

These instructions are for v8.430 of Infusion Business software and SPROCKIT.

They 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.

Table of Contents

Before Beginning the Upgrade	2
Technical Note	4
Requesting / Entering an End User License.....	4
Anti-Virus Software.....	5
Windows Data Execution Prevention (DEP), Server Message Block (SMB2) and Opportunistic Locking (Oplocks)	6
Uninstall Wizard	6
Key Features	7
Admin.....	7
Cashbook.....	7
Customer Items.....	7
Invoices	8
Job Management	8
Products	8
Purchase Orders.....	9
Rental Hire	9
Staff.....	9
System.....	10

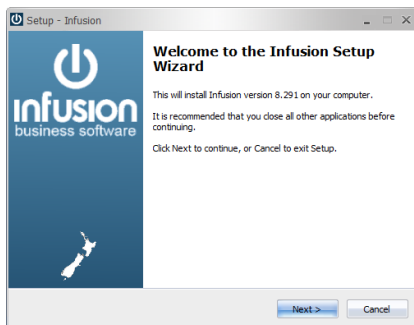
Before Beginning the Upgrade

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. V8.430 will require installation on the server only if upgrading from V8.400 or above. If upgrading from any version prior to V8.400, server AND all workstations installation is required. For any computer being upgraded (server or workstation) a reboot prior to the upgrade is required due to user and registry changes.
5. Upgrading to v8.430 from any version prior to 8.400 will require a new licence. If upgrading after hours, please ensure you request your new v8.4xx license beforehand, inside Infusion office hours.
6. Run the install as an Administrator.

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

The first form is a Welcome form.

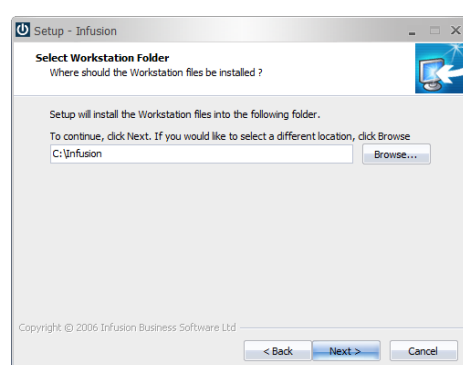
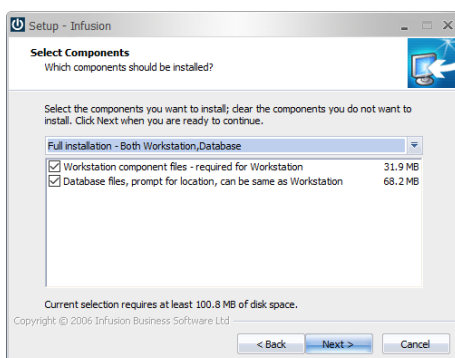
Select **Next**. The License Agreement form is next



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

Select **Next**

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



Select **Next**

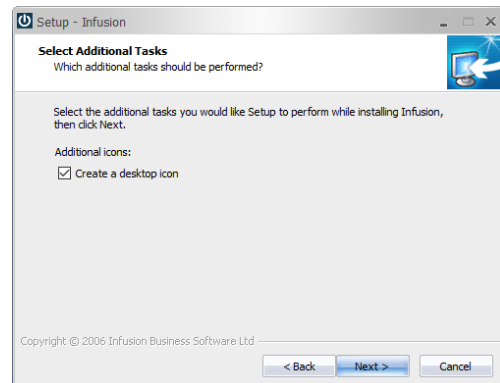
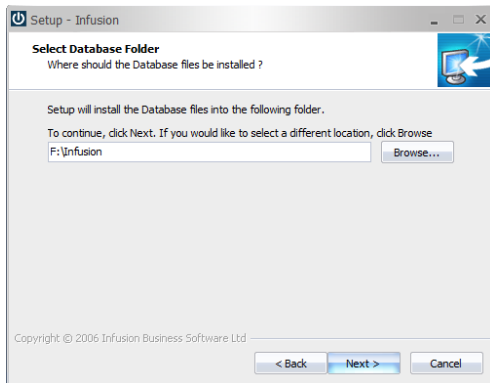
If the "Workstation component files" option was selected you will be prompted for the folder to install these files into. Type in or browse to the required location.

