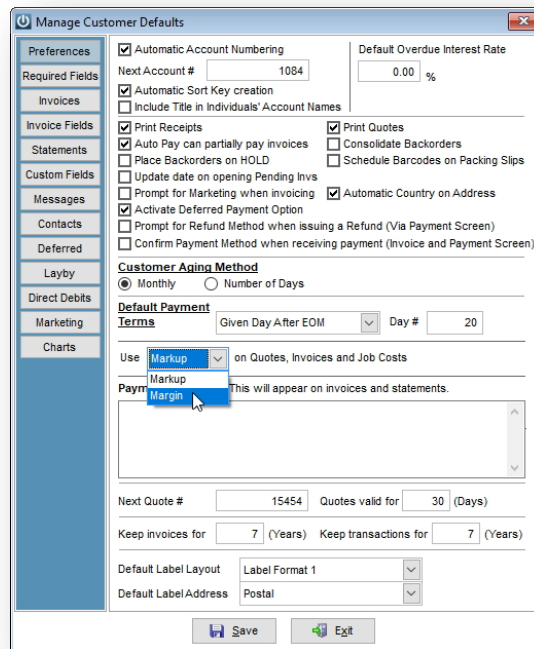


Infusion Software v8.450 Upgrade Notes

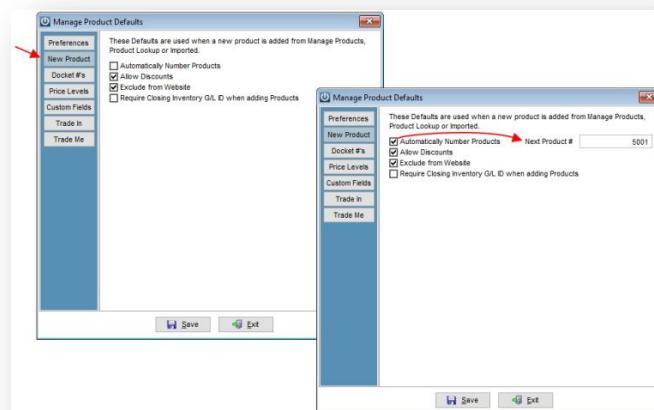
Admin

When selecting to Show Costs/Profit on Customer Quotes, Customer Invoices and Job screens, it is now possible to display either the **Mark-Up** or **Margin**. The setting for this is under Manage Customer Defaults and will apply to all users and the above screens. **#12357**



The screenshot shows the 'Manage Customer Defaults' window. On the left is a sidebar with tabs: Preferences, Required Fields, Invoices, Invoice Fields, Statements, Custom Fields, Messages, Contacts, Deferred, Layby, Direct Debits, Marketing, and Charts. The 'Preferences' tab is selected. The main area contains various settings. Under 'Customer Aging Method', 'Monthly' is selected. Under 'Default Payment Terms', 'Given Day After EOM' is selected with 'Day #' set to 20. A section for 'Use Markup' and 'Paym Margin' has dropdown menus. The 'Use' dropdown is set to 'Markup' and the 'Paym' dropdown is set to 'Margin'. Below this, there are fields for 'Next Quote #' (15454), 'Quotes valid for' (30 Days), 'Keep invoices for' (7 Years), and 'Keep transactions for' (7 Years). At the bottom are 'Default Label Layout' (Label Format 1) and 'Default Label Address' (Postal). 'Save' and 'Exit' buttons are at the bottom right.

A new tab called **New Product** has been added to Product Defaults screen to group the global defaults that will apply when adding a new product. The tick boxes **Automatically Number Products** and **Require Closing Inventory G/L ID when adding Products** have been moved from the Preferences tab to this new tab. Two new tick boxes have been added: **Allow Discounts** and **Exclude From Website**. **#12443**



The image shows two screenshots of the 'Manage Product Defaults' window. The left screenshot shows the 'New Product' tab selected in the sidebar, with a red arrow pointing to it. The main area shows settings for 'Automatically Number Products' (checked), 'Allow Discounts' (checked), 'Exclude From Website' (checked), and 'Require Closing Inventory G/L ID when adding Products' (unchecked). The right screenshot shows the 'Preferences' tab selected, with a red arrow pointing to the 'Automatically Number Products' checkbox, which is now checked. The 'Next Product #' field is set to 5001. Both screenshots have 'Save' and 'Exit' buttons at the bottom.

A Drop-down list for Job Department Codes (JMDEP) is now available for use on custom reports. **#12395**

Infusion Software v8.450 Upgrade Notes

Sprockit Australia only: The logo of the software has been updated to the AU Sprockit logo. **#12411**

Sprockit NZ only: The following changes required to Warranty and Order validation/creation as needed by Stihl for SAP integration have been implemented. These were: 1. NZ Warranty does not need a Mobile Number or Address Line 3 validation. 2. NZ Warranty to send n/a if no Email Address is available. **#12427**

Sprockit only: The Stihl Warranty upload frequency has been removed from the Warranty EDI Defaults as this is configured directly on the Stihl Warranty Service. **#12444**

Corrected an error appearing on **Bulk Supplier Payments** if the system had the INFDATA.GLDIRECT flag to be set to FALSE. **#12498**

Cashbook

Corrected a problem in the **Cashflow Analysis - 12 Months** report (CBANAL12) where the output for equity increase for the 6th month period was picking up the asset decrease figure instead. **#12455**

