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Infusion Software v8.414 Upgrade Notes



These instructions are for v8.414 of Infusion Business software and SPROCKIT and include updates made to version 8.410 and 8.411. These are designed to give an oversight into upgrading an existing installation on a standalone workstation, peer to peer network or LAN. To install the software, firstly download and save the appropriate package from our website.

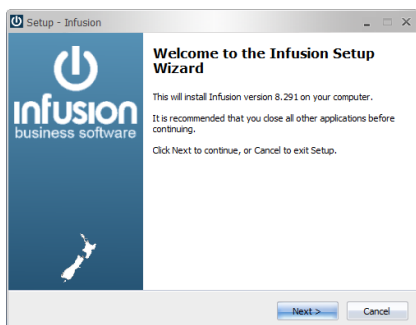
Before Beginning the Upgrade

1. 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.
2. All external syncing services (e.g. Website, CRM, EDI Etc.) need to be stopped before the backup is made.
3. Restart the Server/computer the Infusion data file resides on.
4. Upgrading to v8.414 from any version prior to 8.400 will require a new licence. If upgrading after hours, ensure you request your new v8.4xx license beforehand, inside Infusion office hours.
5. Run the install as an Administrator
6. V8.414 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.

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

The first form is a Welcome form.

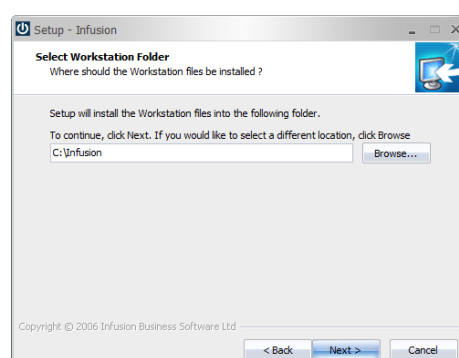
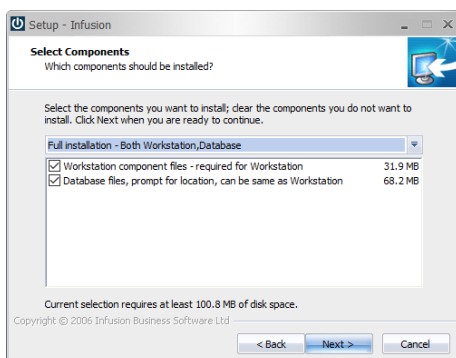
Select **Next**. The License Agreement form is next



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.



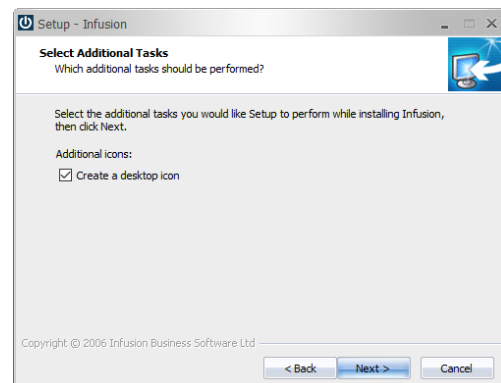
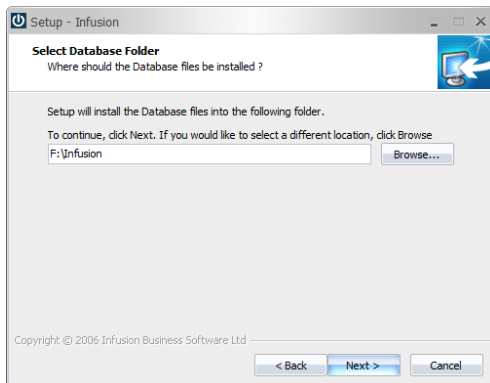
Select **Next**

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.

Infusion Software v8.414 Upgrade Notes

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**

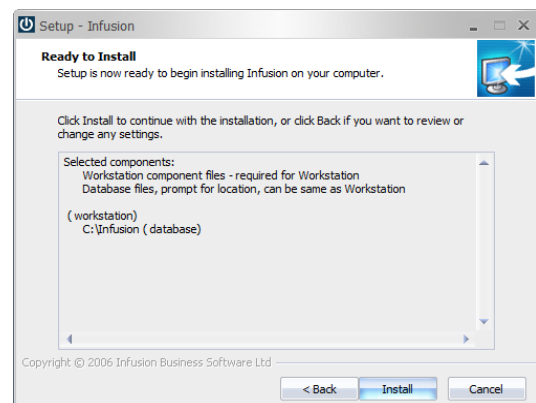
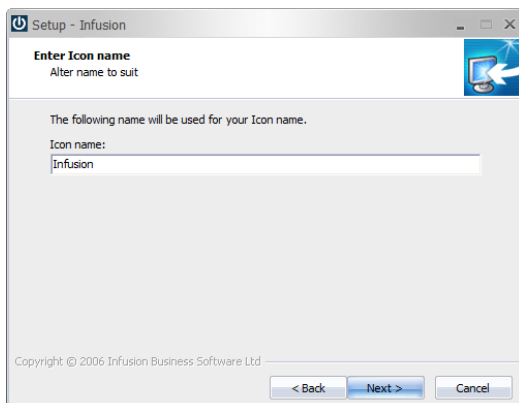
If the "Workstation component files" install was selected, the next form is Additional Tasks.

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.

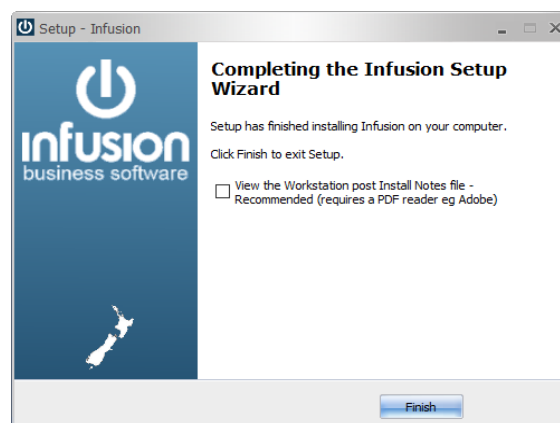
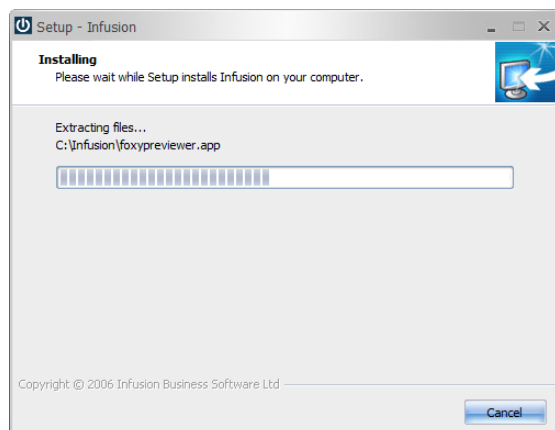


Select **Next**

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

Select **Install**

Infusion Software v8.414 Upgrade Notes



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 Note

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).

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.

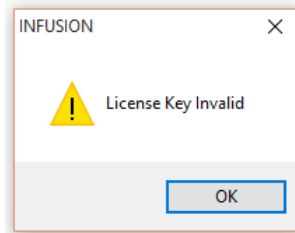
scneme.rtf	21/02/14 11:12 AM	RTF File	3,039 KB
SMS_COMAPI.dll	10/03/05 9:57 AM	Application extens...	140 KB
support.exe	04/06/14 8:18 AM	Application	255 KB
system.app	15/03/13 10:51 PM	APP File	822 KB
Sysupdates.DBF	25/07/15 10:31 AM	DBF File	29 KB
unins000.dat	29/08/15 12:34 PM	DAT File	445 KB
unins000.exe	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

IMPORTANT NOTICE!!!

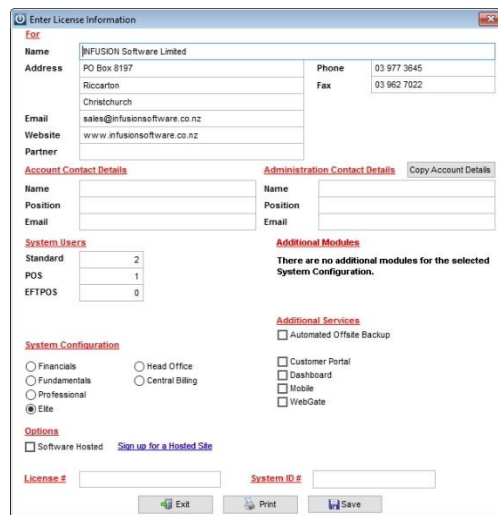
If you install FULL or both Workstation and Database at the same time, running unins000.exe will uninstall both the Workstation AND the Database so it is recommended that two installs are done: firstly install the Database then run it again to install the Workstation.

Requesting / Entering an End User License

Note: v8.414 will require a new licence if you are upgrading from any version prior to 8.400. If upgrading after hours, ensure you request your new v8.4xx 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 v8.4xx 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.

A screenshot of the 'Enter License Information' window. The form is divided into several sections: 'For' (with fields for Name, Address, Phone, Fax, Email, Website, and Partner), 'Account Contact Details' (with fields for Name, Position, and Email), 'Administration Contact Details' (with fields for Name, Position, and Email), 'System Users' (with checkboxes for Standard, POS, and EFTPOS), 'Additional Modules' (with a message: 'There are no additional modules for the selected System Configuration.'), 'Additional Services' (with a checkbox for 'Automated Offsite Backup'), 'System Configuration' (with radio buttons for Financials, Fundamentals, Professional, and Elite), and 'Options' (with a checkbox for 'Software Hosted' and a link 'Sign up for a Hosted Site'). At the bottom, there are fields for 'License #' and 'System ID #' and three buttons: '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 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.

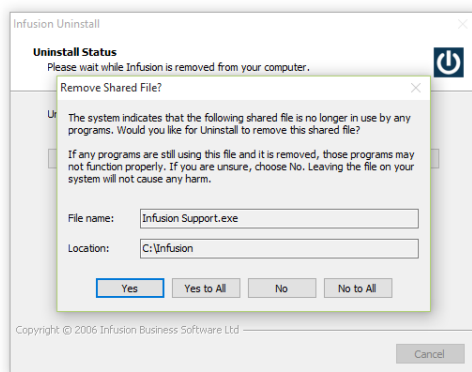
Server Message Block (SMB2)

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

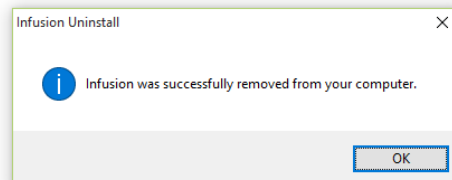
Uninstall Wizard

Double click Unins000.exe in the workstation folder.

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



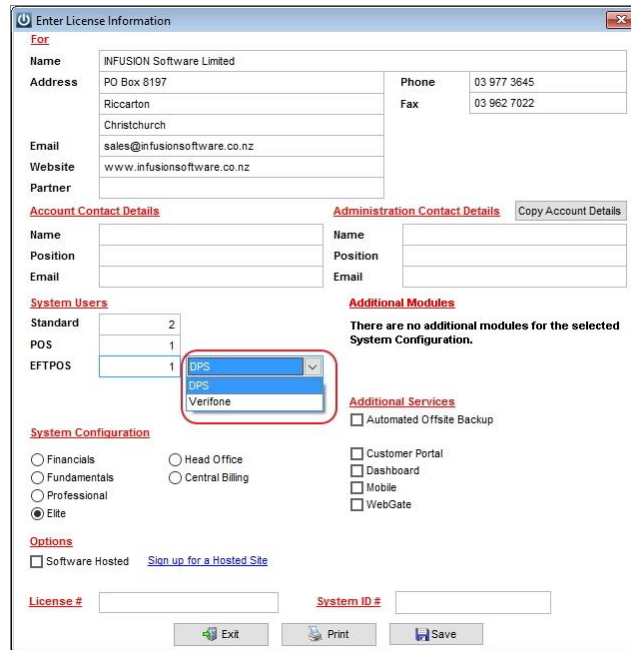
Followed by:



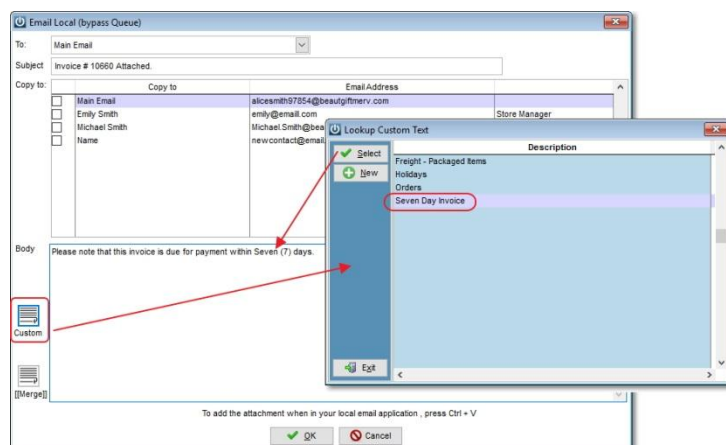
Key Features

Admin

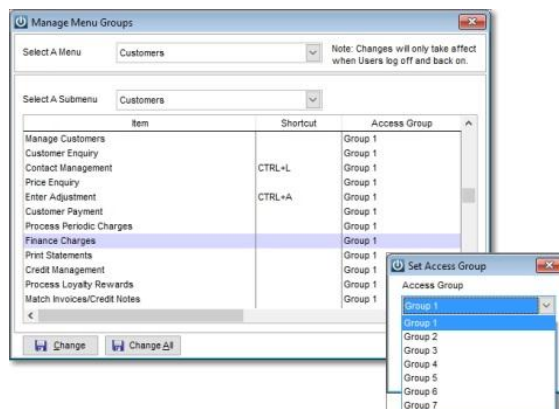
- Import / Export Routines are now included in backups. 9209
- The Enter Licence Information screen has been tidied up and made smaller to cater as much as possible for small monitors and low screen resolution. 9816
- The Licence form of the New Zealand version of the software now allows specifying the provider of the Eftpos Integration when the licence includes Eftpos users. 10717



- A problem on the Queued Emails screen showing all emails when the user is set to restrict them to only theirs has been corrected. 10864
- SPROCKIT: Corrected the links from the option "Infusion on the web" under the Help menu of which was linking to an invalid web page. 10865
- The Demonstration Company Ltd. now allows the use of the Job Scheduler for user STAFF. 10867
- On systems set with Eftpos Integration, it is now possible to include the Eftpos Docket Receipt print out on normal invoices and rental hire invoices as well. In order to achieve this, the INV and/or RH layouts need to be customised. To find more information on this please see our knowledgebase article called "Integrated EFTPOS - Printing the Receipt Docket" <http://infusion.kayako.com/Knowledgebase/Article/View/763/0/integrated-eftpos---printing-the-receipt-docket-information> 10879
- Two new buttons have been added to the "Email (local Email Application)" screen: The CUSTOM button allows adding custom text on the body of the email to be sent using the local application. Custom Texts can be pre-set under Admin > Settings > Other > Manage Custom Text. The MERGE button allows a user to add a Text Merge Template on the body of the email to be sent using the local application. Text Merge Templates can be pre-set under Admin > Settings > Other > Manage Text Merge Templates 10888

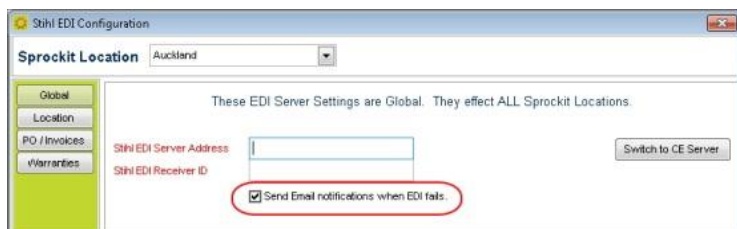


- A new flag has been added under System defaults > Search Options called "Pre Fill 'Filtered Search'" for those users who want the Filtered search field pre-filled. This will override the Primary Search and Use filtered search but will potentially slow the system down. Example: Type 'Bed', and the search shows all the beds. 10896
- The speed of PDF file creation has been improved; this applies to Invoices, Statements, Purchase Orders, etc. E.g. Emails with attachments as PDF files will be faster when adding to the Email Queue. 10900
- The Reindex process has been modified, not allowing modules to be skipped. All files are reindexed now. Integrity checks and history rebuilds are still optional. 10934
- A display issue on the Queued Emails screen displaying ALL emails, including SENT has been resolved. 10939
- The problem with a PDF containing multiple copies of a document when the document was emailed using local application has been resolved. 10946
- The Partially Posted Invoices Repair utility available under the Partner menu (not available to end users) now adds a record in the Audit Trail every time a Customer Invoice is repaired with it. 10971
- An issue with emailing when the system has Rep80 field set to True has been resolved. 10997
- Importing Job Titles now will import all the 100 characters allowed by the field in the job screen instead of 50. 11093
- The Manage Menu Groups option under the Admin menu now allows for 7 levels of Menu Group access and the access level set per user under the Login tab of the staff record will now also allow selecting up to level Group 7. 11182