Select **Next**

Infusion Software v8.430 Upgrade Notes



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.

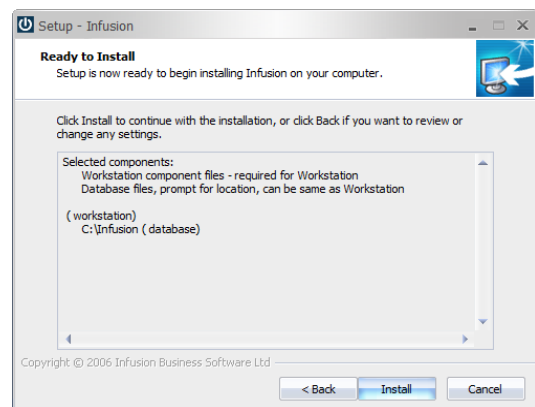
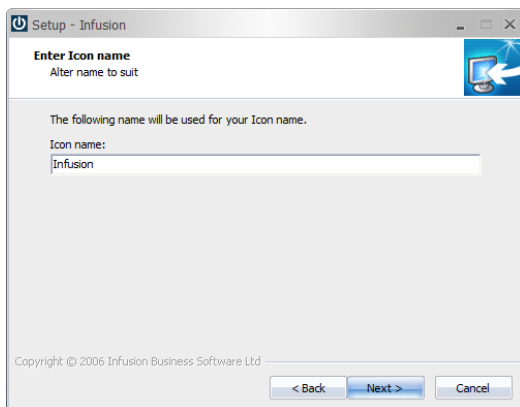
Select **Next**

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.

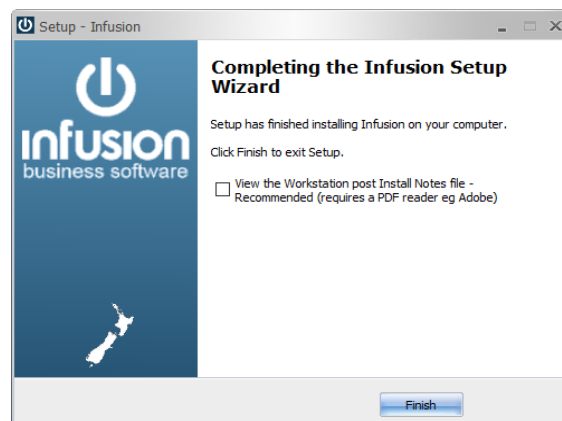
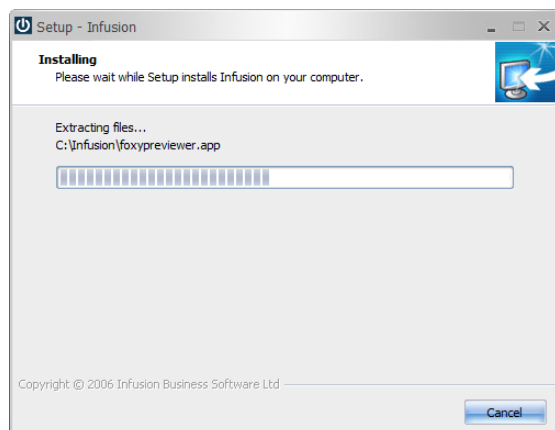


Select **Next**

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

Select **Install**

Infusion Software v8.430 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.

