

## Infusion Software v8.310 Upgrade Notes

These instructions are for v8.310 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](http://www.infusionsoftware.co.nz).

### Upgrade Notes

Run the install as an Administrator

V8.310 will only require installation on the server, if upgrading from 8.300 or above. If upgrading from earlier versions that 8.300, it 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.

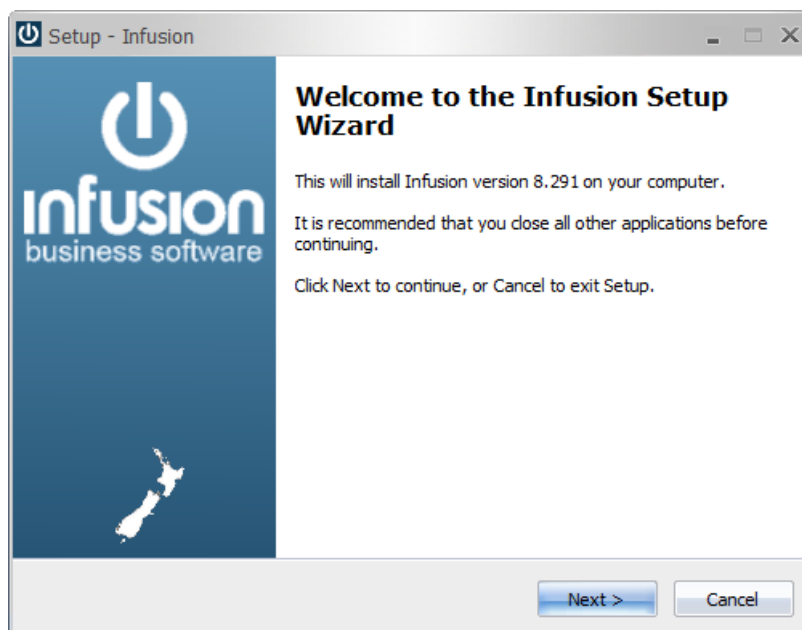
All external syncing services (e.g. website) need to be stopped before the backup is made.

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

Upgrading to v8.310 from any version prior to 8.300 will require a new licence. If upgrading after hours, ensure you request your new v8.3xx 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**

