

These instructions are for v8.460 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 (www.infusionsoftware.co.nz or www.infusionsoftware.com.au).

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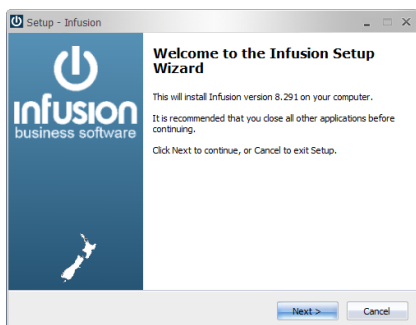
Before Beginning the Upgrade

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. V8.460 will require installation on the server and on workstations as the IBSMAIN.EXE and SPROCKIT.EXE now check the version numbers of the workstation and server. If the version of the executable on the server and the workstation are not the same the application will advise you which one is the oldest and needs updating. Until both are the same, the application will not be able to be launched from that workstation.
5. Upgrading to v8.460 from any version earlier than 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.

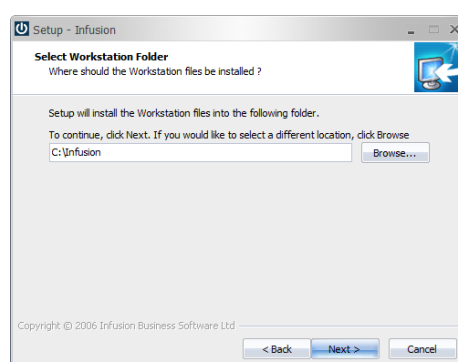
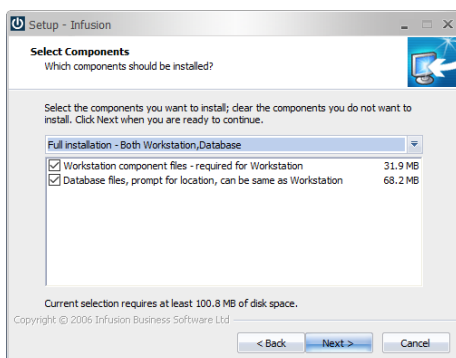
Select **Next**. The License Agreement form is next



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**

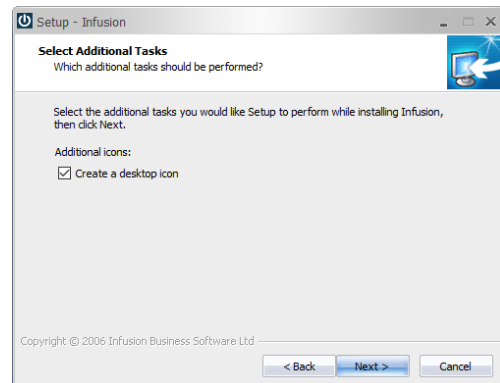
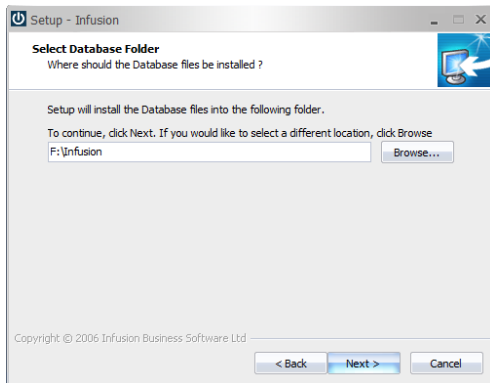
If the "Workstation component files" option was selected you will be prompted for the folder to install these files into. Type in or browse to the required location.

Select **Next**

Infusion Software v8.460 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.

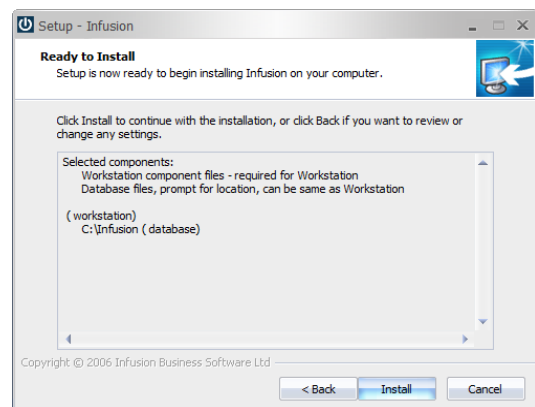
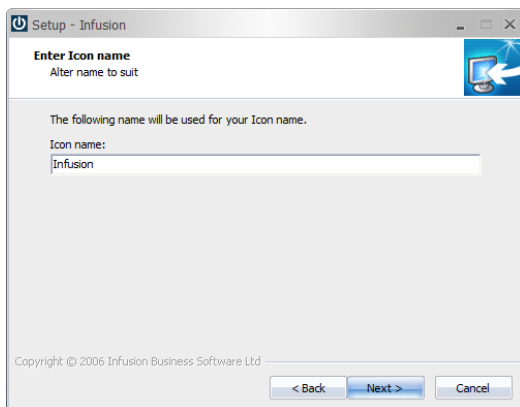
Select **Next**

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.

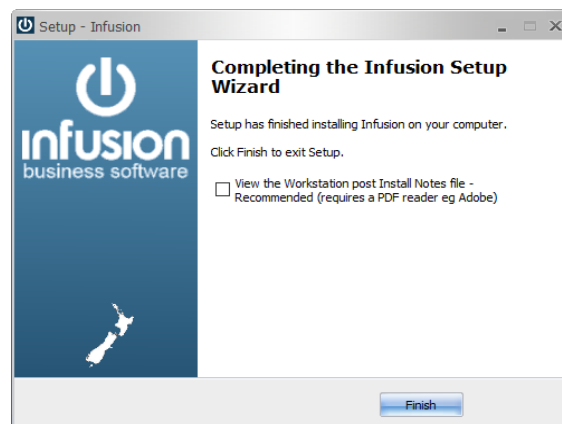
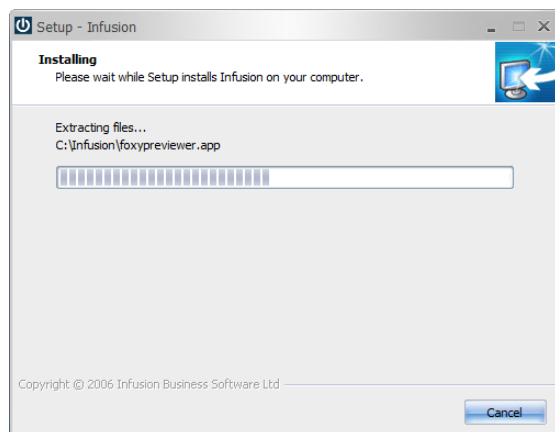


Select **Next**

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

Select **Install**

Infusion Software v8.460 Upgrade Notes



Once the install has completed, on the form will last displayed 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	5,059 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 NOTICES

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.

In April 2018 Microsoft released an update for Windows named the April 2018 Update, Build 1803. This update can cause problems with emails and SMS messages not sending if the Infusion/Sprockit application was running from the server rather than the local workstation. For version 8.450 a temporary measure saw the IBSAPP.EXE file removed as part of the upgrade/installation process in both Infusion and Sprockit, as its functions had been merged to the IBSMAIN.EXE and SPROCKIT.EXE respectively. This meant having the shortcut set to local 'target' and server 'stat in', using ibsmain or sprockit.

Users with this setup in the shortcut can still have the different locations the shortcut points to, but ibsmain and sprockit have to be changed to ibsapp (target and start in).