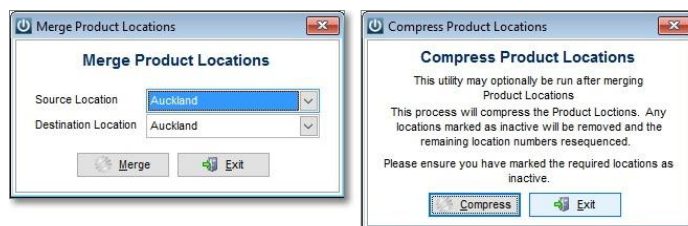


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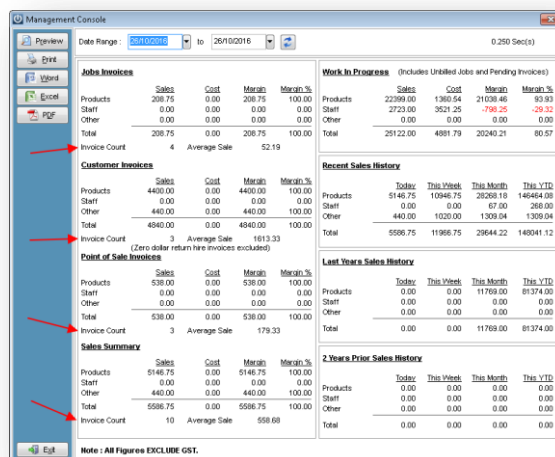
- A problem with the Job Management module name not showing on the Admin / Settings option for Job Management has been fixed. 11312
- The 'Rebuild Customer Items Service Dates' utility has been added to the Admin/Other menu. 11334
- SPROCKIT only: A new flag has been added to Admin / Defaults / Manage Stihl EDI Defaults called 'Send Email Notifications when EDI fails'. When ticked, this will send the error messages by email. If un-ticked then no error messages will be received. This does not affect the emailing of success emails. 11362



- A SafeOpen error occurring with the Direct Credit export occurring on computers where the shortcut was pointing directly to the DATA folder of a mapped drive path has been fixed. 11384
- Certified Partners: Two new utilities have been added under the Partner menu: 1- Merge Product Locations (merges stock from two locations) and 2- Compress Product Locations (removes inactive location gaps) 11453



- All Charts in the Dashboard showing information by Sales Rep are now collating the information based on the Sales Rep that is set under the customer details or by the rep that is entered in the SOLD BY field of the Customer Invoice form. If there is no Sales Rep set on a customer account and the SOLD BY field is left blank on the invoice, the sales will be grouped under sales rep 'Unknown'. 11681
- The Management Console has been updated to show the average sale value next to the invoice count under each Invoice Source section as well as the sum 11682



Management Console
Date Range: 01/01/2016 to 26/10/2016
0.250 Sec(s)

Jobs Invoices					Work In Progress (Includes Unbilled Jobs and Pending Invoices)				
	Sales	Cost	Margin	Margin %		Sales	Cost	Margin	Margin %
Products	208.75	0.00	208.75	100.00	Products	2239.00	1360.54	2108.46	93.93
Start	0.00	0.00	0.00	0.00	Start	2723.00	2621.25	795.25	-29.12
Other	0.00	0.00	0.00	0.00	Other	0.00	0.00	0.00	0.00
Total	208.75	0.00	208.75	100.00	Total	2512.00	4981.79	20240.21	80.57
Invoice Count	4 Average Sale 52.19								

Customer Invoices					Recent Sales History				
	Sales	Cost	Margin	Margin %		Today	This Week	This Month	This YTD
Products	4400.00	0.00	4400.00	100.00	Products	5146.75	10946.75	26268.16	146464.08
Start	0.00	0.00	0.00	0.00	Start	0.00	0.00	67.00	266.00
Other	440.00	0.00	440.00	100.00	Other	440.00	1020.00	1309.04	1309.04
Total	4840.00	0.00	4840.00	100.00	Total	5586.75	11966.75	29644.22	146941.12
Invoice Count	3 Average Sale 1613.33 (Zero dollar return here invoices excluded)								

Point of Sale Invoices					Last Years Sales History				
	Sales	Cost	Margin	Margin %		Today	This Week	This Month	This YTD
Products	538.00	0.00	538.00	100.00	Products	0.00	0.00	11769.00	81374.00
Start	0.00	0.00	0.00	0.00	Start	0.00	0.00	0.00	0.00
Other	0.00	0.00	0.00	0.00	Other	0.00	0.00	0.00	0.00
Total	538.00	0.00	538.00	100.00	Total	0.00	0.00	11769.00	81374.00
Invoice Count	3 Average Sale 179.33								

Sales Summary					2 Years Prior Sales History				
	Sales	Cost	Margin	Margin %		Today	This Week	This Month	This YTD
Products	5146.75	0.00	5146.75	100.00	Products	0.00	0.00	0.00	0.00
Start	0.00	0.00	0.00	0.00	Start	0.00	0.00	0.00	0.00
Other	440.00	0.00	440.00	100.00	Other	0.00	0.00	0.00	0.00
Total	5586.75	0.00	5586.75	100.00	Total	0.00	0.00	0.00	0.00
Invoice Count	10 Average Sale 558.68								

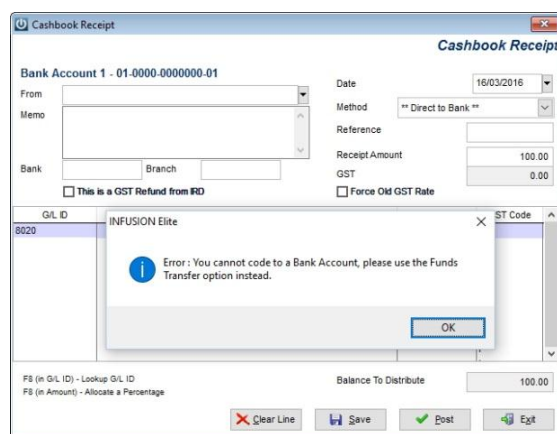
Note: All Figures EXCLUDE GST.

Infusion Software v8.414 Upgrade Notes

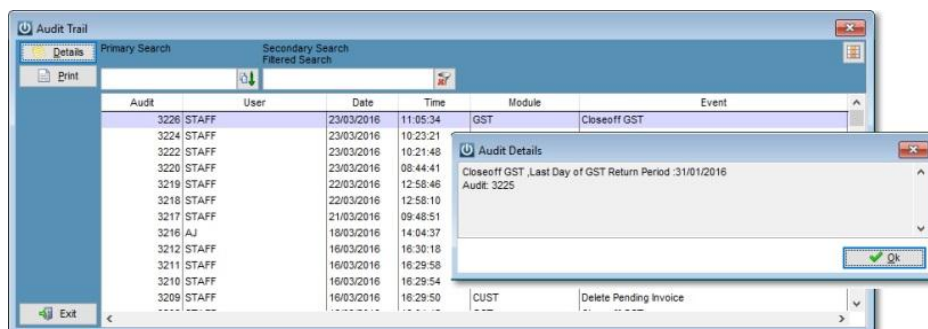
- Corrected a problem where the Dashboard tab was not visible under Admin/Defaults/Manage IBS Service Defaults. 11692
- Modified the Customer Default to be able to make only Address Line 1 mandatory, as opposed to address lines 1 and 2. 11693

Cashbook

- Recurring Invoices and Direct Debit Batches can no longer be posted to Inactive Customer accounts (accounts cannot be made inactive if there is a Pending transaction or a balance owing on their account either). 7269
- Tax Code "N" is now available in the Australian version of Infusion and SPROCKIT. If an item on a transaction is set to Tax Code N, the transaction will not be included in the Tax report. 8671
- Exporting a Direct Credit batch now also records the name of the exported file and the complete path where it was saved to in the Audit Trail entry. 8832
- It is no longer possible to code a Cashbook Payment or a Cashbook Receipt, or a bank imported transaction, to a bank account GL code. Now instead of just getting a warning, the user will receive the message explaining the action is not allowed and that a bank transfer must be entered instead. 9524



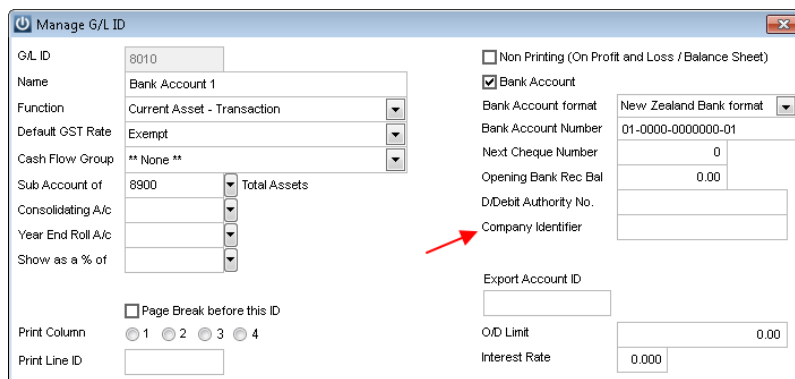
- A problem with the Cash flow Analysis reports not evaluating reversed bank transfer transactions correctly because it had the same description of bank transfers has been resolved. 9761
- Contra Adjustments no longer appear in the tax return reports. This applies for both the New Zealand and Australian versions of Infusion and SPROCKIT. 10068
- The GST Close Off process now adds a record in the Audit Trail screen (Admin > Other > View Audit Trail). The details of the record contain the date used on the Close Off. 10543



- An issue with the reprinted cashup report showing the incorrect payment method has been corrected. The report also shows the date of the cashup. 10666
- Cashbook transactions entered directly from the Bank Reconciliation screen are now no longer automatically tagged in order to stop future dated transactions being included in the close off. 10809
- Saved cashbook payments and receipts now have a blank date when recalled requiring the user to enter the date on the screen, in order to avoid errors posting to the wrong date. Note: because the date is blank, the software recalls the saved transaction using the oldest saved GST rate if the transaction is inclusive, so it will display the GST portion calculated with 12.5%, for example. This is automatically corrected to the valid GST rate as soon as the date is entered in the screen. 10818
- An issue with the cursor jumping to different positions on the Bank Reconciliation screen when trying to reconcile items while the "Hide Tagged Items" flag was on has been corrected. 10846
- An issue on the Bank Reconciliation screen where the closing balance wasn't being calculated unless the mouse was hovered over the figure has been corrected. 10848
- The 'Other Party' field in the 'Import Bank Transactions' screen and on the 'Create New Rule' screen now accept 60 characters. 10986
- The speed for processing Imported Bank Transactions against bank rules has been improved. 11065
- A time stamp in the Bank Rules screen to show when the rule was last processed for an import has been added. 11066



- A new report called "GST Audit Trail - Non Printing GST-Free" has been added to the GST Reports list. This report will be particularly useful for Infusion Australia and SPROCKIT Australia users. 11075
- The Bank Reconciliation reports have been corrected to only list the presented items, the un-presented items, the un-exported DC and the undeposited figures, up to and including the nominated Bank Reconciliation date. Items dated after the nominated date are excluded from the report 11341
- A new field has been made available for Infusion NZ in the Maintenance screens of Bank Account GLs, called Company Identifier. This field will replace the company name on the DCBatch file exported from Infusion with the following formats: ASB Fastnet, Westpac, BNZ, KiwiBank 11517



Central Billing

- The 'Branch Prefix' field has been added on the branches setup screen of the Central Billing module, under Central Billing > Manage Branches. The field is alphanumeric and accepts a maximum of five characters. Newly created branches will require this field to be used in order to save the new branch. Existing branches will only require it if the branch is edited, otherwise the software will keep using the automatic numeric prefix. Only newly synchronised transactions will use the branch prefix entered on the field, transactions that have been synchronised previously will not have the prefix modified. 10835
- A new report is available for the Central Billing module. The report is called "Payments Due to Branches" and it can be found under the Central Billing menu. The report shows payments that have been received from Customers in the Central Billing package and are due to be paid to their respective branches. Synchronising the payments option will send these payments to the branches and will clear the report. 10843

Payments Due to Branches
INFUSION TESTING - CENTRAL BILLING

Printed: 22/04/2016 12:53:00 PM
Printed By: Default Staff Member
Page: 1

The following payments have been received from Customers and are due to be paid to their respective Branches.
These payments will be actioned in the Central Billing System on the next synchronization.

Branch : (B1-) Branch 1				
1 - Alice Smith				
Invoice Date	Invoice Number	Original Amount	Amount Paid	
22/04/2016	B1-20	11.50	11.50	
Total for Alice Smith			11.50	
Total for Branch : Branch 1			11.50	
Branch : (B2-) Branch 2				
1 - Alice Smith				
Invoice Date	Invoice Number	Original Amount	Amount Paid	
22/04/2016	B2-25	40.25	40.25	
Total for Alice Smith			40.25	
2 - Allan Anderson				
Invoice Date	Invoice Number	Original Amount	Amount Paid	
22/04/2016	B2-26	18.40	18.40	
22/04/2016	B2-22	18.40	18.40	
Total for Allan Anderson			36.80	
Total for Branch : Branch 2			77.05	
Grand Total			88.55	

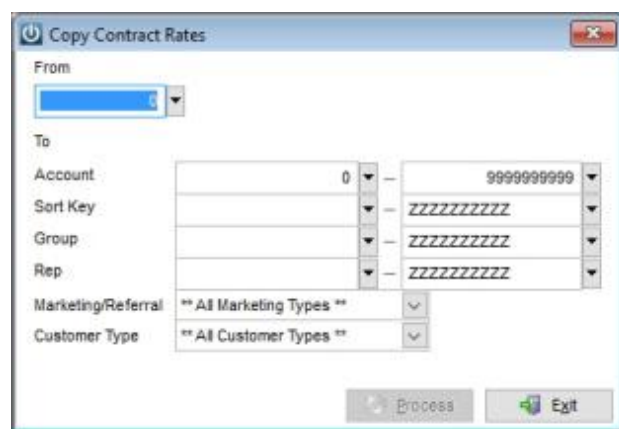
- A new option has been added for the Central Billing module under Admin > Settings > Other > Manage Central Billing Settings, to "Automatically queue Invoices for Emailing (When Authorized or when Imported and Authorization is not required)". Also, if the original Invoice on the branch is for a Customer Item's Job, the following information will flow through to the Invoice in Central Billing: Customer Item's Serial Number, Customer Item's Description, Customer Item's custom field User1, Customer Item's Customer ID, Job's Start Date, Job's Start Time 11119
- A problem linking Customers that have journals and unallocated payments when the central billing type is set to Sales Analysis Only has been fixed. 11167

Contact Management

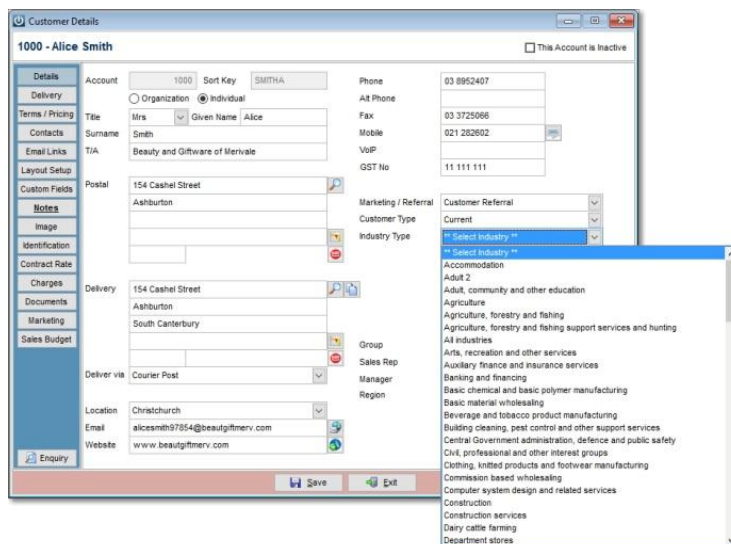
- Contact Management records are now also deleted if either a Customer account or a Supplier account is deleted from the software. 10849
- When Saving and Adding a New Follow Up on the Contact Management, the new follow up screen will have the 'Follow Up Date' pre-populated with the date of the initial follow up. 11703

Customers

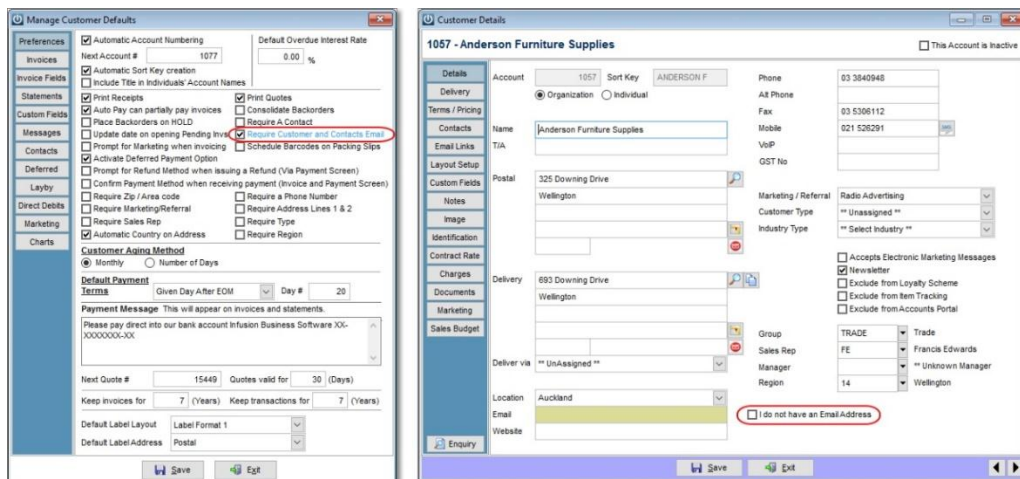
- A new utility under Customers / Utilities called 'Copy Contract Rates' that allows copying the existing Contract Rates from a Customer account to another Customer or range of Customers has been added. Different options for range selection are available on the screen. 1925