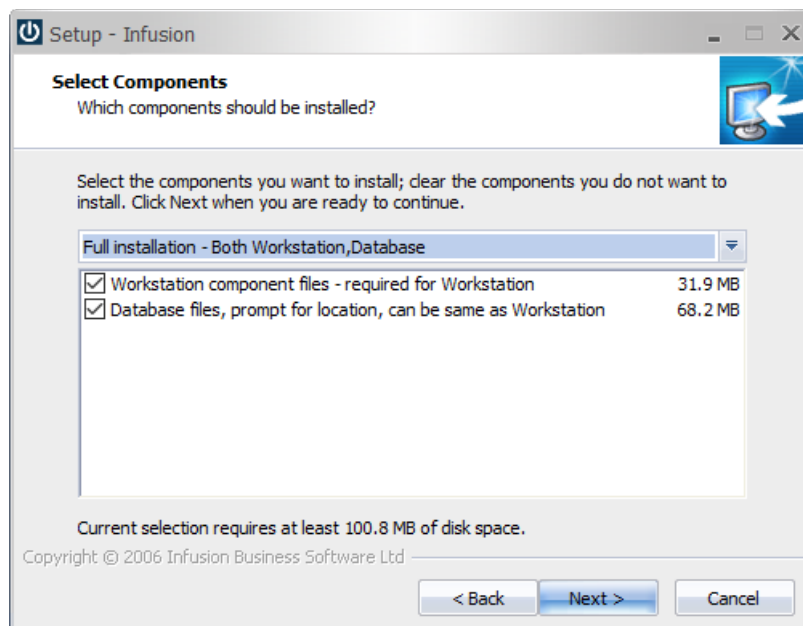
The License Agreement form is next



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

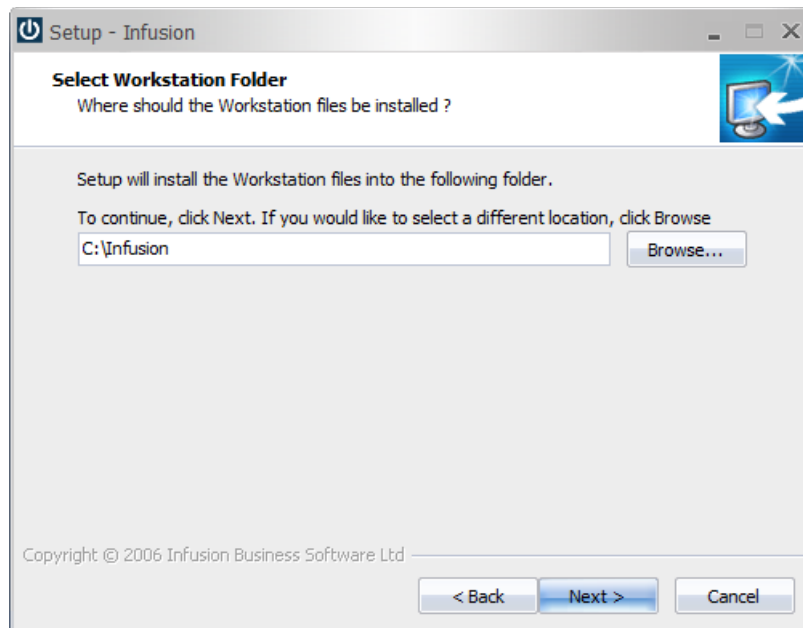
Select **Next**

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



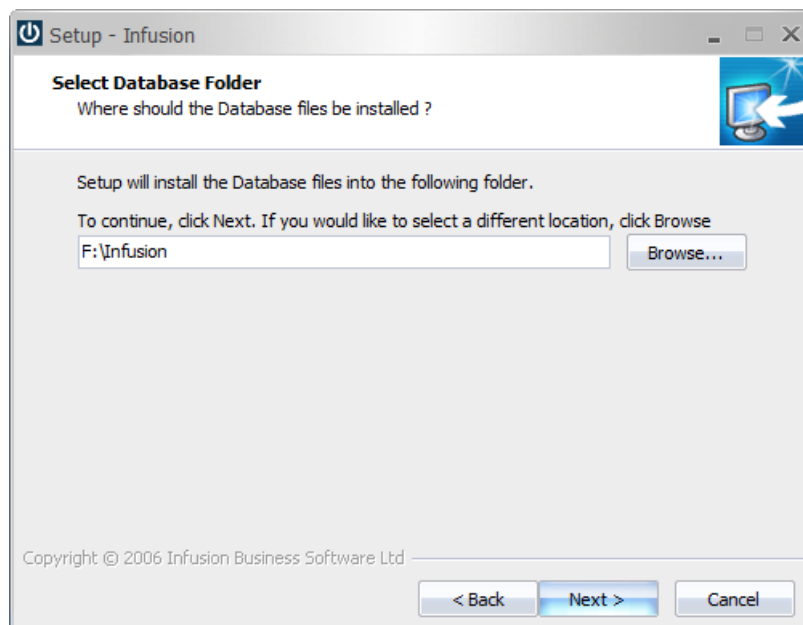
Select **Next**

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**

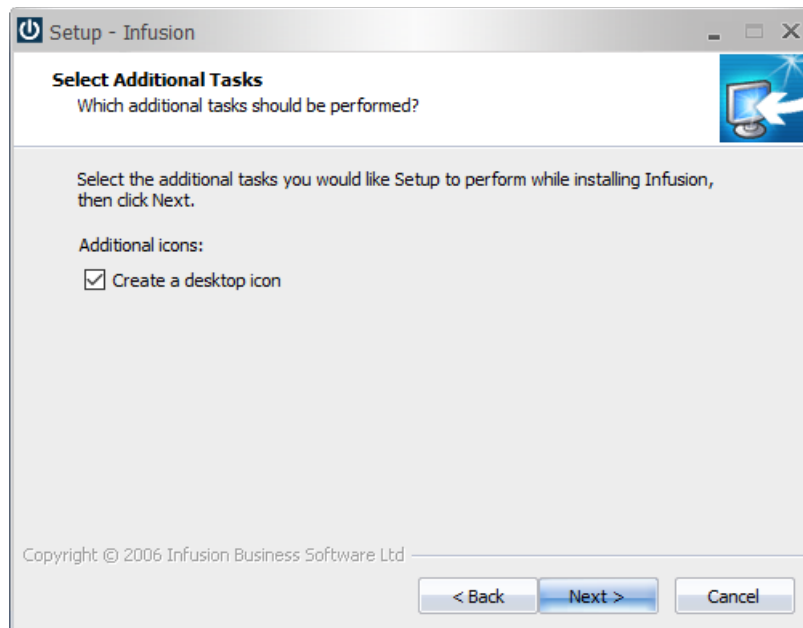
If the "Database files" option was selected you will be prompted for the folder to install the Database files into.



