details tab - the Delivery tab has been removed. 10233

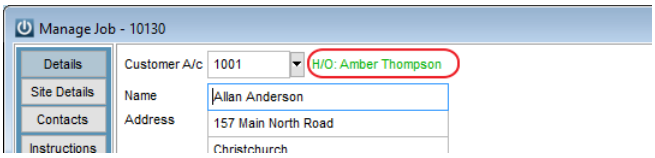


- The full Product description now flows through to the Invoice when a Backorder is filled. 10271
- When using the Credit/Recharge option to credit an Invoice rounding is now handled correctly. 10280
- The Customer Lay By report has been fixed and now shows the correct total amounts. 10399
- An error seen when printing Terms and Conditions with a Customer Invoice is now fixed. 10491
- Error with 'MAKEPDF' module that occurred with some layouts when trying to email an invoice with the local email application has been resolved 10623
- A new tickbox to allow the user to charge the sale via the Customer's account instead of the associated Head Office has been added on the following screens: Customer Invoice / POS Invoice / Create Rental Hire / Extend Rental Hire / Return Rental Hire. When the transaction is initiated the box will be ticked by default, and if unticked, a message will show explaining the transaction will be charged to the customer's account. 10667



Job

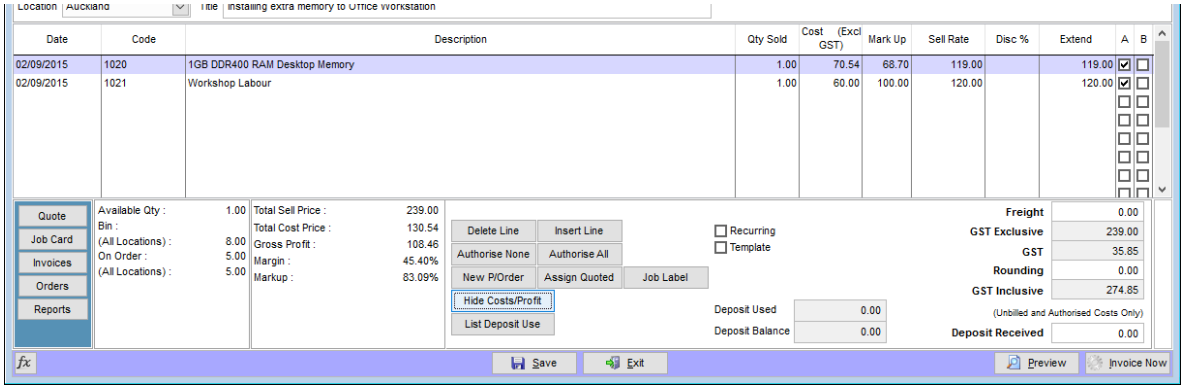
- When selling a serial tracked Product on a Job Invoice the sold date now shows when you check serial history (from the Product Enquiry / Serial # menu). 4347
- Users are no longer able to edit the Discount field in the Job screen if their Staff code is not allowed to edit discounts (Manage Staff / Login menu). 7708
- The issue of rounding when receiving a Payment when a Job deposit is present has been fixed. 8401
- Data entry and behaviour has been improved on Job Entry: 9933
  Lines can be entered continuously on Job management now regardless of having reached the last blank line if you arrow down or press enter or tab away.
  Enter and TAB keys will keep moving the cursor to the next field on the right until it reaches the last one, and then it will create the new line.
  The problem of having the cursor moving to the top line doesn't exist anymore.
- The Supplier Invoice number now prints on the Job Detail report. 9973
- The ability to sort columns on the Customer Item lookup screen when opened from a Job has been restored. 10008
- The name of a Head Office account is no longer superimposed on other fields on the Job screen 10038



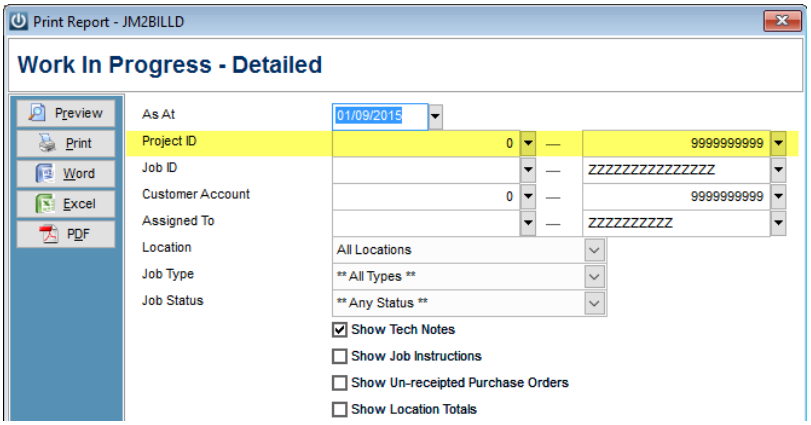
– The Job Deposit screen now uses the standard Date Picker keeping consistency with the rest of the software 10040

– When adding new lines to a completed Job and a change of Location occurs, Billed items are now NOT transferred. 10049

– A button "Show Costs/Profit" has been added to the Job screen and will show the information on a new column next to it when the button is active. For the button to be visible check that the option “Hide the Cost Price Column (Modify Screen)” is NOT selected under Admin / Job Defaults / Cost Entry. 10061



– The ability to filter by Project ID has been added to the majority of Job reports. 10108



– An issue where Jobs were calculating the GST component on items added to Jobs for International Customers has been resolved. 10147

– The rounding from the Modify Job screen now flows to the second Invoice generated when the Job Type is "Warranty - All Costs". The rounding field is now disabled on the Job screen for Job types "Warranty - Labour Only", "Warranty - Parts Only" and "Warranty - Parts & Labour" so the correct amount of rounding can be entered on the two Invoices generated if necessary. 10192