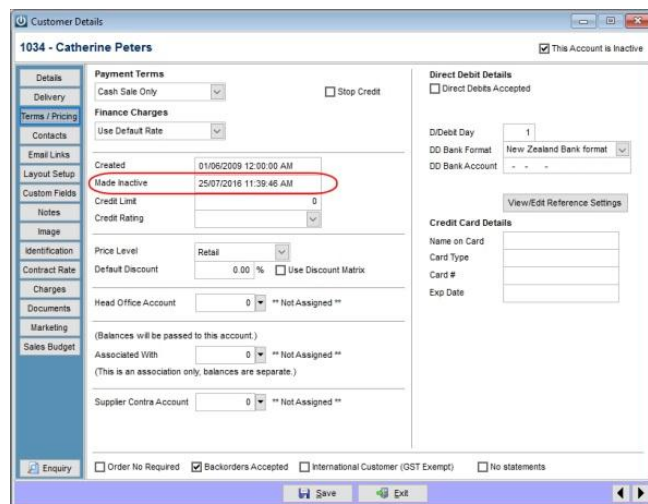
- It is now possible to select CASH as a payment method to do a refund to a Customer. For this method to be visible, the option "Prompt for Refund Method when issuing a Refund (via Payment screen)" in Admin > Manage Customer Defaults must be selected. 9684
- A Customer account can no longer be made Inactive if there is still a Customer Item that is active associated with that account. 10043
- A Customer account can no longer be made Inactive if there are still Pending Invoices for that account. 10044
- Matching Invoices and Credit Notes on systems set to Payment Basis GST now show the record of the matched Invoices and Credit notes in the GST Detail report. 10099
- Customer accounts can now have the Industry Type added to the record. Infusion has a list of 105 Industry Types pre-created, but records on the list can be edited, deleted or added. The list can be customised under Admin / Settings / Customers / Manage Industry Types. 10657



- An error with the Address Lookup occurring when an empty or invalid address was entered has been corrected. 10945
- A new flag has been added under Admin / Defaults / Manage Customer Defaults to make the entry of an Email Address for a Customer account and Customer Contact mandatory. If this flag is on, it can still be overridden on each Customer account screen by ticking the box "I do not have an email address". 11338



- The New/Existing Customer standard report has been updated to display the Customer account number. 11360
- A problem with declined Customer Payment transactions processed as EFTPOS causing the outstanding items to disappear until the user exited and re-entered the Customer Payment screen has been resolved. 11425
- A new field has been added in the Customer / Terms/Pricing tab to display the Time Stamp of when the account was made Inactive. This field will be automatically populated only when the account is marked as Inactive. 11440



Customer Details: 1034 - Catherine Peters

Payment Terms: Cash Sale Only ☐ Stop Credit

Finance Charges: Use Default Rate

Created: 01/06/2009 12:00:00 AM

Made Inactive: 25/07/2016 11:39:46 AM

Credit Limit: 0

Credit Rating: 0

Price Level: Retail

Default Discount: 0.00 % ☐ Use Discount Matrix

Head Office Account: 0 ** Not Assigned **

Associated With: 0 ** Not Assigned **

Supplier Contra Account: 0 ** Not Assigned **

Direct Debit Details: ☐ Direct Debits Accepted

DD Debit Day: 1

DD Bank Format: New Zealand Bank format

DD Bank Account: - - -

View/Edit Reference Settings

Credit Card Details:

Name on Card:

Card Type:

Card #:

Exp Date:

Order No Required ☐ Backorders Accepted ☒ International Customer (GST Exempt) ☐ No statements ☐

Save Exit

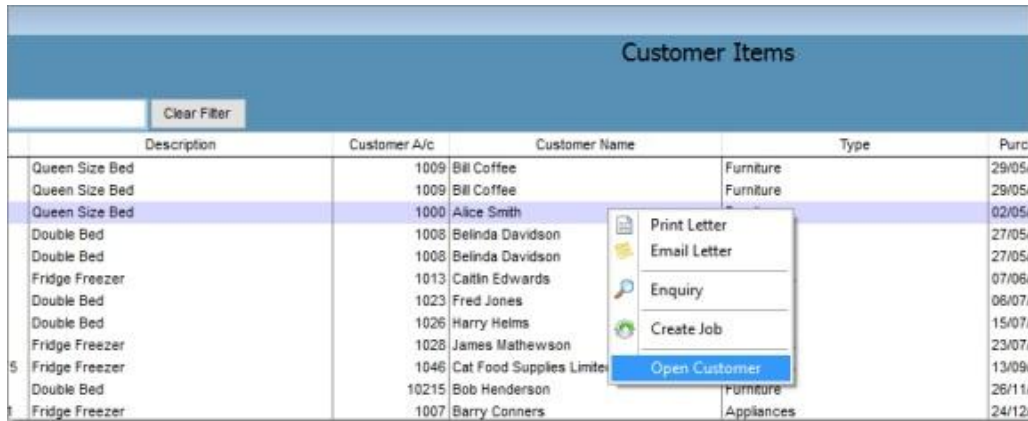
- Corrected a problem where email links were not retained when creating a new customer account and moving away from the email links tab without saving first. 11677
- Corrected a problem where selecting and saving an option of 'Industry Type' on a Customer account was removing the existing 'Customer Type' on that account. 11690
- The warning popping up when trying to make a customer inactive when there is still an active customer item assigned to it has been modified to show the name that has been selected by the user for the Customer Items menu in the software. 11691
- The right click menu on the Customer's Management screen now includes the option to print the highlighted customer's statement. If an email link for statements is set for the customer, the right click menu will also include the option to email the statement. These options will not be visible in the right click menu if the setting "No Statement" under the Terms / Pricing tab of the customer account screen is selected. 11695

Account	Sort Key	Name	Balance
1000	SMITHA	Alice Smith	5653.41
1001	ANDERSA	Allan Anderson	7 M
1002	THOMPSA	Amber Thompson	0 H
1003	HILLA	Andrea Hill	3 L
1004	HILLSA	Andrew Hills	6 E
1005	SWIFTA	Angus Swift	9 A
1006	BANDERA	Anthony Bander	2 H
1007	CONNERB	Barry Conners	5 L
1008	DAVIDSB	Belinda Davidson	8 E
1009	COFFEEB	Bill Coffee	1 A
1010	DEVERSB	Bob Deverson	4 E
1011	EMERSOB	Brent Emerson	7 C
1012	ELLISB	Britney Ellis	0 D
1013	EDWARDC	Caitlin Edwards	3 E
1014	EDINGHC	Colin Edinghouse	6 F
1015	FLOWERC	Craig Flowerston	9 C
1016	GEORGID	David Georgison	2 C
1017	GABLESD	Dan Gables	5 H
1018	HANDLED	Debbie Handle	8 L
1020	HARVEYE	Edward Harvey	4 N
1021	INTERCO	Ellen Interco Ltd	7 C
1022	JAMESF	Fiona James	0 M
1023	JONESF	Fred Jones	3 H
1024	JOHNSTG	George Johnston	6 L
1025	JOHNSH	Hamish Johns	9 E
1026	HELMISH	Harry Helms	2 A
1027	LONGBY	Ian Longby	1123.88

- The Duplicated Customers Listing report now sorts the information by Name under the session for Duplicated Customers and by Mobile number under the session Duplicated Mobiles. 11708

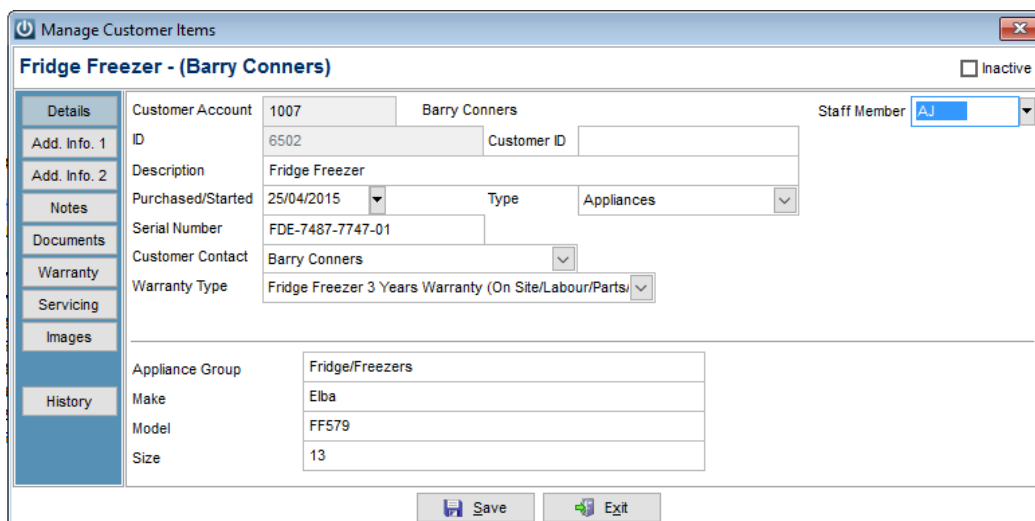
Customer Items

- SPROCKIT: The Warranty EDI no longer attempts to send warranties to Stihl that don't have an asset type selected, stopping the transmission of invalid warranty data. 10304
- The Customer account can now be opened from the Customer Items screen when right clicking on a record. 10998



Description	Customer A/c	Customer Name	Type	Purch
Queen Size Bed	1009	Bill Coffee	Furniture	29/05/
Queen Size Bed	1009	Bill Coffee	Furniture	29/05/
Queen Size Bed	1000	Alice Smith		02/05/
Double Bed	1008	Belinda Davidson		27/05/
Double Bed	1008	Belinda Davidson		27/05/
Fridge Freezer	1013	Caitlin Edwards		07/06/
Double Bed	1023	Fred Jones		06/07/
Double Bed	1026	Harry Helms		15/07/
Fridge Freezer	1028	James Mathewson		23/07/
Fridge Freezer	1046	Cat Food Supplies Limited		13/09/
Double Bed	10215	Bob Henderson	Furniture	26/11/
Fridge Freezer	1007	Barry Conners	Appliances	24/12/

- A problem with service reminder letters where blank letters were created for inactive items has been corrected. 11351
- An issue with Customer account ranges not working for service letters has been fixed. 11352
- A new field has been added to the Customer Item maintenance screen to allow the setup of the staff member who normally looks after and services the item. 11566



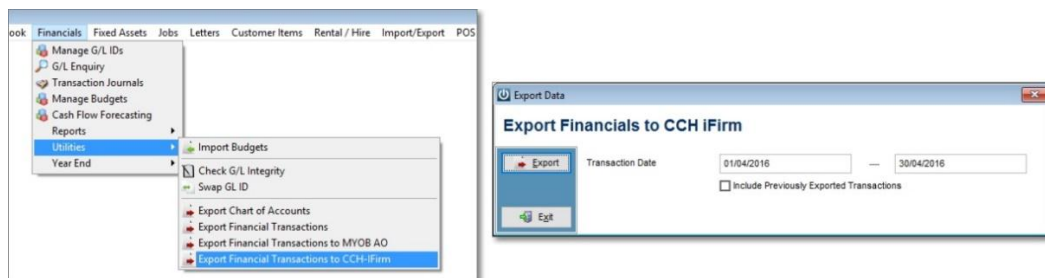
Manage Customer Items

Fridge Freezer - (Barry Conners) ☐ Inactive

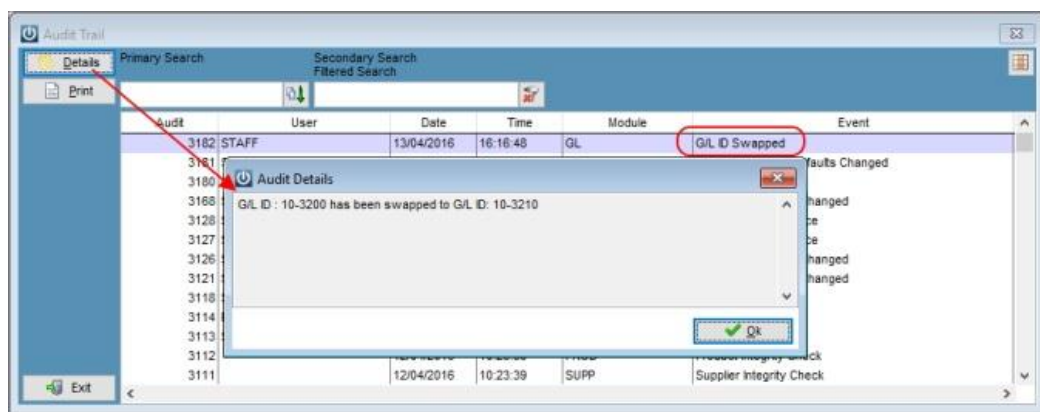
Details	Customer Account	1007	Barry Conners	Staff Member	AJ
Add. Info. 1	ID	6502	Customer ID		
Add. Info. 2	Description	Fridge Freezer			
Notes	Purchased/Started	25/04/2015	Type	Appliances	
Documents	Serial Number	FDE-7487-7747-01			
Warranty	Customer Contact	Barry Conners			
Servicing	Warranty Type	Fridge Freezer 3 Years Warranty (On Site/Labour/Parts)			
Images	Appliance Group	Fridge/Freezers			
History	Make	Elba			
	Model	FF579			
	Size	13			

Financials

- A new financial transactions export for CCH IFirm has been added under the Financials \ Utilities Menu. The utility allows a user to select a date range and to re-export previously exported lines. 10309



- A problem with the financial reports "P & L By Branch" and "P & L By Branch with Budget" not showing the GL Code description if Branch 1 had no value to print, but Branch 2 had has been fixed. 10594
- A problem in the "GL Transaction Detail" report calculating the opening balance incorrectly when printed from the GL Enquiry screen has been corrected. 10790
- It is no longer necessary to have a Closing Inventory account set under Admin / Defaults / Manage Financial Defaults in order to be able to close off financial year. 10842
- An issue with the date picker on some financial reports not responding to the initial date selection made with the mouse has been sorted. 10868
- The speed for Posting Journals from the 'G/L Journals' screen has been improved. 10880
- A 12 month Cash Flow Forecast can be produced, based on stored data, and budgets. The user can make fine tune adjustments, review results and print a report. To find more information on this please see our knowledgebase article called "Cash Flow Forecasting" at <http://infusion.kayako.com/Knowledgebase/Article/View/828/3/cash-flow-forecastingtr> 11051
- An entry is now recorded in the Audit Trail when using the Swap GL ID utility from the Financials menu. 11060



- The MYOB AO Financials Export now allows re-exporting previously exported transactions. 11118
- An error occurring in Financials / Transaction Journals caused by entering a value in the Primary Search field of the GL/ID lookup screen and then clicking on the Filtered Search field has been corrected. 11435

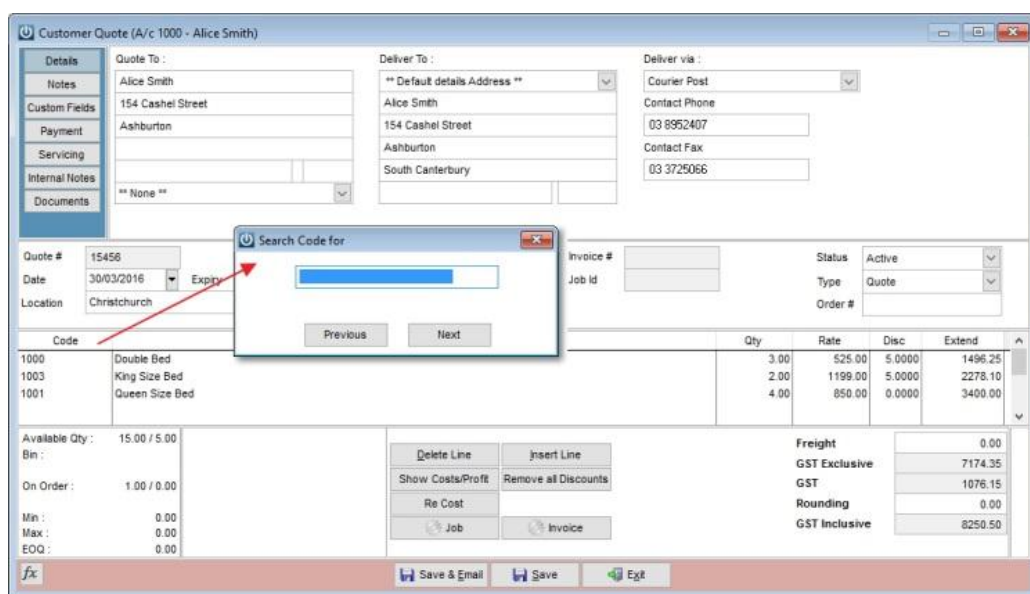
Fixed Assets

- The Fixed Assets Defaults and the Fixed Assets Setup options have been moved from the Fixed Asset menu to the Admin menu under Defaults and Settings to make it consistent with other menus. 10924

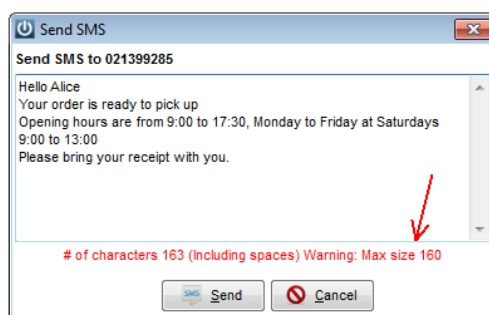
- A problem stopping users from being able to enter the Note on a sold Fixed Asset on the integrated packages has been corrected. 11037

