

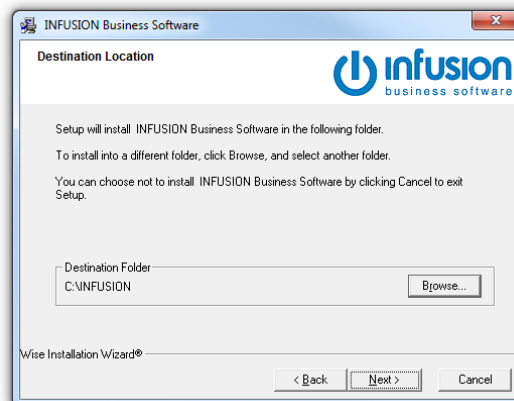
Infusion V5.00 Upgrade Notes

Introduction

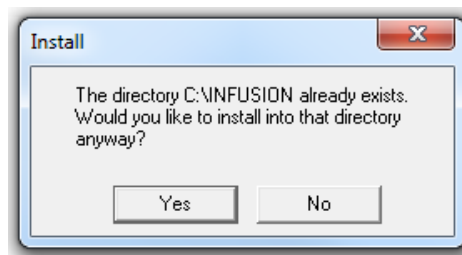
- ⚡ This document is designed to give an oversight into upgrading an existing installation of Infusion software on a standalone workstation, peer to peer network or LAN.
- ⚡ For upgrades of Versions 3.04 and below a full install is required on the Server and all Workstations accessing the software. For upgrades from Version 3.05 a SYSTEM install MAY be required on work stations. This will be dictated by the permissions of the user installing the upgrade on the data file. As a test, if the Customer's account can be modified, a local install is not required.
- ⚡ From Version 5.00 Infusion has Live Updates which allows downloading of the latest update from the Infusion Software Limited website. This feature can be turned off by creating/saving a text file in the Infusion folder called Noupdate.txt.

Upgrading Infusion:

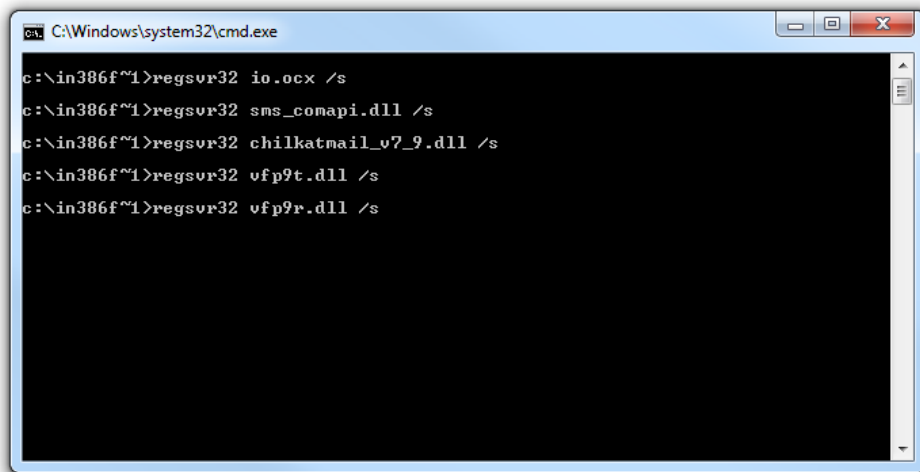
- ⚡ Before beginning the upgrade make a **full backup** of the existing version of the software (ie. Data, Custom and Images folders). Modify the name of the backup to include a note signifying it is a pre upgrade backup and what version is being upgraded eg IBSDATA20100210b4upgrade403
- ⚡ Make sure no one else is in Infusion then run the installer file (from a CD or downloaded from www.infusionnz.com) and install it over the top of the current install:



- ⚡ A quick way to find the Infusion directory is to right click on the Infusion icon and use "Find Target" ("find File Location" in Windows Vista). If you use the browse function, take care as the path will include \Infusion at the end of it. The result may be to install a fresh copy of the Infusion underneath the existing system. If done correctly a pop up will appear as per below stating that the folder already exists:



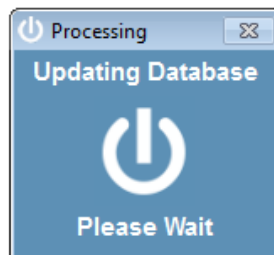
- ⏻ When the upgrade has finished and you log in to Infusion again a number of files will be registered by the system:



```
C:\Windows\system32\cmd.exe

c:\in386f~1>regsvr32 io.ocx /s
c:\in386f~1>regsvr32 sms_comapi.dll /s
c:\in386f~1>regsvr32 chilkatmail_v7_9.dll /s
c:\in386f~1>regsvr32 vfp9t.dll /s
c:\in386f~1>regsvr32 vfp9r.dll /s
```

