Infusion Business Software Version 6.00

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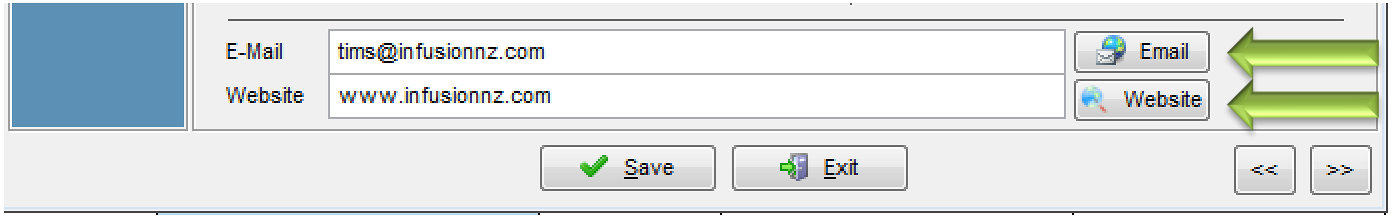
V6 - System Wide Changes

- The backup procedure has changed so that there is now no prompt option to test it - it is always done.
- We have removed the Web ninja CRM from within Infusion as buttons linking back to Infusion became an issue when embedded. The software must now be launched via the User’s web browser.
- We have introduced an alternative SMS Provider SMS Global which allows text messages to be sent with a short alpha code rather than the mobile number and will allow for txt message replies to come back as emails.
- The cost of the TXT message will increase to 15 cents per message from 1.9.2011 for both providers.

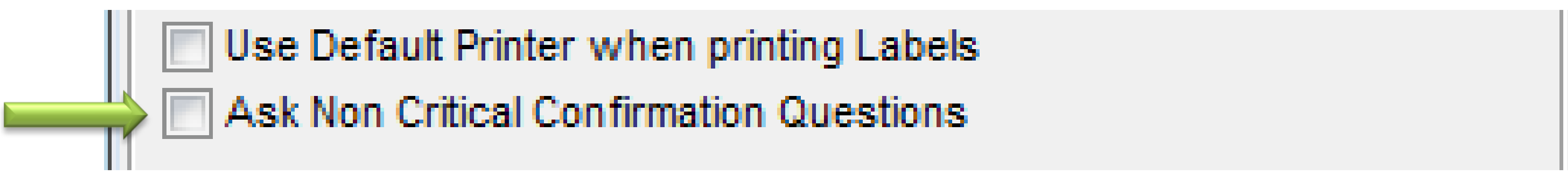
System Wide Changes

- Buttons have been added next to the Email and Website fields in Customers, Suppliers and Contact Log. The Email button opens up the default email program with the related email address as the recipient while the Website button opens up the default web browser.



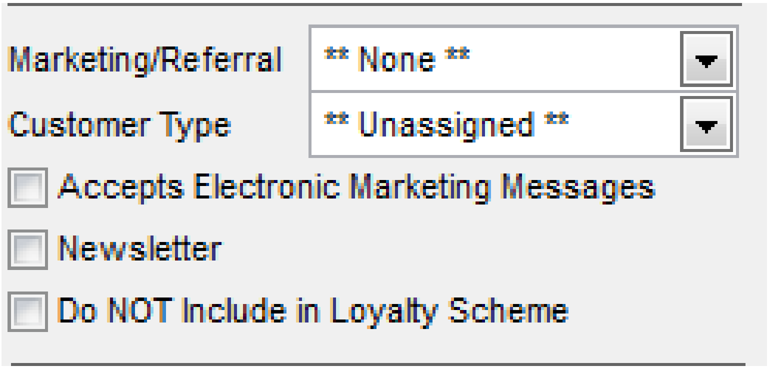
The “Are you Sure?” Prompt

- We have turned off over 100 prompts. These are prompts which will not affect data but improve speed
- Admin / Defaults / Mange System Defaults
- New Installs will be shipped with this turned off
- Upgrades will need to remove the tick box



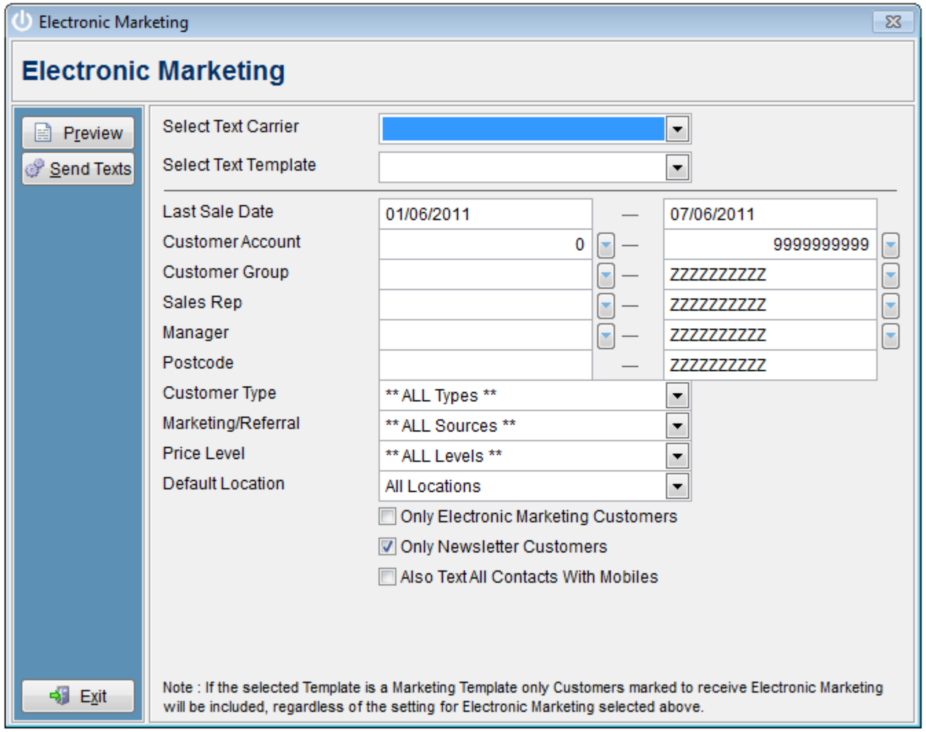
Electronic Marketing

- A new Check box has been added to the Customer details screen. Customers who have opted in to accept Electronic marketing messages, Texts and Emails should have this box selected



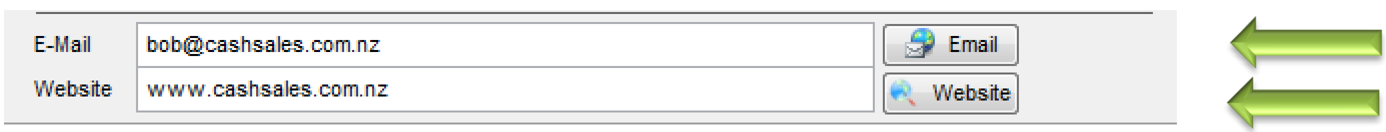
Text Marketing Template

- A new Marketing text template has been established. This will only send to those who have opted In.
- This is accessed from the Customer / Electronic Marketing dropdown menu



Email and Website Access

- An Email and Website button have been added to the Customer and Supplier Details Screen