General

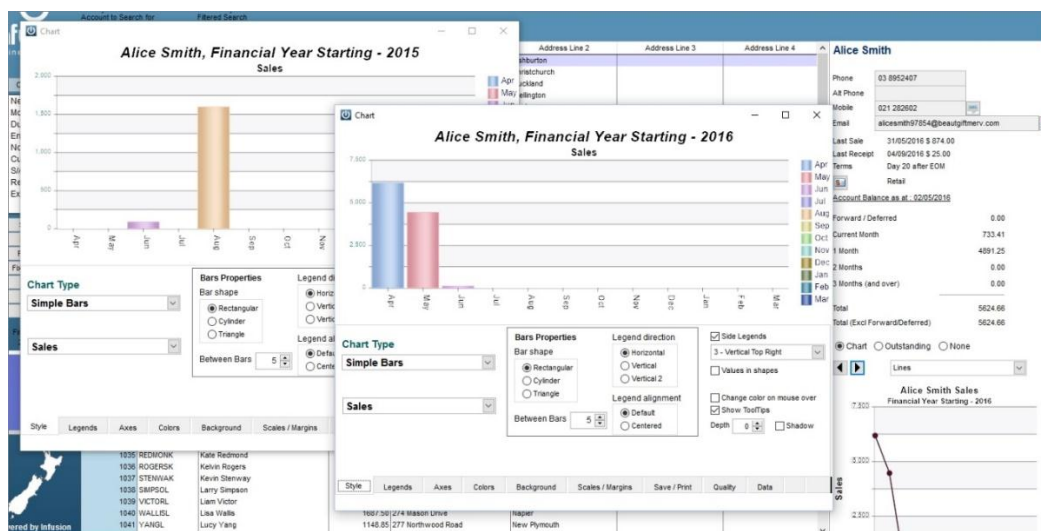
- Customer and Supplier accounts will now warn if the Sort Key field is blank and will not allow saving until the data is entered in the field (where Defaults have been set to manual sort key creation). 8646
- The ability to search on grid columns throughout the system has been added. This can be done by right clicking on the column header. For example, in the grid of a Customer Invoice, right click on the CODE field and a pop up will display where a code to search for can be typed. Previous or Next value options are also available. 10922



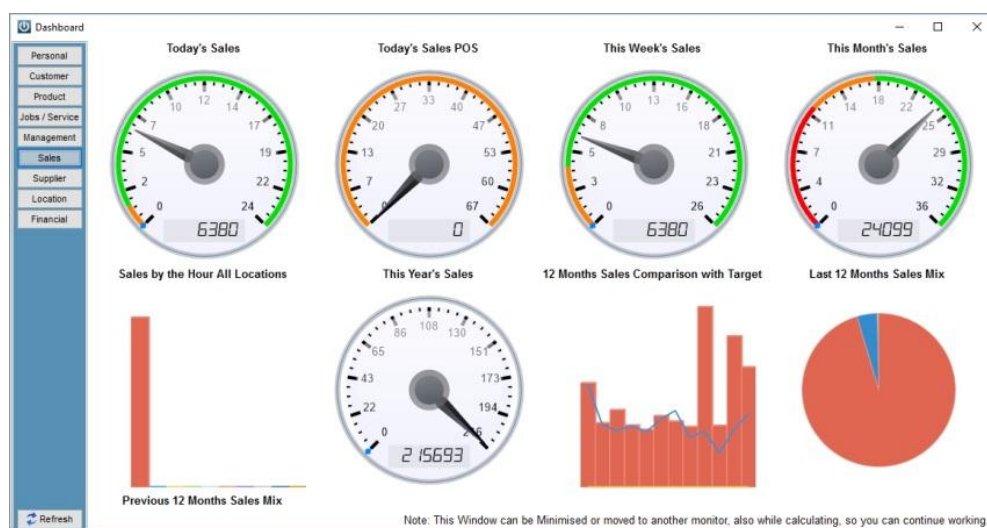
- An error occurring when running Customer and Supplier Aged Trial Balance reports with a blank date on the 'as at' date field of the parameters has been fixed. Now, if the date is left blank, the error will not occur, but the report will not run either. 11041
- If a user selects to view or hide the Side Panel on Manage Customers, Suppliers or Products screens, this preference will be remembered the next time the user logs in. 11083
- A counter of characters has been added to the SMS screen, allowing the user to see if the message has gone over the limit. 11124



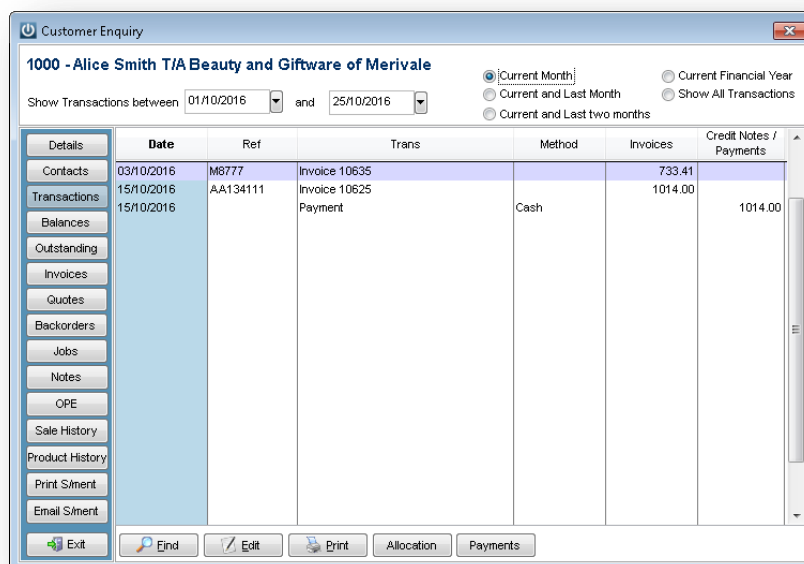
- When a Recurring Charge is added, the default GST Code for the GL ID is now used, unless the Customer or Supplier is set to International, in which case it uses Z for Customers and X for Suppliers. 11139
- The Side Panel charts now open independently so more than one can be open for comparing. Regardless of Chart type chosen, it will default to Simple Bars when opened, but can be changed from the individual screen. 11208



- A Dashboard with more than 30 Charts and Gauges has been added to Infusion. To activate, open a Staff member via the Staff menu and on the Charts tab, select the Charts the staff member is allowed to access. Also select 'Allow advanced Options on Chart display' if required (these advanced options allow the user to alter the display of the chart - these alterations can be saved per Staff member). The Staff member will need to log off and log back on to activate the 'Dashboard' via the 'File Menu'. To find more information on this please see our knowledgebase article called "Infusion Dashboard Charts" at <http://infusion.kayako.com/Knowledgebase/Article/View/826/3/infusion-dashboard-charts> 11209



- Maps have been removed from the left hand side panel and are now shown on the main screen underneath the main logo. 11316
- Additional date filters are available in Customer, Supplier, Product and Financial enquiry screens. Along with the pre-existing date range selection 'from' and 'to' fields, which by default are set as 'Current Month', and the 'Show All Transactions' option, the user can now also select to display the 'Current and Last Month', the 'Current and Last two Months' and the 'Current Financial Year'. 11694

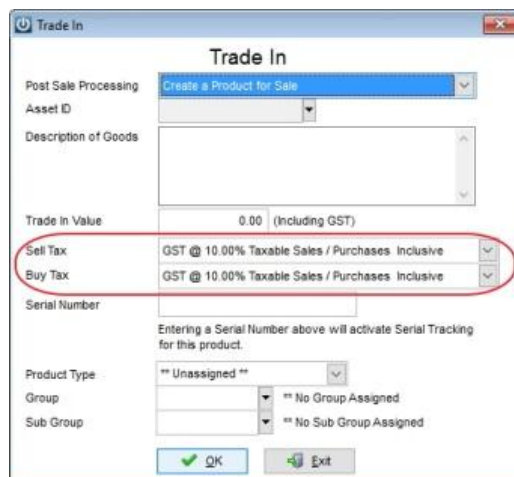


Import / Export

- A new Purchase Order import option called "Supplier Purchase Order Import" has been created for the Import/Export module. This new routine imports a two column CSV file (containing Product Code or Barcode, and Quantity) as one Purchase Order. The import allows specifying the Supplier account number for the Purchase Order and if the file contains Product Codes or Barcodes. A report is generated when the import is finished and it displays if: 1) The item is not set with this Supplier as the Preferred Supplier (but still setup as a Supplier) 2) The item is not set up with this Supplier as a Supplier at all. 9505
- The CRT Invoice export has been updated and freight values appear now as a line item. 11103
- The Mitre10 Invoice Export routine has been updated so it uses the latest email functionality in Infusion 11420

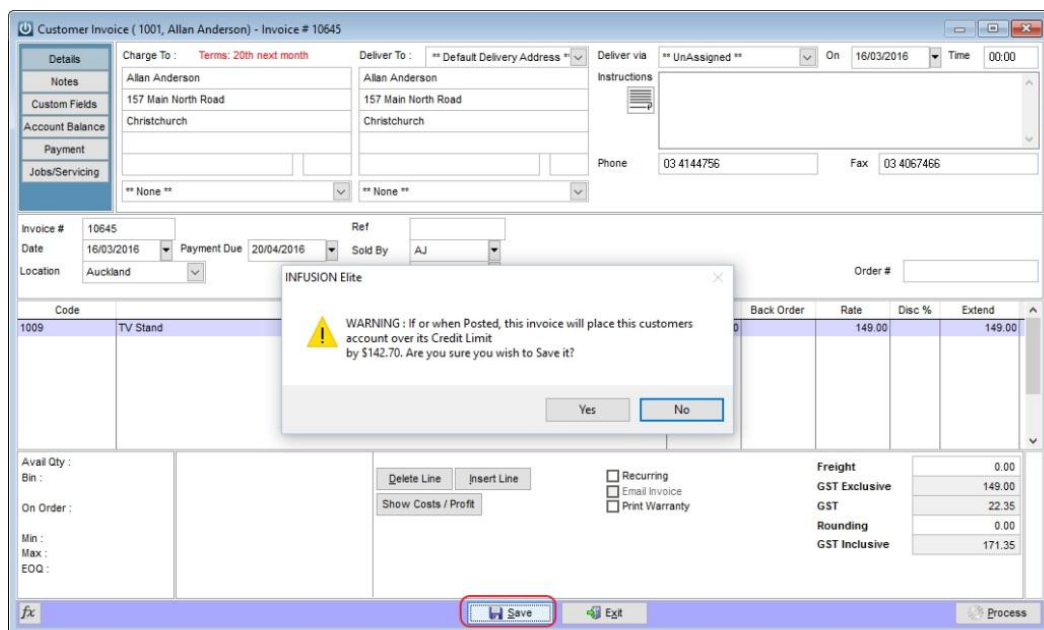
Invoices

- The standard message of Payment Due at the bottom of Invoices no longer prints if the Invoice is created with Deferred Payments or if the full payment of the Invoice is entered in the same transaction when posting the Invoice. 4568
- Pending Invoices reports will now include Invoices created with GL lines only. 7868
- The ability to select the Tax code to be set for a Trade In Product has been added to the Trade In screen (using /T on invoice screens) 9187



The 'Trade In' form includes fields for Post Sale Processing (set to 'Create a Product for Sale'), Asset ID, Description of Goods, Trade In Value (0.00), and tax selections. The 'Sell Tax' and 'Buy Tax' dropdowns are both set to 'GST @ 10.00% Taxable Sales / Purchases Inclusive' and are circled in red. Other fields include Serial Number, Product Type (** Unassigned **), Group, and Sub Group.

- Duplicated Invoices created using the Credit/Recharge utility had a problem where the Payment Method of the original was also being added to the duplicated invoice. This has now been corrected. 9326
- A problem with the Credit / Recharge Utility when dealing with customers with changed names after the original invoice was posted has been fixed. The utility will now correctly create the Credit Note with the name used on the original invoice and the new invoice with the new name set in the customer record. 9342
- A problem with the quantities not being retained by the Credit/Recharge utility when the original invoice was created using the Qty Build Up function (F9 on quantity field) has been corrected. 9537
- A Credit Limit warning now appears while Saving a Pending Invoice when a Customer's credit limit is reached, not only when the Invoice is Posted. This warning is only based on the balance from already posted Invoices i.e. Pending Invoices aren't included. It won't, however, post Pending Invoices for an account where credit limit has been reached if the POST ALL option on the Manage Invoices screen is used. The user will have to open each Invoice individually if they want to process them. 9931

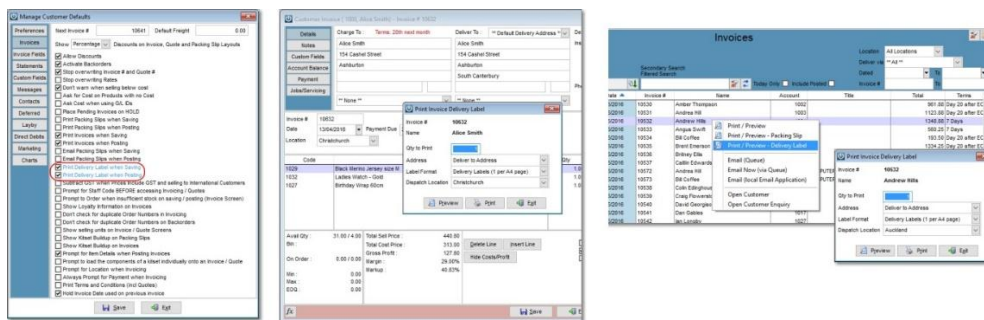


The 'Customer Invoice' form for 'Allan Anderson' (Invoice # 10645) is shown. A warning dialog box titled 'INFUSION Elite' is displayed over the form, stating: 'WARNING: If or when Posted, this invoice will place this customers account over its Credit Limit by \$142.70. Are you sure you wish to Save it?'. The dialog has 'Yes' and 'No' buttons. The 'Save' button at the bottom of the form is circled in red.

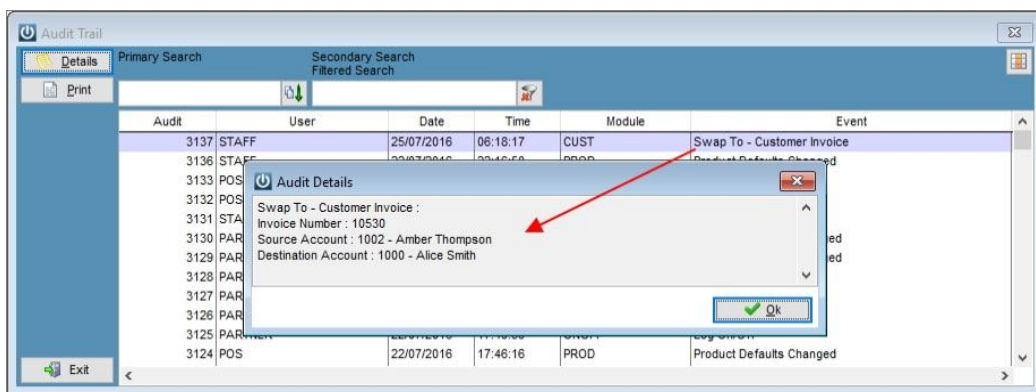
- Columns can now be sorted on the Customer Invoice grid. 10005

- The problem of POST 1 or POST ALL buttons from the Manage Invoices screen allowing the user to post a credit note that exceeded the credit limit they had set under their staff record for individual credit notes has been fixed. 10266
- The behaviour of F2 and F3 keys on the Code field of Customer Invoices has been corrected so the grid no longer moves up hiding top lines, and if F3 is used on last line of the Invoice, creating a gap of blank lines between top lines and the last, these blank lines will not be saved. Also reinstated was the ability to delete "/"N" from the Code field with delete or backspace so it is no longer necessary to delete the entire line. 10368
- Users can no longer delete Customer Invoices from the Pending Invoices Lookup screen if they do not have permission to delete Invoices. 10467
- A problem allowing multiple users to fill the same Backorder at the same time has been fixed. A warning message now is displayed if a second user attempts to work on the Backorder. 10554
- A problem with saved Job Invoices where re-opening and re-saving it was duplicating allocated quantities has been resolved. 10564
- A refresh problem on the "Show Costs/Profit" section of the Customer Invoice screen has been fixed so now when lines are deleted the cost and profit will automatically be recalculated on the screen, without having to save, close and re-open the screen for the recalculation to take effect. 10572
- A POS invoice can now be credited, recharged or copied using the "Credit / Recharge Invoice" option under the "Invoices / Quotes" menu. This works for POS invoices created without payment at the time, i.e., the original POS invoice was charged to a Customer account. 10841
- A problem with the date picker on Invoices that was affecting the calculation of the profit/margin on the screen has been fixed. 10869
- The problem of ignoring the quantity to print when Invoice Layouts under the Admin menu have been set to print more than one copy and the option 'Don't Prompt for Printer' is on has been fixed. 10876
- An issue with the Warranty layout not being automatically printed when an Invoice was being posted has been fixed. 10898
- A problem in multi-user sessions where a second user was able to open and post the same Pending Invoice that had already been processed by a first user but was left still 'open' on the prompt to print form, which was potentially causing duplicated lines and invoices in the system has been fixed. 10914
- The Credit Note created using the Credit / Recharge utility for Customer Invoices now creates the Pending Credit Note with the same date of the original Invoice being credited by default. The user can still edit the Pending Credit Note later. 10978
- Saved Deferred Payment Invoices now retain their payment schedule when recalled in POS. 10985
- An issue with costs not showing when using Build-ups on Invoices has been corrected. 11011
- Customer Invoices can now have the prompt to print the delivery label at the time of Saving or Posting, from the Invoice screen. To enable these options, two new tick-boxes have been added under Admin > Defaults > Manage Customer Defaults > Invoices tab. This option is also available by right clicking on the Invoice in the Manage Invoices screen. This option will print what is entered in the Invoice. 11018