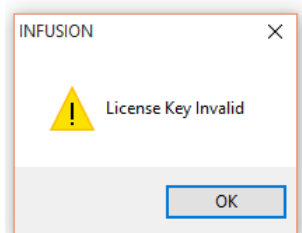
scneme.rtf	21/02/14 11:12 AM	RTF File	3,039 KB
SMS_COMAPI.dll	10/03/05 9:57 AM	Application extens...	140 KB
support.exe	04/06/14 8:18 AM	Application	255 KB
system.app	15/03/13 10:51 PM	APP File	822 KB
Sysupdates.DBF	25/07/15 10:31 AM	DBF File	29 KB
unins000.dat	29/08/15 12:34 PM	DAT File	445 KB
unins000.exe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

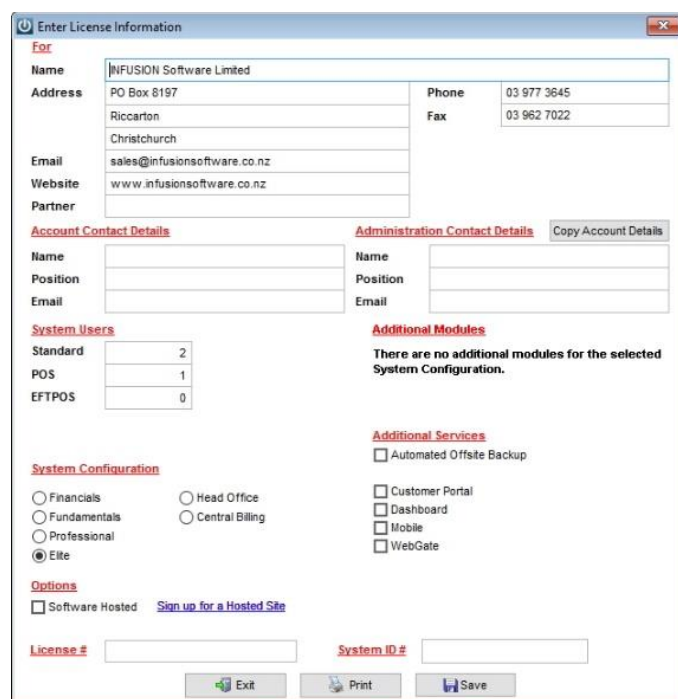
If you install FULL (both Workstation and Database at the same time), running unins000.exe will uninstall both the Workstation AND the Database so it is recommended that two installs are done: firstly install the Database then run it again to install the Workstation.

Requesting / Entering an End User License

Note: v8.430 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. At the top, there's a "For" section with fields for Name, Address, Phone, Fax, Email, Website, and Partner. Below this are "Account Contact Details" and "Administration Contact Details" sections, each with fields for Name, Position, and Email. There's a "System Users" section with a table for Standard, POS, and EFTPOS users. To the right is an "Additional Modules" section with a message: "There are no additional modules for the selected System Configuration." Below that is an "Additional Services" section with checkboxes for Automated Offsite Backup, Customer Portal, Dashboard, Mobile, and WebGate. A "System Configuration" section has radio buttons for Financials, Fundamentals, Professional, and Elite (selected), as well as Head Office and Central Billing. An "Options" section has a checkbox for Software Hosted and a link to "Sign up for a Hosted Site". At the bottom, there are fields for "License #" and "System ID #", and buttons for Exit, Print, and Save.

Anti-Virus Software

A number of anti-virus software packages slow the speed and performance of Infusion as well as lock files. Because of this the Infusion root folder must be added to any exclusion folder available within the anti-virus software setup on all computers running Infusion.

Windows Data Execution Prevention (DEP), Server Message Block (SMB2) and Opportunistic Locking (Oplocks)

Some computers may require DEP settings turned off for Infusion.

Networks with computers having operating systems of Vista and above (i.e. support SMB2) require disabling of SMB2 and Oplocks.

