

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



If the "Database files" option was selected you will be prompted for the folder to install the Database files into.

🖸 Setup - Infusion 💶 🗆 🗙	🖸 Setup - Infusion 💶 🗆 🗙
Select Database Folder Where should the Database files be installed ?	Select Additional Tasks Which additional tasks should be performed?
Setup will install the Database files into the following folder. To continue, click Next. If you would like to select a different location, click Browse F:\Infusion Browse	Select the additional tasks you would like Setup to perform while installing Infusion, then click Next. Additional icons:
	Create a desktop icon
Copyright © 2006 Infusion Business Software Ltd	Copyright @ 2006 Infusion Business Software Ltd

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.

🕑 Setup - Infusion 💶 🗆 🗙	🕑 Setup - Infusion 💶 🗆
Enter Icon name Alter name to suit	Ready to Install Setup is now ready to begin installing Infusion on your computer.
The following name will be used for your Icon name. Icon name:	Click Install to continue with the installation, or click Back if you want to review or change any settings.
Infusion	Selected components: Workstation component files - required for Workstation Database files, prompt for location, can be same as Workstation
	(workstation) C:\Infusion (database)
Copyright (9) 2006 Infusion Business Software Ltd	Converbit (8) 2005 Tofixion Rusiness Software Ltd
< Back Next > Cancel	< Back Instal Cancel

Select Next

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

Select Install



U Setup - Infusion	_ = ×
Installing Please wait while Setup installs Infusion on your computer.	R
Extracting files C: \Infusion\foxypreviewer.app	
Copyright © 2006 Infusion Business Software Ltd	
	Cancel

😃 Setup - Infusion	_
(l)	Completing the Infusion Setup Wizard
Infusion business software	Setup has finished installing Infusion on your computer. Click Finish to exit Setup. View the Workstation post Install Notes file - Recommended (requires a PDF reader eg Adobe)
))	
	Finish

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.

scheme.rel	2//02/14 11:12 AM	TP1 FIIE	5.059 6.6
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	Annlication extens	4 624 KR

IMPORTANT NOTICES

If you install FULL (both Workstation and Database at the same time), running unins000.exe will uninstall both the Workstation <u>AND</u> 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.

Name	INFUSION Sof	ftware Limi	ted				
Address	PO Box 8197				Phone	03 977	3645
	Riccarton				Fax	03 962	7022
	Christchurch						
Email	sales@infusi	onsoftware	e.co.nz				
Website	www.infusio	onsoftware	.co.nz				
Partner							
Account Co	ontact Details			Administr	ration Contai	t Details	Copy Account Details
Name				Name			
Position				Position			
Email				Email			
System Us	ers			Additio	nal Modules	6	
	-						
Standard		2		There	are no additi	ional modu	ules for the selected
Standard POS		2		There System	are no additi n Configurat	ional modu ion.	ules for the selected
Standard POS EFTPOS		2 1 0		There System	are no additi n Configurat	ional modu ion.	ules for the selected
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Standard POS EFTPOS System Co O Financial	enfiguration Is	2 1 0 Head 0	ffice	There System Additic Auto	are no additi n Configurat onal Services omated Offsite tomer Portal hboard	ional modu ion. E Backup	ules for the selected
Standard POS EFTPOS System Co Financial Fundame Professio	Infiguration is Intals Intals	2 1 0 Head O Central	ffice Billing	There System Additic Additic Cus Das Mob	are no additi n Configurat onal Services omated Offsite tomer Portal hboard ile	ional modu ion. E Backup	ules for the selected
Standard POS EFTPOS O Financial O Fundame O Professia Ite	Infiguration is Intals Intals	2 1 0 Head 0 Central	ffice Billing	Additic System Autu Cus Das Mob Wet	are no additi n Configurat onal Services omated Offsite tomer Portal hboard ile oGate	ional modu ion. E Backup	ules for the selected
Standard POS EFTPOS System Co Financial Fundame Professie Elite Options	Infiguration is Intais Intais	2 1 0 Head O Central	ffice Billing	Additic System Additic Auto Cus Das Mob Wet	are no additi n Configurat onal Services omated Offsite tomer Portal hboard ile yGate	ional modu ion. E Backup	ules for the selected
Standard POS EFTPOS System Co Financial Fundame Professik Elite Options Software	Infiguration Is Initials Ional	2 1 0 Head 0 Central	ffice Billing osted Site	Addiffic Autor Cus Das Mob Wet	are no additi n Configurat omal Services omated Offsite tomer Portal hboard iile Gate	ional modu ion. E Backup	ules for the selected
Standard POS EFTPOS System Co Financial Fundame Professik Elite Software	e Hosted Sign	2 1 0 Head O Central	ffice Billing osted Site	Additic Auto Cus Das Mob Wet	are no additi n Configurat onal Services omated Offsite tomer Portal hoboard ile yGate	ional modu ion. E Backup	ules for the selected



