

Infusion Business Software Update 8.425

Admin

- It is possible to select now if the software is to 'Keep Attachments' of previously sent emails. This tickbox is found in the Manage Email Defaults screen under the Admin menu. By default, the setting will be left as ON after the upgrade to 8.419 to continue with the current setting, however, **we strongly recommend this is turned off after the upgrade is done.** It is important to understand that although keeping the attachments allows for a quick re-send of an email directly from the Email Queue without having to generate it again, it also means the size of backups will increment overtime and also will increase the time it takes to complete the backup. Turning off the 'Keep Attachments' option will purge all the attachments from already sent emails reducing the time of creation and size of backups - Emails can be generated again in the software, which will create a new attachment to send. **#11781**
- A problem with the emailing letters process which was not resetting default seek configuration back to the default has been corrected. This caused problems with invoices where GST was not being calculated because the system was not able to find the GST CODE necessary. This has also corrected problems in some drop down lists where the contents of the list could not be selected. **#11977**

Central Billing

- An error happening when trying to invoice a customer linked to a Central Billing account from the POS screen has been fixed. The POS user can still make an invoice for the customer, but only using the Customer Invoice form, from the Invoices/Quotes menu, and the transaction is automatically charged to the account. **#11628**
- Customer accounts linked to Central Billing on a branch data set no longer allow matching of invoices and credit notes in the branch system. **#11794**
- Updated the Authorise Branch Invoices screen has been updated to handle multi-user scenarios more efficiently. **#11798**
- An error occurring in Central Billing module when trying to synchronise a payment containing a discount portion back to the branch has been fixed. **#11825**
- The Discount column has been added to the Payment Due to Branches report in the Central Billing module. **#11827**

- A problem in the Central Billing module where the Order Number was not updating the Customer Transaction screen if the Order Number was entered after posting the invoice using the Edit function from the Invoices tab of the Customer Enquiry Screen has been fixed. **#11863**
- Invoices tagged as On Hold cannot be rejected now - the user must remove the hold tag from the transaction before being able to reject it. **#11875**
- A problem with Sales History displaying amounts inclusive of GST in the Customer Enquiry of Central Billing has been corrected. Newly synchronised transactions from this version onwards will be fine; please call Infusion Support for the correction of older existing transactions in Central Billing. **#12114**

Customers

- The Customer Sales Analysis report - Date Range (CUSTSA40) now has the column headers in the correct place when the report is exported/saved as excel. **#9263**
- An error occurring in the Customer Enquiry screen when selecting to show All Transactions and sorting by Ref has been fixed. **#11851**
- The Customer Aged Trial Balance – with Invoices (CUSTATBD) report has been updated to handle account numbers larger than seven characters. **#12020**

Customer Items

- A new report called Forecasted Services to highlight the spread of services over the 12 months, including overdue services has been included under the Customer Items menu. **#11757**

Financial

- A problem has been resolved where comparative financial reports run for the end of February weren't including 29th of February values for last year (when it was a leap year). **#7564**
- A problem with the Get Budget function in the Budget screen bringing in income values in with the opposite sign has been fixed: positive values were being populated as negatives, and vice-versa. **#11903**

General

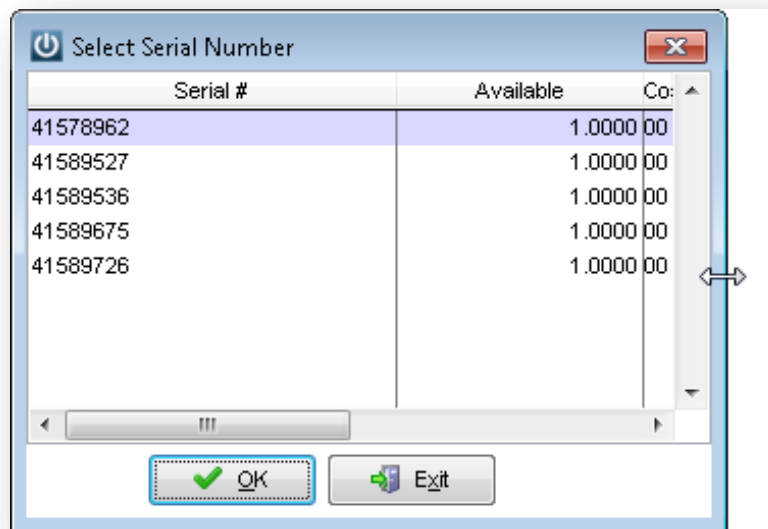
- All Post Code fields throughout the software now accept up to 10 characters. **#11836**