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**

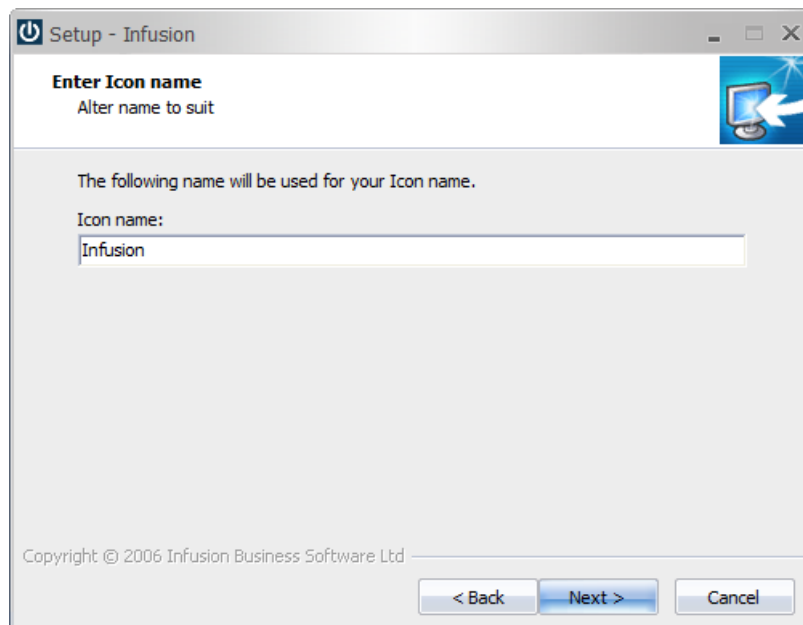
If the "Workstation component files" install was selected, the next form is Additional Tasks.  
Note: If Database ONLY option was selected, go to the "Ready to Install" step.



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

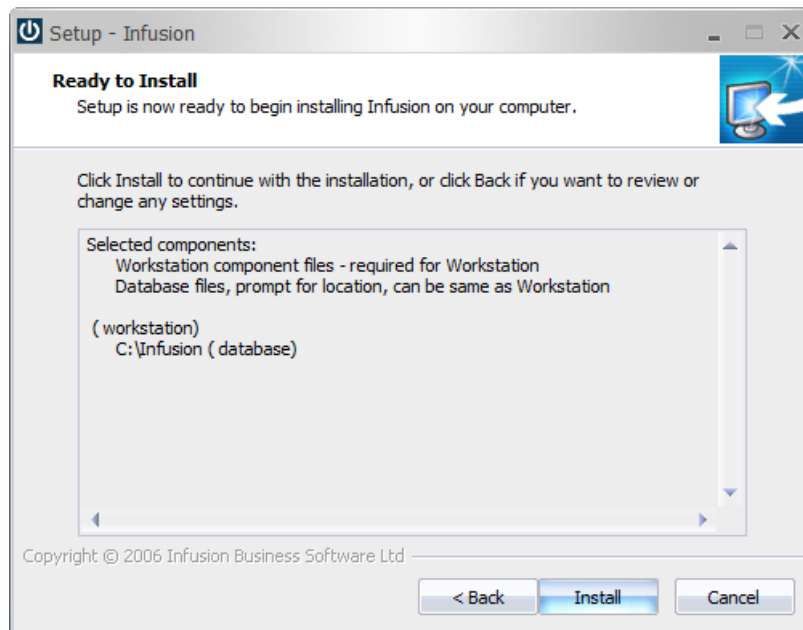
Select **Next**

Enter the name you want displayed with the Icon.