– The warning for 'selling below cost' is now working correctly on Jobs. 10263

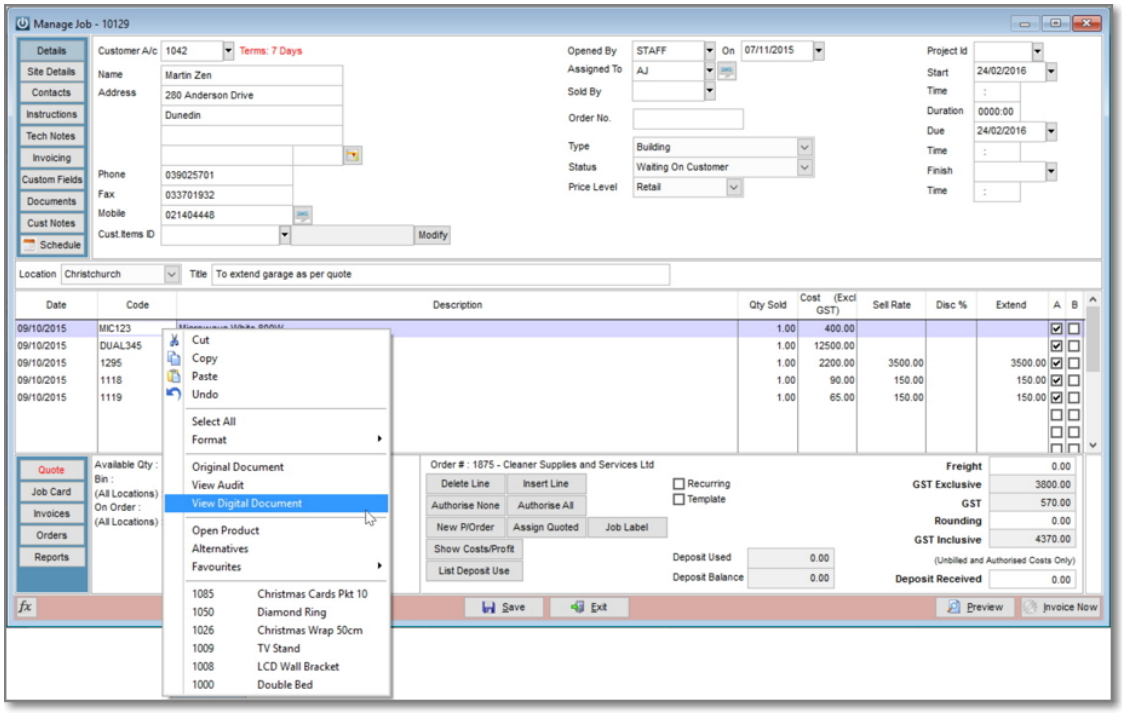
– The issue of Job Invoices not including all the lines of the Job when the system default had the "Go To Code first where possible" flag on has been resolved. 10278

– The "Allow Editing of rates in Customer Invoice /Quote /Price Enquiry / POS / Jobs" setting under Staff Login setup is now working correctly for Jobs. 10498

– The Job Management Defaults now allow the Production feature on Jobs to be activated. For more about this module please see Production Knowledgebase Article 10521

– An error in the job screen happening when using a pricebook item that did not exist in the products list has been corrected. 10615

– It is now possible to open the scanned supplier invoice directly from a line in the job screen by right clicking in the product code field. The option 'View Digital Document' will be available if that code has come through to the Job from a Purchase Order linked to a supplier invoice loaded using Xtracta. 10628



– Resolved an issue where job invoices were not holding the order in which lines were entered on a quote if the job was invoiced using option "as per quoted". 10635

– Mark Up column no longer causing numeric overflow error and also now can accommodate 6 digits before decimal point to avoid displaying ****.** 10649

POS

– Rounding behaviour on Customer and POS Invoices has been unified and now is working consistently on all options for POS user, non POS user, Round all Sales on or off. For more information, please refer to the POS Rounding Knowledgebase Article 4004

– The incorrect calculation of rounding on a POS Credit Note with refund when POS defaults are set to 'Round all Sales' has been fixed. 7987

– The issue with GST reverting to Inclusive when a Held Invoice for an International Customer (Zero Rated) is recalled from POS has been fixed. 8545

– The Rep field on POS screen is now populated when selecting a Customer Account. 8877

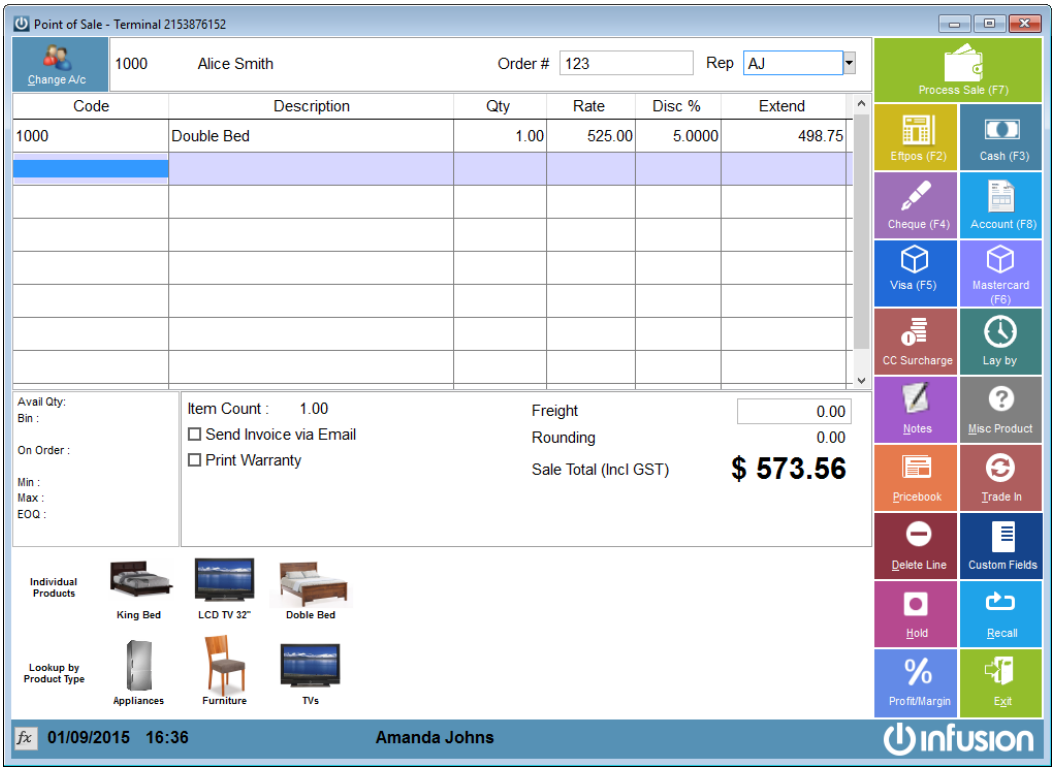
– When using DPS Eftpos integration the printing is now done in the correct order, i.e.: Customer Receipt first, Merchant Receipt second. 10028