Import / Export

- The Mitre 10 Customer Invoice key file import has been updated as it was not handling correctly lines for unavailable stock quantities. **#11802**

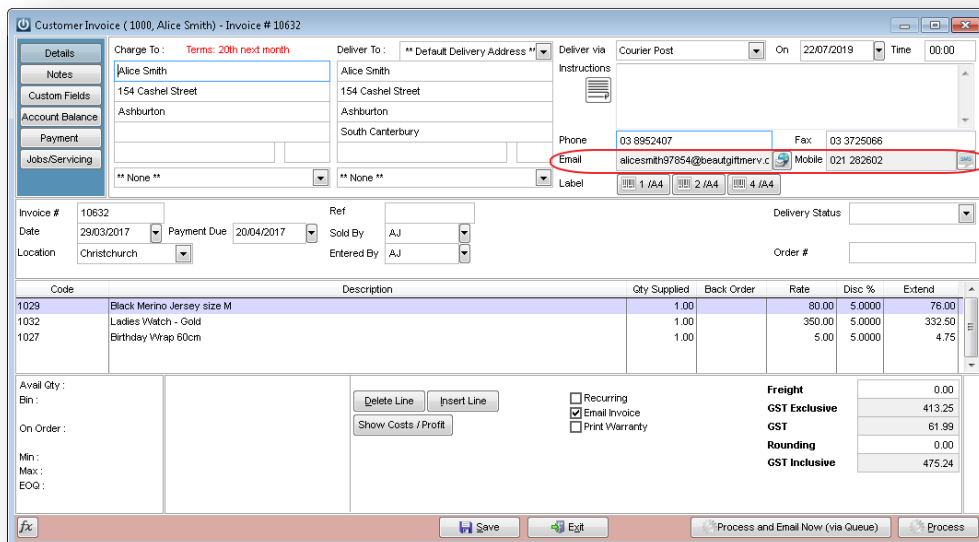
Invoices

- The pop up screen for selecting serial numbers on a customer invoice or POS invoice will now retain the size if the user changes its width in order to hide the cost column from view. This preference is saved per user. There is a scroll bar at the bottom that allows the user to see the cost column if required without having to re-size the screen again. **#10726**



- A display issue has been fixed where the date changing to the current date when opening a Posted Invoice screen in Read Only mode on systems set to 'update date on opening Pending Invs' under Customer Defaults. Now Posted Invoices display the correct date of the transaction in the read only invoice screen. **#11822**

- A problem has been corrected where using the Filtered Search field of a Product Lookup screen on Quotes and Invoices was too slow. **#11831**
- The main Mobile Number and Email Address have been added to the Customer Invoice screen allowing for quick emailing and SMS creation. **#11843**



Customer Invoice (1000, Alice Smith) - Invoice # 10632

Details: Charge To: Terms: 20th next month, Deliver To: ** Default Delivery Address **, Deliver via: Courier Post, On: 22/07/2019, Time: 00:00

Notes: Alice Smith, Custom Fields: 154 Cashel Street, Ashburton, South Canterbury, Account Balance: ** None **, Payment: ** None **, Jobs/Service: ** None **

Phone: 03 8952407, Fax: 03 3725066, Email: alicsmith97854@beautifultimerv.c, Mobile: 021 282602

Invoice # 10632, Date: 29/03/2017, Payment Due: 20/04/2017, Sold By: AJ, Entered By: AJ, Location: Christchurch, Delivery Status: , Order #:

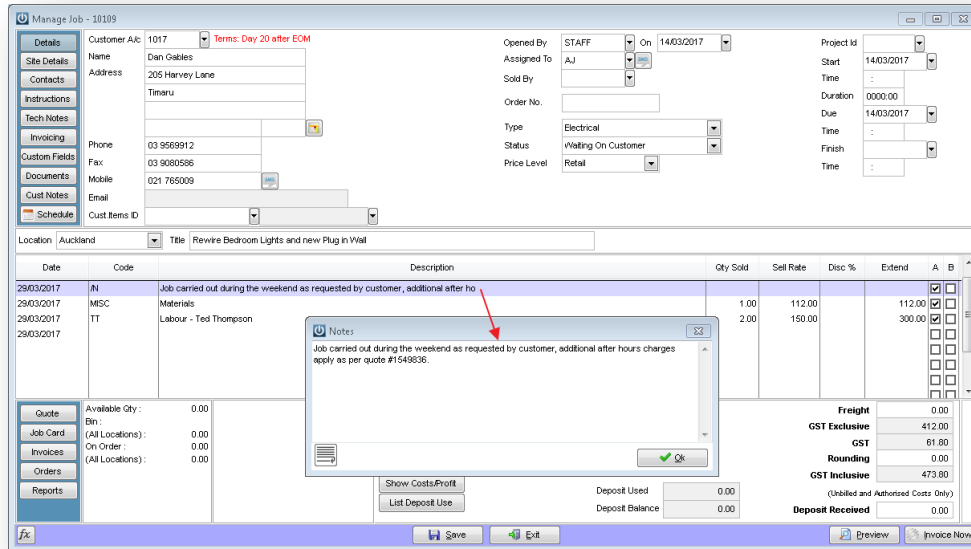
Code	Description	Qty Supplied	Back Order	Rate	Disc %	Extend
1029	Black Merino Jersey size M	1.00		80.00	5.0000	76.00
1032	Ladies Watch - Gold	1.00		350.00	5.0000	332.50
1027	Birthday Wrap 60cm	1.00		5.00	5.0000	4.75