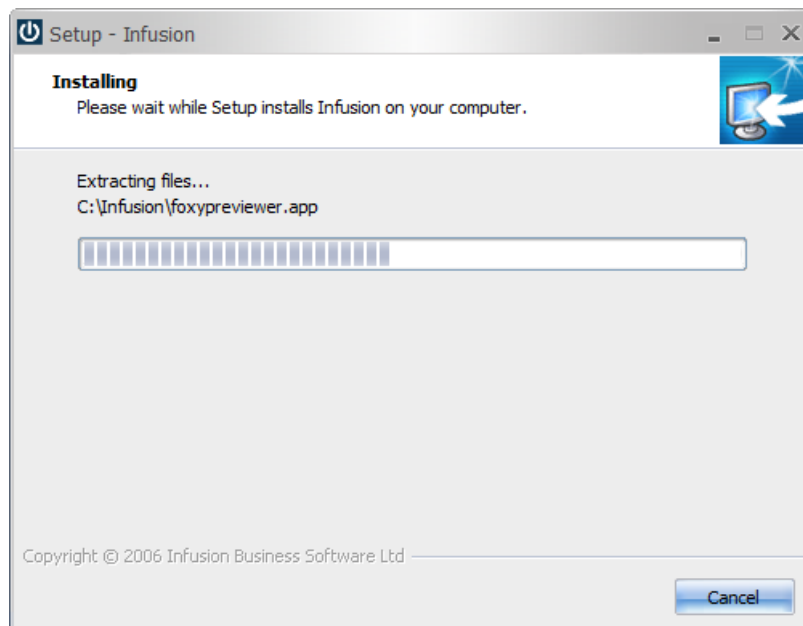


Select **Next**

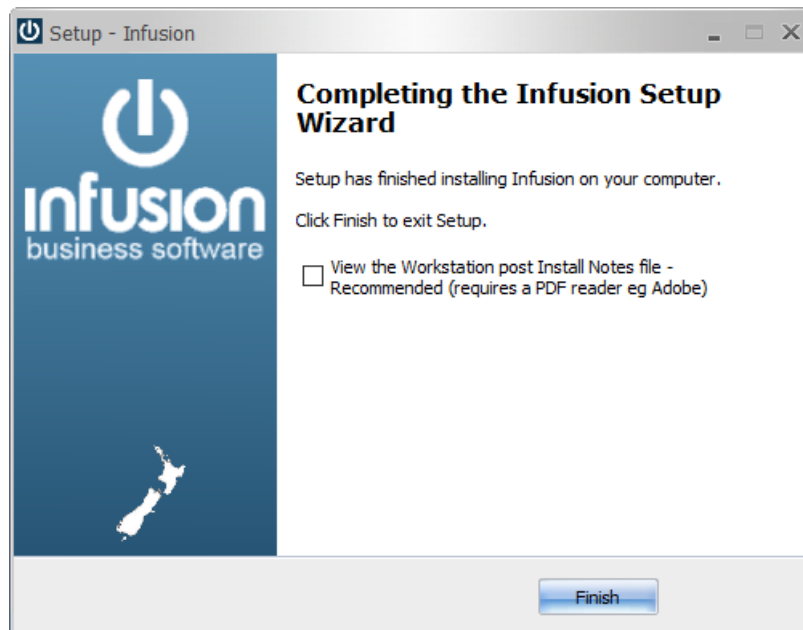
Infusion Setup Wizard will then prompt you to install the software.



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
 Mscmct2.ocx	09/03/04 5:45 PM	ActiveX control	647 KB
 Mscmctl.ocx	09/03/04 5:45 PM	ActiveX control	1,057 KB
 Mscmm32.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
 richbx32.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
 vfn9r.dll	03/04/09 1:01 PM	Application extens...	4 624 KB

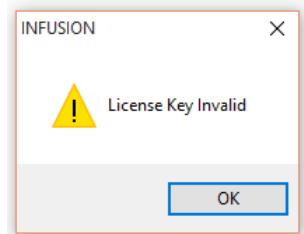
If you run unins000.exe (with the Infusion logo) it will Uninstall and de-register the install. The unins000.exe is only created when you select Workstation as part of the Install.

## IMPORTANT NOTICE!!!

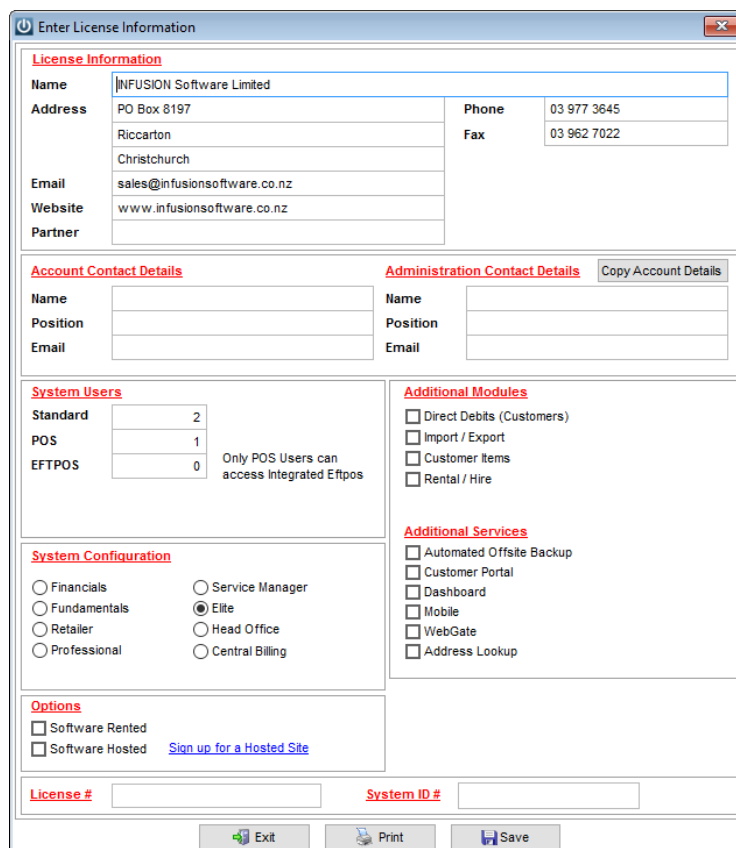
If you install FULL or both Workstation and Database at the same time, running unins000.exe will uninstall both the Workstation AND the Database so it is recommended that two installs are done: firstly install the Database then run it again to install the Workstation.

## Requesting / Entering an End User License

Note: v8.310 will require a new licence if you are upgrading from any version prior to 8.300. If upgrading after hours, ensure you request your new v8.3xx 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](mailto:registrations@infusionsoftware.co.nz) (If upgrading after hours, ensure you request your new v8.3xx 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.