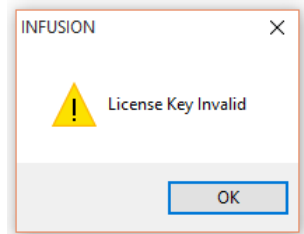
For more information, please refer to the following Knowledge Base Articles:

<https://infusionsoftware.zendesk.com/hc/en-us/articles/360000191336-Email-and-SMS-Not-Sending-10-May-2018>

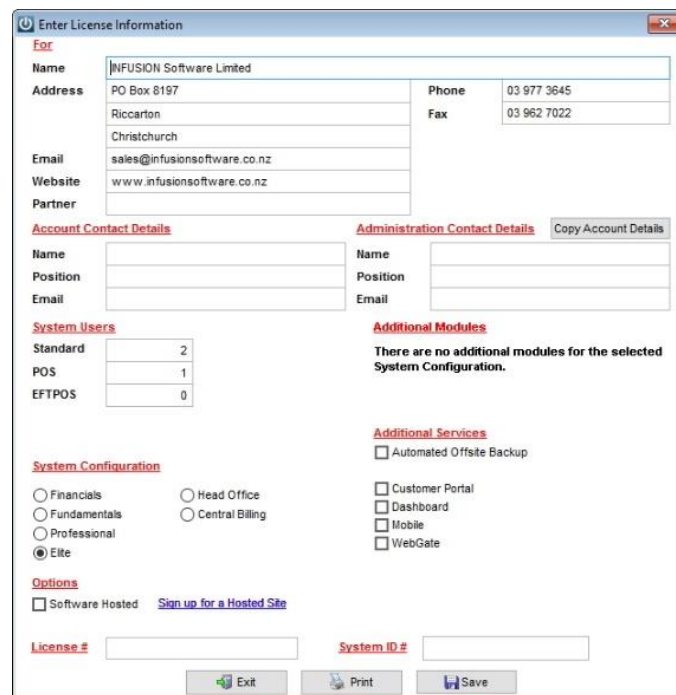
<https://infusionsoftware.zendesk.com/hc/en-us/articles/360000198936-Service-Pack-Installation-Instructions>

Requesting / Entering an End User License

Note: v8.460 will require a new licence if you are upgrading from any version earlier than 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, Email, Website, and Partner), "Account Contact Details" (Name, Position, Email), "Administration Contact Details" (Name, Position, Email), "System Users" (Standard: 2, POS: 1, EFTPOS: 0), "Additional Modules" (a message stating no additional modules are configured), "Additional Services" (checkboxes for Automated Offsite Backup, Customer Portal, Dashboard, Mobile, and WebGate), "System Configuration" (radio buttons for Financials, Fundamentals, Professional, and Elite), "Options" (checkbox for Software Hosted and a link to "Sign up for a Hosted Site"), and "License # / System ID #". At the bottom are "Exit", "Print", and "Save" buttons.

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 SMB1) 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. Also, on any computer running Windows 10 with Build 1803 or higher, SMB1 has to be enabled manually.

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

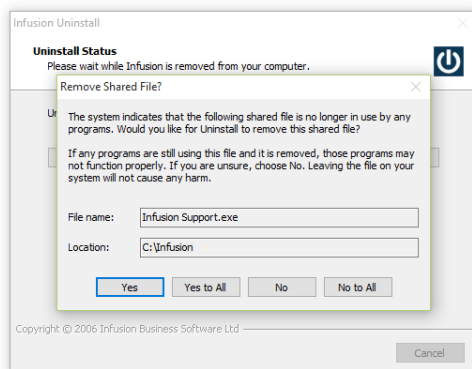
<https://infusionsoftware.zendesk.com/hc/en-us/articles/115003413113-Recommended-Settings-for-Infusion>

<https://infusionsoftware.zendesk.com/hc/en-us/articles/360000193095-SMB1-on-Windows-10-Build-1803>

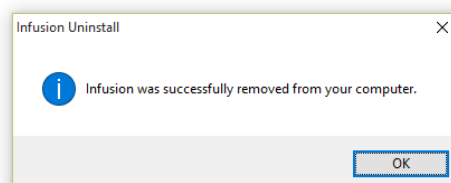
Uninstall Wizard

Double click Unins000.exe in the workstation folder.

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



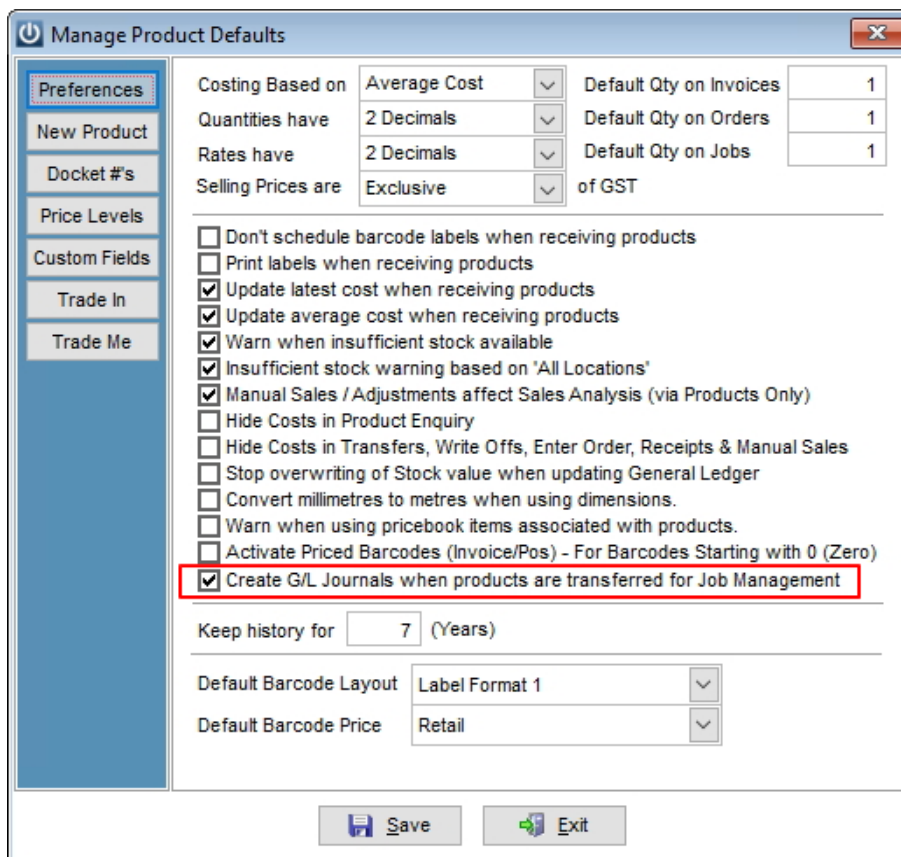
Followed by:



Key Features

Admin

- A new system setting under Admin / Defaults / Manage Products Defaults allows to control if product transfers occurring in Jobs are to create a transfer of cost of goods sold in the financials when the different locations have different GL accounts set up for purchases. 12209



Manage Product Defaults

Preferences

Costing Based on: Average Cost (v)

Quantities have: 2 Decimals (v)

Rates have: 2 Decimals (v)

Selling Prices are: Exclusive (v) of GST

Default Qty on Invoices: 1

Default Qty on Orders: 1

Default Qty on Jobs: 1

☐ Don't schedule barcode labels when receiving products
☐ Print labels when receiving products
☒ Update latest cost when receiving products
☒ Update average cost when receiving products
☒ Warn when insufficient stock available
☒ Insufficient stock warning based on 'All Locations'
☒ Manual Sales / Adjustments affect Sales Analysis (via Products Only)
☐ Hide Costs in Product Enquiry
☐ Hide Costs in Transfers, Write Offs, Enter Order, Receipts & Manual Sales
☐ Stop overwriting of Stock value when updating General Ledger
☐ Convert millimetres to metres when using dimensions.
☐ Warn when using pricebook items associated with products.
☐ Activate Priced Barcodes (Invoice/Pos) - For Barcodes Starting with 0 (Zero)
☒ Create G/L Journals when products are transferred for Job Management

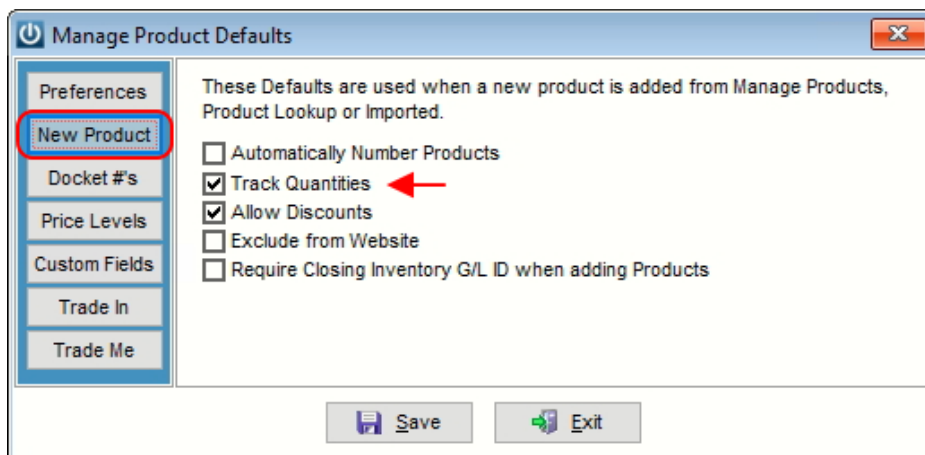
Keep history for: 7 (Years)

Default Barcode Layout: Label Format 1 (v)