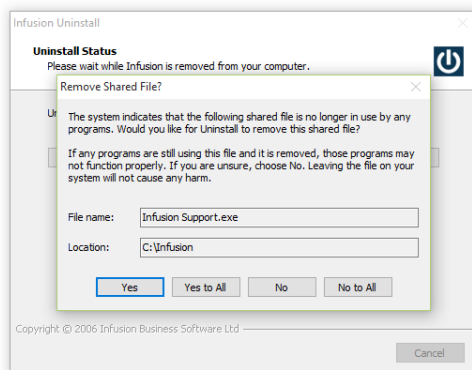
For assistance with these, please refer to the Knowledge Base article below:

<https://infusionsoftware.zendesk.com/hc/en-us/articles/115003413113-Recommended-Settings-for-Infusion>

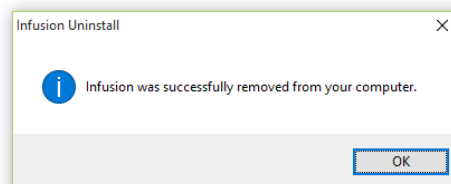
Uninstall Wizard

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

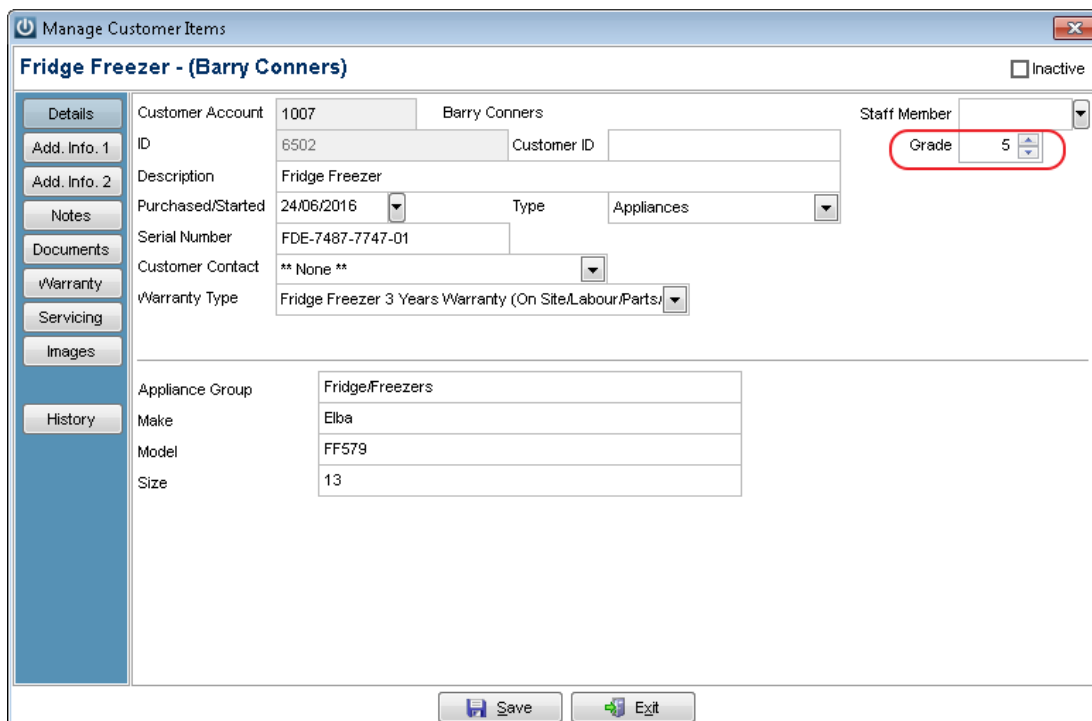
- Sprockit only: The Product Type, Group And Sub Group reserved values have been updated from this version onward. Product Types up to number 79 are system reserved. Users can create, edit and delete only Types starting from number 80 or with letters. Product Groups up to number 7999 are system reserved. Users can create, edit and delete only Groups starting from number 8000 or with letters. Product Sub-groups up to number 799999 are system reserved. Users can create, edit and delete only Sub-groups starting from number 800000 or with letters. 12325

Cashbook

- A new Payment method has been added to the software called "Internet" (for New Zealand) or "BPay" (for Australia) 6850
This may be selected with Customer payments and POS Payments.
Please Note - user must be certain the payment has been received in directly in the bank account before selecting this method in the payment.