The 'Enter License Information' form is divided into several sections:

- License Information:** Fields for Name (INFUSION Software Limited), Address (PO Box 8197, Riccarton, Christchurch), Email (sales@infusionsoftware.co.nz), Website (www.infusionsoftware.co.nz), and Partner.
- Account Contact Details:** Fields for Name, Position, and Email.
- Administration Contact Details:** Fields for Name, Position, and Email.
- System Users:** A table for user counts: Standard (2), POS (1), and EFTPOS (0). A note states: 'Only POS Users can access Integrated Eftpos'.
- System Configuration:** Radio buttons for Financials, Fundamentals, Retailer, Professional, Service Manager, Elite (selected), Head Office, and Central Billing.
- Additional Modules:** Checkboxes for Direct Debits (Customers), Import / Export, Customer Items, and Rental / Hire.
- Additional Services:** Checkboxes for Automated Offsite Backup, Customer Portal, Dashboard, Mobile, WebGate, and Address Lookup.
- Options:** Checkboxes for Software Rented and Software Hosted, with a link to 'Sign up for a Hosted Site'.
- License # and System ID #:** Two empty text boxes for the final license details.

At the bottom are buttons for Exit, Print, and Save.



## 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 2<sup>nd</sup> 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.

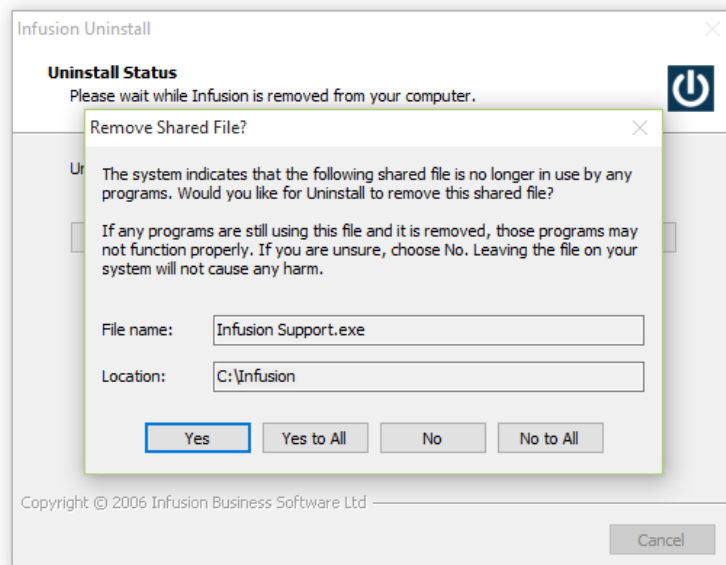
## Server Message Block (SMB2)

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>

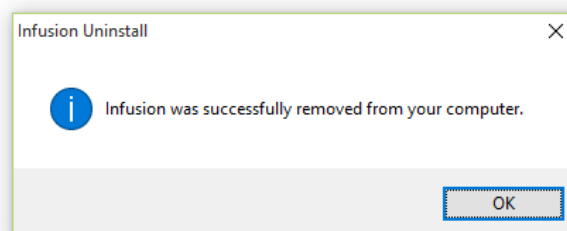
## Uninstall Wizard

Double click Unins000.exe in the workstation folder.

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



Followed by:

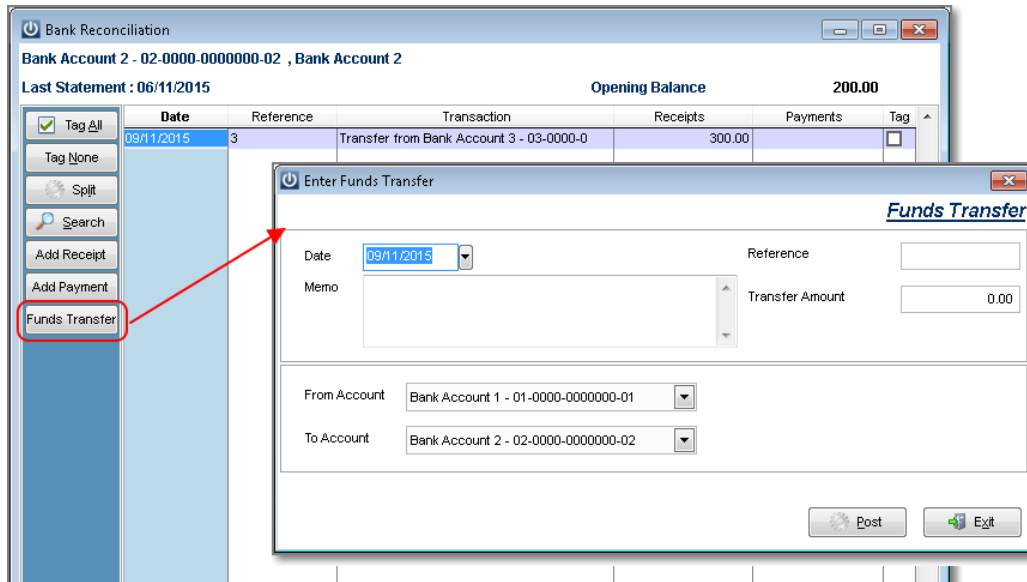


## Key Features

### Cashbook

- Funds Transfers can now be done directly from within the bank reconciliation screen.