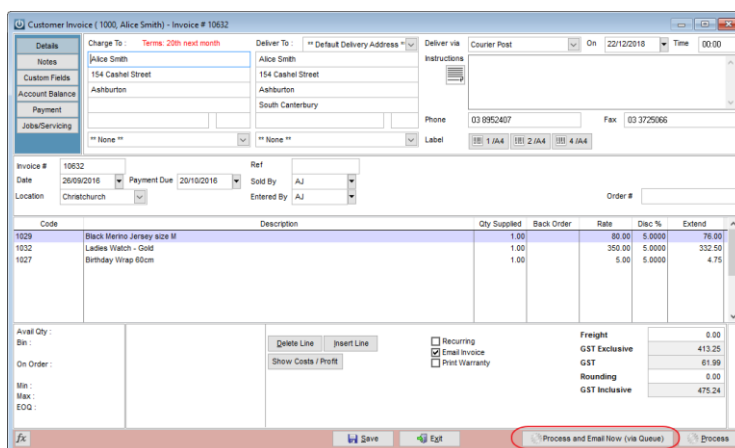
Infusion Software v8.414 Upgrade Notes



- The warning of an Invoice Number already having been used will show even if the Invoice number starts with a space. 11019
- A problem where Customer Invoices with Deferred Payments had stopped printing the Deferred Payment schedule page has been corrected. 11026
- When swapping a Pending Customer Invoice to a different Customer account, a log is created now in the Audit Trail under Admin / Others / View Audit Trail 11186

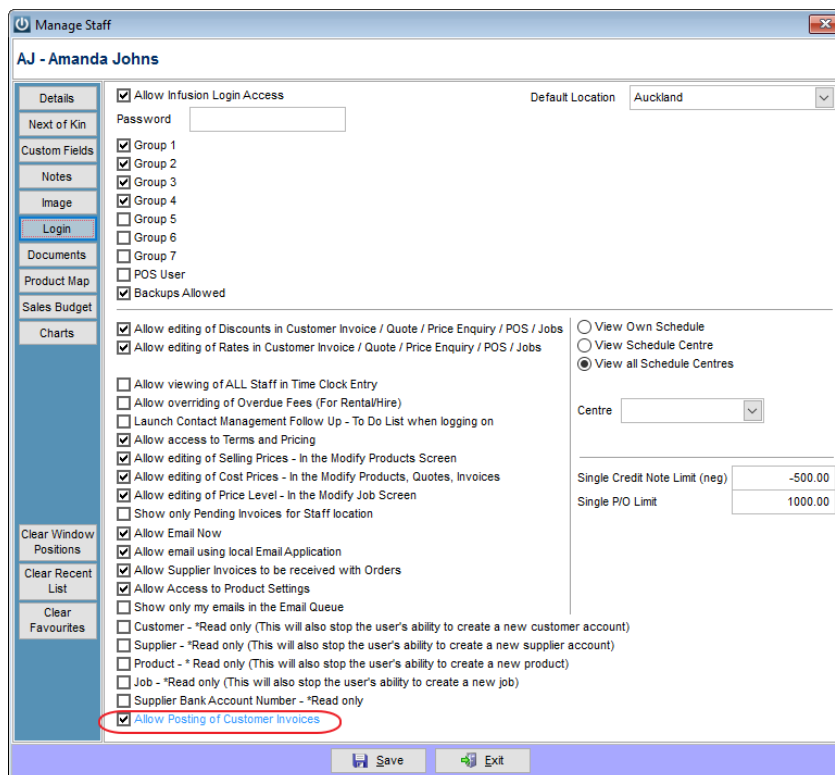


- A problem in the total calculation of a Product build-up occurring when a line was deleted from the build-up has been fixed. 11317
- A new button 'Process and Email Now (Via Queue)' has been added to the Customer Invoice screen. This button will process the invoice and immediately send the email out to the customer, without having to open the Queued Emails screen. This button will be enabled if the Customer has been set with email links and the logged in user has permission to 'Email Now' (Staff / Manage Staff / Login / Allow 'Email Now'). Turning off the tick box 'Email Invoice' on the screen will disable the button 11652



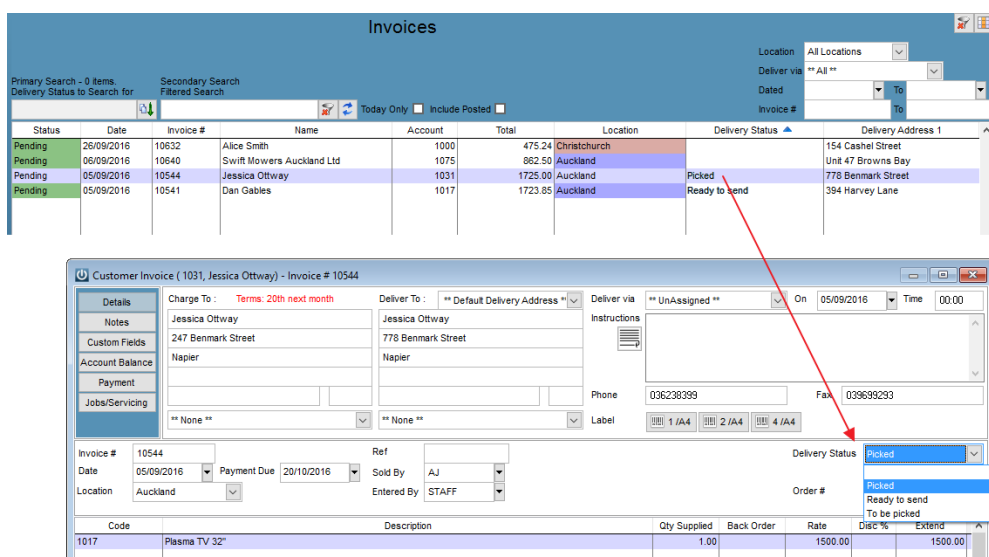
- The ability to stop a user from being able to process Customer invoices has been added to the Staff maintenance screen. This option is always selected by default when a new Staff Code is created. Turning it off means the user will only be able to Save Customer Invoices, but not Process them. The user needs to log out and log back in for the change to take effect.

11563



- A new field called Delivery Status has been added to the Customer Invoice screen. The Delivery Status is set from Admin / Settings /Customers/ Manage Invoice Delivery Status. There are three pre-set statuses to use (which are system reserved) and more can be added/edited or deleted. A new column called Delivery Status is also available on the Manage Invoices screen, which will display the delivery status set on the invoice

11565



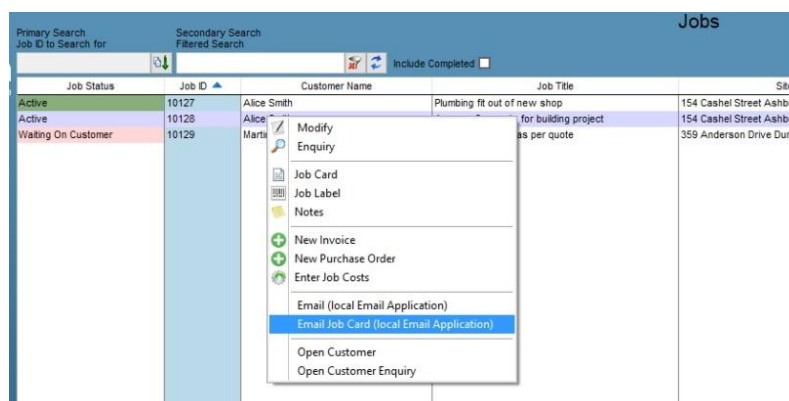
- The name of the 'Qty' (quantity) field in the grid of the Customer Invoice screen has been changed to 'Qty Supplied'.

11567

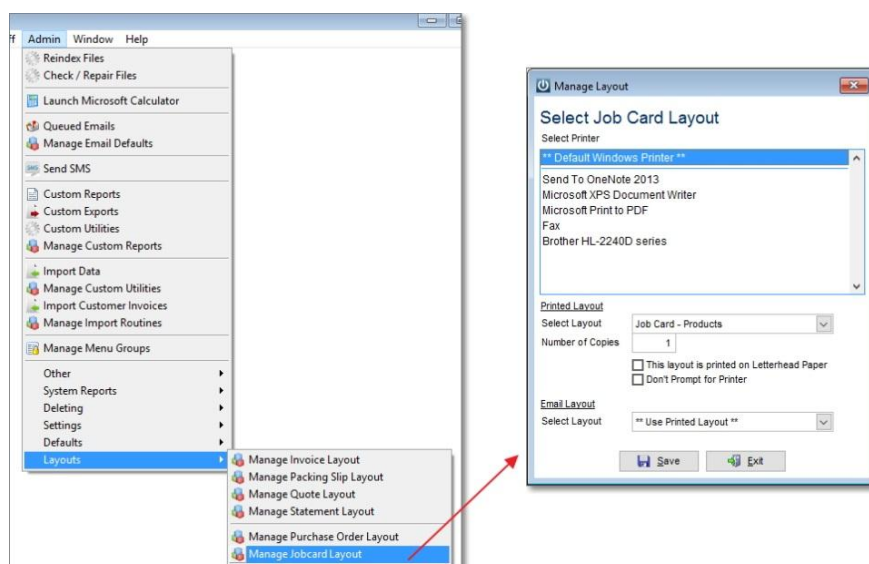
- An issue allowing multi-user entry on the same transaction generating duplicated lines on invoices was corrected. 11654
- The right click menu on the Invoices Management screen now includes the option to credit / recharge the selected invoice. 11698

Job Management

- It is now possible to email the Job card of a Job using the "Email (Local Email Application)" option by right clicking on a Job in the Job Management screen, as long as the Customer has an email account OR there are staff members which have an email address. i.e. you can email a Job Card to a staff member. 3155



- The Job card tab has been removed from Admin > Defaults > Manage Job Defaults. The default Job card is now set under Admin > Layouts > Manage Job card Layout. The screen has the same options available to other layouts (default printer selection, letterhead paper, email layout, etc.). The option to change the name of a Job card Layout in the software is no longer available to the users. This can still be done in command mode by the Infusion Certified Partner or Infusion Support Staff. 4602



- A problem where Trade In Items added on a Job created automatically from the Customer Invoice were showing a duplication warning causing the line to be deleted from the Job has been fixed. 9325

Infusion Software v8.414 Upgrade Notes

- If a line on a Job was entered automatically when the item was received on a Job Management Purchase Order, right clicking on the Job line will now allow opening the original document.

9962

- Stock transfers generated in Job Management are now recorded with the same date the stock code has in the Job line, instead of the actual date the transfer was done by the user.
- The email address field has been added to the Job screen. The main email address, if it exists, will be pre-populated with the Email field of the Details tab. Under the Contacts tab, the emails will also be pre-populated if they exist for the Contact in the Customer account.

10050

10074

- Problems with the sort order of lines in Job Invoices, displaying incorrectly on Invoice Preview and on a final Invoice have been sorted. All Previews and Generate commands should now create the lines in the following order: * If all options are left as Full Detail, the items will be listed in the same order as they are on the Job * If one or more items are set to Summary or Total, etc., the items are processed in the following order: - Products, Supplier, Cashbook, Disbursements and then Staff - within each type, the items will be listed in Code order including those listed in full detail. ** Products set to Job Management Type Consumables or Resources are excluded from the Invoice Preview report.
- A problem where totals were calculated incorrectly if rounding was entered on a Job screen or on the Quote of a Job has been corrected.
- An issue where Jobs were prompting to receive the Job deposit twice has been fixed.
- The Contacts Tab of the Job screen has been tidied up: Contacts are not pre-loaded by

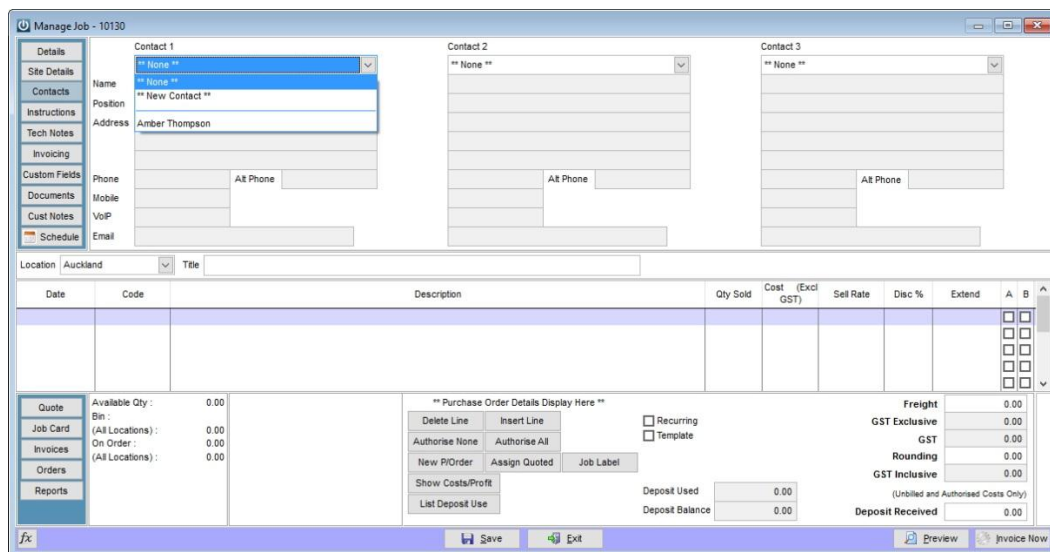
10080

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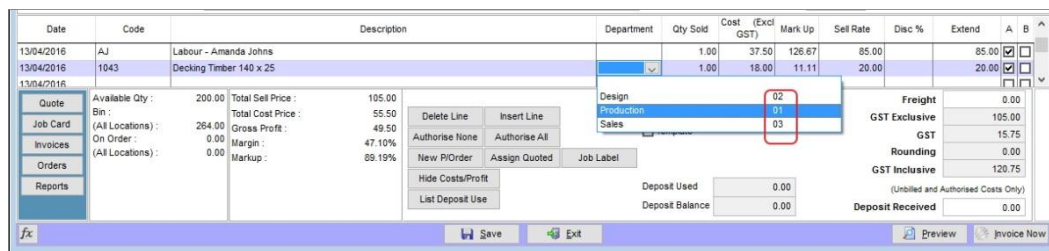
default, and it is possible to create a new contact from the screen which will flow back to the Customer account record.