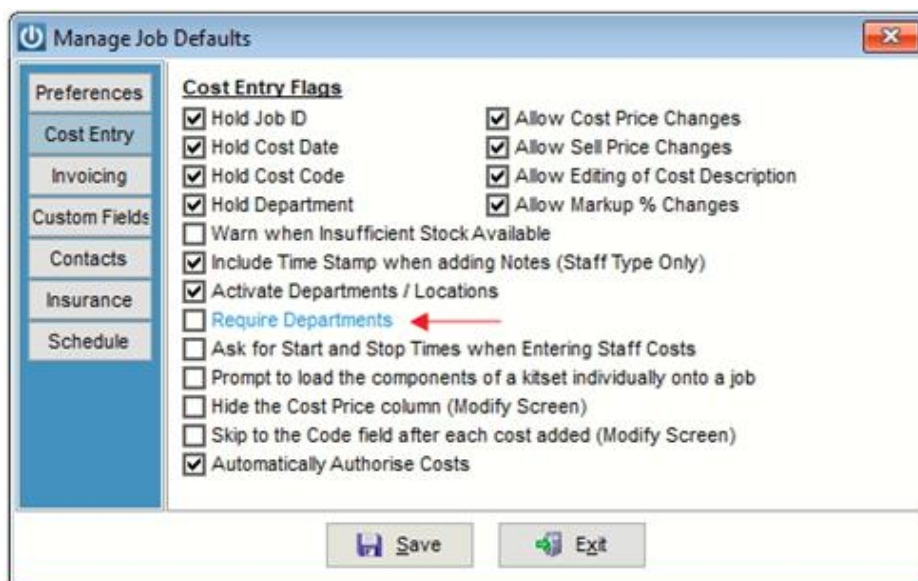
Default Barcode Price: Retail (v)

Save Exit

- Sprockit only:
The Stihl EDI Defaults screen has been updated to record the Stihl supplier account number per location. This allows having different supplier account numbers assigned to each location and will not stop Warranties from being sent to Stihl. 12399
- A new flag has been added to the Product Defaults menu which will allow you to decide whether new products are to have tracked quantities by default or not. 12526



- Sprockit Australia only: 12548
The Stihl OPEA Import Routine has been updated to allow for spaces in the product code field, and the cost price calculation has also been corrected. Information about this feature is included in this Knowledge Base Article: <https://infusionsoftware.zendesk.com/hc/en-us/articles/360000171235-Stihl-OPEA-Import-Routine>.
- Another option for receiving incoming remote connections from our Infusion Support team has been added to the help menu. This can be accessed from Help / Team Viewer Download. If you click on this option and then click save and run, it will install a light version of the Team Viewer software on your computer. This may be used instead of or in conjunction with the Help / Infusion Remote Access menu option. To save and run Team Viewer you will require the correct level of security access from your organisation to install new programs on your computer, otherwise you will need to request assistance from your IT department to install it in the first instance. 12556
- A new flag has been added to Manage Job Defaults / Cost Entry tab to make Job Departments mandatory on transactions. This option is enabled when Job Departments/Locations is activated. The requirement of Job Department has been made mandatory on transaction screens with the exception of Customer Quotes and Supplier Purchase Orders in saved or ordered status. 12565

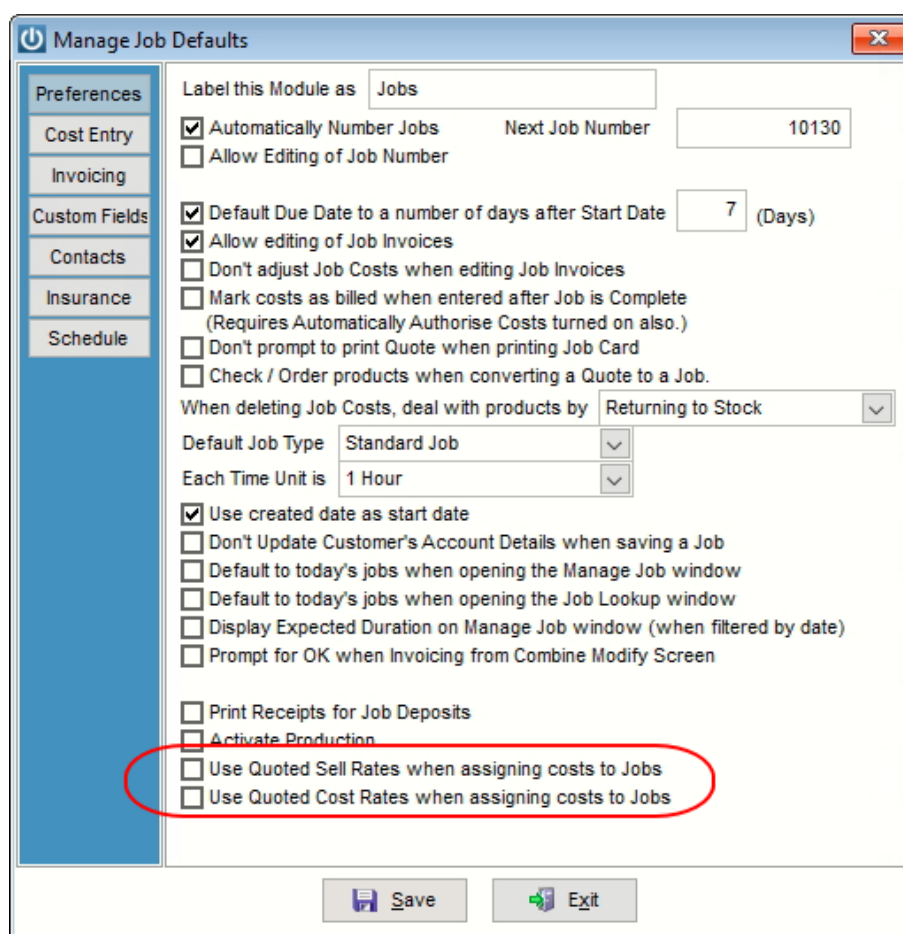


- An error occurring when running the Partially Posted Invoices Repair Utility if the Fintrans record was broken for the invoice being repaired has been corrected. 12626

- Sprockit only: 12691
Product Types and Product Groups within the reserved range can now have part of their details edited.
 - Restricted Product Types: It is possible to edit Sales Budgets. Fields in the Default tab remain as read only.
 - Restricted Product Groups: It is possible to edit only the selection of GL codes and the value Floor Space Percentage on the Defaults tab; all other fields remain as read only. All other tabs can be edited completely.

- Two new options have been added to the Manage Job Defaults screen: 12693
 - Use Quoted Sell Rates when assigning costs to Jobs
 - Use Quoted Cost Rates when assigning costs to Jobs

These options apply only when the lines of a quote are entered directly on the Job Modify screen. They will not apply to lines entered automatically into the job if they are received in a Job Purchase Order. Also, the Quoted Cost Rates will not apply if the line is for a Serial Tracked product or a Kitset.



Manage Job Defaults

Label this Module as

☒ Automatically Number Jobs Next Job Number

☐ Allow Editing of Job Number

☒ Default Due Date to a number of days after Start Date (Days)

☒ Allow editing of Job Invoices

☐ Don't adjust Job Costs when editing Job Invoices

☐ Mark costs as billed when entered after Job is Complete
(Requires Automatically Authorise Costs turned on also.)

☐ Don't prompt to print Quote when printing Job Card

☐ Check / Order products when converting a Quote to a Job.