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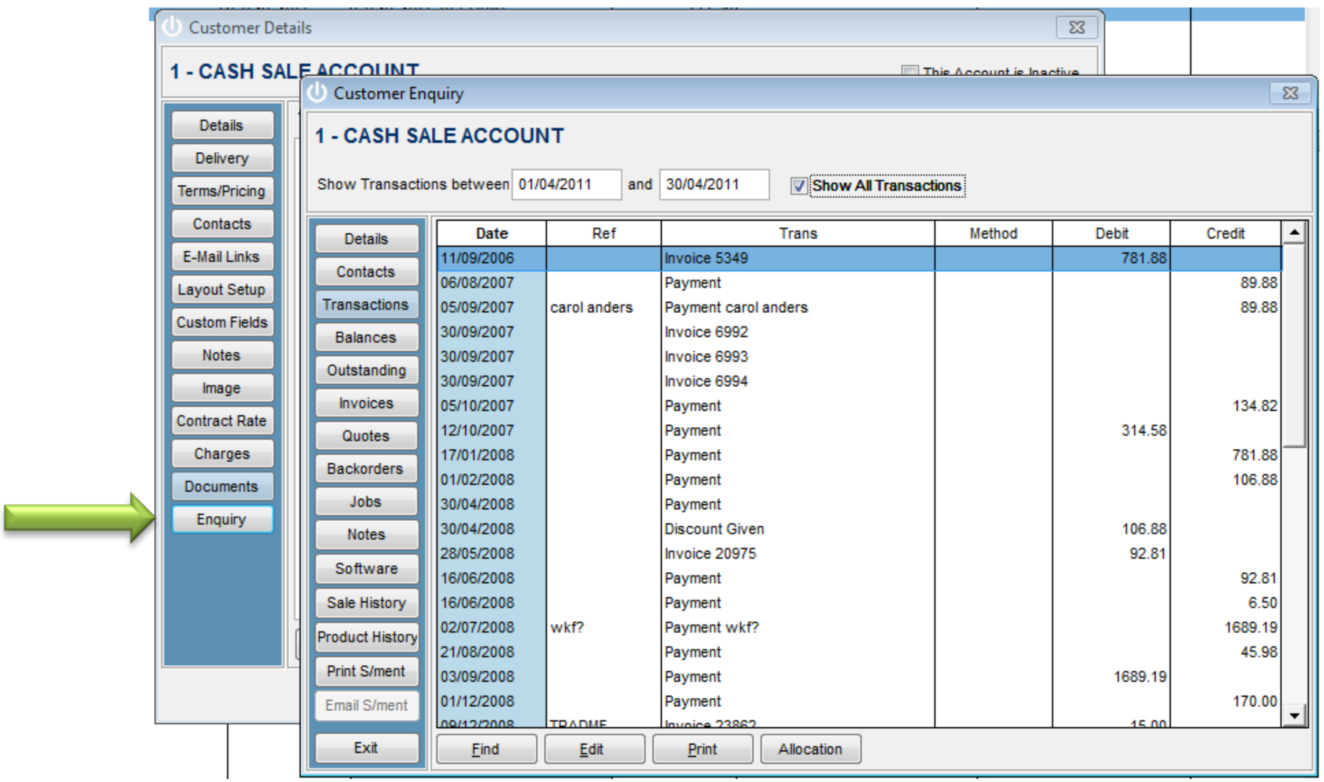
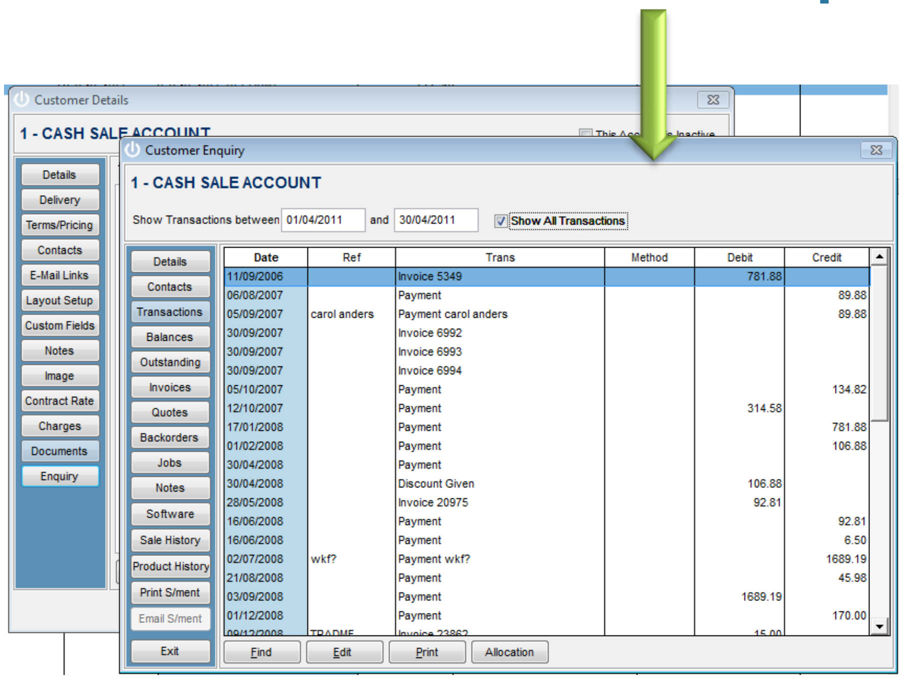
Enquiry Button added to Customers



Payment Method added to Enquiry

The Customer Enquiry window has been updated to include the method of payment. Note the method will only show from version 6 forward

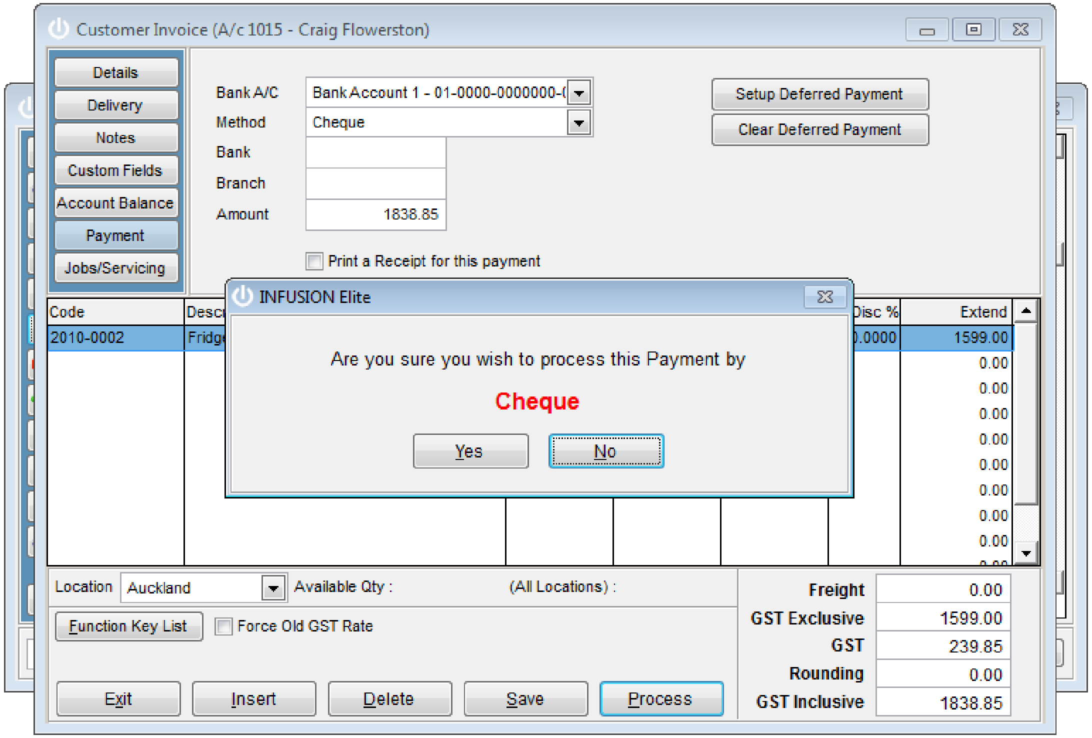


Customers

- There is now a quote layout (Quote1) with the Product code - not just the description.
- "Mr and Mrs" has been added as a title option for Customers and Contacts.
- The SMS functionality has been added to the mobile numbers for Contacts (both Customers and Suppliers).

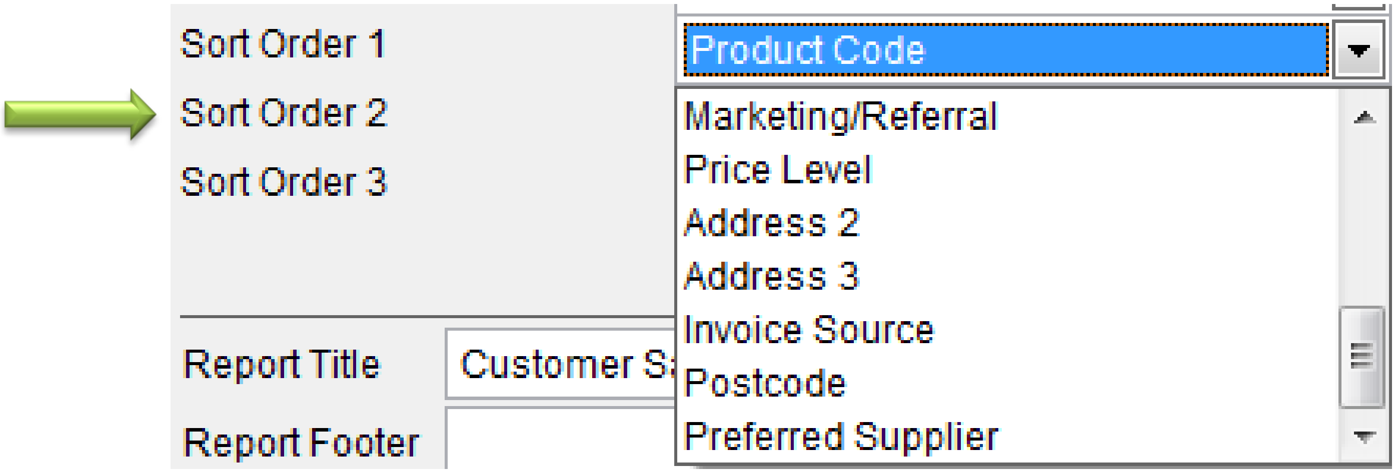
Customers

- A “Customers with No Sale” report using a date range has been added to identify clients who have not purchased within a given period.
- A tick box option "Confirm Payment Method when receiving payment (Invoice and payment screen)" has been added to the Manage Customer Defaults / Preferences screen.