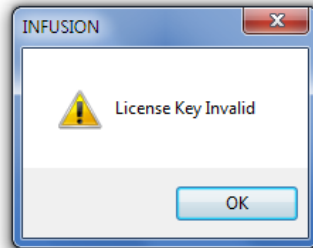
- ⏻ Logging back into Infusion again will cause the data to be upgraded:



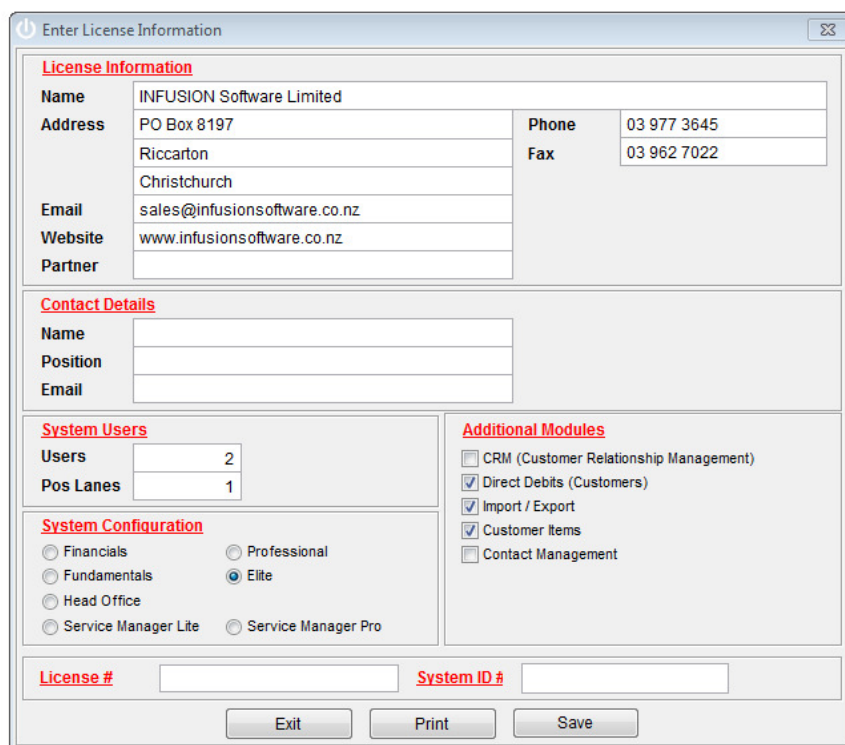
Let this process complete before accessing it from any other computers on your network.

Requesting / Entering an End User License

Upon completing the initial steps of the upgrade you will be prompted to re-open Infusion. Doing so will display the following message:



- ⚡ **Click** OK: to open the Software License Agreement window and carefully read the Infusion Software Limited Terms and Conditions.
- ⚡ **Click** I Agree:
- ⚡ The Enter License Information window will appear.
- ⚡ For those on a Maintenance or Support Plan they will receive, by email, their new License and System ID number. Enter these and select **Save**. This is all that is required. For all other End Users follow the steps below.
- ⚡ **Click** Print: to print out a faxable copy. Fax the License Request to 03 962 7022.
- ⚡ Once Infusion Software Limited has processed the request it will be faxed / emailed it back
- ⚡ Enter the License # and System ID. **Click** Save.
- ⚡ Your Infusion software will now be licensed for use.