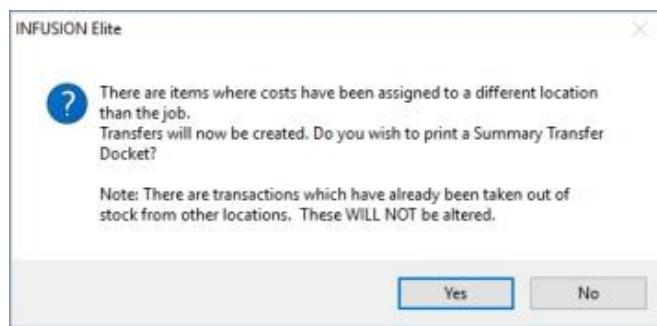
- A problem with Product Job Management Types of "Consumable", "Disbursement" and "Resource" being categorized incorrectly in the Jobs as "Products" has been fixed. 10798
- When a Quote with /N note lines is assigned to a Job, the /N note lines will now be included on the Job. 10811
- A red text legend has been added onto the Assign Quoted screen in Jobs to warn the user that if the quote contains Freight or Rounding, these values will be added to the Job, unless the user removes the values from this screen first. 10822



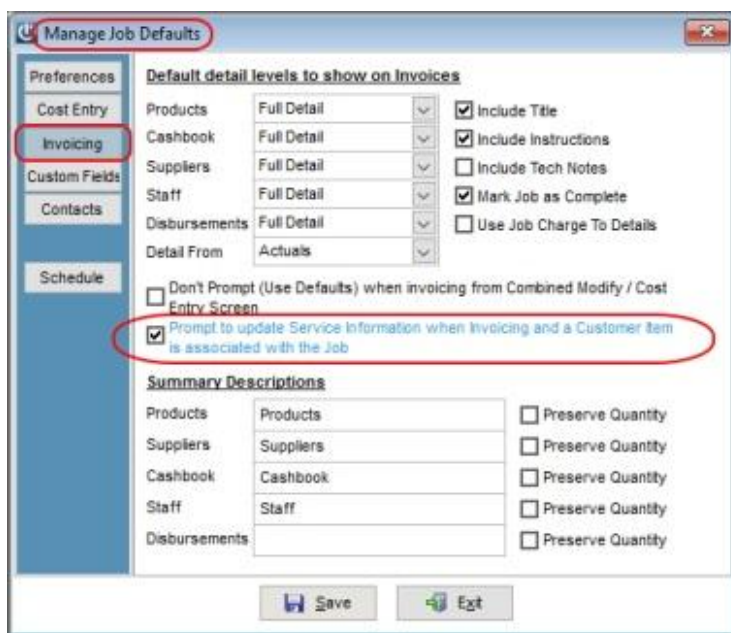
- A problem on the Job Scheduler Time calculation where the time entered was being automatically reduced by one minute has been fixed. 10882
- A multi-user problem that allowed a second user to open a Job while the first user had the same Job already opened and had it sitting on the Quote screen has been fixed. 10919
- An issue where the Job Scheduler screen was still including Jobs set to a type of 'Exclude from Scheduler' has been fixed. 10976
- It is no longer possible to enter an Inactive Customer account on the 'On charge warranty' field of a Job 11036
- The CODE of a Job Department has been added to the right on drop down list to select a Department of a line in a Job. 11046



- An error occurring when selecting a Customer on Stop Credit in the 'on charge warranty' field of a warranty Job has been corrected. 11050
- When stock transfers needed to be made on a Job for several locations, and some of the transfers were from the same location, the software was recording only one line of transfer on the Product records, instead of the multiple lines needed. This issue has now been corrected. 11094
- Stock transfers will only occur if NEW costs are added to a Job and the items have been taken from a different Location than the one set on the Job. Transfers will not be created for GL codes or Staff lines. Existing costs will not generate a transfer and the warning below will be displayed. 11095

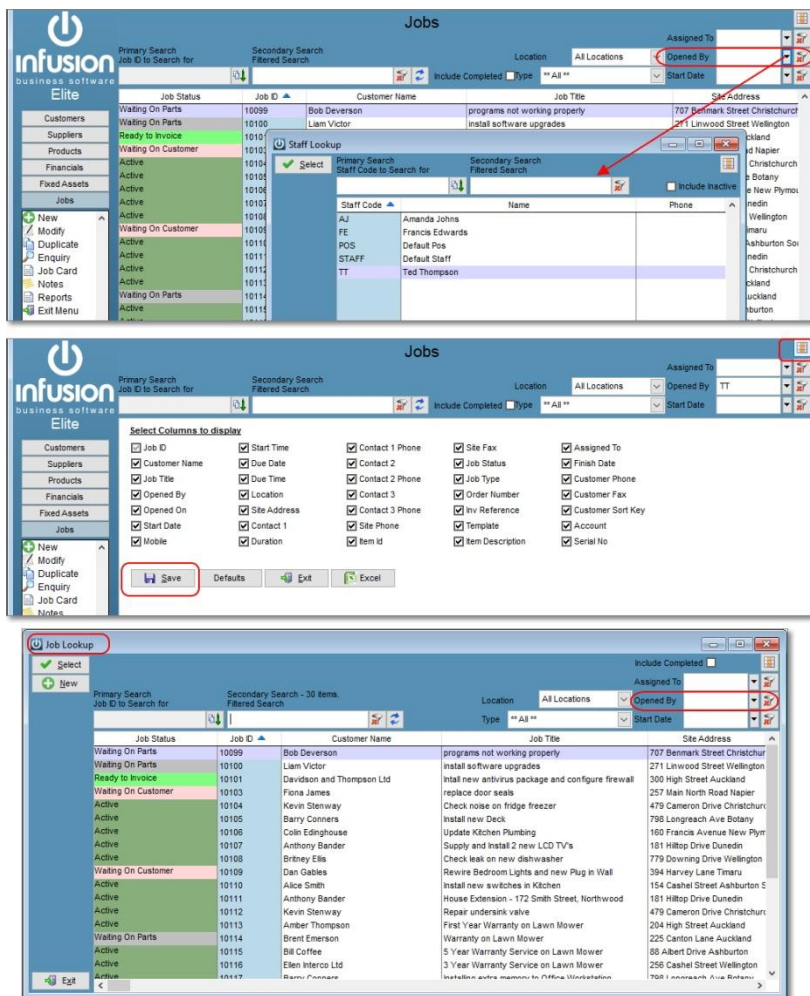


- The ability to have the software prompting to update Service Information when Invoicing a Job with a Customer Item assigned to it has been added. This can be enabled from Admin / Defaults / Manage Job Defaults, Invoicing tab. 11189



- The ability to filter Jobs with "Opened By" staff code has been added. This new filter is available in the Manage Job screen and on the Job Lookup screen. A preferred Staff code can be saved on these grids by selecting the code to filter by and then opening the grid fields and saving. The preference is saved per grid and per user.

11190



The first screenshot shows the 'Jobs' screen with the 'Opened By' filter set to 'TT' in the top right. The second screenshot shows the 'Select Columns to display' dialog with the 'Save' button highlighted. The third screenshot shows the 'Job Lookup' screen with the 'Opened By' filter set to 'TT'.

- The standard "Job Card - Customer Item" layout (Jobcard7) has been modified to include the Customer Item Notes. The Job card will expand over onto a new page if the Notes require this.
- A display problem in the Manage Job screen when using the filtered search after opening it from the drop down menu at the top has been fixed.
- The Job Invoice Preview standard layout has been updated to show freight value if applicable.
- A problem where the time clock in Jobs was not rounding to the time clock minimum set in defaults when the time entered was less than the minimum default has been fixed.
- The standard Job Detail report has been modified to correct a problem with incomplete/incorrect Purchase Order details being printed.
- Corrected a multi-user record lock error in Job Management when saving a job.

11213

11276

11323

11391

11399

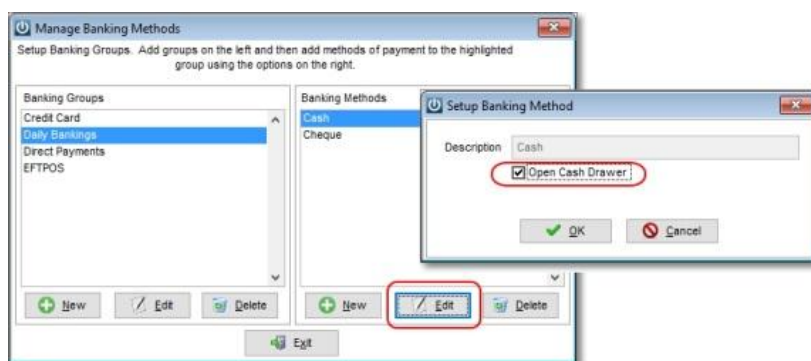
11709

Letters

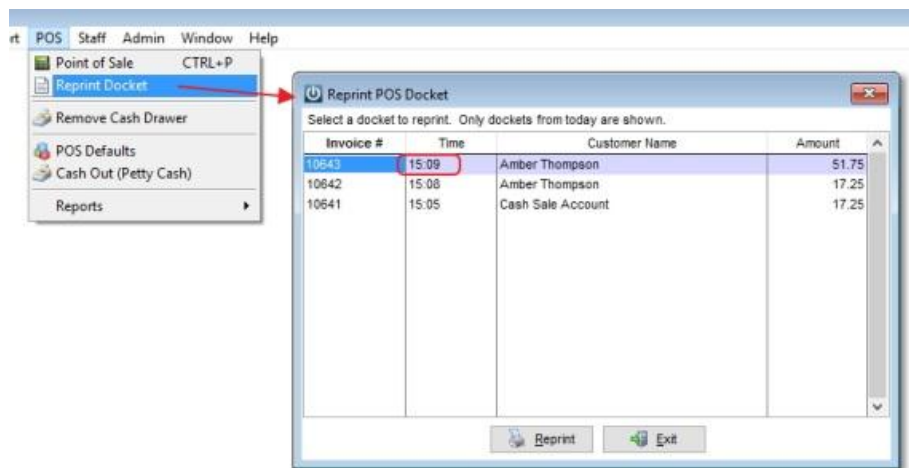
- An issue with letters not showing the inserted images if the computer is running Windows 8 or above has been resolved. This applies to images in the following formats: BMP, GIF, JPG and PDF. 10603

POS

- Each payment method can now be selected to open or not the cash drawer for POS users. This is done from Admin / Settings / GL/Cashbook / Manage Banking Methods, and editing the payment methods and ticking the box shown below. 6483

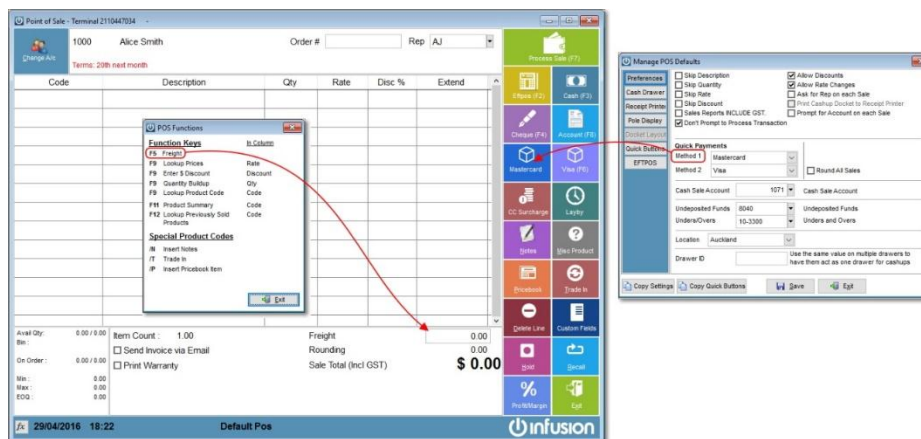


- The "Reprint POS docket" option has been changed to descending order so the last docket is at the top of the list and highlighted. 8499

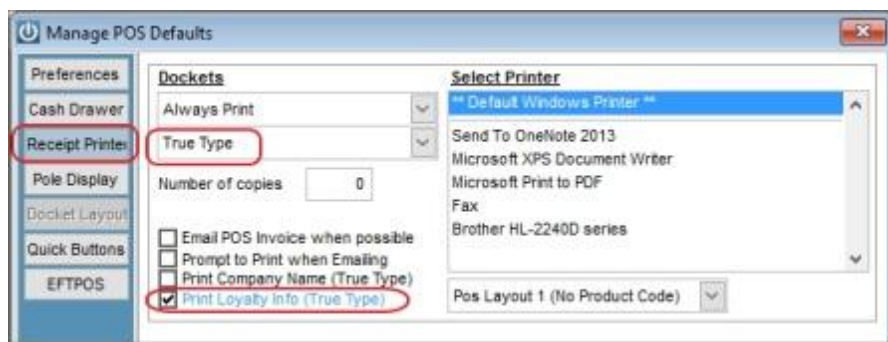


- Standard POS layouts POS01 - POS06 have been altered so recalling a saved Job Management Invoice in POS will print correctly, respecting summarised lines. 8765
- Emailed POS Invoices now have the Payment Amount and the Payment Method showing in the PDF attachment of the Email Queue, to coincide with the printed layouts. 9878
- F5 key behaviour on POS screen has been modified. In order to keep consistency with the rest of the software, the POS screen will now move the cursor always to the Freight field if the F5 key is pressed. This means that the previously used shortcut to move the cursor to the additional payment method 1 button will no longer apply. The F5 key also moves the cursor to the Freight field in Supplier Invoices and Purchase Orders. 10009

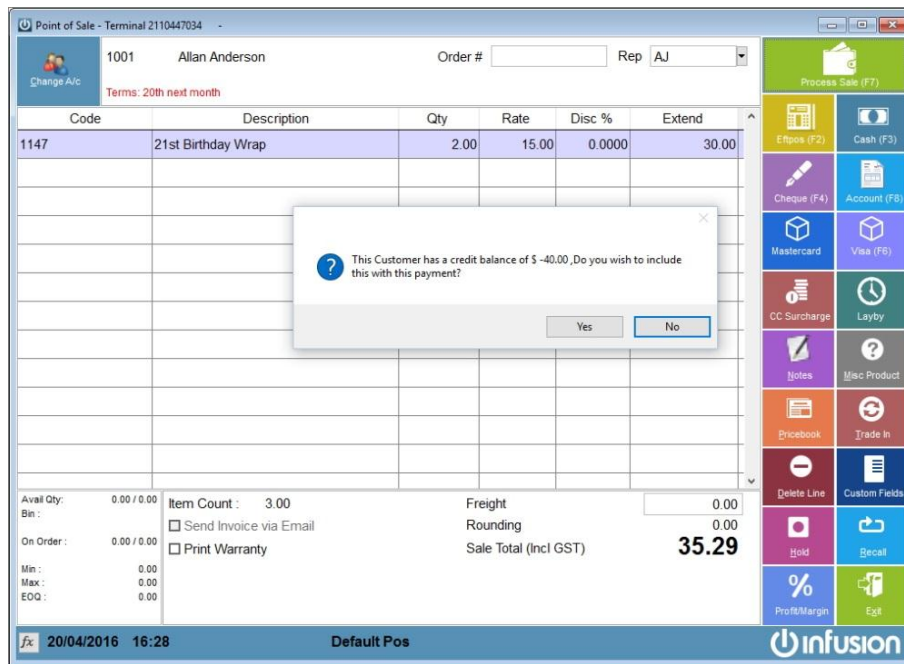
Infusion Software v8.414 Upgrade Notes



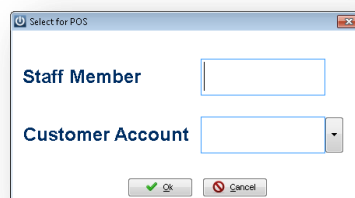
- A problem with the Pole Display not showing the Total Sale value when the payment was entered using the quick payment buttons from the POS screen has been fixed. 10013
- The 'Company T/A Name' is now printed in the 40 column dockets in POS. 10022
- A problem of GST portion being incorrectly reduced twice on the financial journal of the transaction when the Invoice was a POS invoice and the Product Defaults in Admin were set to pricing inclusive of GST has been fixed. 10662
- An issue with rounding not being included in the financial record of the transaction when recalling a Pending Invoice on the POS screen of a system set to ROUND ALL SALES has been corrected. 10823
- An issue occurring when a system with Eftpos Integration was printing a POS receipt marked to be emailed as well has been fixed. 10862
- The speed to re-open the POS invoice screen after a POS invoice was finished has been improved. 10944
- POS layouts - true type (A4 Printer) now include Layby instructions where applicable and show Loyalty information. Also included are Time and Location on the same line as the Date. 11076
- After a POS Cash Drawer is removed, the Cash up Docket reports now show the Terminal ID number (Itemised and Summary reports). 11069
- The Loyalty information can now be printed on POS invoices when using True Type layouts and having the POS Default to include the loyalty details. 11077



- When creating a POS invoice to a customer that is not on cash terms and the Customer account is in credit, a pop up will appear asking the user if the credit is to be applied to the Invoice being processed. 11111



- A problem with EFTPOS integration failing to complete the transaction in Infusion intermittently has been fixed. 11378
- Corrected a problem where the Merchant Copy of a Signature Required receipt was not printing from Infusion when the EFTPOS terminal said Accept with Sig (or Sign Receipt). 11685
- The size of the pop up screen prompting to confirm if a POS docket/invoice is to be printed has been increased. 11699
- If the POS Defaults are set to 'Ask for Rep on each Sale' and 'Prompt for Account on each Sale', these prompts are now combined on one pop up screen so they can be entered at the same time. 11700



Products

- The Update Stocktake Value to GL screen now has an Exit button to allow cancelling the update if required.

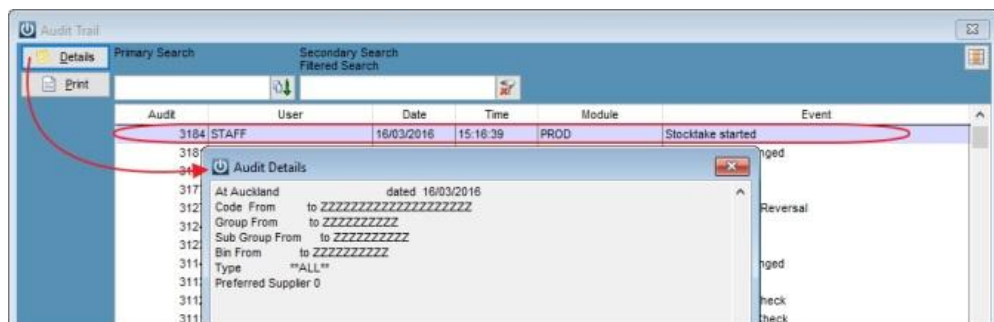
8580



- Trade Me integration has been added to Infusion. To find more information on this please see our knowledgebase article called "Trade Me Integration" at <http://infusion.kayako.com/Knowledgebase/Article/View/822/3/trade-me-integration>
- The Audit Trail (Admin > Other > View Audit Trail) now has a record of when a stocktake is started in the software, storing the details of the user, the time this was done and also the parameters selected for the stocktake (date, location, product range, etc.)