– An issue emailing the correct Invoice Layout via POS has been fixed. 10116

– A prompt to select for a Printer has been added to POS when a Warranty may be required. 10148

– POS Quick Buttons now resize the image automatically so they are displayed correctly at the bottom of the screen. 9624

POS has been re-schemed. Buttons on the right have a background colour to make it easier to identify. If any of the options do not apply or are restricted to the Customer or the user, the background colour will remain but the icon of the option will be disabled.



– Pending Customer Invoices created from a Job invoiced with lines as Total now show the correct lines on the POS screen when recalled from POS. 10391

– A 'One Off Service' is now correctly recorded against a Customer Item when sold from the POS screen. 10405

– Resolved an issue where POS invoices could not be completed if created to a customer account with no sales rep assigned to it while the POS Defaults were set to "Ask for Rep on each Sale" and the System Defaults were set to "Staff Code Required on All Transactions". 10577

– The cursor will move to the quantity field on the POS screen if using the POS Quick Buttons to enter the product in the line and the POS Defaults are NOT set to skip the QTY 10602

– An issue where the second row of POS buttons were not visible on the POS screen if they had no images has been resolved. 10624

– A problem where POS dockets charged with Eftpos using DPS integration were being re-printed after printing a non Eftpos POS docket has been resolved. 10647

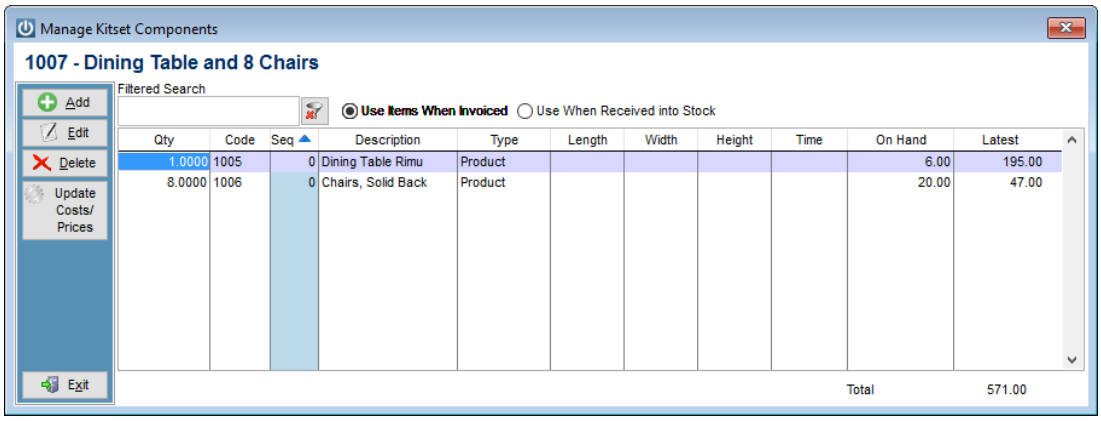
– Alt + C is now correctly triggering the Change Account button on the POS screen. 10672

Product

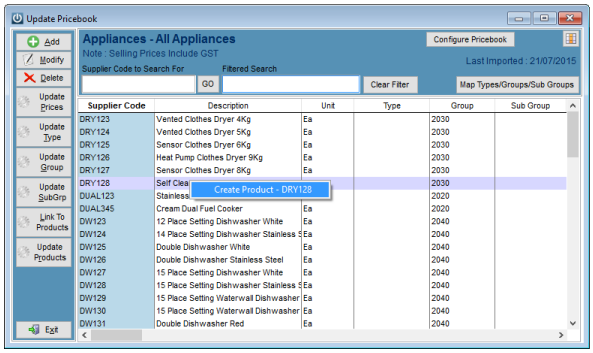
– The Code of a Product created from a Pricebook now saves correctly if it is modified when being created. 10119