When deleting Job Costs, deal with products by

Default Job Type

Each Time Unit is

☒ Use created date as start date

☐ Don't Update Customer's Account Details when saving a Job

☐ Default to today's jobs when opening the Manage Job window

☐ Default to today's jobs when opening the Job Lookup window

☐ Display Expected Duration on Manage Job window (when filtered by date)

☐ Prompt for OK when Invoicing from Combine Modify Screen

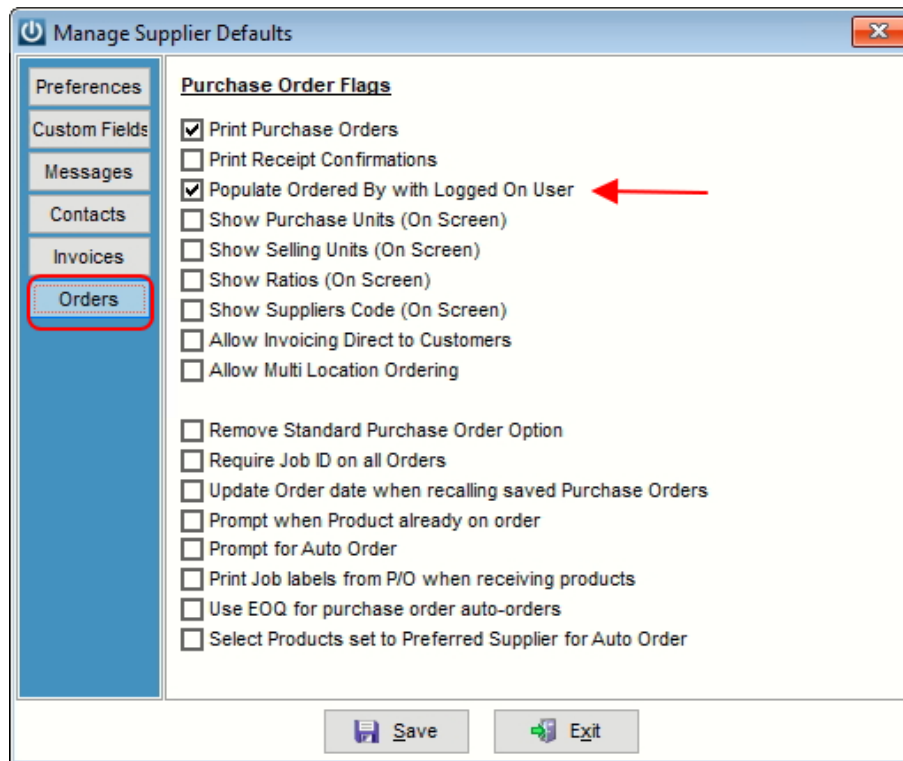
☐ Print Receipts for Job Deposits

☐ Activate Production

☐ Use Quoted Sell Rates when assigning costs to Jobs

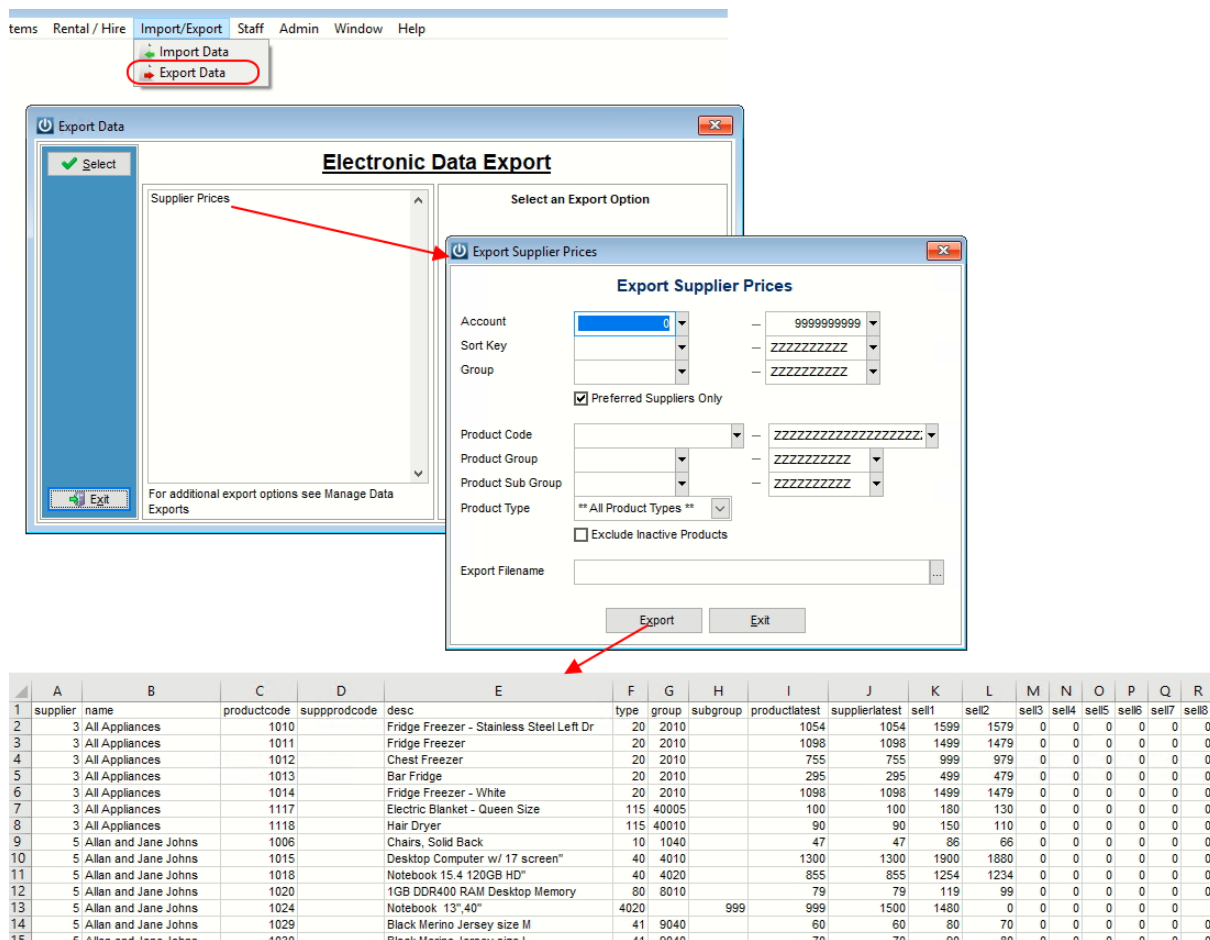
☐ Use Quoted Cost Rates when assigning costs to Jobs

- A new tick box has been added to the Manage Supplier Defaults screen on the Orders tab to allow the user to select if the Ordered By field on purchase orders is to be always pre-populated with the Staff ID of the logged in user or if it is to be left blank. The upgrade process will set this tick box as selected by default. 12711



Import / Export

- An issue on Supplier Invoices imports which was doubling up the order quantities has been corrected. 12665
- A new export option has been added to the Exports section of the Import / Export module called "Supplier Prices". The export allows can be filtered by supplier account and group. It can be run for just Preferred Suppliers if required. Product range options include Code, Group and Sub-group as well as All or a specific Product Type. Inactive Products can be excluded. The file created is in CSV format and contains the supplier account number and name, the product code, the supplier code, the description, type, group and sub-group; the latest cost in the product and in the supplier tab, and 8 price level columns. 12532



- The Supplier / PO Invoice Import processing logic (Import/Export Module) has been updated to correct an inconsistency when a Job Department is required. 12545
- A problem where Importing of Supplier Purchase Orders was not setting the Status of the Order correctly after import has been corrected. 12675
- A problem with rounding of GST on the Edward Gibbons Invoice with Products import key file has been corrected. 12690

Invoices

- The Margin and Mark-Up calculations on Customer Invoices, Quotes and Jobs have been updated to take into consideration discounts applied. 12544
- Sprockit only - applies to Field Days system. 12629
The system now responds to a switch file called StihlFielddays.txt which needs to be placed in the Sprockit folder. When this file exists:
 - New Customer Accounts will be created with the email address for Stihl Customer Services and be configured to email Invoices.
 - Customer Invoices will automatically send the email / PDF when the Process button is clicked. The Process and Email button has been removed (to avoid confusion). The Taken field will be displayed when the description field is accessed. This will only be visible if the product type is 50 or higher.
- An error occurring when entering a product set to use dimensions on a customer invoice screen and the system is set to 'Convert millimetres to meters when using dimensions' has been corrected. 12708

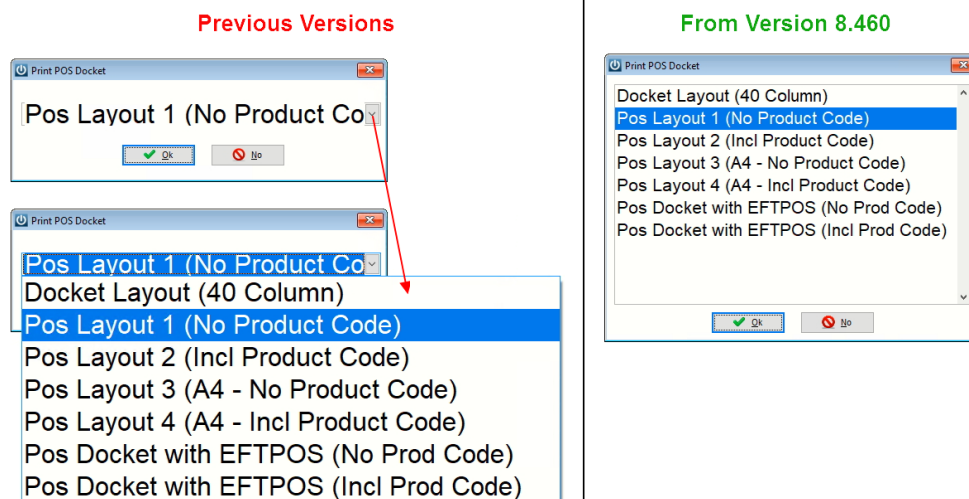
- A problem with serial number items on build-ups being invoiced where the prompt "Not all serial numbers have been entered, you will need to enter these before posting." kept appearing has been corrected. 12727