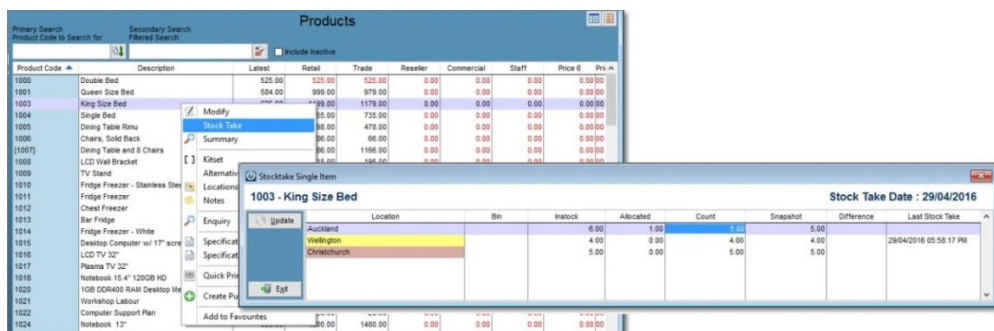
9717

10077



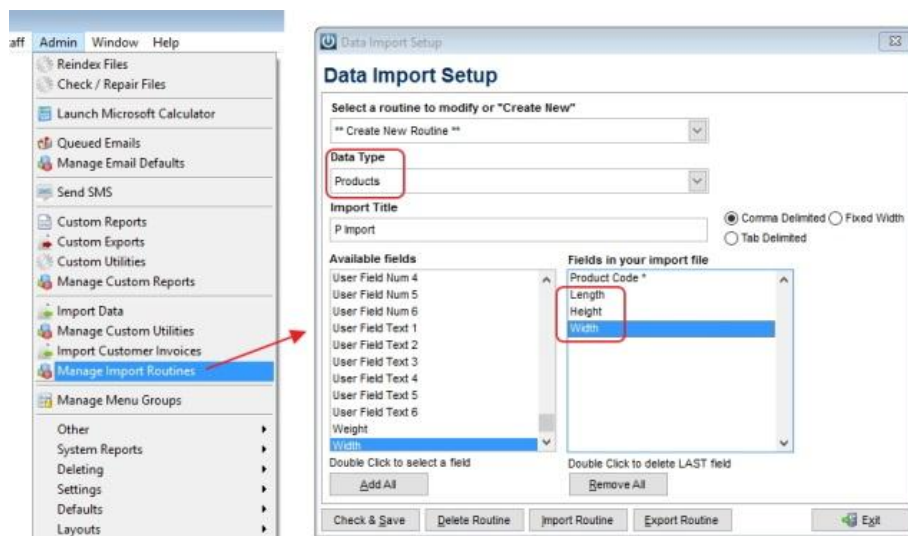
- The option to do a stocktake on an individual product has now been added. This can be done by right clicking on the Product Code in the Manage Products screen. The option is not available for Products that do not track quantities, products that track serial numbers, kitset products set to be created when invoiced and inactive products. Also, if the product is included on the range of an open stocktake, or the Modify Product screen is open by another user, the individual stocktake is not available and the user will see a warning message.

10078



- The fields Height, Length, and Width are now available to be included on import routines of Data Type of Products.

10545

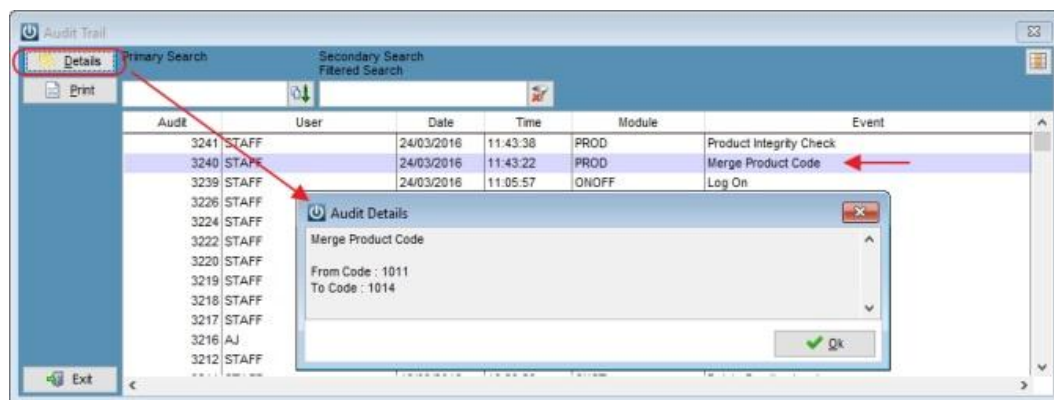


- An issue with the Product Import Routine rounding the value of volume and weight if the software product defaults are set to 4 decimal places has been fixed. (Example: if the import file has the value 3.7394 on the weight column, and the software is set to 4 decimals, the value imported will be exactly 3.7394 instead of 3.7390)
- The problem of a kitset product set with a different % value of product group mark-up than the % set on the components not calculating the correct cost and sell prices until the kitset is re-opened if a component was changed has been fixed.
- The Merge Product Codes utility now creates a record in the Audit Trail. (Admin > Other > View Audit Trail)

10546

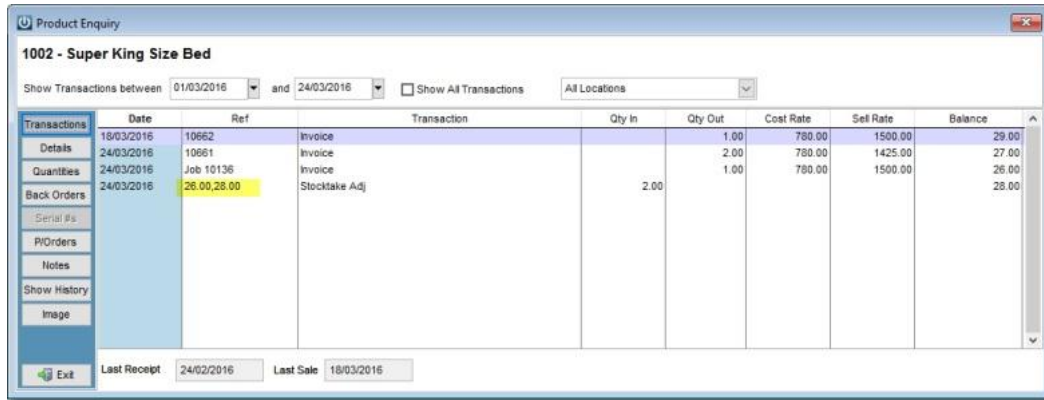
10591

10840



- When a Stocktake has been updated, the Product Enquiry screen of an adjusted Product now shows the quantities related with that adjustment on the reference field: the value on the left is the quantity before adjustment; the value on the right is the quantity after adjustment.

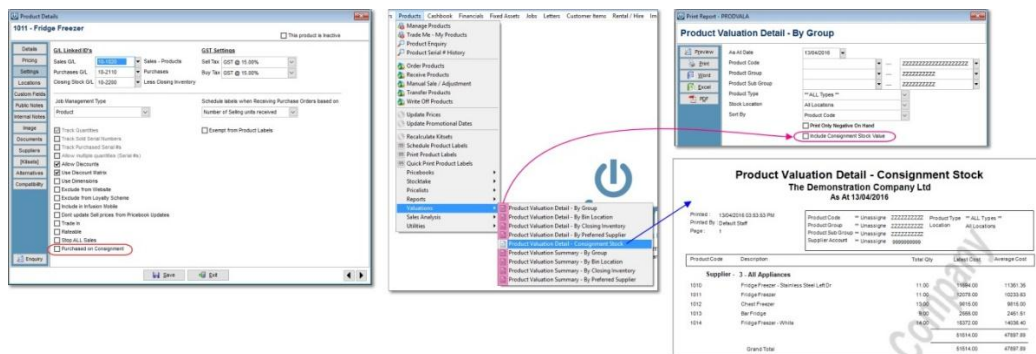
10845



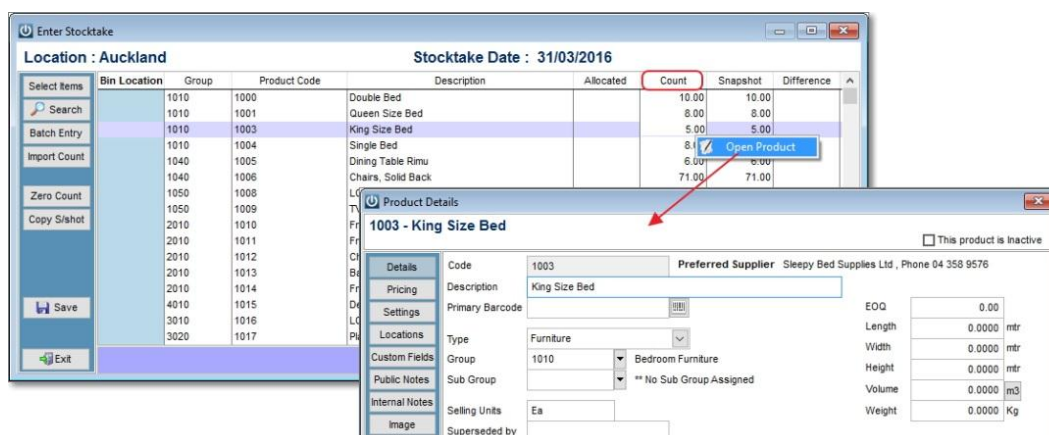
Transactions	Date	Ref	Transaction	Qty In	Qty Out	Cost Rate	Sell Rate	Balance
Details	18/03/2016	10662	Invoice		1.00	780.00	1500.00	29.00
	24/03/2016	10661	Invoice		2.00	780.00	1425.00	27.00
Quantities	24/03/2016	Job 10136	Invoice		1.00	780.00	1500.00	26.00
Back Orders	24/03/2016	26.00, 28.00	Stocktake Adj	2.00				28.00

- An error occurring on multi-user sessions, where one user tried to Enquire on the Notes tab of a Product while another user was editing the same Notes has been fixed. 10853
- Inconsistency of quantity of characters stored and displayed on Products Custom Fields Text1 through to Text6 has been addressed. The quantity of characters is now consistently 40. 10890
- An issue where changing the pricing method on a Product from Product Group Mark-ups to Manual Pricing was not automatically refreshed forcing the user to close the Product and open it again in order to see the change has been fixed - the change is now reflected immediately. 10920
- A calculation problem on Products with ratio values less than 1, which were resulting in receipts for the entire quantity with a negative quantity on order created attempting to offset the difference has been fixed. Example: a product with ratio of 0.25 was ordered as quantity of 1, and the receipt was recording a total of 1 received into stock, with a quantity on order of -0.75. Now the receipt will record correctly 0.25 received into stock and no negative on order quantity will be created. 10929
- Entering a duplicate barcode on a Product has been stopped. 10933
- A problem with the Product Min/Max By Location report printing blank descriptions when it included different Products with the same description has been fixed. It now prints the description on the first line for each Product code. 10948
- When importing Bin Locations, the software will now automatically convert the characters to upper case if they are in lower case in the import file, to ensure these Bin Locations appear in stock take. 11002
- A new tick box has been added to the Settings tab of a Product screen to identify it as a Product 'Purchased in Consignment'. Products marked as such are ignored in the calculation of the Update Stock Value to GL utility. A new 'Product Valuation Detail - Consignment Stock' report has been created to show these items. All other Product Valuation reports will ignore these Products unless the box 'Include Consignment Stock Value' box is ticked. 11048

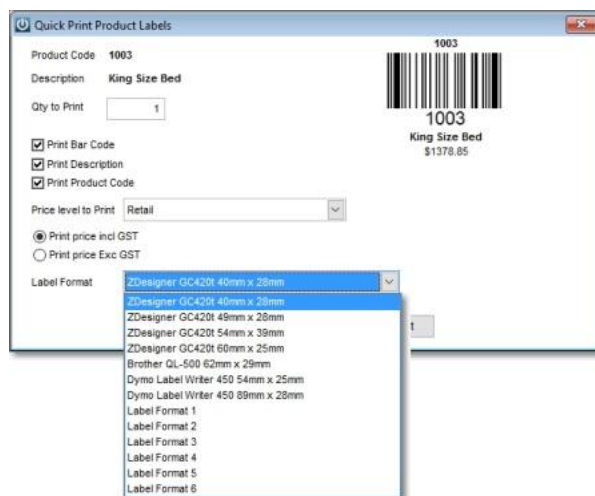
Infusion Software v8.414 Upgrade Notes



- Product and Stocktake Valuation reports can now be printed including or excluding Consignment Products. 11049
- The ability to open a Product when in the Stock Take window has been added. To operate, right click when in the 'Count' column. 11073

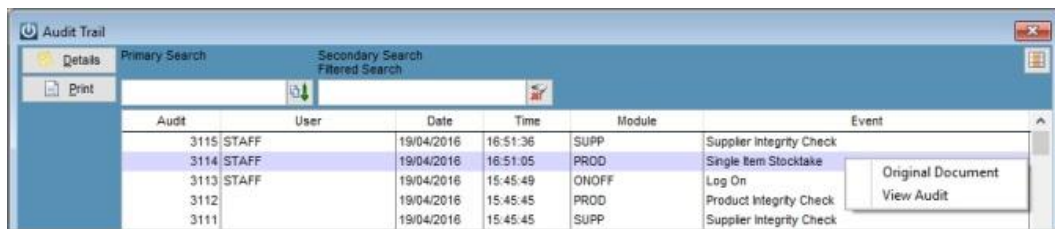


- A new field was created in the PRODBALS table to store the time stamp of an updated stocktake. This time stamp will be visible when new stocktake transactions are updated and will show in the enquiry screen of a Product, as well as the new individual stocktake option (see #10078). 11078
- New Product Barcodes have been designed. These are set up for a range of pre-defined label sizes and printers, using the barcode Image rather than the font. The Quick Print Product Labels screen has been updated to display an example of the barcode to be printed, indicating the label type size and format. 11086



- The Audit Trail now shows the exact audit number corresponding to the stock take transactions and the user can also see the right click options to open either the drill down or the transaction layout.

11104



Audit	User	Date	Time	Module	Event
3115	STAFF	19/04/2016	16:51:36	SUPP	Supplier Integrity Check
3114	STAFF	19/04/2016	16:51:05	PROD	Single Item Stocktake
3113	STAFF	19/04/2016	15:45:49	ONOFF	Log On
3112	STAFF	19/04/2016	15:45:45	PROD	Product Integrity Check
3111	STAFF	19/04/2016	15:45:45	SUPP	Supplier Integrity Check

- SPROCKIT only: A new field has been added to the Modify Products screen to assign Target Groups to the Products. Target Groups are setup under Admin \ Settings \ Products. Under the Target Group, Financial year targets for Quarters 1,2,3,4 can be entered. The Target can be either a Number of Units or a Dollar Value. Target Group is NOT Mandatory on the Product Setup. Two new reports have been created: Stihl Target Report - Selected Quarter and Stihl Target Report - Full Year. These two new reports are listed at the bottom to the Customer \ Sales Analysis menu.

11114

- A new parameter is now available for selection on the Inactive Products utility: Created Before: < date>. The utility will select only Products that have been created before the nominated date.

11159

- Certified Partners: the Job Management Type 'Product' is no longer duplicated in the drop down list under the Product Setting screen. The upgrade to this version automatically unifies the values of the items previously sitting in the drop down list to just 0, instead of 0 and 3. Customised reports that used the value 3 will have to be updated to use the value 0.

11183

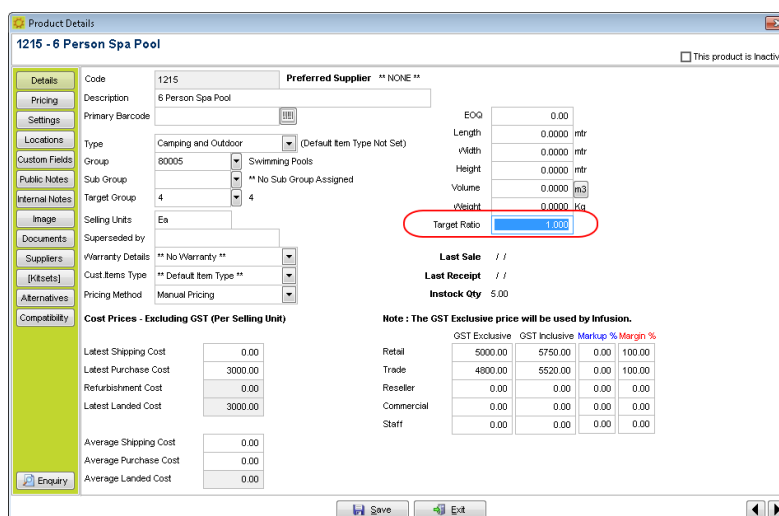
- A problem with Saved Product Manual Orders (Products / Order Products) creating allocated quantities in the Product after an Integrity Check has been fixed.

11194

- An error occurring when trying to link a Pricebook Item to an existing Product Code has been fixed.

11273

- SPROCKIT Only: A new Field has been added to the Product Maintenance Screen, only visible when the Target Group is set and this group is set to be UNITS. The SPROCKIT Target Reports will multiply the sale / order quantities by this ratio.