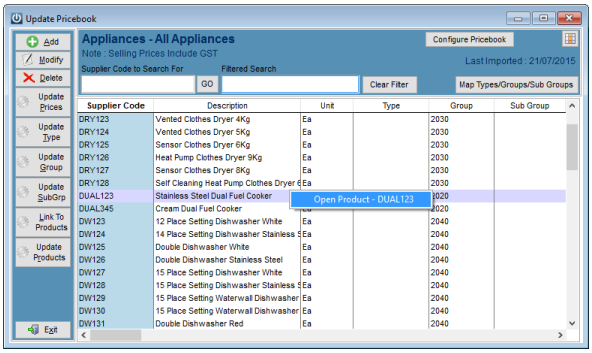
- A Stocktake cannot be created with a date prior to a 'before' lockout date. 6087
- The Locations tab of a Modify Product screen allows users to type GL IDs up to 10 characters long to keep consistency with the GL IDs field length in Financials. 6376
- Specification Sheet reports for Products will now show a Promotional Price only when the date of printing falls within the Promotional date range. It will print the Promotional Price AND the Promotional Date Range otherwise the normal price will print. 7447
- The Swap Product Code process no longer leaves the old Code records in Prodbals and Suppprod tables. 7961
- Pricebook Codes used on Quotes without creating the new Product Code in Infusion will now show on Job lines if the Quote has been assigned inside the Job. New Product Codes will be created in this process. 8574
- The Swap Product Code process now updates the Product Code in the record of the Customer Item as required. 9758
- Location colour bands have been added to the Stock Take, Receive Products, Order Products, Manual Sale/Adj. and Write off Products screens. 9919
- The issue with Product Groups not being correctly restricted to the Associated Product Types when assigning a Product Type has been fixed. 9987
- It is now possible to enter negative quantities on the 'Receive Products' and 'Write Off Products' transaction screens on the Products menu. 10065
- The Product Transfer, Product Manual Sale/Adjustment and Product Write Off processes now handle multiple quantity serial tracked items correctly. 10145
- Consolidated Closing Inventory Accounts are no longer visible on the 'Update Stock Value to GL' screen under the Products / Utilities menu. 10257
- The ability to add one Kitset to another that is 'Use When Invoiced' has been reinstated. 10262
- An issue with multiple users Recalling, Posting or Deleting the same Product Transaction has been resolved. 10393
- The issue with the Product Sales Analysis report "Top/Bottom Product Code by Date" not showing correct data when the 'Include Products with no Sales' tick box was not selected has been resolved. 10466
- The problem where the Cost field of the Supplier tab inside a Product was being re-calculated to add or remove the amount of GST if the 'Update Products' button within the Pricebook Management screen was used has been resolved. 10475
- Printing of all standard Bar code labels has been sped up. 10502
- An error generated by pressing F9 on a GL Code field of the Product Location screen when there was already a GL code entered has been resolved. 10508
- Products created using the right click option to "create product" from the Pricebook screen will now create the new products in Infusion using the mapped Infusion Types, Groups and Sub-Groups. 10582
- Error when opening the side panel on product lookup screen has been resolved. 10722

– A new 'Update Costs/Prices' button has been added to the Kitset form so users can exit without being prompted to update costs and prices. 10301



– On the screen of a Pricebook, users can now right click on a Pricebook product. 10343
If the product does not exist in Infusion yet, the option “Create Product” is available and creating it with this option also links the record in the Pricebook with the new record.
If the product already exists in Infusion, then the option to “Open Product” appears, and this opens the Product record from Infusion, not the Pricebook.





– Product lookup screen now has the pre-populated code in the filtered search field fully highlighted so user can just overtype on it. 10723

Purchase Orders

– When receiving a Purchase Order for a new Product created from a Pricebook, the correct quantity of labels to print is scheduled. 7109

– A message 'This invoice can only be posted from the Invoice screen due to it having GL code(s) with a zero rate.' has been added for when trying to post an Invoice with a zero GST rate GL ID from the Manage Invoices screen. GL IDs with a Zero GST rate can be created automatically from a Customer Special order. 7760

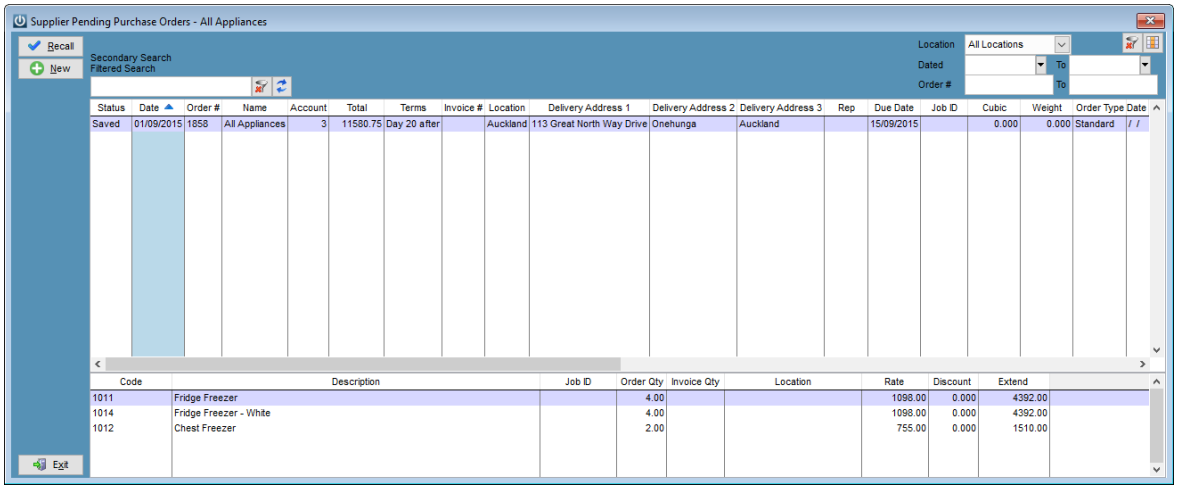
– A warning that a Product is already on order when a Barcode is used to enter the Product onto a new Purchase Order has been introduced. 8131

– The 'Ordered By' on a new Purchase Order will now default to the person logged into the software. 8254

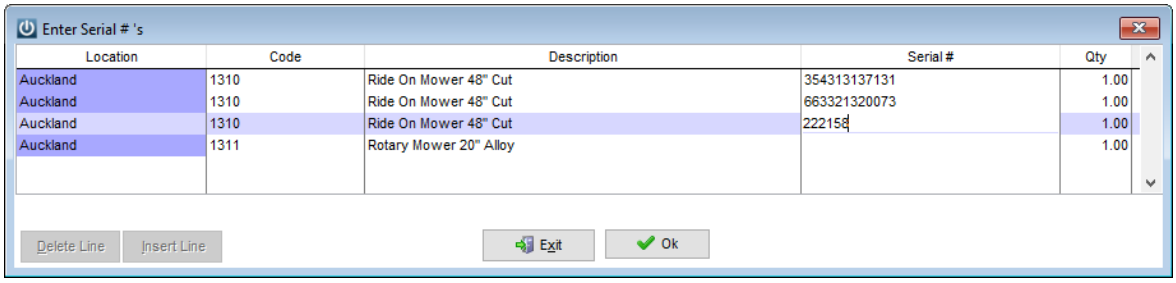
– A new Digital Invoice Importing option has been added for the processing of Supplier Invoices. For more information, please refer to the Digital Invoice Import Knowledgebase Article 9860