Job Management

- The name of the button on the Job screen of Trade-In Jobs incorrectly showing "Invoice Now" instead of "Add to Stock" has been corrected. 12529
- Improvements have been made in the Quote for Insurance Job process: 12535
 - It is no longer possible to transform the Insurance Quote into a Job if details of the Insured Customer are not entered on the Quote first.
 - The behaviour of the Job buttons on the Quote screen and the Quotes Management screen have been made consistent.
 - It is no longer possible to invoice an Insurance Job if the Insurance Company details are not entered in the Job first.
 - It is no longer possible to transform the Insurance Quote directly into an Invoice; it must be transformed into a Job first.
 - When Invoicing an Insurance Job as per Quote and there are serial number tracked items on the Quote, the item must be assigned to the Job line before clicking Invoice Now if it is to be removed from stock.
- An error occurring when trying to enter a product set to Use Dimensions in the Enter Job Costs screen has been fixed 12710

POS

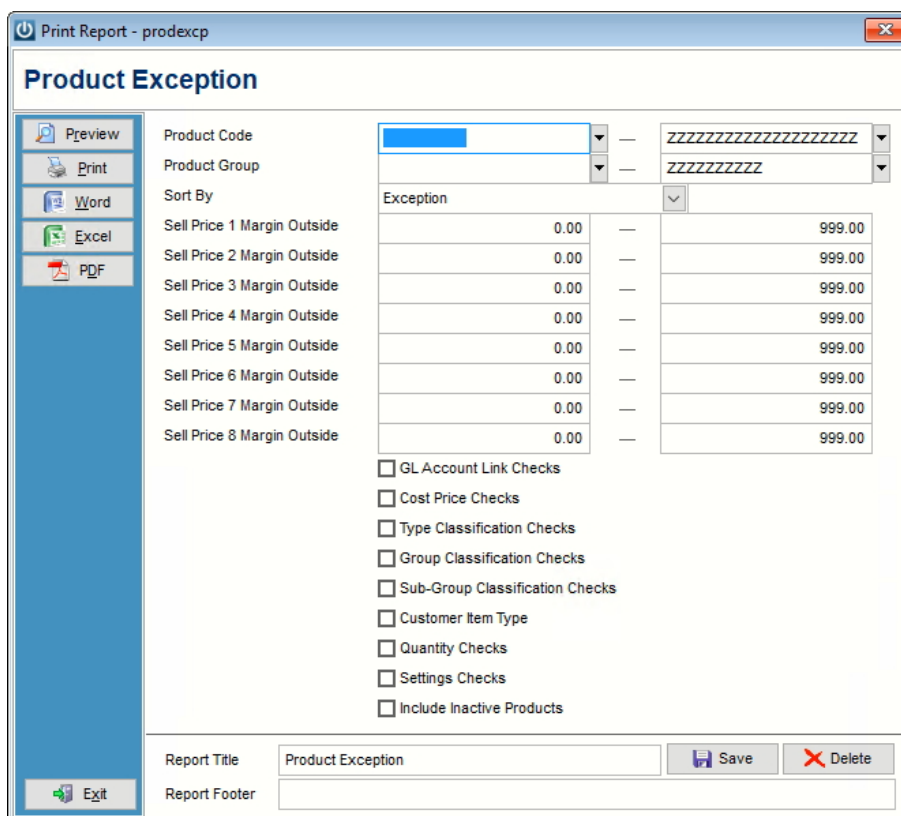
- The Print POS Docket pop up that appears on the POS screen when the POS defaults are set to print invoices in True Type layout has been modified from a drop-down to a list where the font size has been slightly reduced in order to display the complete name of the available layouts. The layout selected as default is still the one showing as highlighted when the pop up appears. 12562



- It is no longer possible to recall a saved/held invoice that includes Build Ups from the POS screen. A POS user can re-open a pending invoice and process it, but it must be done from the Invoices Management screen. This restriction has been put in place to correct an inconsistency in POS that was resulted in deleted lines from inside Build Ups. 12570
- It is no longer possible to recall a saved job invoice on the POS screen. A POS user can still re-open and process a saved invoice created from a job, but it must be done from the Invoices Management screen. 12571

Products

- Sprockit only: 12397
A problem with the filter for Bin Location in the "Product Valuation Detail - By Bin Location" report, where the resulting data included products set to Bin Locations that were not in the selected range has been fixed.
- A problem where products from Pricebooks used on Quotes were bringing up the Best Rate Warning has been corrected. 12514
- The Product Exception report has been improved to be more specific, to filter only certain types of errors and allow better reporting. It has the product code and product group as selection parameter ranges. 12642
 - It can be sorted by product code - or by the error / exception code in which case each error will start on a new page.
 - The Margin check for each price level will check that the price is not zero, that the margin is within the parameter range and if there are quantity breaks that they are logically incremental.
 - The GL Account Link Checks confirm that the sales, purchases and closing inventory GL accounts exist and are valid, that they match the product group setting if it exists and that they are of the appropriate GL type/function.
 - The Cost Price Checks confirms that a latest cost exists and where average costing is used that the average cost exists.
 - The Type Classification Checks confirms that the product type exists and is valid and matches the product group setting if it exists.
 - The Group Classification Checks confirms that the product group exists and is valid.
 - The Sub-Group Classification Checks confirms that the product sub-group exists and is valid, and the product group matches the setting if it exists.
 - The Customer Item Type confirms that the customer item exists and matches any product type, group or sub-group setting that is entered. Currently NONE or DEFAULT can be accepted.
 - The Quantity Checks confirms that non-tracked items and inactive items do not have stock quantities and that serial tracked items have serial number quantities that match the on-hand quantities.
 - The Settings Checks confirms that the settings related to serial tracking and multiple serial tracking numbers match the product group setting.
 - It also checks that no product codes are duplicated.

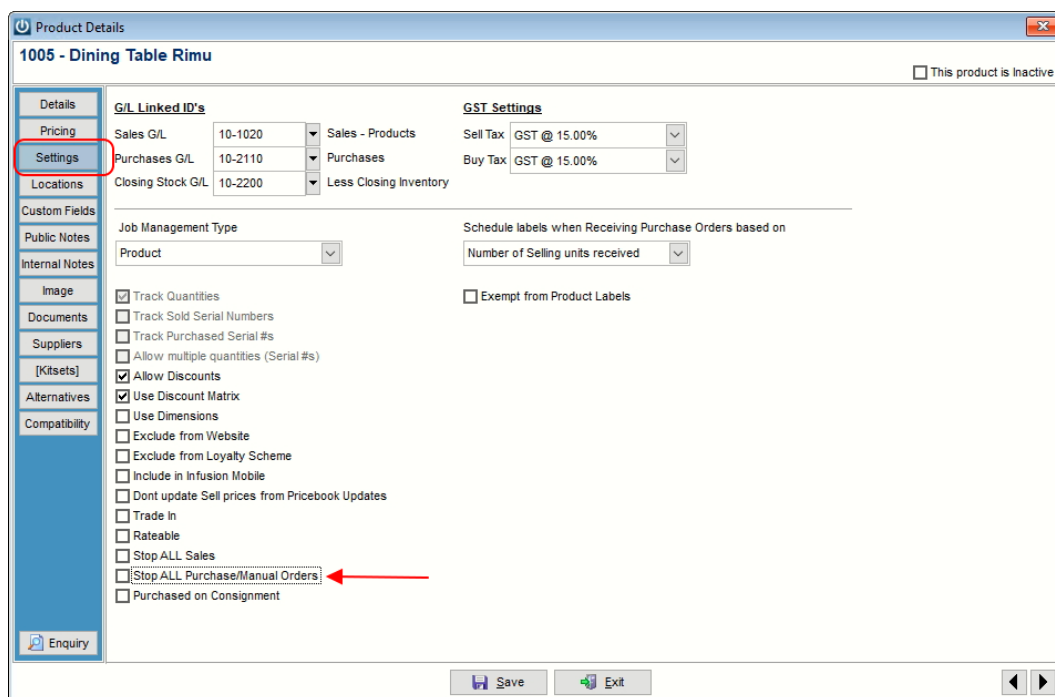


- The Product Movement report has been updated to include a column for the stock turn. 12643