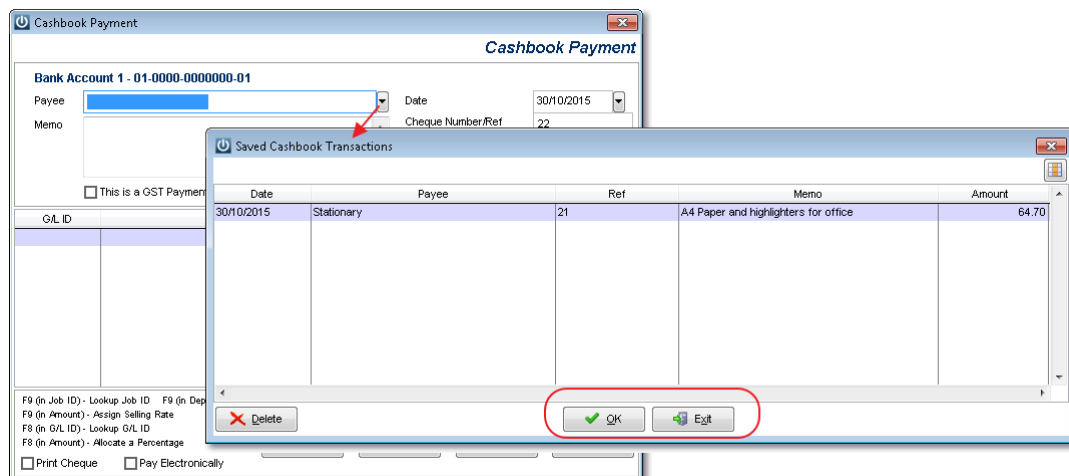
3682



- An issue where the G/L ID Lookup screen in cashbook payments and receipts retained the previous search made if the screen was closed without selecting a code has been corrected.
- Cashbook Payment and Cashbook Receipt: when opening the screen to recall a saved transaction, the position of the buttons OK and EXIT has been switched in order to keep consistency with the position of the Exit button on other screens

9957

10743



- Resolved a problem where a user was being locked and unable to do a cashbook payment, a bank deposit, a bank import or a bank reconciliation if another user had been using the bank reconciliation screen previously and although finished, still kept the GL Management screen or the POS screen open.

10799

## Customer

- The Customer Payment screen has been sped up. 10515
- New Customer Statistics Report added under Customers\Reports. 10727

Customer Statistics The Demonstration Company Ltd			
Printed : 03/11/2015 02:22:17 PM	Date Added	01/11/2000	03/11/2015
Printed By : Amanda Johns	Account	0	9999999999
Page : 1	Sort Key	** Unassigned **	ZZZZZZZZZZ
	Group	** Unassigned **	ZZZZZZZZZZ
	Sales Rep	** Unassigned **	ZZZZZZZZZZ
	Region	** Unassigned **	ZZZZZZZZZZ
	Customer Type	** ALL Types **	
	ACTIVE Customers	INACTIVE Customers	TOTAL Customers
Total Customers :	73	2	75
Total Customers with Emails :	22	0	22
Total Customers who Accept Electronic Marketing :	39	1	40
Total Customers with Emails, who Accept Electronic Marketing :	13	0	13
% of Customers with Emails, who Accept Electronic Marketing :	59.09%	0.00%	59.09%
% of the Total Customers, who have Emails and Accept Electronic Marketing :	17.81%	0.00%	17.33%
Total Customers with Group Assigned :	73	2	75
Total Customers with Marketing Referral Selected :	70	2	72
Total Customers with Customer Type Selected :	67	2	69
Total Customers with Mobile Number Recorded :	71	2	73

- Fixed an error happening by pressing the enter key while having the Pending Backorders Screen open. 10780

## Fixed Assets

- Fixed an error happening when re-opening the Fixed Assets Adjustment screen. 10778

## Invoices

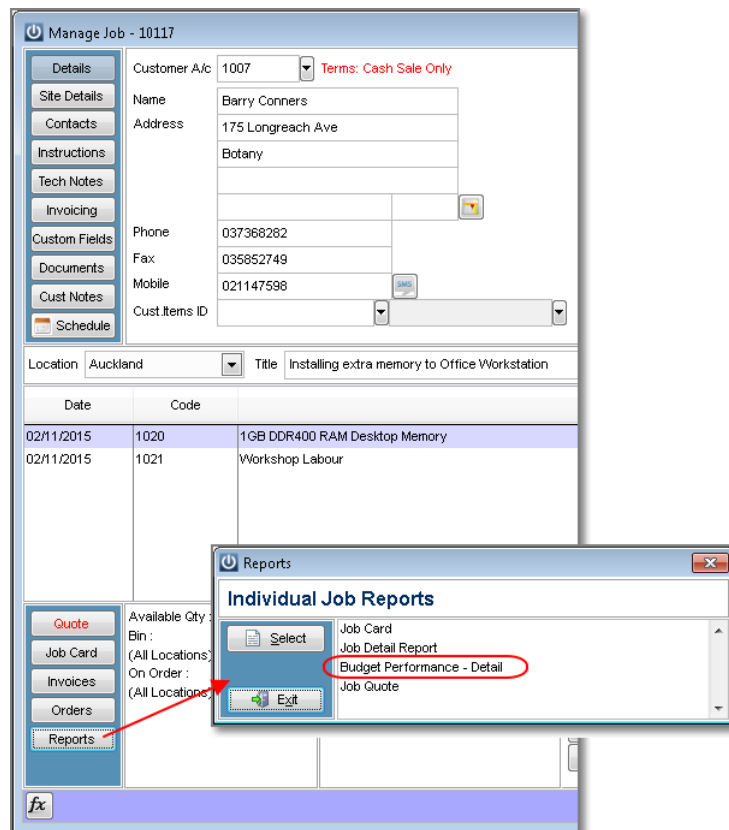
- Pending Invoices with subtotal lines can be posted from the Invoices Management Screen without having to open them first. 10775
- A problem where the "Do Not Prompt For Printer" setting was being ignored when printing invoices from some screens has been corrected. 10795