– Deleting a Saved Purchase Order no longer creates negative on order quantities for the Products involved. 8867

– The Supplier Pending Purchase Order look up screen has been replaced with a new screen. Sorting and filtered searching is available in this. 9542

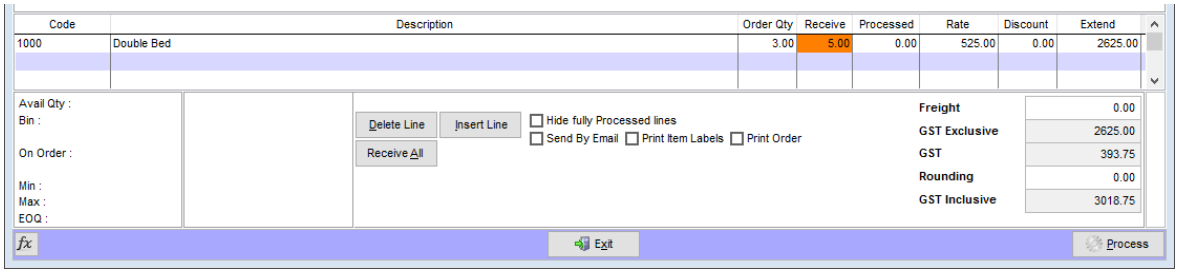


– The screen for entry of Serial Numbers via Receive Products has been re designed and made simpler to use. 9729



– The ability to alter the Quantity Ordered on a Purchase Order without having to receive or process an Invoice has been added. 9885

– If the quantity received on a line of a Purchase Order is more than the quantity ordered, the field will be highlighted orange. 9976

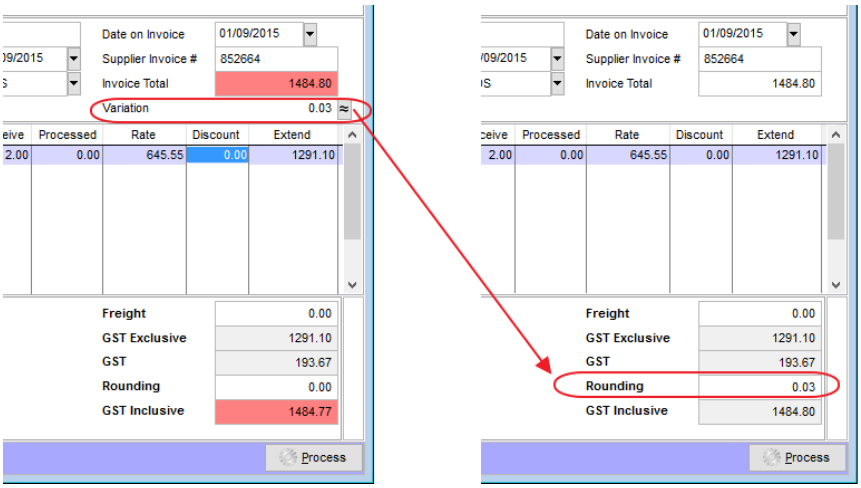


– Lockout dates now stop the processing of Purchase Order Receipts and Supplier Invoices if the date is outside the range. 10059

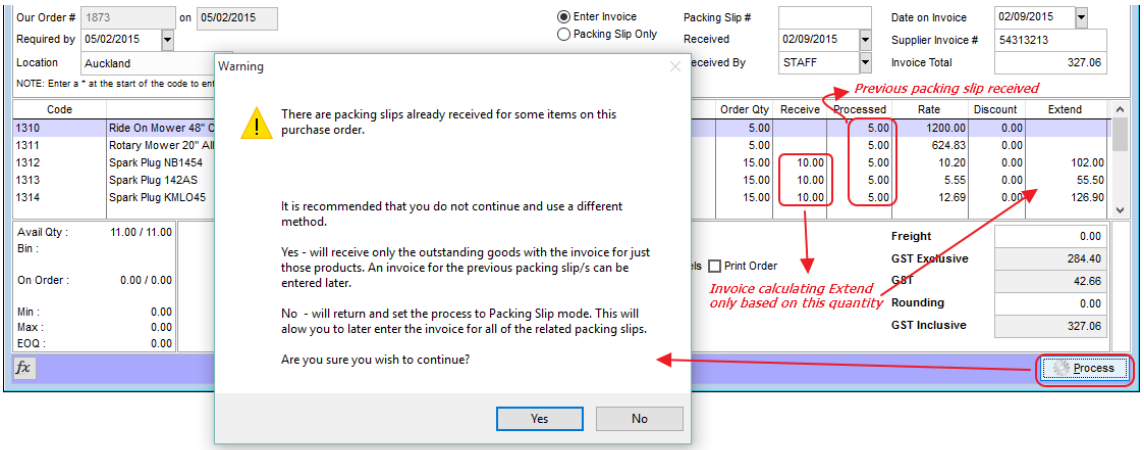
– When swapping a Job Management Purchase Order to a different supplier, the 'Delivery to' Address can now be changed. 10071

– A Purchase Order now holds the Delivery Address when the Purchase Order is swapped to a different Supplier. 10100

– Supplier Invoices now show the variation amount if there is one between the Invoice Total control field and the total field at the bottom of the screen that is automatically calculated from the values on the screen. If the variance is up to $0.04, an additional button on the side of the variance will appear so the rounding can be added to the rounding field at the bottom to make the calculation of the screen match the amount entered in the Invoice Total field. 9862



– If a part filled Purchase Order is being processed to have the remaining items receipted, a warning message will appear. The user can choose to receipt the remaining items to a packing slip only or to receipt those items with their Invoice. Thus the Invoice for the original packing slip can be combined with the second packing slip OR be entered alone. 10097



– <u>Sprockit only:</u> STIHL Purchase Orders can now be edited and updated after they have been sent to STIHL and when they are received. 10112

– An issue with the Reference field on the Outstanding tab of the Supplier Enquiry screen and the Reference field of the Supplier Payment screen not being populated with the Purchase Order Number when it was received with Packing Slip only has been resolved. 10150