Product Code	Description	Stock Turn	Open Bal	Invoice	Receipt	Manual	Writeoff	Stk Take	Transfers	Kitset	Produce	Close Bal
10000 - Books												
1076	Landscape Gardening Book							12.00				12.00
1077	Gourmet Cook Book	0.18		1.00				12.00				11.00
1078	Best Places to Visit in New Zealand Bk							17.00				17.00
1143	Beginners Guide to Buying Rental Pro	0.25		1.00				9.00				8.00
1144	Beginners Guide to Buying your First C							10.00				10.00
10005 - Cards												

- A check for error "File '...\pb000000.dbf' does not exist." Has been added which stops it from occurring. 12669
- A new option has been added to the Settings tab in the Product screen called "Stop all Purchases". This setting stops the user from entering the product on a new Purchase Order line or on the line of a Manual Order from the Products menu. It also stops the Auto-Order processes from adding the product to the order. If the product was put on order before the setting is changed, it will still remain in the original order and can be received. The option only stops the ordering action, not the receipt; therefore, it will NOT stop the user from adding the product on a New/Receive Purchase Order either. This field has also been added to the available fields to import into on import routines for data type Products. 12694



Purchase Orders

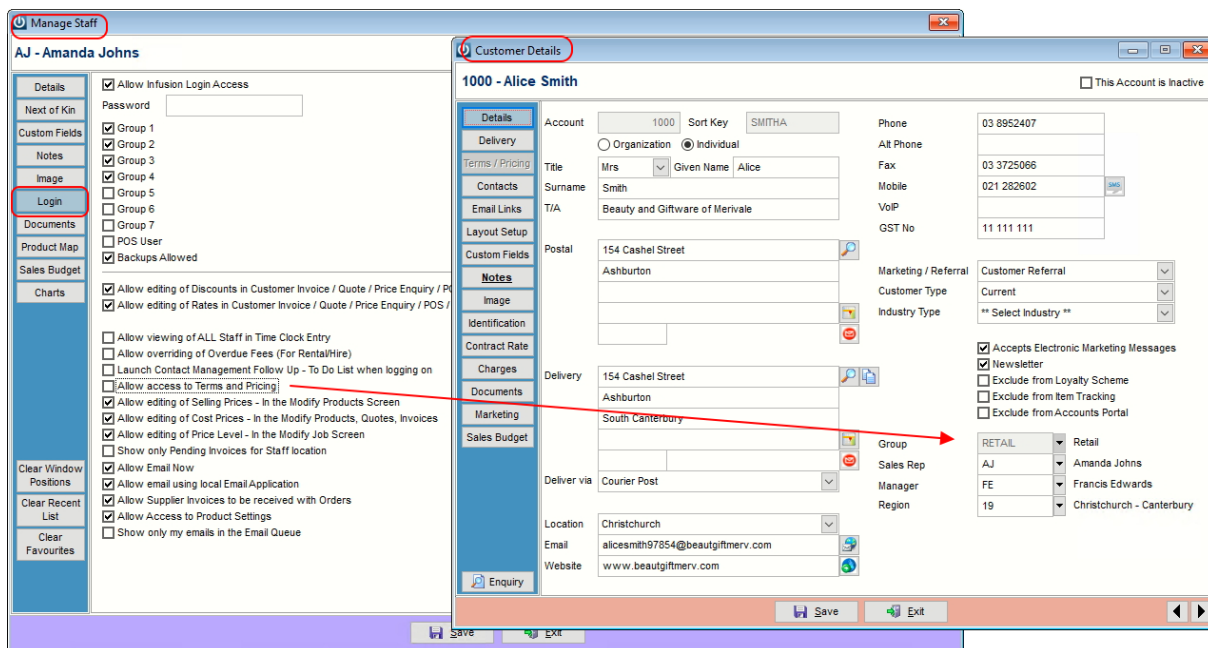
- Previously when freight was entered into the freight field on a Purchase order and then processed as received, the freight component would not display on the printed copy of the Purchase order. Printing the Purchase order will now show the freight component. 12507
- An error occurring on the Purchase Order receipt screen when the date field was left empty has been corrected. 12640

Quotes

- An error occurring in the quotes screen when losing focus from the Margin/Mark-Up column of the grid has been corrected. 12619
- The shortcut for the 'Remove All Discounts' button of Quotes has been corrected by replacing it with Alt+R in order to stop conflict with the shortcut for the 'Delete Line' button (Alt+D). 12682

Staff

- When the Terms and Pricing option is removed from a staff member access, they are no longer able to make any changes to the Group on a Customer or access the drop-down selection as this would give them access to the Discount Matrix setup. 12558



Manage Staff
AJ - Amanda Johns

Details
Next of Kin
Custom Fields
Notes
Image
Login
Documents
Product Map
Sales Budget
Charts

☒ Allow Infusion Login Access
Password
☒ Group 1
☒ Group 2
☒ Group 3
☒ Group 4
☒ Group 5
☐ Group 6
☐ Group 7
☐ POS User
☒ Backups Allowed
☒ Allow editing of Discounts in Customer Invoice / Quote / Price Enquiry / P
☒ Allow editing of Rates in Customer Invoice / Quote / Price Enquiry / POS /
☐ Allow viewing of ALL Staff in Time Clock Entry
☐ Allow overriding of Overdue Fees (For Rental/Hire)
☐ Launch Contact Management Follow Up - To Do List when logging on
☐ Allow access to Terms and Pricing
☒ Allow editing of Selling Prices - In the Modify Products Screen
☒ Allow editing of Cost Prices - In the Modify Products, Quotes, Invoices
☒ Allow editing of Price Level - In the Modify Job Screen
☐ Show only Pending Invoices for Staff location
☒ Allow Email Now
☒ Allow email using local Email Application
☒ Allow Supplier Invoices to be received with Orders
☒ Allow Access to Product Settings
☐ Show only my emails in the Email Queue
Clear Window Positions
Clear Recent List
Clear Favourites

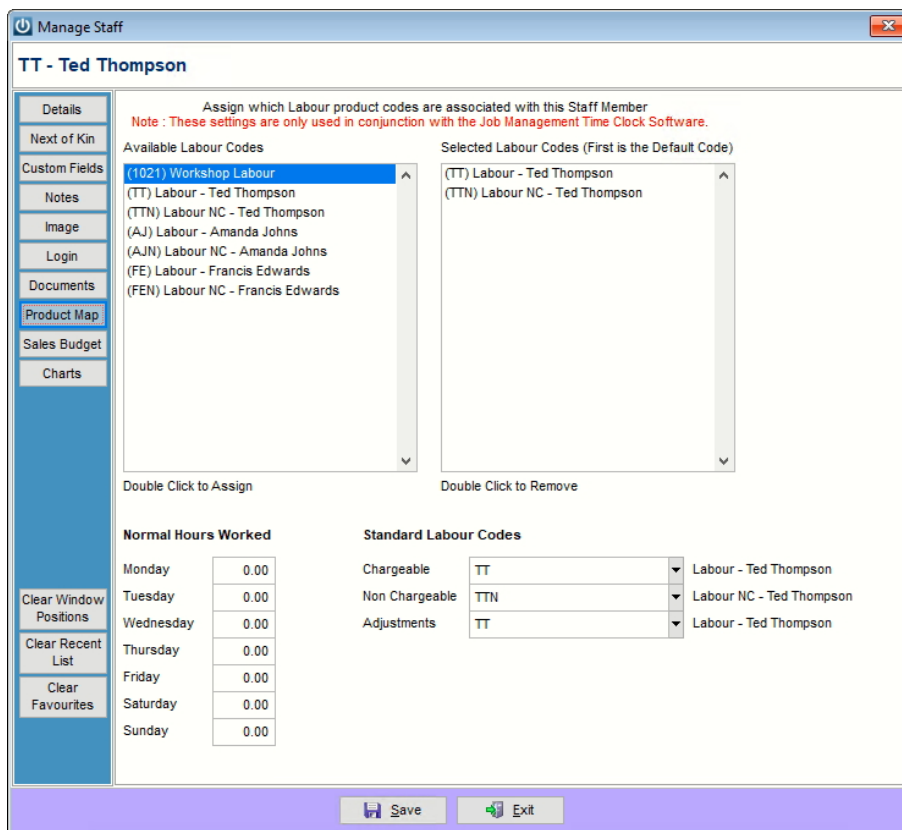
Customer Details
1000 - Alice Smith

Details
Delivery
Terms / Pricing
Contacts
Email Links
Layout Setup
Custom Fields
Notes
Image
Identification
Contract Rate
Charges
Documents
Marketing
Sales Budget