## Job

- Resolved the problem of the message "you are selling below your cost" showing incorrectly on job lines if the Products defaults are set to Pricing Inclusive of GST and the Customer defaults are set to warn when selling below cost. 10610
- Corrected a problem affecting the calculation of margins on jobs when tagging and un-tagging the Authorised box 10777

- The 'Budget Performance Detail' report can now be opened from within the job screen, using the Reports button.

3151



## POS

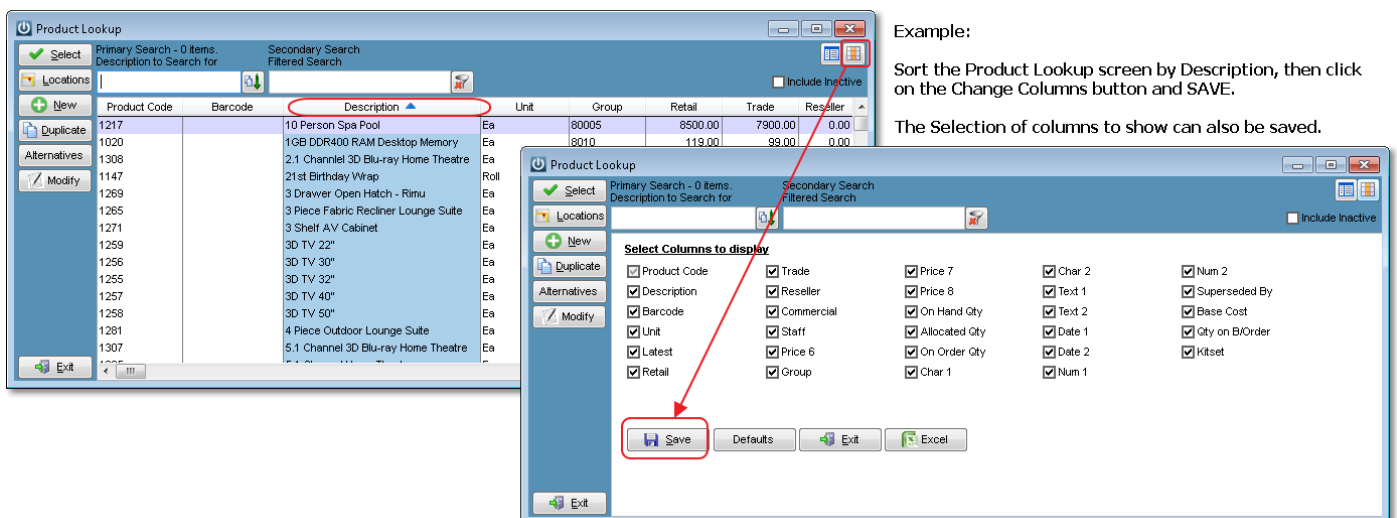
- An issue with Customer Prompt Notes not popping up when POS default was set to 'Prompt for Account on each Sale' has been resolved

9942

## Product

- The Product Lookup Screen can now have the preferences saved per user for column sorting and column selection.

10011



- An extend column has been added to the Kitset screen, to show the total cost per line of component taking the quantity used into account. 10704
- The Product Enquiry screen, transactions tab, now has the quantities displaying in two columns, to show the quantities in and the quantities out separately. 10705

Product Enquiry

1014 - Fridge Freezer - White

Show Transactions between 01/10/2015 and 28/10/2015 ☒ Show All Transactions All Locations