Updated Ranges for Sales Analysis

- Address Line 2, 3, Invoice Source, Postcode and Preferred Supplier have been added as Customer Sales Analysis report Sort Order options.

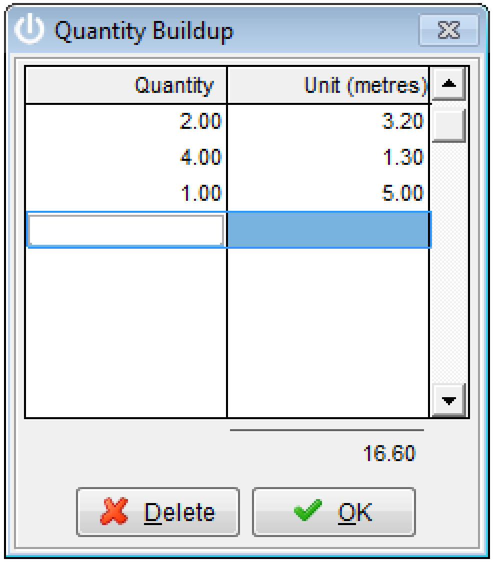


Customer Import

- The Customer Import routine has been modified to include Individual Title, Given Name, Surname and Acct Type.
- There are now options to import specifically Customer and Supplier Contact data information through the Admin / Import Data functionality.

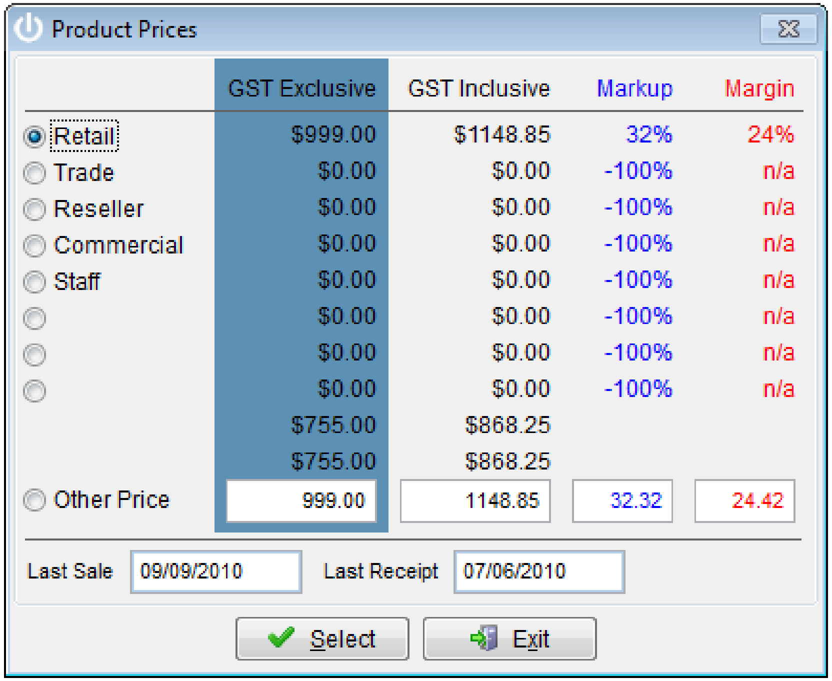
Invoicing / Quotes

- There is now a Quantity Buildup option that allows entry of multiple quantities and Units of Measure for an item on a single line.
- By selecting the F9 key when in the Quantity field a grid will display allowing entry of the multiple lots of a Product



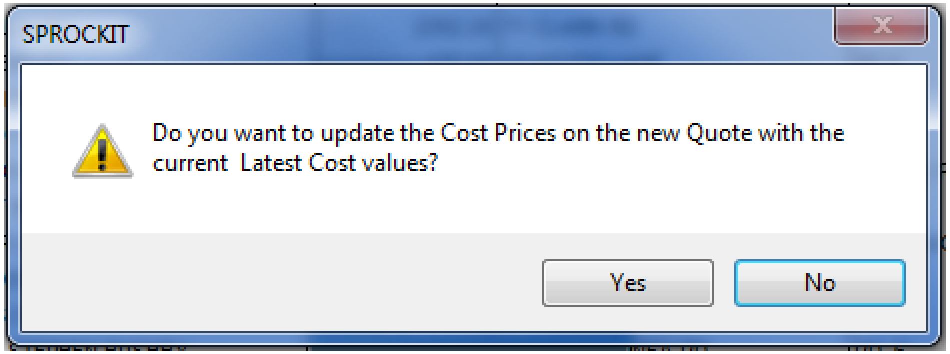
Invoicing / Quotes

- The Price lookup window (F8) on the Rate column (of an Invoice, Quote and Combined Job screen) has been updated so that a Price can be entered (in the “Other Price” field) and a Margin/Markup calculated. Also, if a Markup or Margin is entered a Sell price is calculated.



Invoicing / Quotes

- There is now a prompt when duplicating a Quote (from the Invoices/Quotes drop down menu) to update the cost prices associated with the Quote being copied.



Invoicing

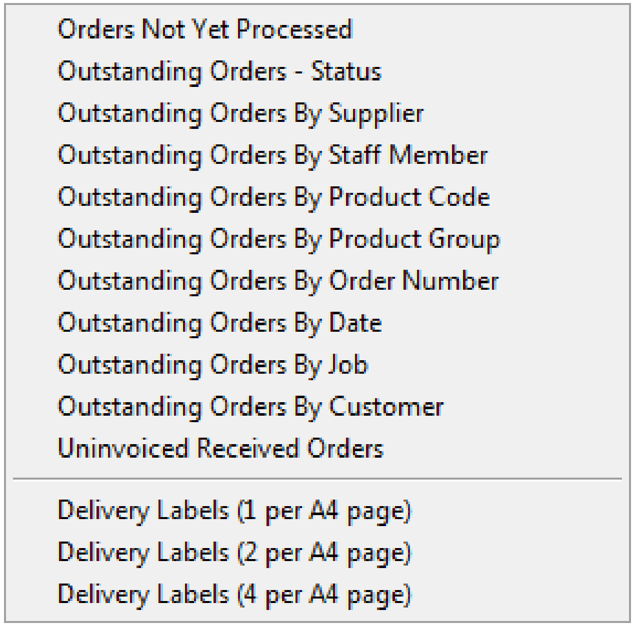
- When filling a backorder and the Consolidate Backorders option is selected and the Order number column in the Pending Customer Backorder screen shows three asterisks (***) even when there is only one order being filled has been fixed. The Order number will only show *** if there is more than one order on the backorder. Also the Backorder preview has been updated to show the order numbers if there are multiple orders.

Customer Payments

- Changes have been made to the processing of Customer Payments to improve the speed. This has affected clients with large Customer files.