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.

Infusion Uninstall	×			
Uninstall Status Please wait while Infusion is removed from your computer.	С			
Remove Shared File?				
Ur The system indicates that the following shared file is no longer in use by any programs. Would you like for Uninstall to remove this shared file? If any programs are still using this file and it is removed, those programs may not function properly. If you are unsure, choose No. Leaving the file on your system will not cause any harm.				
File name: Infusion Support.exe			Infusion Uninstall	×
Yes Yes to All No No to All			infusion was successfully removed from your computer.	
Copyright © 2006 Infusion Business Software Ltd	_			
Ca	ncel	Followed by:	ОК	



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.

- 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.
- A new flag has been added to the Product Defaults menu which will allow you to decide 12526 whether new products are to have tracked quantities by default or not.



🕛 Manage Proc	duct Defaults
Preferences New Product Docket #'s Price Levels Custom Fields Trade In Trade Me	These Defaults are used when a new product is added from Manage Products, Product Lookup or Imported. Automatically Number Products Track Quantities Allow Discounts Exclude from Website Require Closing Inventory G/L ID when adding Products
	Save Save

- Sprockit Australia only: 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: <u>https://infusionsoftware.zendesk.com/hc/en-</u> 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.
- 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.

Preferences	Cost Entry Flags		
0.151	Hold Job ID	Allow Cost Price Changes	
Cost Entry	Hold Cost Date	Allow Sell Price Changes	
Invoicing	Hold Cost Code	Allow Editing of Cost Description	
Suchase Fields	Hold Department	Allow Markup % Changes	
Custom Fields	Warn when Insufficient	t Stock Available	
Contacts	Include Time Stamp wh	en adding Notes (Staff Type Only)	
Innurance	Activate Departments /	Locations	
insurance	Require Departments		
Schedule	Ask for Start and Stop	Times when Entering Staff Costs	
	Prompt to load the come	ponents of a kitset individually onto a job	
	Hide the Cost Price colu	umn (Modify Screen)	
	Skip to the Code field at	fter each cost added (Modify Screen)	
	Automatically Authorise	Costs	
		1.573.5423	
	La si	ave 🛋 Exit	

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.





- Sprockit only:

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:
 - 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 Joł	b Defaults
Preferences	Label this Module as Jobs
Cost Entry	Automatically Number Jobs Next Job Number 10130
Invoicing	Allow Editing of Job Number
Custom Fields	Default Due Date to a number of days after Start Date 7 (Days)
Contacts	Allow editing of Job Invoices Don't adjust Job Costs when editing Job Invoices
Insurance	Mark costs as billed when entered after Job is Complete
Schedule	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 Returning to Stock
	Default Job Type Standard Job
	Each Time Unit is 1 Hour
	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
	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
C	Use Quoted Sell Rates when assigning costs to Jobs
	Use Quoted Cost Rates when assigning costs to Jobs
	Isave Save Save Save Save Save Save Save S

 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 prepopulated 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.