– The Order Date of a Purchase Order with status 'ordered' can no longer be changed. 10173

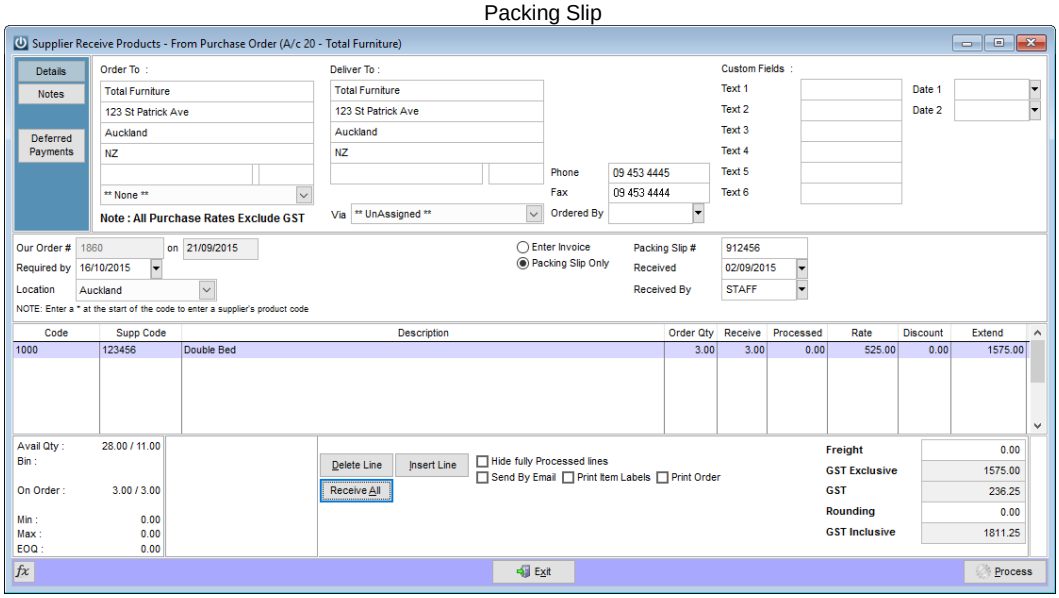
– Resolved an issue where a Customer Special Purchase Order including a serial tracked product with a Ratio greater than 1 was populating the Customer Invoice with the incorrect quantity. 10201

– The ability to open a Posted Supplier Invoice has been added to the Manage Purchase Orders screen. This can be done by selecting 'Include Completed' and double clicking on the Invoice, which will open on Read-only mode. 10202

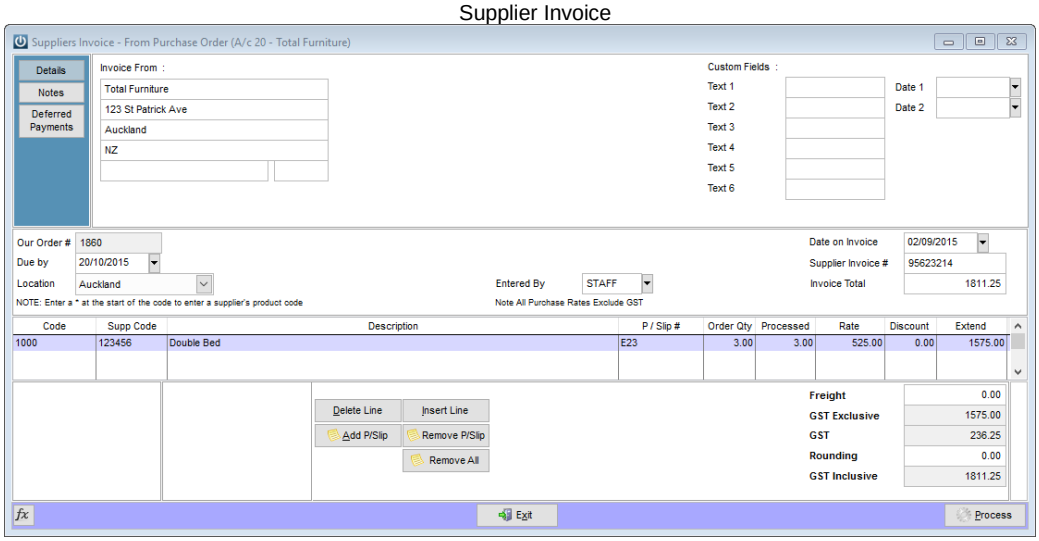
– The option to 'Remove All Packing Slips' has been added to the Packing Slip Invoice. 10371

– The Supplier Code column now shows on Order, Packing Slip and Supplier Invoice screens as long as this is set to show under the Admin / Defaults/ Manage Supplier Defaults / Orders menu. 10046