Account 1000 Sort Key SMITHA
☐ Organization ☒ Individual
Title Mrs Given Name Alice
Surname Smith
T/A Beauty and Giftware of Merivale
Postal 154 Cashel Street Ashburton
Delivery 154 Cashel Street Ashburton
Documents South Canterbury
Marketing Courier Post
Sales Rep FE
Manager Francis Edwards
Region 19 Christchurch - Canterbury
Phone 03 8952407
Alt Phone
Fax 03 3725066
Mobile 021 282602
VoIP
GST No 11 111 111
Marketing / Referral Customer Referral
Customer Type Current
Industry Type ** Select Industry **
☒ Accepts Electronic Marketing Messages
☒ Newsletter
☐ Exclude from Loyalty Scheme
☐ Exclude from Item Tracking
☐ Exclude from Accounts Portal
Group RETAIL Retail
Sales Rep AJ Amanda Johns
Manager FE Francis Edwards
Region 19 Christchurch - Canterbury
Save Exit

- New fields have been added to the Manage Staff screen on the Product Map tab. These fields allow to set the normal working hours for each day of the week and also to set up which are the Standard Labour codes for the staff (codes displayed on the lookup screens are restricted to product codes set as Job Management Type "STAFF"). These fields have been added to aid in recording information that can be used on custom reports and exports. There are no standard reports or exports at the moment in the software that use the information in these fields.

12597



Manage Staff
TT - Ted Thompson

Assign which Labour product codes are associated with this Staff Member
Note : These settings are only used in conjunction with the Job Management Time Clock Software.

Available Labour Codes
(1021) Workshop Labour
(TT) Labour - Ted Thompson
(TTN) Labour NC - Ted Thompson
(AJ) Labour - Amanda Johns
(AJN) Labour NC - Amanda Johns
(FE) Labour - Francis Edwards
(FEN) Labour NC - Francis Edwards

Selected Labour Codes (First is the Default Code)
(TT) Labour - Ted Thompson
(TTN) Labour NC - Ted Thompson

Double Click to Assign Double Click to Remove

Normal Hours Worked

Day	Hours
Monday	0.00
Tuesday	0.00
Wednesday	0.00
Thursday	0.00
Friday	0.00
Saturday	0.00
Sunday	0.00

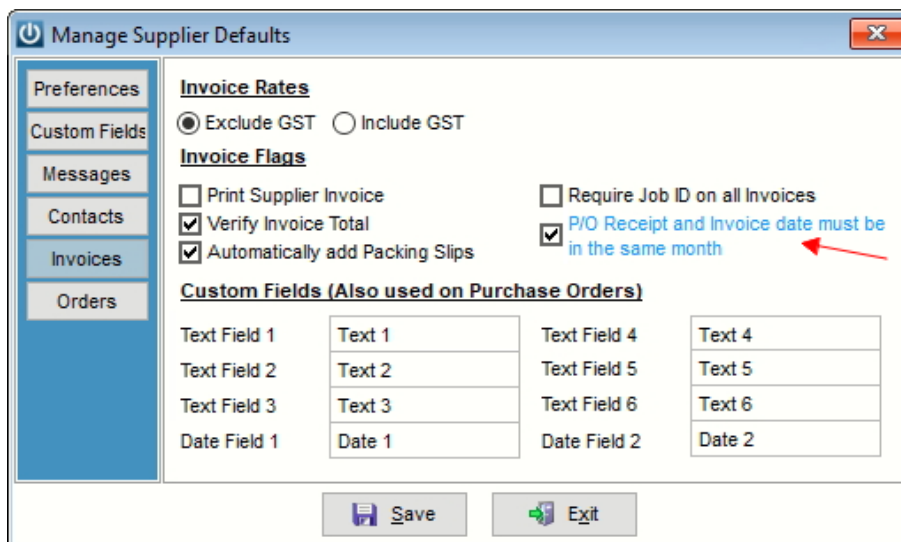
Standard Labour Codes

Chargeable	Code	Description
Chargeable	TT	Labour - Ted Thompson
Non Chargeable	TTN	Labour NC - Ted Thompson
Adjustments	TT	Labour - Ted Thompson

Save Exit

Supplier

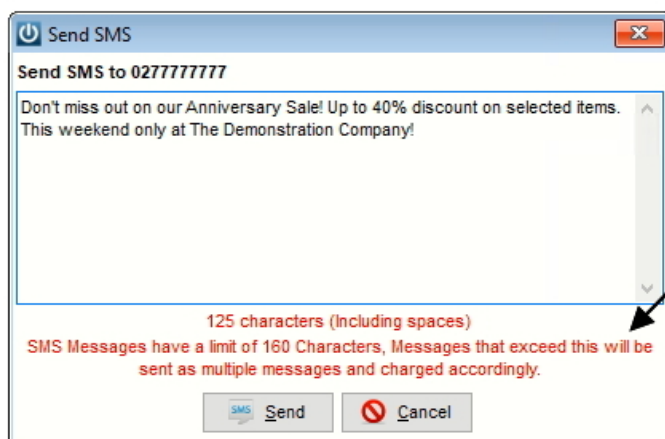
- Sprockit only: 12518
It is possible now to import Stihl invoices into Sprockit, via the Digital Supplier Invoice Import screen. Information about this feature is included in this Knowledge Base Article: <https://infusionsoftware.zendesk.com/hc/en-us/articles/360000313536-Suppliers-Digital-Invoice-Import-for-Stihl-Invoices->
- A new tick box has been added to the Invoices tab of the Manage Supplier Defaults screen which allows to restrict the date on the Purchase Order Receipts and the date on the Invoices to be in the same month or not. This tick box is set as selected by default. 12599



- A problem where the Supplier Invoice (No Products) was not always recalculating correctly the totals when the invoice was saved and recalled from the Pending Supplier Invoices (No Products) screen has been corrected. 12673
- A problem in the Digital Supplier Invoice Import screen making invoices uploaded to Xtracta invisible to the screen has been fixed. 12674
- A problem preventing users from deleting invoices imported from Xtracta has been corrected. 12678
- A data type mismatch error caused by the index structure in the Supplier Digital Invoice Import screen has been corrected. 12707

System

- A message stating the limit of SMS messages has been added to the Send SMS screen, the Maintain Customer Template screen and the Electronic Marketing screen. A counter has also been added to these screens with the exception of the Electronic Marketing screen, which allows the user to see the quantity (or an estimate where custom fields apply) of characters entered on the message. 12641



Send SMS

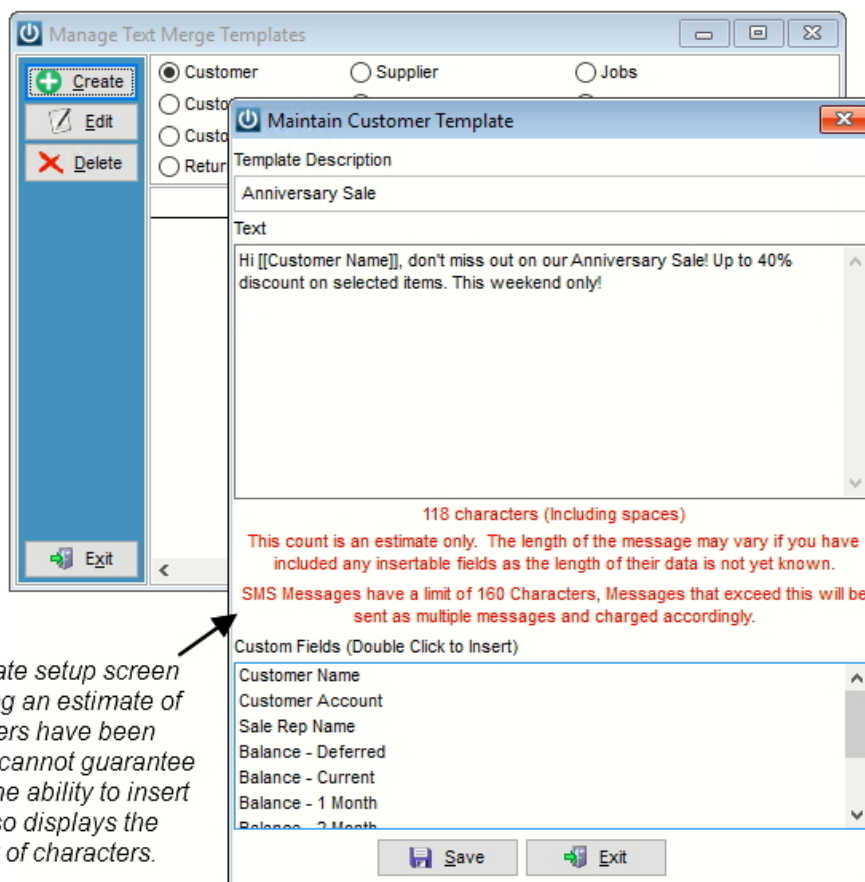
Send SMS to 0277777777

Don't miss out on our Anniversary Sale! Up to 40% discount on selected items. This weekend only at The Demonstration Company!