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🕛 Manage Su	pplier Defaults
Preferences Custom Fields	Purchase Order Flags
Messages Contacts Invoices Orders	Print Receipt Confirmations Populate Ordered By with Logged On User Show Purchase Units (On Screen) Show Selling Units (On Screen) Show Ratios (On Screen) Show Suppliers Code (On Screen) Allow Invoicing Direct to Customers
	 Allow Multi Location Ordering Allow Multi Location Ordering Remove Standard Purchase Order Option Require Job ID on all Orders Update Order date when recalling saved Purchase Orders Prompt when Product already on order Prompt for Auto Order Print Job labels from P/O when receiving products Use EOQ for purchase order auto-orders Select Products set to Preferred Supplier for Auto Order
	🛃 Save 🖏 E <u>x</u> it

Import / Export

- An issue on Supplier Invoices imports which was doubling up the order quantities has been ¹²⁶⁶⁵ corrected.
- 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.



Expo	ort Data							×									
~	Select		Electr	onic D	ata Export												
	Supplier Pr	rices		^	Select an I	Export Option	n										
					Export Supplier P	rices					×						
						Exp	ort Su	upplier F	Prices								
					Account		0		- 99999	99999 🔻							
					Sort Key Group		-		- 22222222	ZZZ •							
						Preferred	Supplier	s Only		•							
					Product Code			•	- 2222222	777777777777777777777777777777777777777	Z						
					Product Group		•		- 2222222	ZZZ 🔻							
	Exit For addition	nal export options	see Manage Da	ata	Product Sub Group		•		- 2222222	ZZZ 🔻							
	Exports				Product Type	** All Product	t Types *	* ~									
						I I P Y C U / I P U											
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- The Supplier / PO Invoice Import processing logic (Import/Export Module) has been updated to correct an inconsistency when a Job Department is required.
- A problem where Importing of Supplier Purchase Orders was not setting the Status of the Order correctly after import has been corrected.
- A problem with rounding of GST on the Edward Gibbons Invoice with Products import key file ¹²⁶⁹⁰ has been corrected.

Invoices

- The Margin and Mark-Up calculations on Customer Invoices, Quotes and Jobs have been ¹²⁵⁴⁴ updated to take into consideration discounts applied.
- Sprockit only applies to Field Days system.
 The system now responds to a switch file called StihlFieldays.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.



12727 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. Job Management 12529 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. 12535 Improvements have been made in the Quote for Insurance Job process: 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. 12710 An error occurring when trying to enter a product set to Use Dimensions in the Enter Job Costs screen has been fixed

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.

Previous Versions
Print POS Docket
Pos Layout 1 (No Product Co
<u></u> Qk <u>№</u>
(0) Print POS Docket
Pos Layout 1 (No Product Cor)
Docket Layout (40 Column)
Pos Layout 1 (No Product Code)
Pos Layout 2 (Incl Product Code)
Pos Layout 3 (A4 - No Product Code)
Pos Layout 4 (A4 - Incl Product Code)
Pos Docket with EFTPOS (No Prod Code)
Pos Docket with EFTPOS (Incl Prod Code)



- 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.
- 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.



12397

Products

- Sprockit only: 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 ¹²⁵¹⁴ Warning has been corrected.
- 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.
 - 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.



U Print Report -	prodexcp					×
Product E	xception					
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word	Sort By		Exception		~	
Excel	Sell Price 1 Margi	in Outside	0.00	_	999.00	
	Sell Price 2 Margi	in Outside	0.00	1 —	999.00	
	Sell Price 3 Margi	in Outside	0.00	1 —	999.00	
	Sell Price 4 Margi	in Outside	0.00	1 —	999.00	
	Sell Price 5 Margi	in Outside	0.00	_	999.00	
	Sell Price 6 Margi	in Outside	0.00	1 _	999.00	
	Sell Price 7 Margi	in Outside	0.00	1 _	999.00	
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			GL Account Link Checks			_
			Cost Price Checks			
			Type Classification Checks			
			Group Classification Checks			
			Sub-Group Classification Ch	ecks		
			Customer Item Type			
			Quantity Checks			
			Settings Checks			
			Include Inactive Products			
	Report Title	Product Exc	ception		🕞 Save 🔀 Delete	e
🐳 E <u>x</u> it	Report Footer					

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

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- A check for error "File '...\pb000000.dbf' does not exist." Has been added which stops it from ¹²⁶⁶⁹ occurring.
- 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.