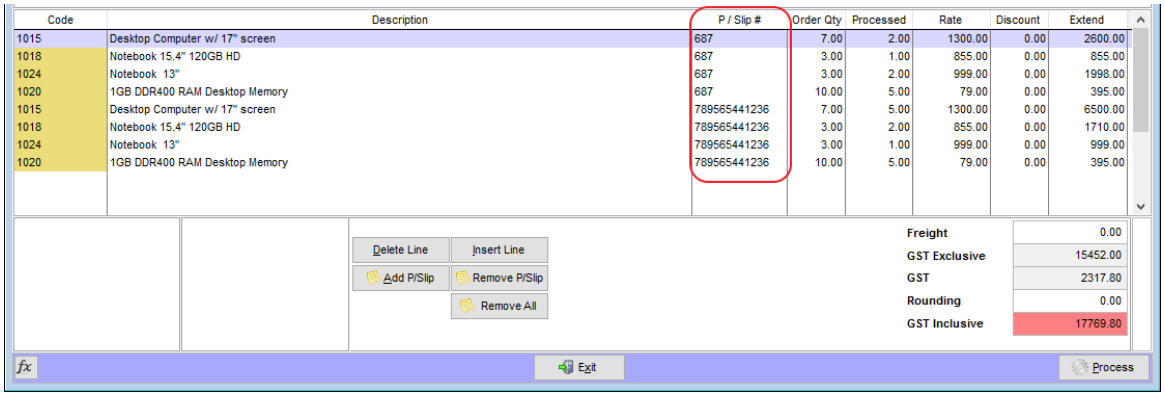
Packing Slip



Supplier Invoice

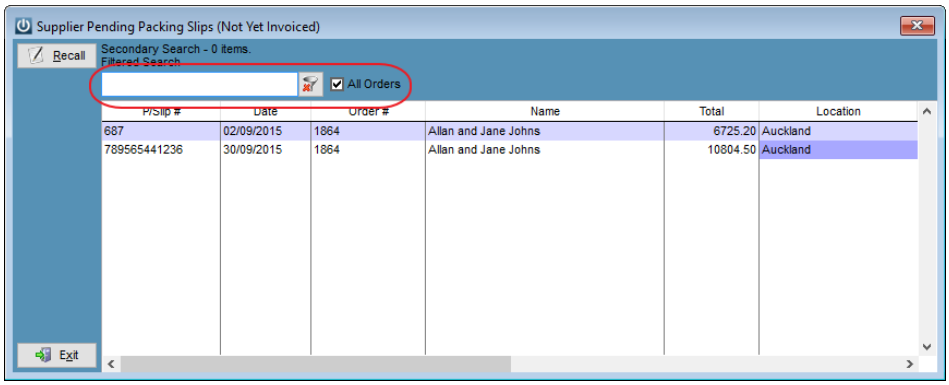


– The Packing Slip number now shows on the Supplier Invoice 'All received' screen. 10101

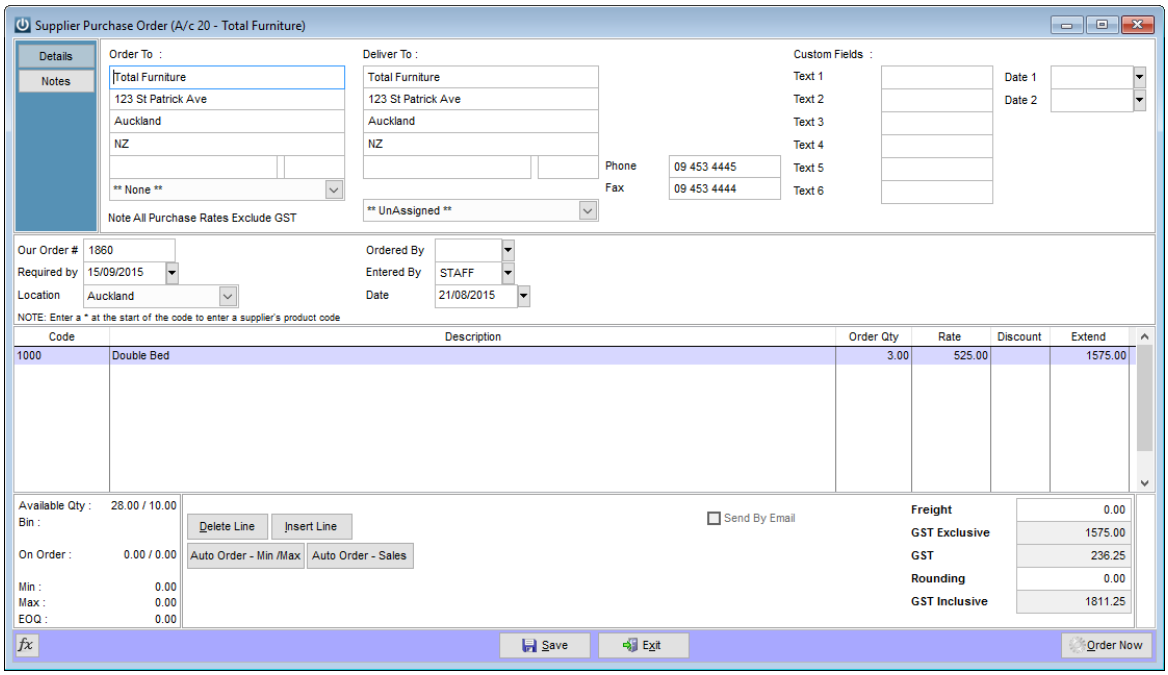


– The Purchase Order date is now populated when using New/Receive from the Manage Purchase Orders screen. 10281

– Filtered Searching of Order # and Invoice # has been added to the Pending Packing Slips screen. 10102



– The custom fields have been moved to the top right of the main Details tab of Purchase Orders screen. The Custom tab has been removed. 10236



– An issue in Customer Special Orders with multiple quantity serial tracked Products defaulting the incoming stock to the wrong Location has been resolved. 10316

– A Purchase Order can no longer be posted to an Inactive Supplier. 10390

– If a purchase order is created at the time of receiving an invoice with Xtracta using the order number of the invoice, and then a second invoice is sent for the same order number, the software now allows this second invoice to also be processed with Xtracta, allowing the same order number to be used on a new purchase order. 10569

– A record locking issue occurring with files related to purchase orders and supplier invoices has been resolved. 10637

– An error occurring when trying to change the contact on a purchase order receipt has been resolved. 10645

– Required By Date field on purchase orders is no longer left blank on new orders, it will always be pre-populated with the computer's date at the time of creation. 10712

– Serial Tracked Items on Sale only will now create the record correctly in jobs when added from a job purchase order receipt. 10718

Quotes

– The Job ID now appears on the Quote screen when the Job is created from a Quote. 9979

– The Customer Prompt Note is now visible when creating a Job from a Quote to a customer that has a prompt note set. 10224

– The Quote screen now has separate buttons to “Save” and to “Save and Email”. The latter is active if the Customer account on the Quote has email links set for Quotes. This button allows saving the Quote and sending it to the email queue. The Save button simply saves the Quote without creating the email. 10242

– The Delivery Details have been moved to the main Details tab of the Quote screen. The Delivery tab has been removed. 10234