Avail Qty: , Bin: , On Order: , Min: , Max: , EOQ: , Delete Line, Insert Line, Show Costs / Profit, Recurring, Email Invoice, Print Warranty, Freight: 0.00, GST Exclusive: 413.25, GST: 61.99, Rounding: 0.00, GST Inclusive: 475.24

Save, Exit, Process and Email Now (via Queue), Process

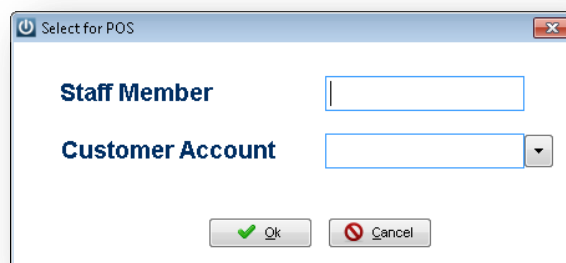
Jobs

- An issue where the value in the Duration field of a job was being re-set to zero when the Job Type was changed has been fixed. **#11589**
- A problem with the Job Invoice Preview report showing incorrect data when selecting to preview details from Quote has been fixed. **#11594**
- An issue where other menus and options were disabled if a job was open on the screen in the last version has been addressed; other menus are again available now. **#11874**
- A problem with the Job screen losing focus when clicking on a date field if the Job Scheduler screen was also open, making the Job screen move behind the Job Scheduler screen has been fixed. **#12002**
- The Note pop up box now opens as expected when tabbing into the Description field of a Job line, allowing the entire Note entered to be viewed. **#12006**



POS

- The pop up message box that prompts for a user name and account number before opening the POS screen for a new transaction has been resized. **#11753**



- An issue where the POS screen was not re-opening if a recall action found no pending transactions to recall has been addressed. **#11834**
- A problem where recalled transactions in POS were automatically set to rounding, even when a payment method had not yet been selected has been corrected. **#11835**

Products

- The Stocktake Sheet - Serial Number Products report now also includes serial tracked products with zero quantity on hand. When running the report, the user has the ability to exclude zero quantity items if required. **#4203**

- A problem with credit notes for serial numbered products leaving the quantity as allocated and not returning it to stock if the credit note was created using the credit/recharge utility from the Invoices/Quotes menu has been corrected. **#12008**
- Corrected a problem in the Serial Number History screen and now it displays the information of sales if it refers to a job as expected. **#12024**
- The standard Stocktake Sheets - Serial Numbered Products report has been modified to include the total 'On Hand' quantity for the location selected next to the name of the product. This total comes from the PRODUCTS file and allows for a quick comparison with the calculated total in the listing of serial numbers below which comes from the SERIAL NUMBERS file, making it easier to spot discrepancies. **#12077**

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Stocktake Sheets - Serial Numbered Products

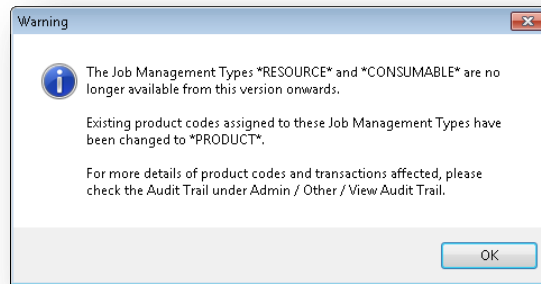
The Demonstration Company Ltd
Auckland

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Page: 1

Product Code	** Unassigned *	ZZZZZZZZZZ	Product SubGroup	** Unassigned	ZZZZZZZZZZ
Group	** Unassigned *	ZZZZZZZZZZ	Product Type	** ALL Types **	
Includes Products with Nil On Hand			Bin Location	** Unassigned	ZZZZZZZZZZ