U Product Det	ails		— ×
1005 - Dinir	ng Table Rimu		
	r		This product is Inactive
Details	G/L Linked ID's	GST Settings	
Pricing	Sales G/L 10-1020 V Sales - Products	Sell Tax GST @ 15.00%	
Settings	Purchases G/L 10-2110 Purchases	Buy Tax GST @ 15.00%	
Locations	Closing Stock G/L 10-2200 Less Closing Inventory		
Custom Fields			
Public Notes	Job Management Type	Schedule labels when Receiving Purchase Orders based on	
Internal Notes	Product	Number of Selling units received	
Image	Track Quantities	Exempt from Product Labels	
Documents	Track Sold Serial Numbers		
Suppliers	Track Purchased Serial #s		
[Kiteate]	Allow multiple quantities (Serial #s)		
[relatera]	Allow Discounts		
Alternatives	Use Discount Matrix		
Compatibility	Exclude from Website		
	Exclude from Loyalty Scheme		
	Include in Infusion Mobile		
	Dont update Sell prices from Pricebook Updates		
	Trade In		
	Rateable		
	Stop ALL Sales		
	Stop ALL Purchase/Manual Orders		
Enquiry			
		Save Save	
		4.4 A	

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
Quote	es	
-	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



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AJ - Amanda	Johns	Q Customer D	etails				- • •
Details	Allow Infusion Login Access	1000 - Alice	Smith				This Account is Inactive
Next of Kin	Password	Datala	Î				
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Notes	Group 2	Delivery		Organization Individual		Alt Phone	
HOIDS	Group 3	Terms / Pricing	Title	Mrs V Given Name Alice		Fax	03 3725066
Image	Group 5	Contacts	Surname	Smith		Mobile	021 282602
Login	Group 6	Email Links	T/A	Beauty and Giftware of Merivale		VolP	
Documents	Group 7	Lavout Setup				GST No	11 111 111
Product Map	POS User	Custom Fields	Postal	154 Cashel Street			
Sales Budget	Backups Allowed	Custom Fields		Ashburton	-	Marketing / Deferral	Customer Referral
Charte	Allow editing of Discounts in Customer Invoice / Quote / Price Enquiry / P	Notes		Asing ton		Customer Type	Current
Charts	Allow editing of Rates in Customer Invoice / Quote / Price Enquiry / POS /	Image			(Free)	Industry Type	
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	Allow viewing of ALL Staff in Time Clock Entry	Contract Rate			9		Accepts Electronic Marketing Messages
	Allow overriding of Overdue Fees (For Rental/Hire)	Charges				_	✓ Newsletter
	Allow access to Terms and Pricing	Charges	Delivery	154 Cashel Street	P 4		Exclude from Loyalty Scheme
	Allow editing of Selling Prices - In the Modify Products Screen	Documents		Ashburton			Exclude from Item Tracking
	Allow editing of Cost Prices - In the Modify Products, Quotes, Invoices	Marketing		South Canterbury			Exclude from Accounts Portal
	Allow editing of Price Level - In the Modify Job Screen	Sales Budget				Group	RETAIL Retail
Olean Mindawe	Show only Pending Invoices for Staff location				0	Sales Rep	AJ Amanda Johns
Positions	Allow email using local Email Application		Deliver via	Courier Post	$\overline{\mathbf{v}}$	Managar	FE Francis Edwards
Clear Recent	Allow Supplier Invoices to be received with Orders					Region	19 Christchurch - Canterbury
List	Allow Access to Product Settings		Location	Christohurch		region	is constant of a contracting
Clear	Show only my emails in the Email Queue		Email	eliesemäh07254@heauteißmens eem			
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		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.