Suppliers

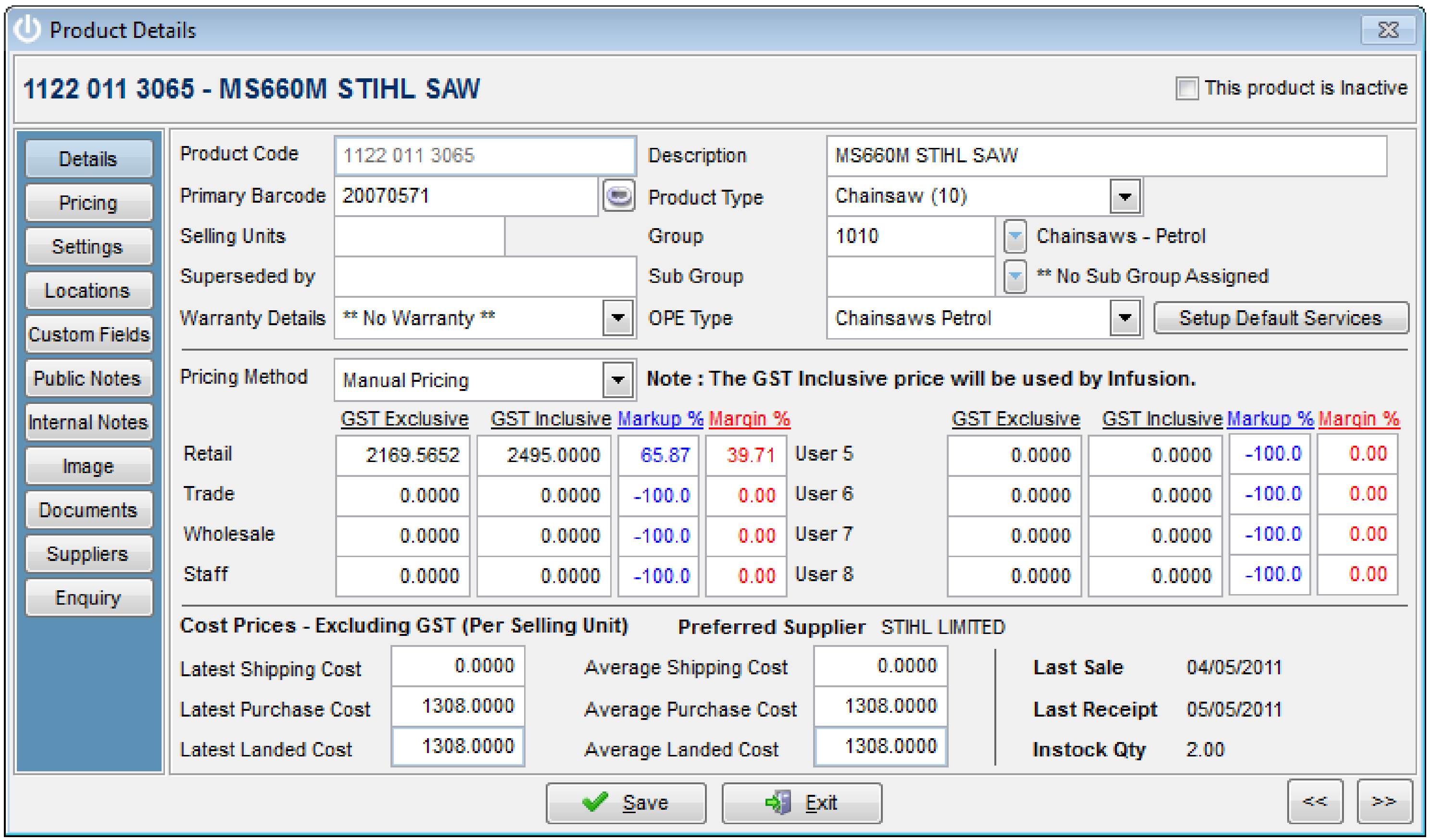
- There is now an Outstanding Orders by Job report.
- There is a an Outstanding Purchase order report by Date
- There is now a Purchase Order report called "Outstanding Orders - Status". This reports all Purchase Orders that have quantities still to be received. Orders are grouped by Supplier.
- There is a Outstanding Orders by Customer report



Suppliers

- When ordering items, the On Order check / prompt is now only performed when a line is added to a Purchase Order (or Order Receipt).

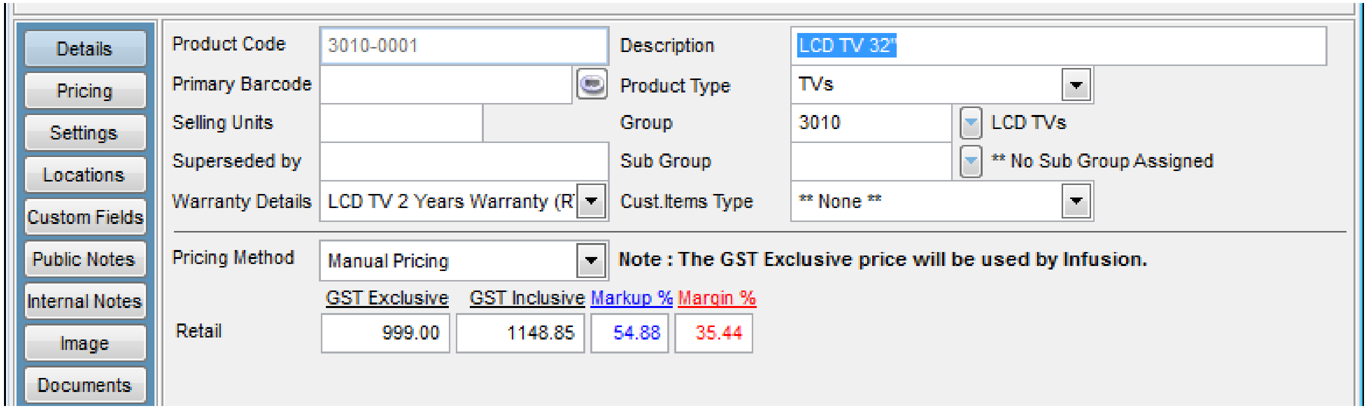
Products


Product Details
1122 011 3065 - MS660M STIHL SAW
This product is Inactive
Details
Pricing
Settings
Locations
Custom Fields
Public Notes
Internal Notes
Image
Documents
Suppliers
Enquiry
Product Code
1122 011 3065
Primary Barcode
20070571
Selling Units
Superseded by
Warranty Details
** No Warranty **
Description
MS660M STIHL SAW
Product Type
Chainsaw (10)
Group
1010
Chainsaws - Petrol
Sub Group
** No Sub Group Assigned
OPE Type
Chainsaws Petrol
Setup Default Services
Pricing Method
Manual Pricing
Note : The GST Inclusive price will be used by Infusion.
GST Exclusive
GST Inclusive
Markup %
Margin %
Retail
2169.5652
2495.0000
65.87
39.71
Trade
0.0000
0.0000
-100.0
0.00
Wholesale
0.0000
0.0000
-100.0
0.00
Staff
0.0000
0.0000
-100.0
0.00
User 5
0.0000
0.0000
-100.0
0.00
User 6
0.0000
0.0000
-100.0
0.00
User 7
0.0000
0.0000
-100.0
0.00
User 8
0.0000
0.0000
-100.0
0.00
Cost Prices - Excluding GST (Per Selling Unit)
Preferred Supplier
STIHL LIMITED
Latest Shipping Cost
0.0000
Latest Purchase Cost
1308.0000
Latest Landed Cost
1308.0000
Average Shipping Cost
0.0000
Average Purchase Cost
1308.0000
Average Landed Cost
1308.0000
Last Sale
04/05/2011
Last Receipt
05/05/2011
Instock Qty
2.00
Save
Exit
<<
>>

Products

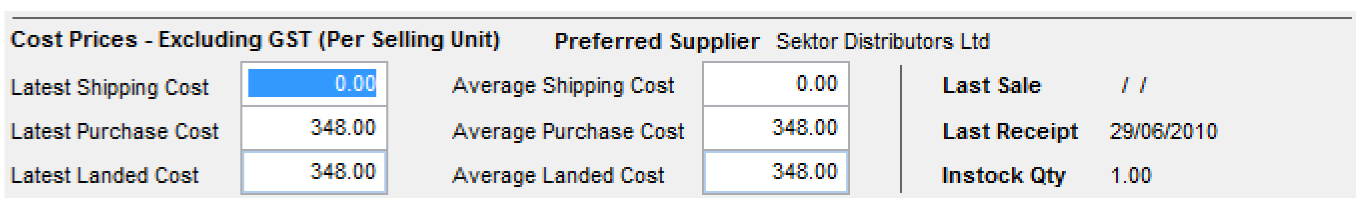
- The main Products Screen has been updated to now include the Price levels and also give the user the ability to enter in the Inclusive, Exclusive, Mark-up or Margin value. Infusion will then recalculate the remaining values.

- Only the price levels currently used will be displayed. To turn these off remove the heading from the Manage Products set up.