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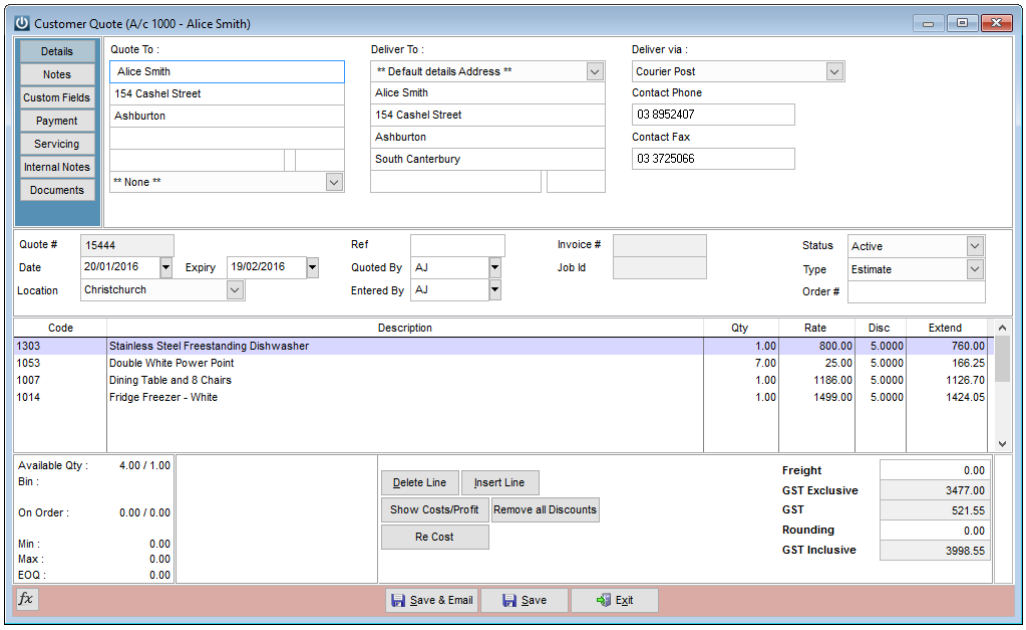


Rental Hire

– An issue not allowing entry of titles of Custom Fields for Rental Hire Types has been resolved. 10163

Staff

– A multi-user record locking problem when opening a Staff record has been resolved. 10501

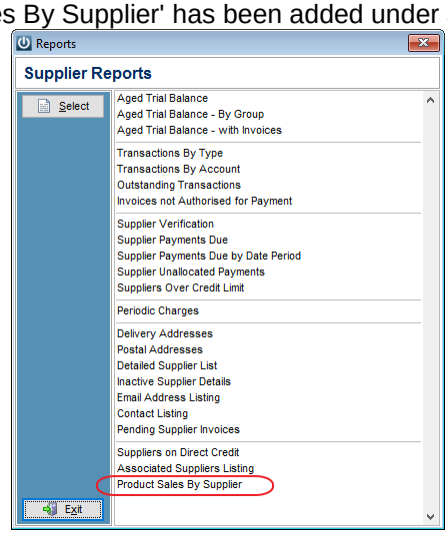
Supplier

– The Direct Credit Batch Reference column is now extended to 20 characters to suit Australian ABA format. 8870

– The issue with Supplier Account Balances not displaying correctly IF the default ageing methods in Customers Defaults and Supplier Defaults were not the same has been resolved and now shows the correct amounts on Balance tab of Supplier Enquiry, Supplier Contact Log and Supplier Payment forms. 10346

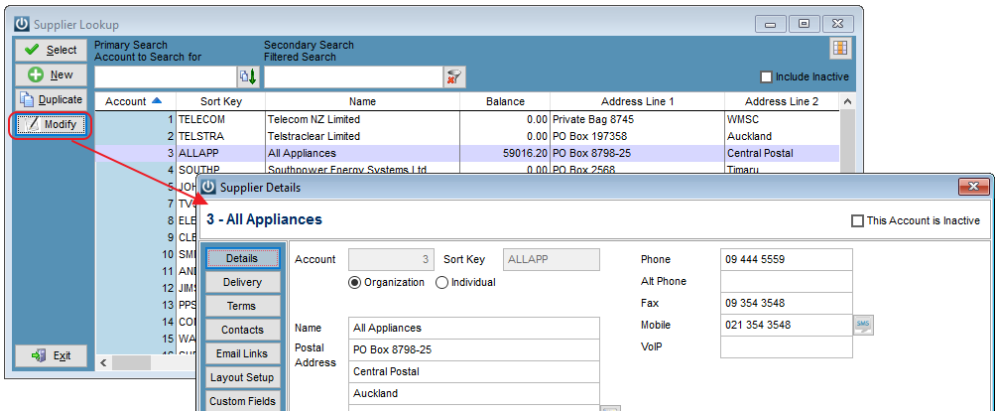
– The Supplier's bank account must be filled in the supplier terms to export a Direct Credit batch. 9144

– The new report 'Product Sales By Supplier' has been added under Suppliers / Reports. 10339



– There are now new short cut options to open a Supplier Invoice in Read-only mode from Supplier Enquiry and new Details Panel. To open an Invoice double click on an Invoice from the Transactions, Outstanding or Invoices tabs. 10433

– The ability to modify a Supplier while in the Supplier Lookup screen has been added. 10479



System

– Spaces and dashes have been removed from Phone and Mobile numbers in Filtered Search to improve searching. They no longer need to be entered to search. 7048

– New Controls have been introduced for Email, FTP, Zip and others and some for future use. One control replaces 12 previous controls. NOTE: With the introduction of these new controls a Server and all Workstation install will be required. 9659

– The Demonstration Company data has been updated so that the SETDEMODATA program now runs when the user opens The Demonstration Company for the first time. This shifts the dates to the current Financial Year based on the date the user first opens it. 10030

– The issue when saving to Excel more than once from the Management screens has been fixed. 10209

– Minor Bugs have been fixed. 10442

– Testing of Infusion with Windows 10 has been done. The only issues noted relate to Windows display setting. See the Windows 10 Knowledgebase Article for more on this. 10443