Transactions	Date	Ref	Transaction	Qty In	Qty Out	Cost Rate	Sell Rate
Details	31/10/2013		Stocktake Adj	200.00			
Quantities	31/10/2013	1823	Receipt	20.00		1098.00	
Back Orders	31/10/2013	2001	Write Off		200.00	-1098.00	
Serial #s	06/11/2013	10275	Invoice		1.00	950.00	1498.00
P/Orders	13/12/2013	10288	Invoice		1.00	950.00	1498.00
Notes	25/12/2013	10291	Invoice		1.00	950.00	1498.00
Show History	09/01/2014	10297	Invoice		1.00	950.00	1498.00
Image	25/02/2014	10312	Invoice		1.00	950.00	1498.00
	01/03/2014	10313	Invoice		1.00	950.00	1498.00
	27/04/2014	10331	Invoice		1.00	950.00	1498.00
	24/07/2014	10361	Invoice		1.00	950.00	1498.00
	21/10/2014	10391	Invoice		1.00	950.00	1498.00
	05/11/2014	10396	Invoice		1.00	950.00	1498.00
	05/11/2014	1829	Receipt	1.00		1098.00	
	09/11/2014	1833	Receipt	1.00		1098.00	
	11/11/2014	10398	Invoice		1.00	950.00	1498.00
	29/11/2014	10404	Invoice		1.00	950.00	1498.00
	03/02/2015	10425	Invoice		1.00	950.00	1498.00
	16/02/2015	10430	Invoice		1.00	950.00	1498.00
	09/07/2015	10478	Invoice		1.00	950.00	1498.00
	30/09/2015		Stocktake Adj	5.00			
	30/09/2015		Stocktake Adj	2.00			

Exit Last Receipt 09/11/2014 Last Sale 09/07/2015

- A problem with the Product Serial # History screen by Product Code showing the incorrect sales information has been corrected. 10737
- A column to show the running balance of a product has been added to the Product Enquiry screen. This column is visible if the product is set to track quantities. If a product has had the setting changed to on or off at some point in the history of the items, there will be an asterisk next to the transaction description and a legend at the bottom to differentiate which transaction line was entered when the item did or did not track quantities. The calculation of the balance is done using the current stock level as a starting point, working backwards from there through the transactions. There may be cases where the running balance will not show the expected figure for older transactions, please refer to the Knowledge Base article for more information: <http://infusion.kayako.com/Knowledgebase/Article/View/710/0/product-running-balance> 10766

Product Enquiry

TT - Labour - Ted Thompson

Show Transactions between 01/11/2015 and 09/11/2015 ☒ Show All Transactions All Locations

Transactions	Date	Ref	Transaction	Qty In	Qty Out	Cost Rate	Sell Rate	Balance
Details	01/01/2015	Job 10113	Invoice *		1.00		67.00	
Quantities	04/11/2015	Job 10105	Invoice *		3.50	37.50	85.00	
Back Orders	04/11/2015	Job 10105	Invoice *		4.50	37.50	85.00	
Serial #s	08/11/2015	Job 10127	Invoice *		1.00	37.50	80.75	-1.00
P/Orders	08/11/2015	Job 10109	Invoice *		1.00	37.50	85.00	-2.00
Notes	25/11/2015	Job 10120	Invoice *		2.00	37.50	85.00	
Show History	25/11/2015	Job 10120	Invoice *		0.50	37.50	85.00	
Image	01/12/2015	Job 10122	Invoice *		1.00	37.50	80.75	
	01/12/2015	Job 10123	Invoice *		45.00	37.50	80.75	

Exit Last Receipt / / Last Sale 01/12/2015 \* This Item was Processed when 'Tracked Quantities' was not selected.

- Fixed a problem on the Product Lookup screen where the primary search field was not working correctly. 10817

## Purchase Orders

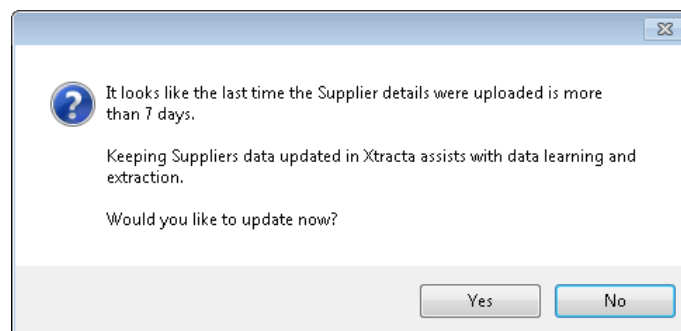
- If a product is received when entering an invoice using Xtracta and the product code does not have a record of the supplier's code in it, the record is now created (Modify Product code, Suppliers Tab). 10680
- A problem where received lines were not showing on the shipping costs screen when pressing F12 on an "All Received" purchase order has been corrected. 10747

## Quotes

- An issue where the cost of kitsets added to a build-up on a quote using F8 came through the quote line with zero cost has been resolved. 10794

## Supplier

- Merging supplier accounts not only updates SUPPPROD, but now it also updates the DEFSUPP field in PRODUCTS. 7728
- A message now appears when opening Xtracta if the supplier details haven't been uploaded to Xtracta after 7 days. This will aid in the data learning and extraction of the system. 10786



- An error occurring on the Xtracta screen when typing /S on the code field to open the GL Lookup screen has been corrected. 10788
- A button has been added to the Xtracta screen to show the usage of the service based on the current plan held by the company. 10815