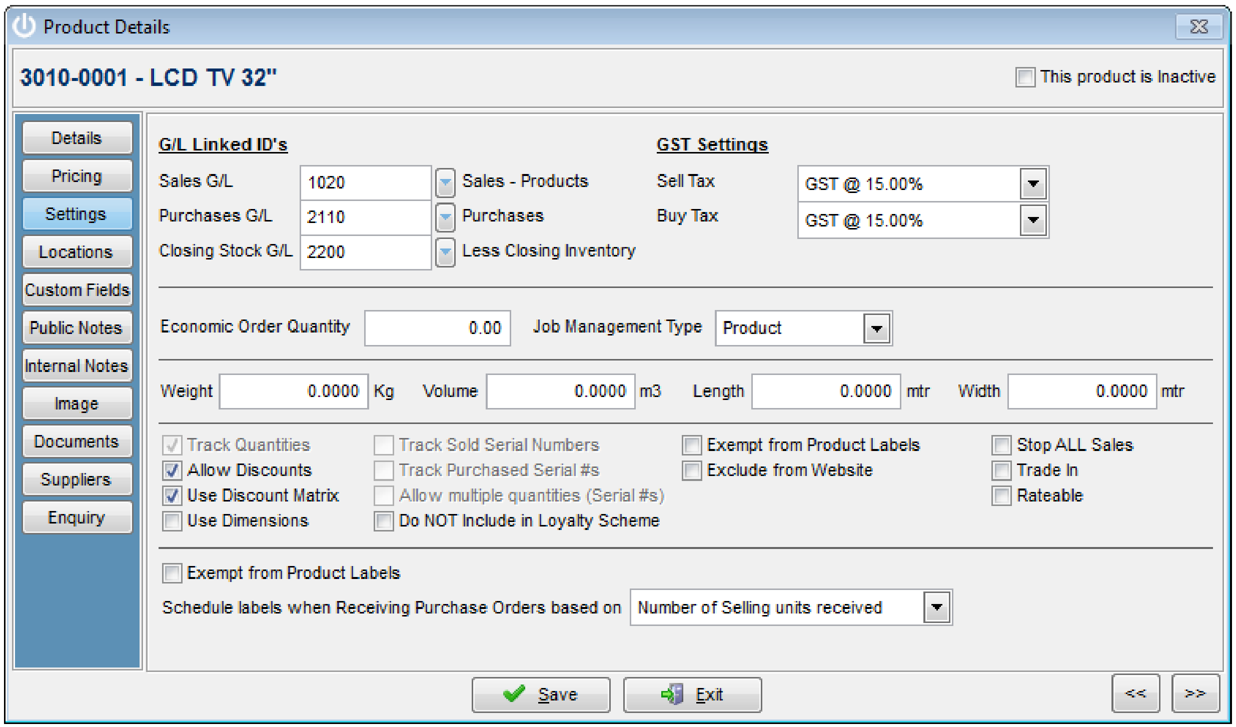


Products

- The Date of last Sale, Last receipt and current Instock Quantity have also been added
- The Preferred Supplier is also shown

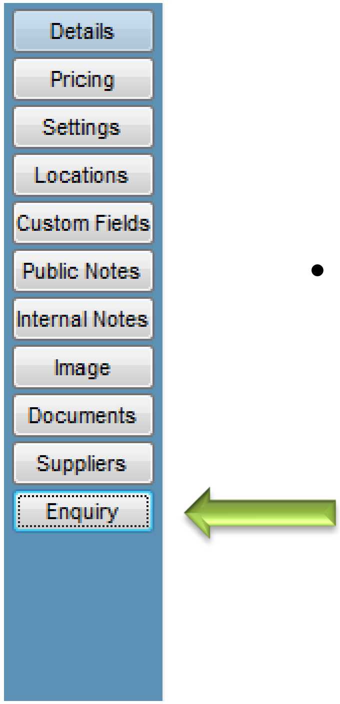


Products



- The Settings Tab now contains the settings which are not normally updated on a regular basis

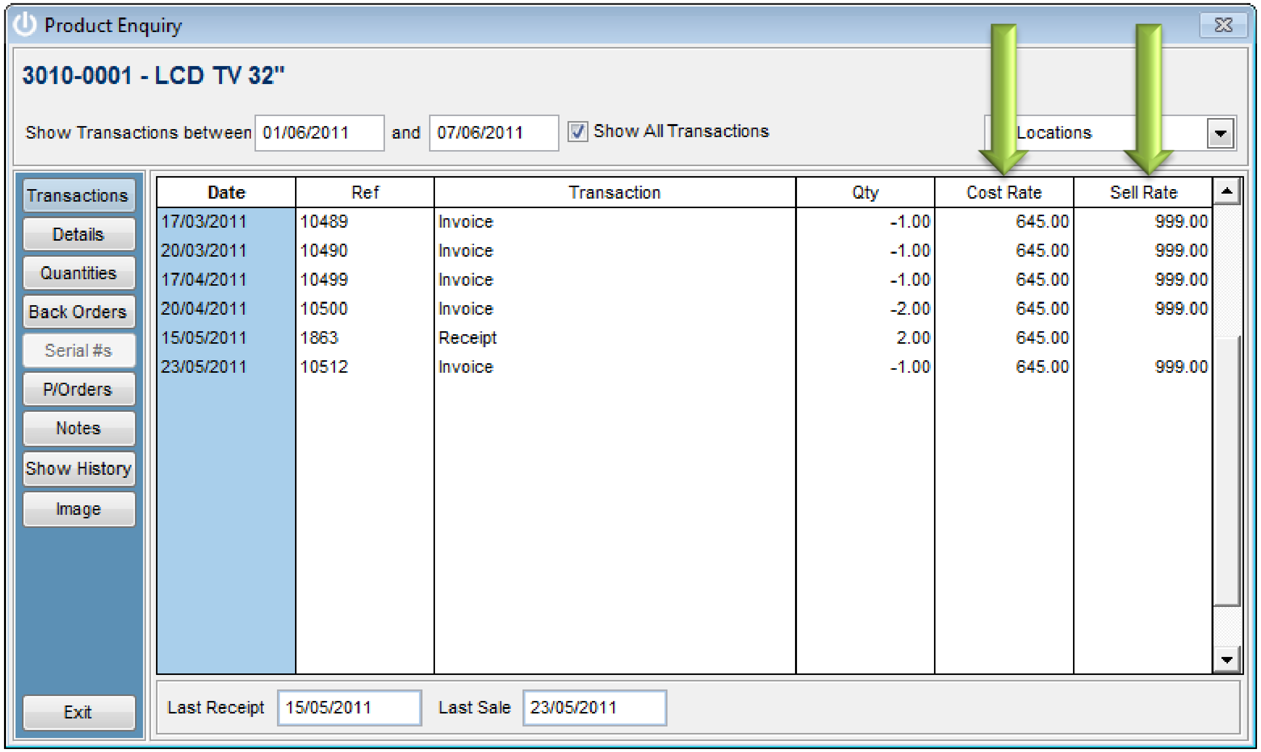
Products



- The Enquiry Button has also been added to the Manage products Screen

Products

- The Product Enquiry screen now shows the cost rate and Sell rate for each transaction

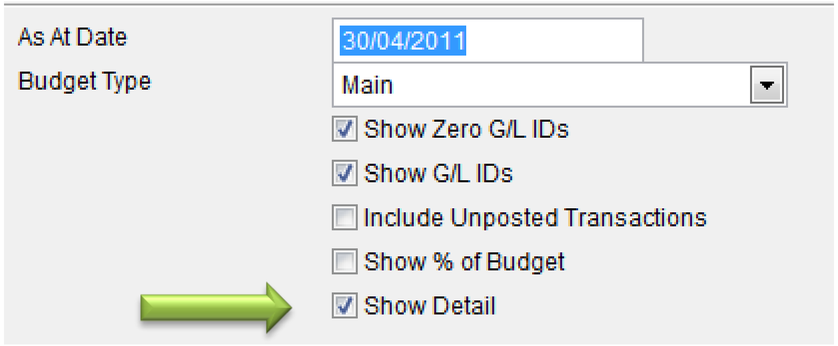


Cashbook Financials

- The number of cheques being banked is now shown on the Daily Banking printout.
- There is now a Direct Credit export option for Rabobank.
- The Westpac Business Online Direct Credit export format is now available.
- The Prepare Bank Deposit bank Reference field now holds and prints 15 characters.

Summarised Financial Reports

- Financial reports can now be printed so they only show the Total and Consolidated Accounts
- To activate this **untick** the Show Detail Box



Importing Financial Transactions

- When using Transaction Import Routines a Bank Rec entry is now created for any GL IDs which are setup as Bank Accounts. This applies to Type "0" (eg MYOB Payroll) and "1" import routines.

Job Management

- Job Management / Reports / Staff Timesheet Analysis report:– there are now two reports, one for a five day week and the second for a seven day week.

- The mobile number of the Assigned To staff member has been added onto the Modify Job screen. Also the Site Address for a Job has been added to the list of fields available in a Job SMS template.

- An option to "Do not prompt for printer" has been added to the Job Cards Layouts screen.

- The Payment Terms change to Green to indicate that the invoice will be charged to a head office account.