Customer Items

- Customer Items - OPE Items may now be graded from 0 to 10 for an indication of the condition of the item: 1 being the lowest and 10 being the highest. Example: 1 is poor condition, 10 is As New condition. 12235



The screenshot shows the 'Manage Customer Items' window. The title bar says 'Manage Customer Items'. The main window has a tab 'Fridge Freezer - (Barry Conners)' and an 'Inactive' checkbox. On the left is a sidebar with buttons: Details, Add. Info. 1, Add. Info. 2, Notes, Documents, Warranty, Servicing, Images, and History. The main area contains the following fields:

- Customer Account: 1007 Barry Conners
- Staff Member: [Dropdown]
- ID: 6502 Customer ID: [Field]
- Description: Fridge Freezer
- Purchased/Started: 24/06/2016 Type: Appliances
- Serial Number: FDE-7487-7747-01
- Customer Contact: ** None **
- Warranty Type: Fridge Freezer 3 Years Warranty (On Site/Labour/Parts/)
- Appliance Group: Fridge/Freezers
- Make: Elba
- Model: FF579
- Size: 13

The 'Grade' field, located next to the 'Staff Member' dropdown, is highlighted with a red circle and contains the value '5'.

- Sprockit only: It is now possible to select a product code for a manually created OPE item, allowing the software to prepare the Warranty to be sent to Stihl. 12289

Invoices

- Sprockit only: Updates made to the Stihl Warranty EDI in order to comply with the new EDIFACT Format required some adjustments in Sprockit to deal with invoices for OPE items.
 - Pending invoices with OPE items cannot be posted from the Manage Invoices screen using the buttons POST1 or POST ALL, the user will see a message explaining why the invoice cannot be posted. The invoice form needs to be opened first so when posting the user can see the Stihl Warranty Questions prompt.
 - The same Stihl Warranty Questions prompt pops up in the POS Screen when finishing an invoice there.
 - The Stihl Warranty Questions prompted when posting invoices are set under Admin / Defaults / Manage SSED Defaults/ Warranty tab.

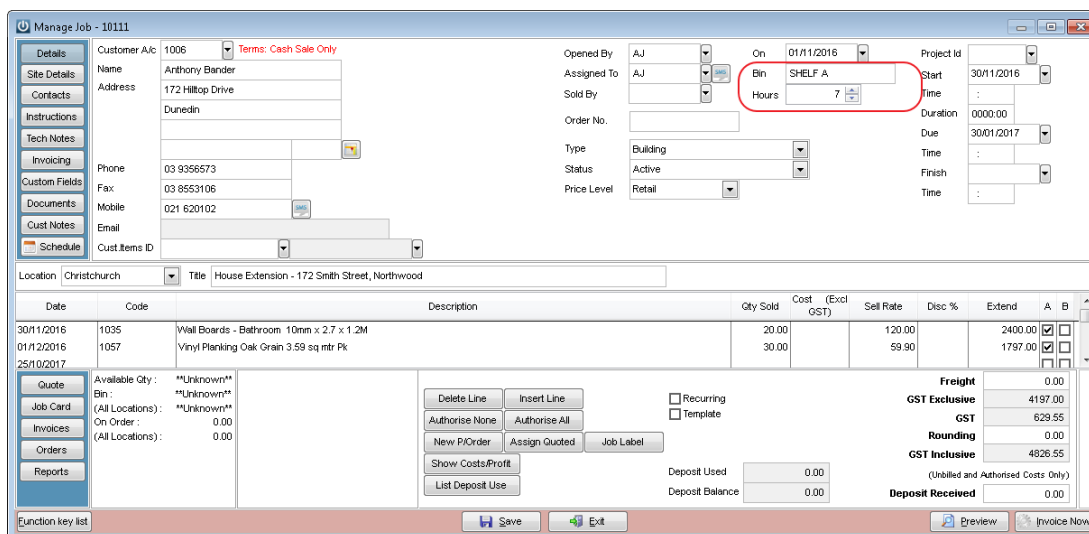
12287

Job Management

- Two new fields have been added to the job modify screen:
 - Bin: this is a text field, 10 characters long, intended for the user to note where the item serviced is stored in the workshop.
 - Hours: this is a numeric field, 8 digits long without decimals, intended for the user to enter the Mileage or the Hours relating to the servicing of the equipment.