Manage Sta	hompson				×
Details Next of Kin Custom Fields Notes Image Login Documents Product Map	A Note : These (1021) Worksl (TT) Labour - (TT) Labour - (AJ) Labour - (AJ) Labour - (FE) Labour I (FEN) Labour I	ssign which Lab settings are only ur Codes nop Labour Ted Thompson VC - Ted Thompson NC - Amanda Johns NC - Amanda Johns NC - Amanda Johns NC - Francis Edwards VC - Francis Edw	our product codes are as used in conjunction with t Sele on on rans rands	sociated with this Staff Member he Job Management Time Clock S sected Labour Codes (First is the) Labour - Ted Thompson N) Labour NC - Ted Thompson	Software. Default Code)
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			Save	√ <u>E</u> xit	

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Supplier

- Sprockit only: 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: <u>https://infusionsoftware.zendesk.com/hc/en-us/articles/360000313536-Suppliers-Digital-Invoice-Import-for-Stihl-Invoices-</u>
- A new tick box has been added to the Invoices tab of the Manage Supplier Defaults screen ¹²⁵⁹⁹ 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.

🕛 Manage Su	pplier Defaults			— ×
Preferences Custom Fields Messages Contacts Invoices	Invoice Rates Exclude GST Invoice Flags Print Supplier Verify Invoice Automatically Custom Fields	 Include GST Invoice Total add Packing Slips (Also used on Pu 	□ Require Job ✓ P/O Receipt in the same rchase Orders)	ID on all Invoices and Invoice date must be month
	Text Field 1 Text Field 2 Text Field 3 Date Field 1	Text 1 Text 2 Text 3 Date 1	Text Field 4 Text Field 5 Text Field 6 Date Field 2	Text 4 Text 5 Text 6 Date 2

- 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.
- A problem in the Digital Supplier Invoice Import screen making invoices uploaded to Xtracta ¹²⁶⁷⁴
 invisible to the screen has been fixed.
- 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 12707 Import screen has been corrected.

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.







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 N	larketing								/	8
Select Template	e					×				
Select Output		SMS	Mes	sages		SMS Mes	ssages have a limit of	160 C	haracters,	
Select Carrier		MS Global - (Default) wessages that exceed this will be sent as multiple messages and charged accordingly.								
Customer Sele	ction									
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Decion			-	7777777777	-	Data of Last Sala	01/09/2018 🔻	_	20/09/2018	-

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- 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.
- The upgrade process of this version will analyse data referring to Job Deposits received in previous versions and create adjustments if necessary.
 - 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.

INFUSION		×					
A GST Adjustment report has been prin printer. This relates to unclaimed GST on Job De	ted to your default eposit Refunds.						
Full details are noted on the report.	ОК	GST Adju Th	GST Adjustments - Job Deposit Refunds The Demonstration Company Ltd				
Audit Details	Job Do	eposits received in previous ven Refunded Job Deposits with ur amounts have already been a	ions had the GST claimed in full at the time of reco corresponding GST reversal recorded. claimed GST are listed below and are included in coounted for manually in the past, please remo	eipt, and refunded deposits did not hav your current GST report for reversal. we them from the total in your GST R	e the Return.		
A GST Adjustment report has been printed to your default printer. This relates to unclaimed GST on Job Deposit Refunds.	A	copy of this report has been sa	ved as PDF in DATA\Audit Reports\12240-Job Dep	osit Refund GST-20180830140807.pdf			
Full details are noted on the report.	Date	Customer	Job Details	Amount	GST		
he report has also been saved to: DATA\Audit Reports\12240, Job Deposit Defund	13/08/2018	Customer 2	Job 1011	-42.50	-5.54		
IST-20180830141018 pdf	13/08/2018	Customer 2	Job 1013	-70.00	-9.13		
				-112.50	-14.67		