Customer Items - Servicing

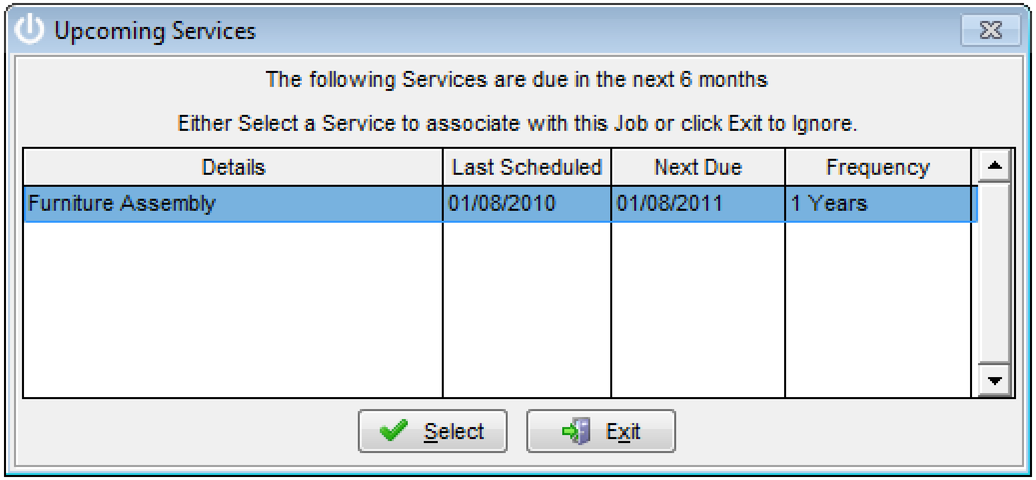
- There is now a service frequency called One Off (for first free follow up service)
- The Upcoming and Scheduled services screens have been combined into one menu option called Manage Services. A radio button option allows toggling between Upcoming and Scheduled screens.
- There is now the ability to edit a Service Event from the Upcoming Services screen
- There is now a Customer Name column on the Upcoming Services report.
- The Customer Item ID field cannot be edited when a new Customer Item is created.

Customer Items - Servicing

- There is now an option to create a Job when right clicking on a Customer Item.
- A Print Letters option has been added to the Upcoming Services screen. Note the ranges for the Letters are controlled by the letter ranges, not the tick boxes
- We have added the ability to send an SMS to all tagged Services on the Upcoming Services screen (Bulk SMS)

Customer Items - Servicing

- When you add a Customer Item to a Job the system can be set up check if there is an Upcoming or Overdue Service for the Item. A Service can then be selected to be used against the Job being created. Set up for this is under the Manage Customer Item Defaults menu



Import / Export

- The Lentune Supplier Invoice import routine has been added to the Import/Export module. Companies using this file format are Telfers Electrical, Redpath Limited, Simpsons Electrical Merchants, IES and Scotts Electrical.

- The Order Number on the Supplier Invoice file can now be used as the Job Number

Import / Export

- A Supplier Invoice import routine called "Import Infusion Supplier Invoices" has been added that will import a file generated from the Infusion Customer Invoice export. Invoice Custom fields are included in the import.

- When importing Supplier Invoices through the Import / Export module, all routines now look at the Pricebook(s) for that Supplier for Product Codes. If the product Code doesn’t exist it will be created. For the logic used in the selection of what Product Code is used see the "Product Selection Logic When Importing Supplier Invoices" file at:
  www.infusionsoftware.co.nz/support/support_documents

Admin

- A "Check for Partially Posted Customer Invoices" report has been added to the Partner menu.   A "Partially Posted Customer Invoice Repair utility" has also been added to the to the Partner menu. This allows certain Invoices on the above report to be repaired. The Invoice or Audit number from the report is used in the utility to specify which Invoice is to be repaired.

- The word Pending has been added in the Admin / Deleting menu option to now give Pending Customer Invoice, Pending Customer Quote,

Letters

- A Service letter can now be created for all Customer Item types. The letter can be printed / emailed for a single Customer Item Type or all Types.

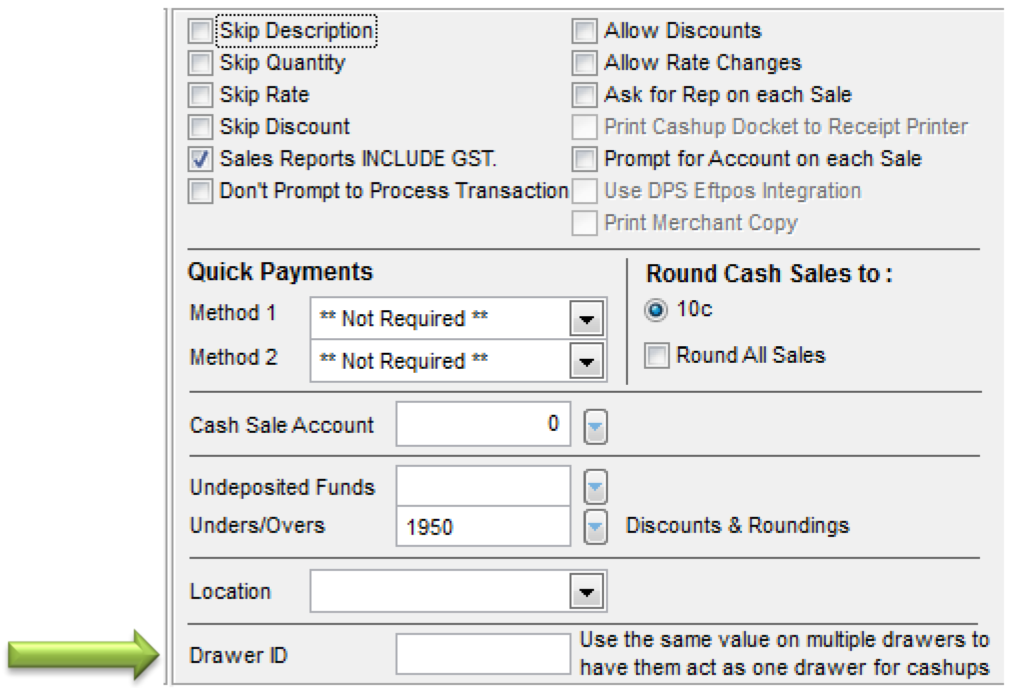
- Letters (printed and emailed) are added to the Contact log for the Customer.

Point of Sale

- Changing the Customer Account during a POS Sale will now force the sale to recalculate all selling prices. Users must be careful if they use the MISC codes

- POS now prints using the Windows Printer drivers.

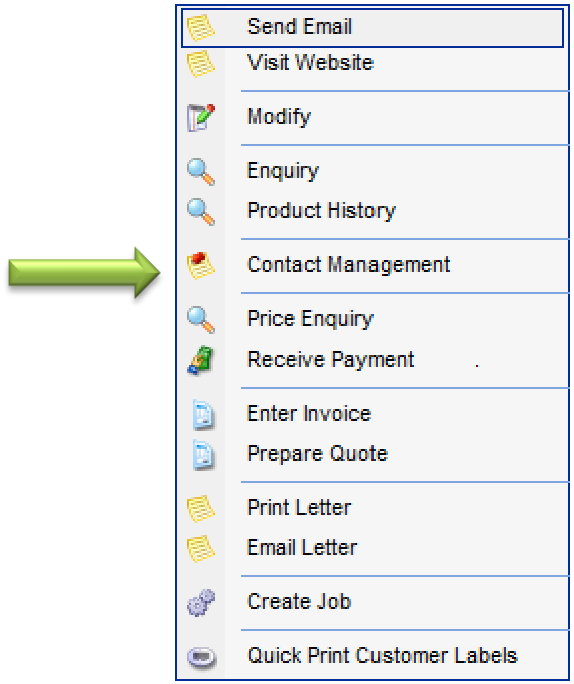
Cash Drawer Consolidation



- Cash drawers can now be consolidated into one or groups of drawers
- Each Till is assigned a group ID. When one of he drawers is removed it will remove all drawers with the same ID