12292

Custom Job card reports will have to be altered to add these fields.



- Standard Jobcard layouts have been modified to include the new fields 'Bin' and 'Hours' added to the Job Modify screen.

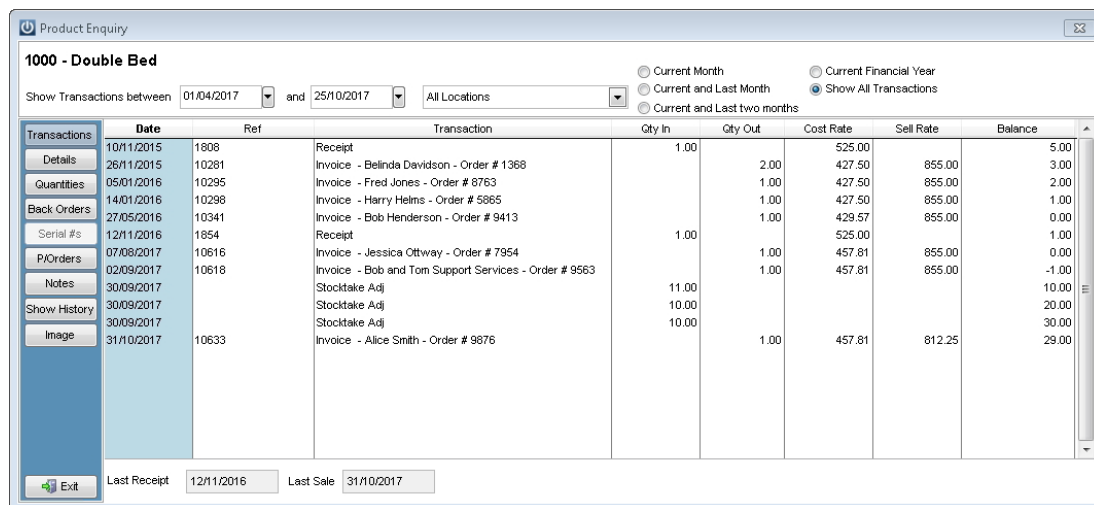
12332

Products

- Corrected an issue with the cursor moving to the last location line in the locations tab of a product after a product group was selected or changed.

12113

- The Product Enquiry screen now includes the name of the Customer and the order number if applicable of an invoice line. 12293



Transactions	Date	Ref	Transaction	Qty In	Qty Out	Cost Rate	Sell Rate	Balance
Details	10/11/2015	1808	Receipt	1.00		525.00		5.00
	26/11/2015	10281	Invoice - Belinda Davidson - Order # 1368		2.00	427.50	855.00	3.00
Quantities	05/01/2016	10295	Invoice - Fred Jones - Order # 8763		1.00	427.50	855.00	2.00
	14/01/2016	10298	Invoice - Harry Helms - Order # 5865		1.00	427.50	855.00	1.00
Back Orders	27/05/2016	10341	Invoice - Bob Henderson - Order # 9413		1.00	429.57	855.00	0.00
Serial #s	12/11/2016	1854	Receipt	1.00		525.00		1.00
POOrders	07/08/2017	10616	Invoice - Jessica Ottway - Order # 7954		1.00	457.81	855.00	0.00
	02/09/2017	10618	Invoice - Bob and Tom Support Services - Order # 9563		1.00	457.81	855.00	-1.00
Notes	30/09/2017		Stocktake Adj	11.00				10.00
	30/09/2017		Stocktake Adj	10.00				20.00
Show History	30/09/2017		Stocktake Adj	10.00				30.00
Image	31/10/2017	10633	Invoice - Alice Smith - Order # 9876		1.00	457.81	812.25	29.00

Purchase Orders

- Sprockit Australia only: Stihl AU have changed their delivery codes with the implementation of SAP. 12353
 - 01 - Road
 - 03 - Courier
 - 51 - Air Freight

All purchase orders have been updated to reflect the new codes by mapping with the old codes. The new codes have been added to the TABLES file and the old ones have been removed.