Product Details
1215 - 6 Person Spa Pool

Code: 1215 Preferred Supplier: ** NONE **

Description: 6 Person Spa Pool

Primary Barcode: [Barcode]

Type: Camping and Outdoor (Default Item Type Not Set)

Group: 80005 Swimming Pools

Sub Group: 4 ** No Sub Group Assigned

Target Group: 4

Selling Units: Ea

Superseded by: [None]

Warranty Details: ** No Warranty **

Cust Item Type: ** Default Item Type **

Pricing Method: Manual Pricing

Cost Prices - Excluding GST (Per Selling Unit)

Latest Shipping Cost	0.00
Latest Purchase Cost	3000.00
Refurbishment Cost	0.00
Latest Landed Cost	3000.00
Average Shipping Cost	0.00
Average Purchase Cost	0.00
Average Landed Cost	0.00

EQG: 0.00

Length: 0.0000 mtr

Width: 0.0000 mtr

Height: 0.0000 mtr

Volume: 0.0000 m3

Weight: 0.0000 kg

Target Ratio: 1.000

Last Sale: //

Last Receipt: //

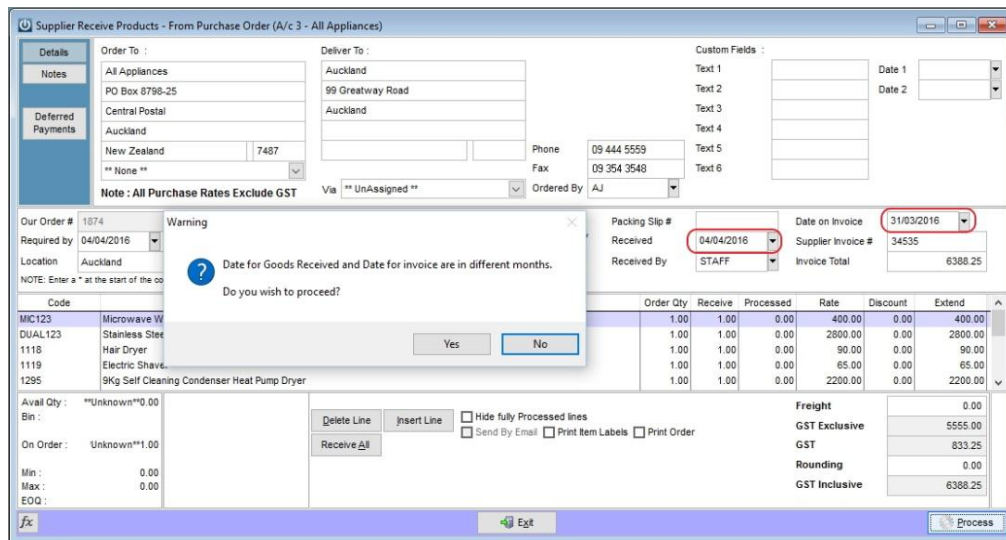
Instock Qty: 5.00

Note: The GST Exclusive price will be used by Infusion.

	GST Exclusive	GST Inclusive	Markup %	Margin %
Retail	5000.00	5750.00	0.00	100.00
Trade	4800.00	5520.00	0.00	100.00
Reseller	0.00	0.00	0.00	0.00
Commercial	0.00	0.00	0.00	0.00
Staff	0.00	0.00	0.00	0.00

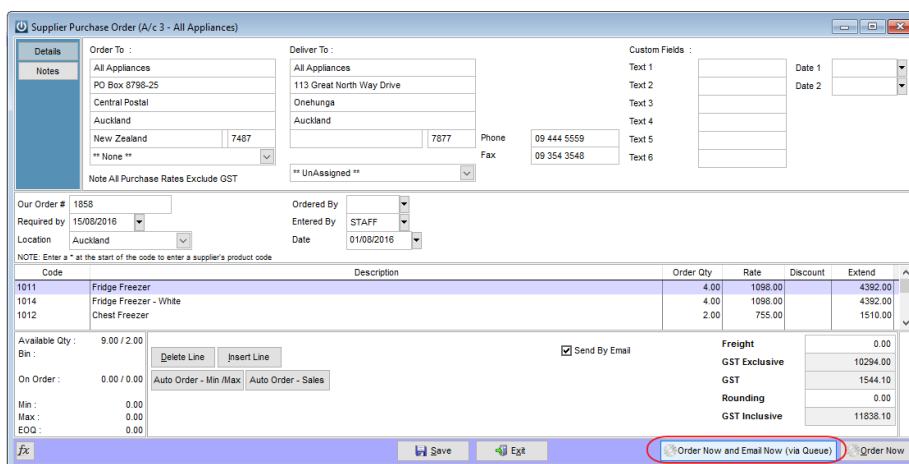
Purchase Orders

- The ability to sort a Purchase Order at any status by Code, Description, Quantity or Rate has been added. 10157
- An issue on the Purchase Order screen where the grid was automatically scrolled down hiding the top lines if the last line was deleted and enter or tab were pressed has been resolved. 10367
- SPROCKIT: When making a Purchase Order to Stihl, if the Order Type is a Customer Special Order, the software will now prompt to send the order to Stihl through EDI just as it does for other Order Types. 10527
- The Required By date field in Purchase Orders can no longer be left blank. The screen will have the date pre-populated with "today's" date by default; if the value in the field is manually deleted and left blank, the software will still record the transaction with "today's" date on Save / Order Now / Process. 10528
- A problem with the "Outstanding Purchase Orders" report not filtering correctly when reporting for All Locations or single selected Location has been fixed. 10537
- SPROCKIT: A problem with Customer Special Purchase Orders being recorded under an incorrect type when the order was created for Stihl has been fixed. 10927
- Purchase Orders created from the Quote now have the status SAVED instead of ORDERED. 10938
- An error caused by having the character '/' in the Purchase Order number field when trying to use the 'Email Now' option has been corrected. 10995
- When receiving the products on a Purchase Order WITH the Supplier's Invoice, if the date of the receipt is in a different month to that of the Invoice, a warning will appear giving the user the option to continue processing or to go back and change the date. 11007

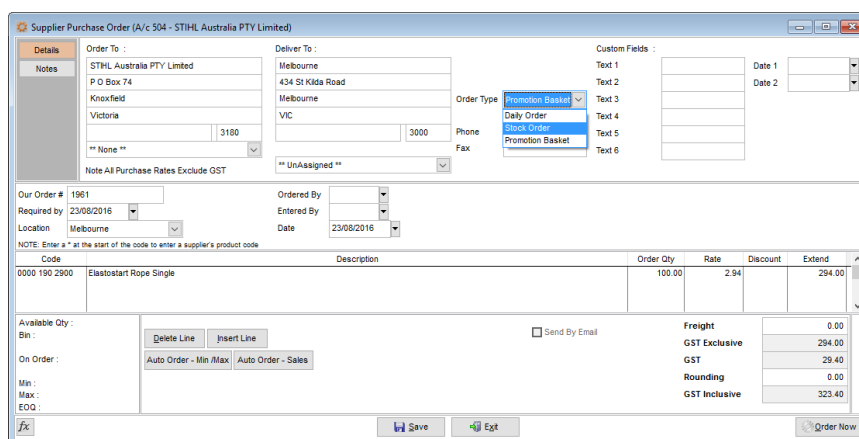


- A problem with Supplier Invoices not populating the due date field for Invoices due at the end of February when supplier terms are set to 30 days after end of month has been fixed. 11032
- The Purchase Order screen now warns that changes will be lost if a user attempts to close without Saving or Processing, regardless of the Status of the Purchase Order, unless completed. 11067

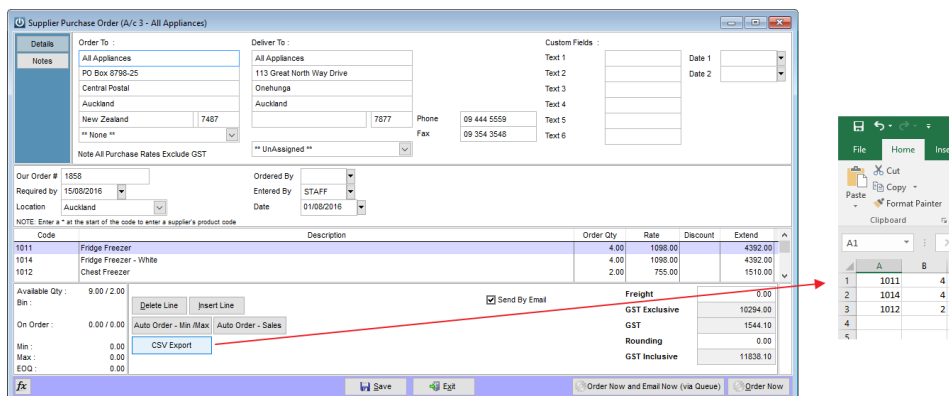
- When a job management purchase order line is receipted and the order is for a location which is not the job locations - the goods are received into the job location and issued from the job location; the journal for the purchase uses the location of the job when determining the correct GL account for the supplier invoice. Purchase Orders now can only order products for the ordering location and one other location (unless you are using deliver to site addresses in which case only one location may be used). 11096
- A problem on Customer Special Orders where the Best Rate warning appeared if the name of the Customer was typed on the field instead of using the lookup screen has been fixed. The cause of this was the typed name did not match a sort key, therefore the software was not finding the correct Customer. Now, if the typed name does not match the sort key, the lookup screen is opened automatically. 11307
- A problem with the Purchase Order Type not displaying when a Saved Purchase Order was recalled has been fixed. 11393
- The Purchase Order forms have been updated to ensure the correct purchase GL/ID is used on the financial record of the transaction, even when Location is modified. 11443
- A new button 'Order Now and Email Now (via Queue)' has been added to the Purchase Order screen. This button will mark the purchase order as 'ordered' and immediately send the email out to the supplier, without having to open the Queued Emails screen. This button will be enabled if the Supplier has been set with email links and the logged in user has permission to 'Email Now' (Staff / Manage Staff / Login / Allow 'Email Now'). Turning off the tick box 'Send by Email' on the screen will disable the button. 11564



- The purchase order type 'Stock Order' has been included in the SPROCKIT Australia software



- Added the ability to export the product code and the quantity from lines of a new or saved purchase order to a CSV comma delimited file. The user will be prompted for a place to save to save the file. The default name of the file will be the supplier sort key, then the purchase order number and finally the date of the export. For example: allapp185825082016.csv



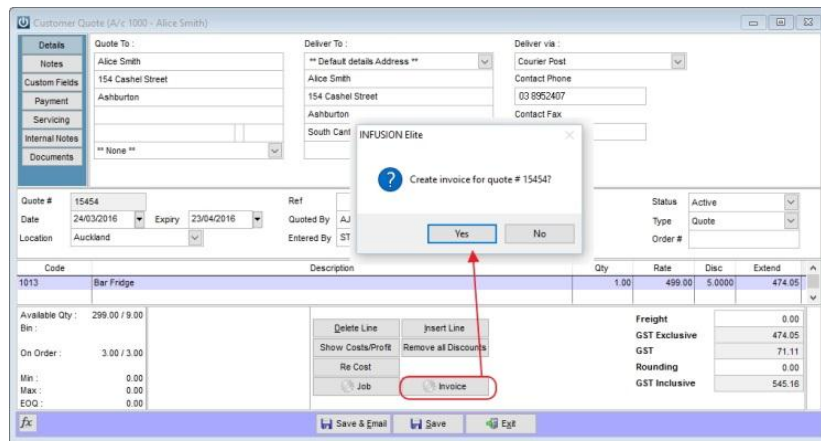
- Added the ability to Export new and saved purchase orders in TAB format. 11683
- Corrected an error in the supplier receipt report, causing it to crash when the receipt was printed for multi-location purchase orders. 11686

Quotes

- A new "Job" button on the Quote screen has been added to allow converting the Quote to a Job without having to Save the Quote first and use the Job button of the Manage Quote screen. This new button acts as a 'shortcut': it will Save the Quote automatically and change its status to "Accepted". The Job function on Quotes has also been tidied up and made more straight forward, so the user can select clearly if the Quote is to be attached to an Existing Job or if a New Job is to be created, or even if the process is to be cancelled. 10833



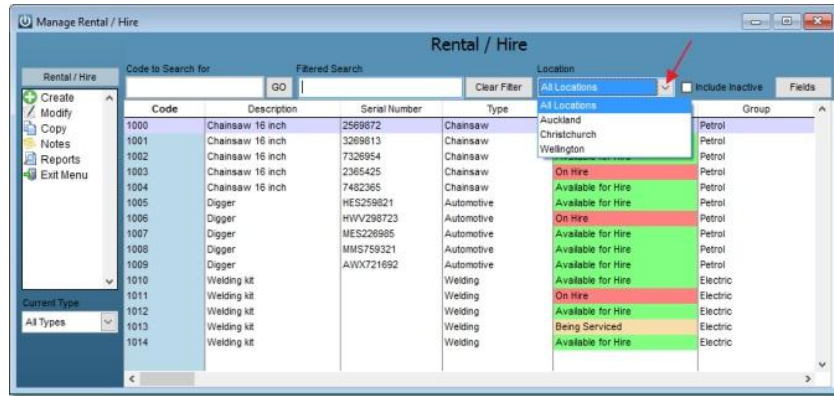
- A new "Invoice" button on the Quote screen allows creating the Invoice directly from that screen, without having to Save the Quote first and using the Invoice button of the Manage Quote screen. This new button acts as a 'shortcut': it will Save the Quote automatically and change its status to "Accepted". 10834



- A duplication of shortcut keys on the buttons of the Quote screen has been fixed. "Save and Email" now responds to Alt+E, "Save" responds to Alt+S 10854
- The ability to sort by the columns in the grid of the Quote screen has been added. 10915
- A problem where the order of Quote lines was not retained after saving the transaction if the lines had been re-ordered using the Move Up (F2) and Move Down (F3) functions has been fixed. 11043
- When a Quote is set to type Estimate and is emailed, the word inside the parenthesis in the subject field of the email will now be Estimate. The first word in the subject field (outside the parenthesis) is set under Admin > Manage Email Defaults > Quotes tab. 11053
- A problem where Quotes created with a Note in the first line (/N) and rounding not calculating the correct total has been fixed. 11112
- A numeric overflow error occurring with large mark-ups on Quotes caused by lines with very low cost and very high rate has been corrected. 11202

Rental Hire

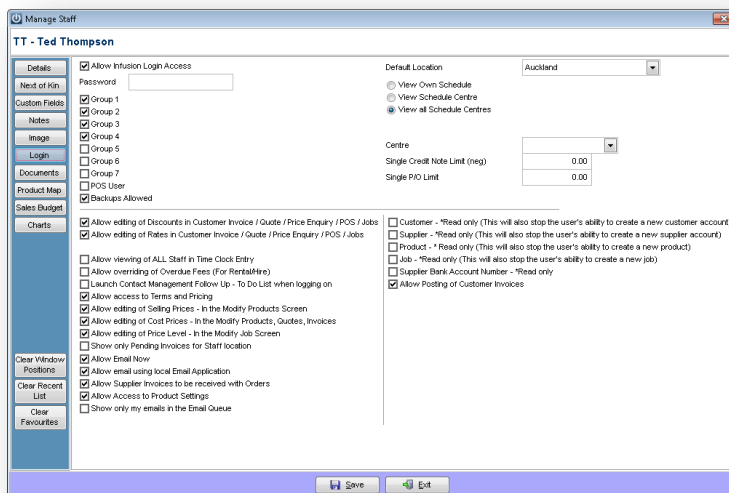
- Rental Hire Returns with Product credits now show correctly in the cash drawer. The Payment no longer processes with the Return Invoice automatically when no prompt is given. When the Payment Prompt is shown, the user can select to charge to an account. This also corrects the incorrect payment problem if a hire was returned early, resulting in credit note. 9313
- A problem with Rental Hire not using the correct Sales GL code if the location was modified on the transaction has been fixed. 9515
- When "Manage Customer Defaults > Invoices - Always Prompt for Payment when Invoicing" is ticked, this now flows through to Rental Hire Invoices and Returns as expected. 9837
- A problem where a Rental Hire could not be extended if a previous cancelled booking was being found to clash with the hire period has been addressed. 9918
- An error occurring when trying to preview a reminder letter for RH Booking has been fixed. 10285
- The Manage Rental Hire Items screen and Lookup screens now allow to list rental hire items for ALL Locations or to select one Location to display. 10677



- Rental Hire Sub-Groups can now be associated with a Group. 10902
- The HIRE01 and RETURN01 standard layouts have been updated to include the Paid Today and Balance Due information as per the Customer Invoice Layouts. Existing customised layouts will have to be modified as well if users' wish to see this information on them. 10910
- An error occurring when trying to delete a pending Rental Hire transaction has been fixed. 10970
- An error occurring in Rental Hire when using 'Ctrl+End' and 'Alt+Home' has been sorted. 11158
- A problem stopping users setting a date range, click or tick boxes in the "Rental / Hire Reminders" screen when looking at 'Bookings' has been fixed. 11195
- The flow of the cursor when pressing TAB or ENTER on the Create Rental Hire, Return Hire and Extend Hire screens has been improved - the focus does not move to the EXIT button as a first option. Also corrected was a problem where intermittently only whole numbers were accepted instead of numbers with decimals on freight and rounding fields. 11380

Staff

- Four new flags have been added to the Staff screen on the LOGIN tab to allow setting up a user with Read Only permission for Customer, Supplier, Product and Job records - to stop the user from making changes or creating new records. 11184
- A new tick-box has been added under the Staff set up to restrict a user from modifying the bank account information of a Supplier set up. 11187
- The Staff maintenance screen has been resized to be wider in order to accommodate for smaller screens of laptops. 11702



Suppliers

- The Bulk Supplier Payment screen is now correctly refreshing and removing the transactions from the screen when creating a zero payment to apply credits to debits, without having to close the screen and re-open it. 9267
- Users can no longer type on the Ref, Code and Particular fields of the Bulk Supplier Payment screen. These fields have now been locked since the exported batch would always use the information set up in the Supplier account instead of what users were manually typing on the screen. 10047
- An error occurring when entering a past date on the Suppliers Periodic Charges screen has been fixed. 10899
- A problem where a saved Supplier Invoice (No Products) was using the link number as the audit number when posted from the Pending Supplier Invoices screen without being re-opened first has been corrected. 10973
- Invoices entered to Supplier accounts marked as International now are categorised correctly as GST Exempt instead of GST Zero Rated. 11084
- The right click menu on the Supplier's Management screen now includes the option to print the highlighted supplier's statement. 11696