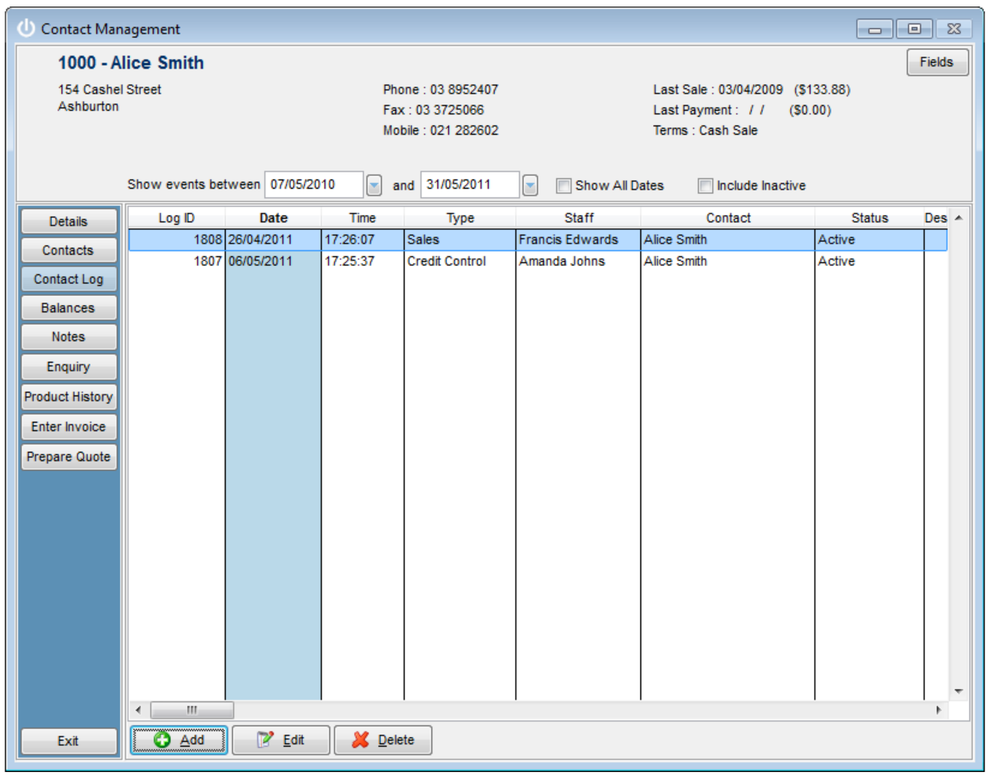
New Module – Contact Management

Contact Management



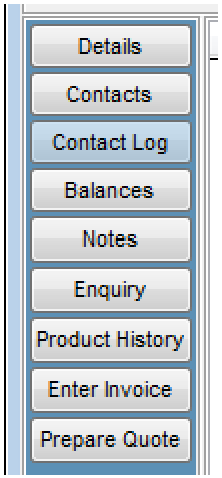
- Once registered, access to the Contact management is from the Customer dropdown menu or by Right Clicking on the Customer

Contact Management



Contact Management

Contact Management

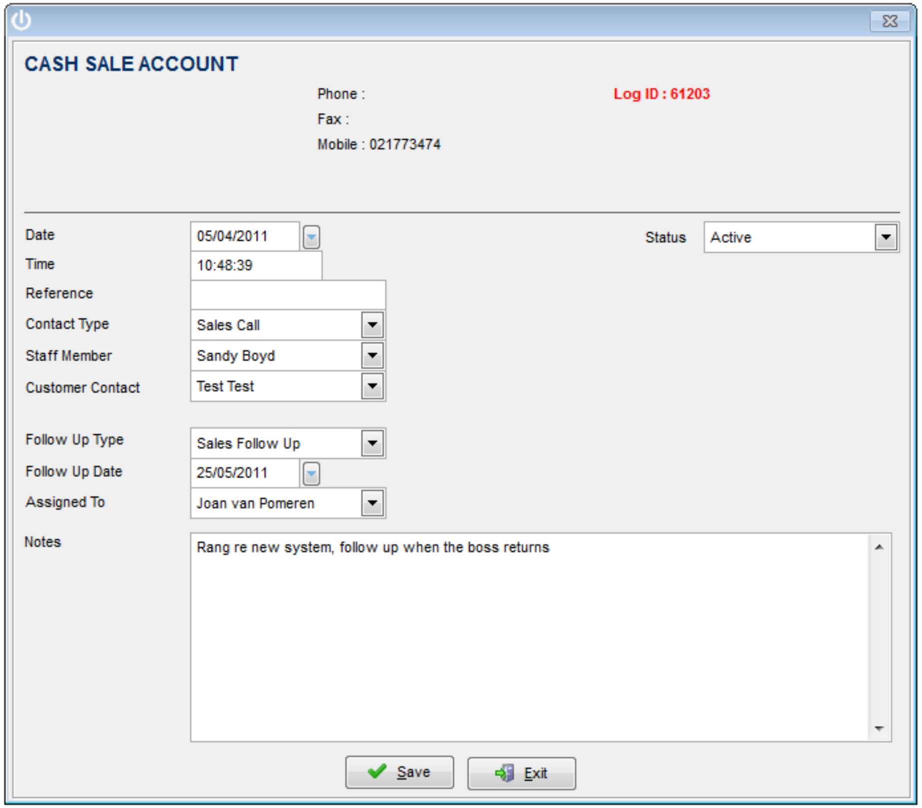


- From the menu bar you can create an:
  - Invoice
  - Quote
- View the Product history
- Check Transactions
- Add Notes

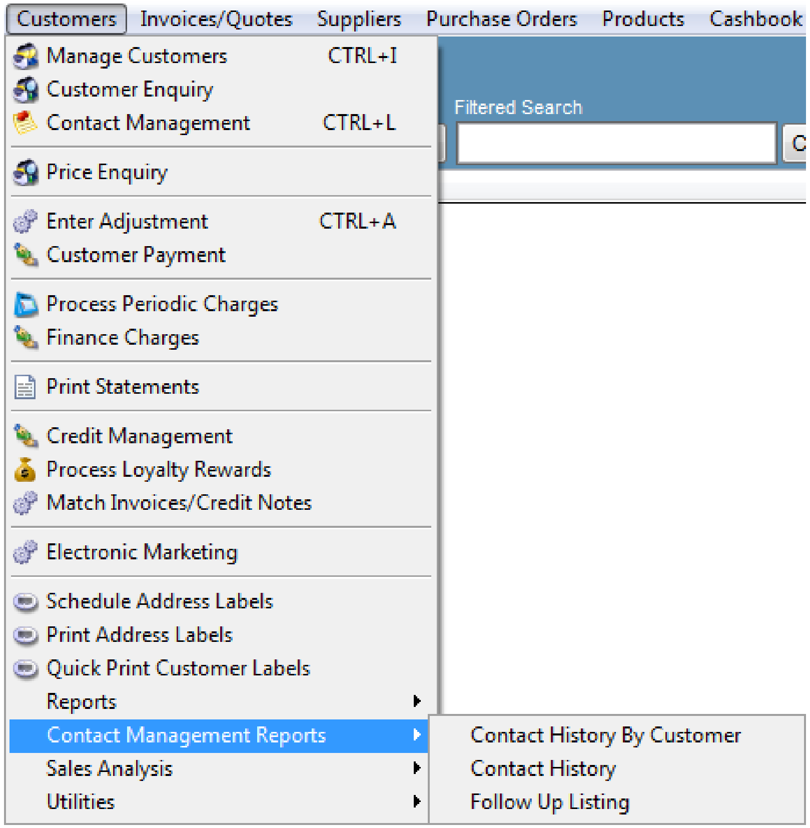
Contact Management

- Add Details of phone calls made indicating the type of call and retaining notes.