Rental Hire

- A new field has been added to the Rental Hire item record: "WOF Due" 12305

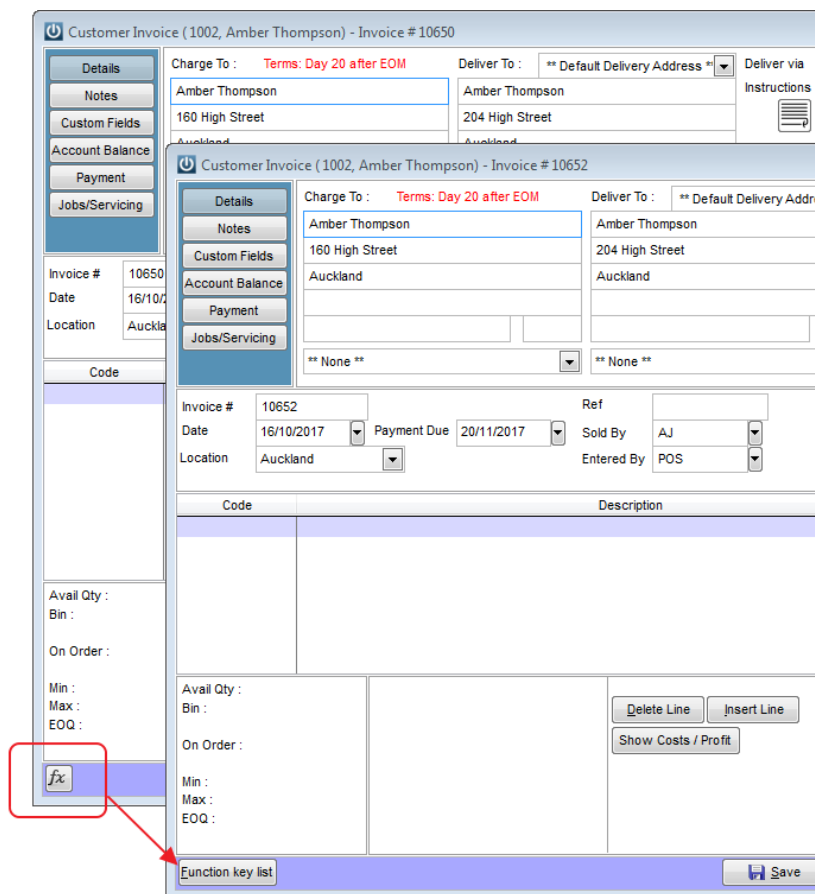
Staff

- Inactive Staff IDs are no longer available in lookup screens and drop down lists so they cannot be used in new transactions or settings. 12117

System

- The Icon for the Function Key Lists in transaction forms has been replaced with the words rather than the icon to make it clearer.

11640



The screenshot displays two overlapping windows of the 'Customer Invoice' form for 'Amber Thompson'.

Top Window (Invoice # 10650):

- Charge To:** Amber Thompson, 160 High Street, Auckland.
- Terms:** Day 20 after EOM.
- Deliver To:** ** Default Delivery Address **.
- Deliver via:** Instructions.

Bottom Window (Invoice # 10652):

- Charge To:** Amber Thompson, 160 High Street, Auckland.
- Terms:** Day 20 after EOM.
- Deliver To:** ** Default Delivery Address **.
- Deliver via:** Instructions.
- Invoice #:** 10652
- Date:** 16/10/2017
- Payment Due:** 20/11/2017
- Location:** Auckland
- Sold By:** AJ
- Entered By:** POS

Table:

Code	Description

Form Fields:

- Avail Qty:** , **Bin:** , **On Order:** , **Min:** , **Max:** , **EOQ:** .

Buttons: Delete Line, Insert Line, Show Costs / Profit, Save.

Change: A red box highlights the 'fx' icon in the bottom window, with a red arrow pointing to the 'Function key list' text in the bottom right corner of the same window.