Serial #	Reference	On Hand	Allocated	Stock Take Comments
Bin Location :				
Product Code : 1310 - Ride On Mower 48" Cut				
41589536	PO 1873	1.00	Ea	
41589527	PO 1873	1.00	Ea	
41578962	PO 1873	1.00	Ea	
41589726	PO 1873	1.00	Ea	
41589675	PO 1873	1.00	Ea	
		5.00		
On Hand 5.00				
Product Code : 1311 - Rotary Mower 20" Alloy				
63589657	PO 1873	1.00	Ea	
63589458	PO 1873	1.00	Ea	
63589461	PO 1873	1.00	Ea	
63589465	PO 1873	1.00	Ea	
63589468	PO 1873	1.00	Ea	
		5.00		
On Hand 5.00				


- The Job Management Types *RESOURCE* and *CONSUMABLE* are no longer available from this version onwards. During the upgrade process, if any existing product codes are found to be assigned to these Job Management Types they will be changed to the Job Management Type *PRODUCT*. A message informing this to the user will appear during the upgrade process. A list of the affected products will be created and saved for the user to review. Pending Quotes and Jobs containing these products will also be changed - the affected transactions will have their lists created and saved for user review. An audit log entry will be created listing the transactions affected and the names of the files containing the lists for user review. **#11979**



Purchase Orders

- Corrected an error occurring when trying to sort columns in the 'Auto Order - Sales' screen. **#9610**
- A new export option was added in Purchase Orders: "OPEA - Export". This is mainly used in Australia. To enable it, it needs to be selected in the Details tab of each Supplier Modify screen. **#11788**
- An error occurring when using the Job Site Delivery Address on a Purchase Order created using the New/Receive option has been fixed. **#11797**
- Packing slip and Invoice numbers have been added to the supplier receipt standard layout SUPPREC **#11829**

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The Demonstration Company Ltd
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RICCARTON
CHRISTCHURCH
Phone : 03 111 2222
Fax : 03 111 2222

Receipt Confirmation

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Received From :

All Appliances PO Box 8798-25 Central Postal Auckland New Zealand	Their Packing Slip Number : 2 Their Invoice Number : 17766 Receiving Location : Auckland Our Order Number : 1875
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Receipt Date : 29/03/2017	Account : 3	Received By : Default Staff
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Product Code	Description	Qty	Rate	Total
AA-MIC123	Microwave White 800W	1.00	400.00	400.00

- A problem on Purchase Orders with multiple Jobs printing the Job id of only one of the Jobs for all lines on some Purchase Order layouts has been corrected. Now all layouts print the correct job id on the corresponding line. The Layouts corrected are: PORDER02 - Grouped by Product Code PORDER03 - Grouped by Location PORDER05 - Grouped by Product Code No Prices PORDER06 - Grouped by Location No Prices PORDER10 - Delivery Status. **#11905**

- It is no longer possible to receive a product with a quantity of zero, either with a packing slip or with a supplier invoice on a purchase order - the user will receive a warning if there are zero quantities in the order. If there are other lines in the purchase order with quantities different than zero, those will be processed and from that stage onwards the zero quantity lines will disappear from the order. **#12048**

Quotes

- Two new reports for Quotes have been added to the software. They can be found in the Invoice/Quotes / Reports menu. They are called Quotes Issued in Date Range (CUSTQTDT) and Quotes Summary by Status (CUSTQTSM). **#11767**
- A problem with Job Quotes showing the Job Number only after being saved and re-opened has been corrected. **#11804**

Rental Hire

- An error in the calculation of totals in the Rental Hire Deposit report has been corrected. **#11777**

Supplier

- Sprockit only: the "Purchase Analysis Report - Date Range" now includes the "Product Target Group" as an option to be selected in the Sort Order fields. **#11742**
- A problem where Bulk Supplier Payments were creating zero payments and blank remittances for other suppliers where invoices had deferred payments has been fixed. **#11772**
- The Xtracta interface was generating duplicated lines or causing discrepancies on some orders and keeping them from being completed in the software when importing invoices for unknown items or credit notes, especially for Purchase Orders that had status Part Fill. This has now been resolved. **#11885**
- Sprockit only: both Purchase Target Reports have been adjusted so purchase orders will only be included if there has been at least a part receipt of the products in the period. **#12067**

System

- The Infusion Remote Access tool has been updated with the current support team's names and the list is sorted alphabetically for easier reading. **#11978**