125 characters (Including spaces)

SMS Messages have a limit of 160 Characters, Messages that exceed this will be sent as multiple messages and charged accordingly.

The Send SMS message screen (for individually created messages) has a counter showing how many characters have been entered and a warning about limit of characters.



Manage Text Merge Templates

Create Edit Delete Exit

Customer Supplier Jobs

Maintain Customer Template

Template Description
Anniversary Sale

Text
Hi [[Customer Name]], don't miss out on our Anniversary Sale! Up to 40% discount on selected items. This weekend only!

118 characters (Including spaces)

This count is an estimate only. The length of the message may vary if you have included any insertable fields as the length of their data is not yet known.

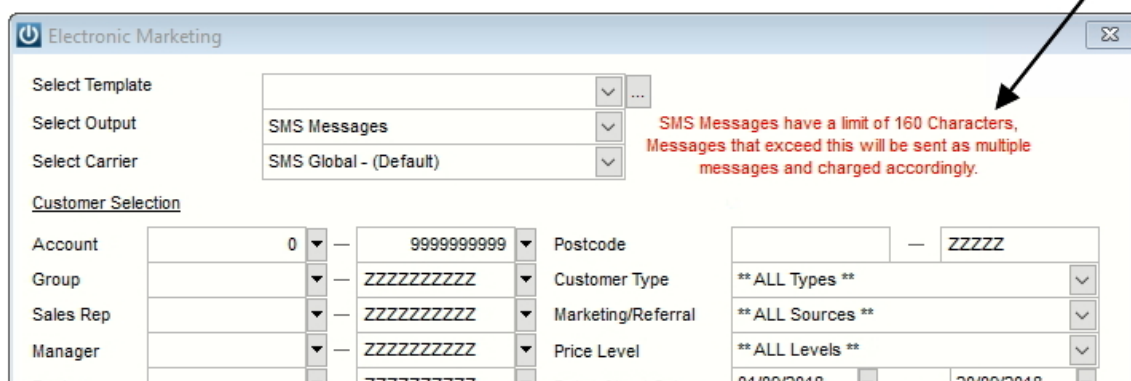
SMS Messages have a limit of 160 Characters, Messages that exceed this will be sent as multiple messages and charged accordingly.

Custom Fields (Double Click to Insert)

- Customer Name
- Customer Account
- Sale Rep Name
- Balance - Deferred
- Balance - Current
- Balance - 1 Month
- Balance - 3 Month

The message template setup screen has a counter showing an estimate of how many characters have been entered. This counter cannot guarantee an exact sum given the ability to insert custom fields. It also displays the warning about limit of characters.

The Electronic Marketing screen has a warning about the limit of characters on messages. It will not display the characters used on the selected template.



Electronic Marketing

Select Template: [Dropdown]

Select Output: SMS Messages

Select Carrier: SMS Global - (Default)

Customer Selection

Account	0	9999999999	Postcode	ZZZZZ
Group		ZZZZZZZZZZ	Customer Type	** ALL Types **
Sales Rep		ZZZZZZZZZZ	Marketing/Referral	** ALL Sources **
Manager		ZZZZZZZZZZ	Price Level	** ALL Levels **
Region		7777777777	Date of Last Sale	01/09/2018 - 20/09/2018

SMS Messages have a limit of 160 Characters, Messages that exceed this will be sent as multiple messages and charged accordingly.

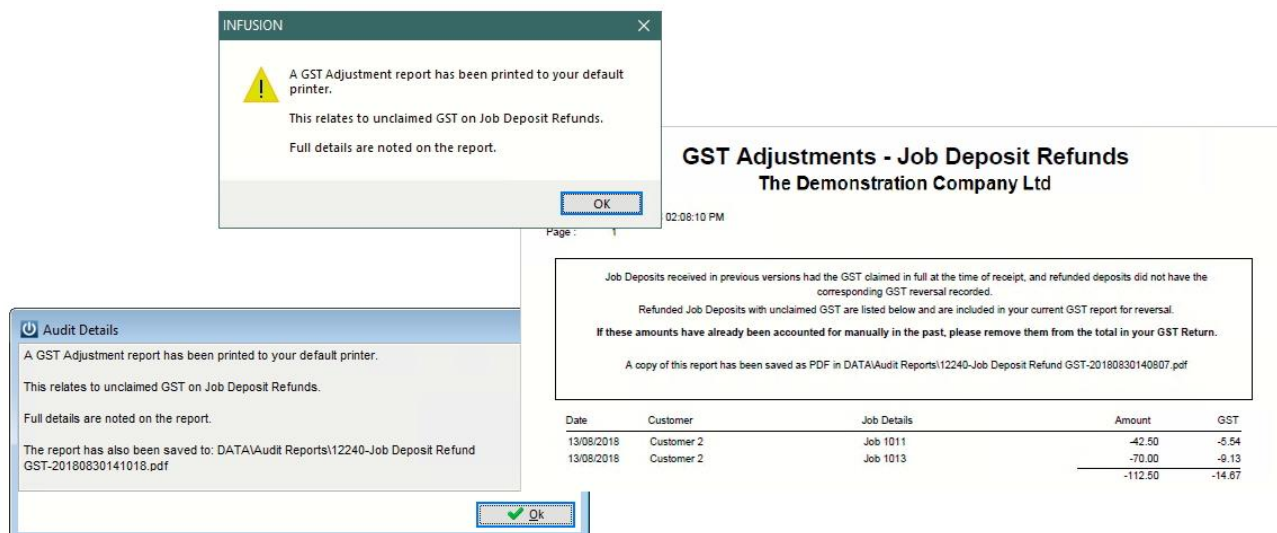
- V8.460 will require installation on the server and on workstations as the IBMAIN.EXE and SPROCKIT.EXE now check the version numbers of the workstation and server. If the version of the executable on the server and the workstation are not the same the application will advise you which one is the oldest and needs updating. Until both are the same the application will not be able to be launched from that workstation. 12616

- The upgrade process of this version will analyse data referring to Job Deposits received in previous versions and create adjustments if necessary. 12702
 - For systems with GST set to Payment Basis (Cash), it has been found that:
 - Refunded Job Deposits did not have the corresponding GST reversal recorded. A report called "GST Adjustments - Job Deposit Refunds" will be generated.
 - For systems with GST set to Invoice Basis (Accrual), it has been found that:
 - Refunded Job Deposits did not have the corresponding GST reversal recorded. A report called "GST Adjustments - Job Deposit Refunds" will be generated.
 - Job Deposits received had the GST claimed in full at the time of receipt, instead of having the GST claimed when they were applied to invoices, and available balances of these deposits have been found still unapplied. A report called "GST Adjustments - Job Deposits" will be generated.

In both cases above, the lines included on the corresponding reports will be added to the current GST report to allow them to be claimed in the next tax return. If any of these adjustments have already been accounted for manually in the past, they will have to be removed from the total of the next GST Return.

The Adjustment Reports generated are automatically printed to the default printer and saved as PDF on a subfolder of Infusion during the upgrade progress. There will be a record in the Audit Trail if any of the reports are generated and what the path the PDF was saved to is.

Example:



GST Adjustments - Job Deposit Refunds
The Demonstration Company Ltd

02:08:10 PM

Job Deposits received in previous versions had the GST claimed in full at the time of receipt, and refunded deposits did not have the corresponding GST reversal recorded.

Refunded Job Deposits with unclaimed GST are listed below and are included in your current GST report for reversal.

If these amounts have already been accounted for manually in the past, please remove them from the total in your GST Return.

A copy of this report has been saved as PDF in DATA\Audit Reports\12240-Job Deposit Refund GST-20180830140807.pdf

Date	Customer	Job Details	Amount	GST
13/08/2018	Customer 2	Job 1011	-42.50	-5.54
13/08/2018	Customer 2	Job 1013	-70.00	-9.13
			-112.50	-14.67