- Follow up calls can also be set. These will be printed on a report



Contact Management Reports

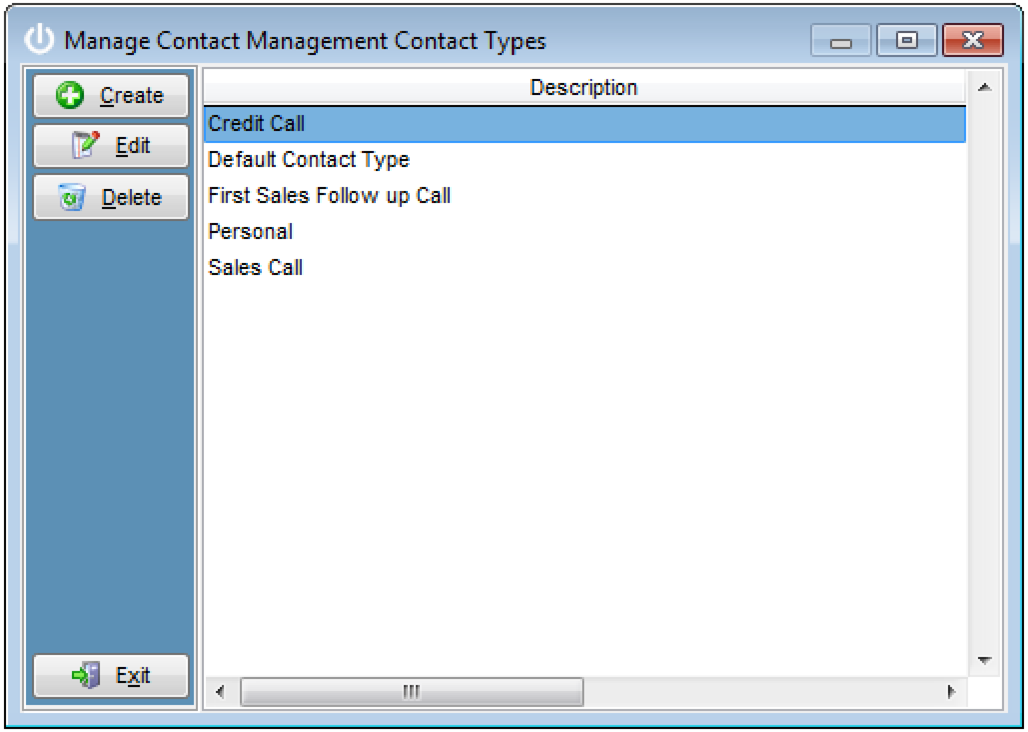


Contact Management

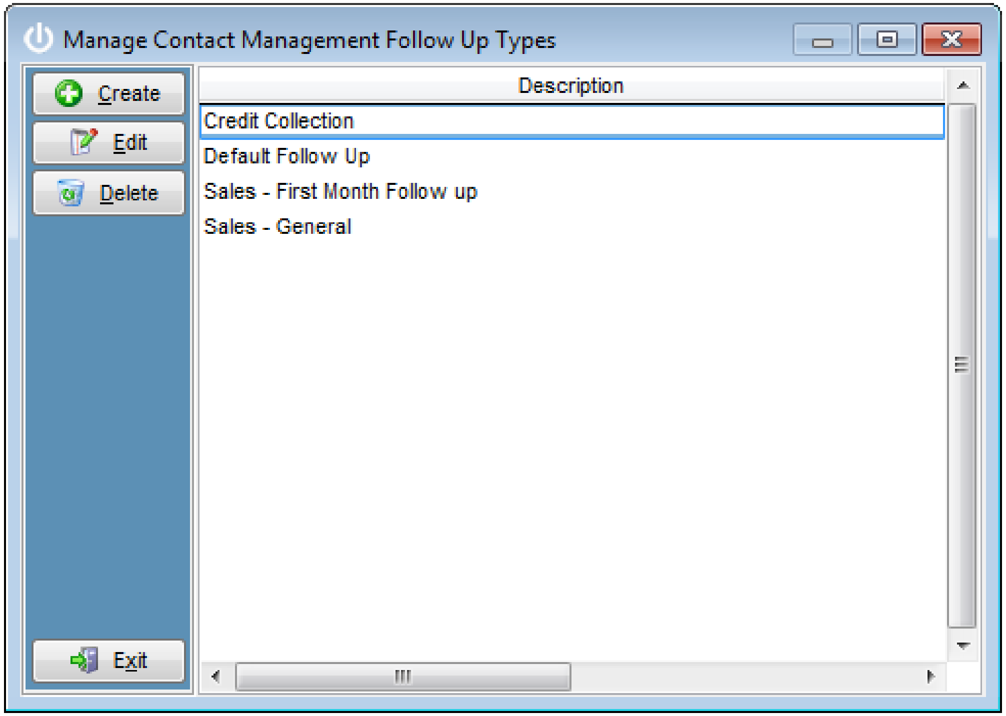
- Contact Types and Follow Up Types can be set up from the Admin / Settings window

Contact Management

- Set up Contact types to easily report on calls made.



Contact Management

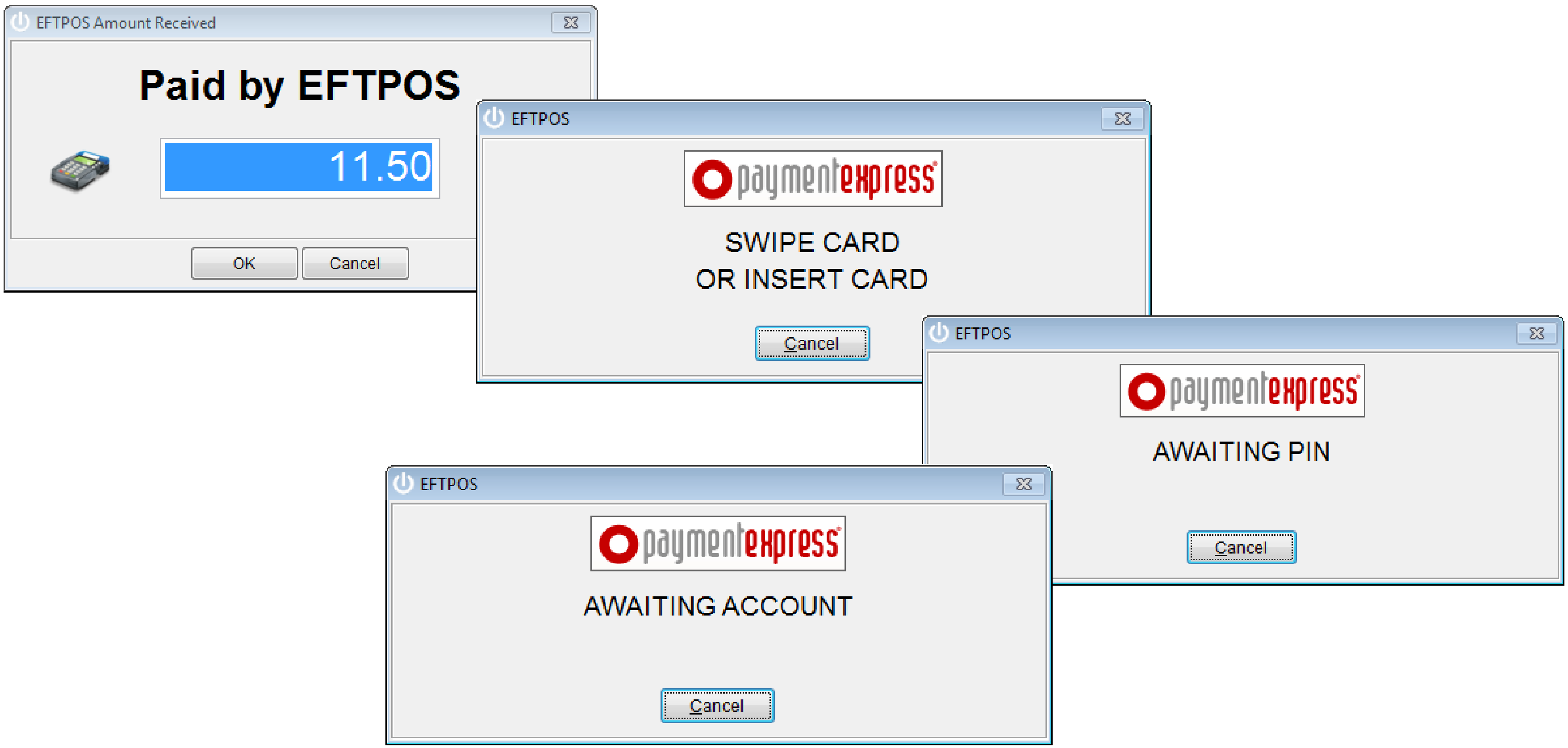


- Manage the follow up calls by grouping them

Integrated EFTPOS

- Infusion now integrates directly with DPS (Direct Payment Solutions)

Integrated EFTPOS



Integrated EFTPOS

Integrated EFT POS

Hardware Setup:

Pin Pad

- A Pin Pad must be rented from DPS. These are available at $59.95 + GST / month.

Printer Set up

- DPS have tested with a Tysso PRP-080II receipt printer and Infusion have tested with a EPSON TM-T81 receipt printer.
- The printer must be a 40 column continuous feed receipt printer (either Thermal or Impact)
- Any printer of this type should work. If not contact, Infusion for driver details
- The printer can be connected to the computer by COM, LPT or USB
- You must install the driver which comes with the printer.
- The Generic Text driver from Windows may work on some printers but may not work if the printer requires special codes for drawer kicking etc.
- This printer can be shared across the network as per any standard network printer.
  NOTE: An EFTPOS sale will not be able to be begun if any jobs are found in the printer queue.
- From an Infusion POS point of view, once the driver is installed, simply select it from under the POS / POS Defaults menu option.

Integrated EFT POS

DPS Set up

- Setup for DPS should all be done by using the DPS Client software. This is where the Banking settings are stored. The DPS client software can be downloaded from www.paymentexpress.com. There is a menu labelled Software towards the bottom right of the screen, which has links to the client software for each brand of pinpad. The default installation path is C:\Program Files\DPS\Eftpos on each computer that has a pinpad connected to it.
- A support document for setup of the Client software is at: http://www.paymentexpress.com/downloads/EFTPOSClientGuide.pdf
- No DPS information is stored within Infusion.

Integrated EFT POS

Infusion Setup :

- Within Infusion firstly there will need to be DPS EFTPOS registered users.
- Only POS users can access these functions, but in addition only some POS terminals may choose to have DPS EFTPOS. For this reason, the number of DPS EFTPOS users can only be equal to or less than the number of POS users.
- Under the POS Defaults on **each POS machine** there is a tick box on the Preferences tab to set this terminal to use DPS EFTPOS. There is also a tick box below this to print a Merchant copy (duplicate) of the EFTPOS part of the receipt.
- These two tick boxes are only available (not greyed out) once the Receipt Printer has been selected as being Docket Layout (40 Col).

These are the only settings under Infusion for DPS EFTPOS.

Integrated EFT POS

Costs

- There is a $150 Set up fee charged directly by DPS
- The terminals are rented @ $59.95 per month from DPS
- All merchant fees remain the same
- All commission rates remain the same

There is no additional cost for the End User to add the DPS functionality. This is however only available from version 6.0 onwards and those registered for POS.