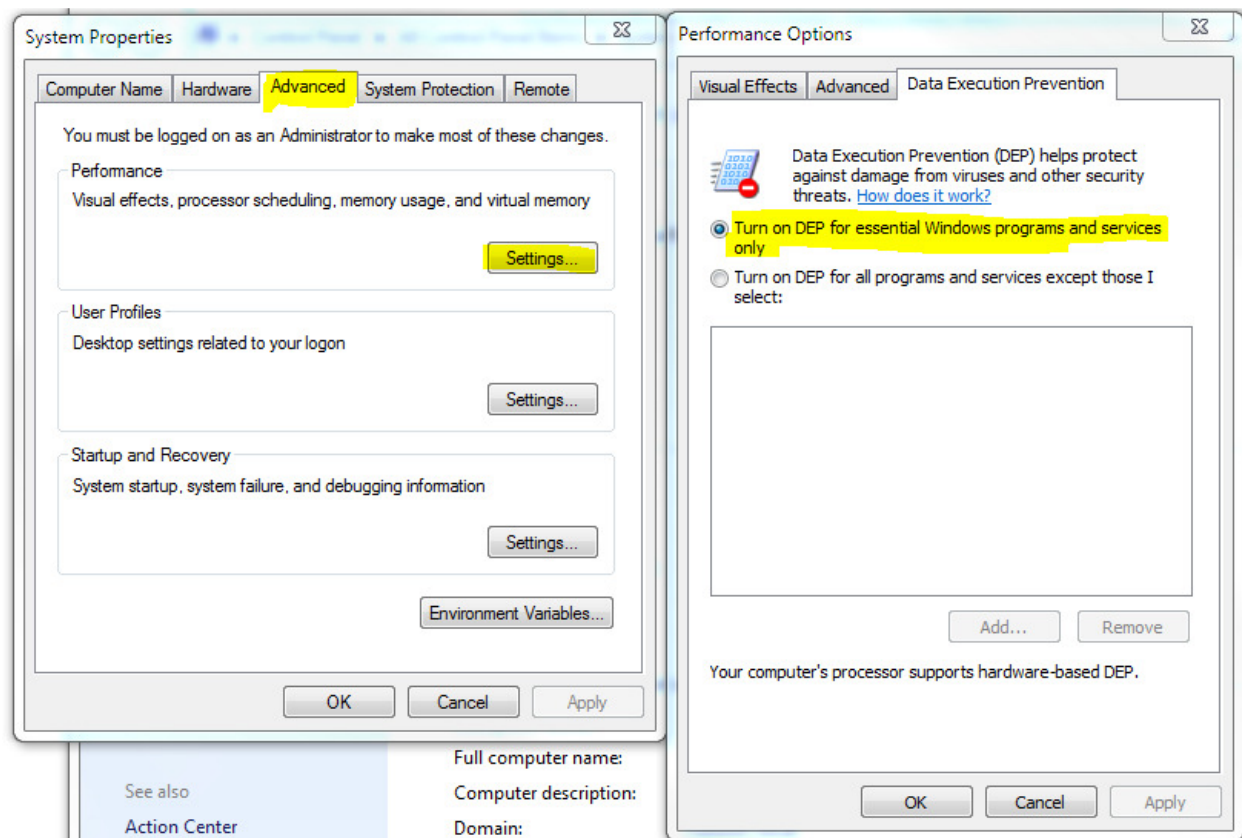
The 'Enter License Information' window is a multi-section form. It includes sections for License Information (Name, Address, Phone, Fax, Email, Website, Partner), Contact Details (Name, Position, Email), System Users (Users, Pos Lanes), System Configuration (Financials, Fundamentals, Head Office, Service Manager Lite, Professional, Elite, Service Manager Pro), and Additional Modules (CRM, Direct Debits, Import / Export, Customer Items, Contact Management). At the bottom, there are fields for License # and System ID #, and buttons for Exit, Print, and Save.

Windows Data Execution Prevention (DEP)

Infusion Version 5.0 requires that it is **excluded** from Windows Data Execution Prevention (DEP)

The default setting under windows for this technology is “Turn on DEP for essential Windows programs and services only” and if this is the case then Infusion will run fine.

This setting can be located by right clicking on My Computer (or Computer) then selecting Properties. This will display the window on the left. Select the Advanced Tab then from the Performance section the Settings button. Select the Data Execution Prevention tab and “Turn on DEP for essential Windows programs and services only” as per below.

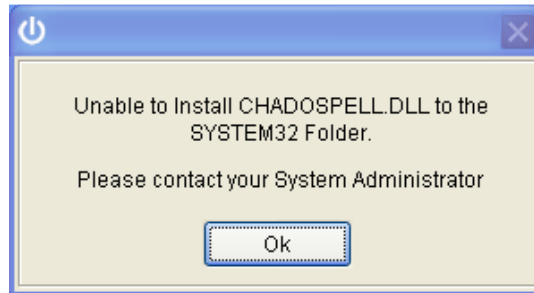


If your system is set to the 2nd option (Turn on DEP for all ...) and you wish to keep this setting, then click Add... to include Infusion as a program to exclude.

You should exclude the IBSAPP.EXE file (not the IBSMAIN.EXE file) however it will not matter if you exclude both.

SpellCheck File Installation Issue

If upon running Infusion from a workstation (after the data file has been upgraded to version 5) the following message appears then there has been an issue with copying or registering of the file Chadospell.dll.



The file exists in the Infusion folder and needs to be copied to the local Windows\System32 folder as part of the version 5 install. This should happen when the user first runs Infusion after an upgrade; however security permissions may mean this needs to be done manually.

For the files to be successfully registered the network must be set up with a Mapped drive (not a Shared Folder) to Infusion. Doing a local install of just the System files will register the dll.

The above message will appear until the files are installed.