Central Billing

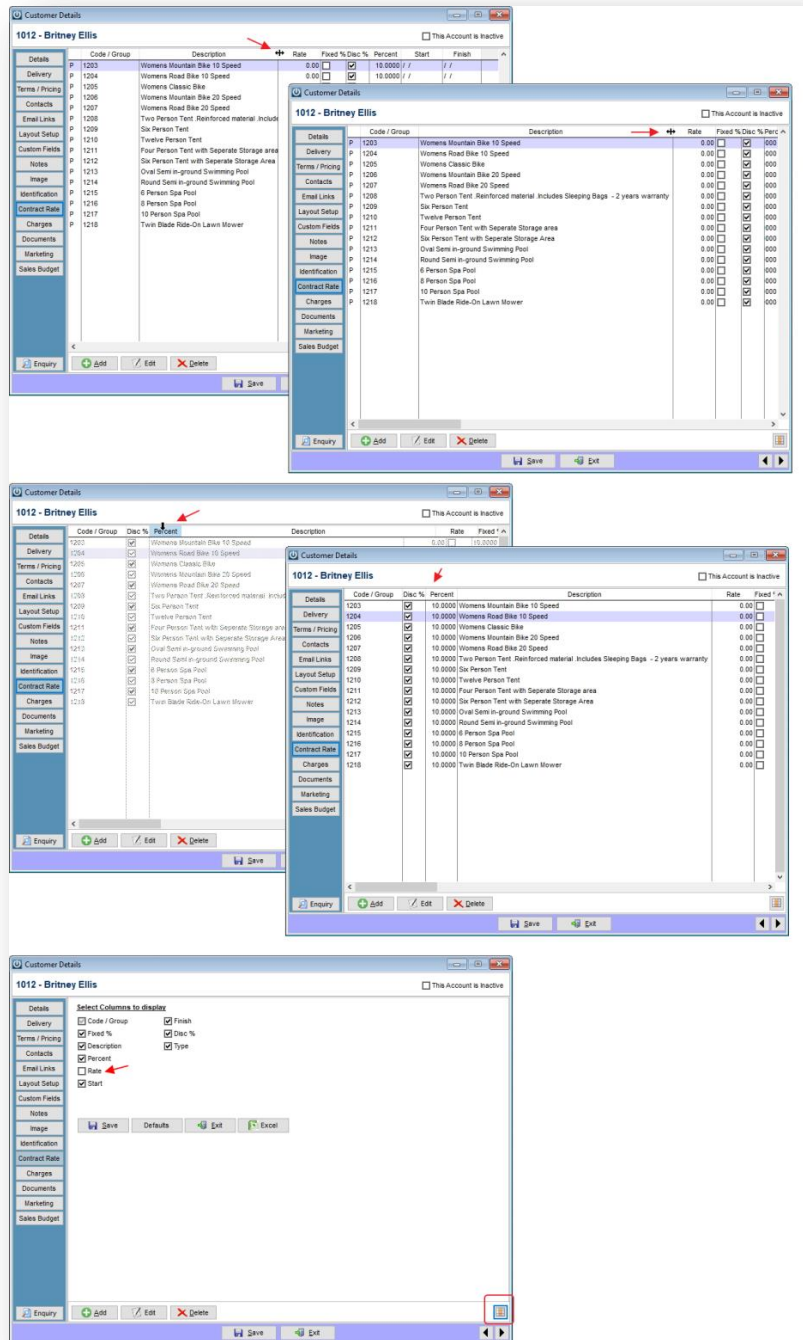
When a customer account from a branch is connected to a Central Billing system, the customer account in the branch will have the option NO STATEMENT (under the Terms/Pricing tab) automatically selected and disabled so the user cannot change it manually. Disconnecting The Customer in the Central Billing system now enables this option. **#12420**

It is no longer possible to code an imported bank transaction to a customer linked to the central billing account on a branch system. The payment can only be entered in the central billing system. **#12421**

Customers

The **Contract Rate** tab of a customer account is now able to display all 80 characters of a product description. The width of the columns can be modified by dragging the column border on the header. Columns can be reordered by dragging the header of a column to the desired position. The user can select which columns to display by selecting the Fields button added to the bottom right corner of the screen and save the preferences. **#12433**

Infusion Software v8.450 Upgrade Notes

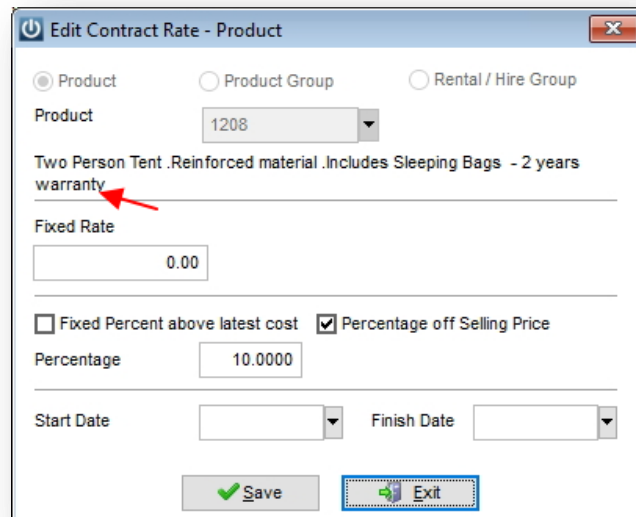


Customer Head Office has been added as an option on the Sort Order fields of the **Customer Sales Analysis - Date Range** report (CUSTSA40). Please note: The report may include invoices that do not belong to the Head Office if the invoices were created on versions prior to 8.304. This is because a field on these older invoices is blank. To correct the problem, please contact your Infusion Certified Partner or Infusion Support (refer to <https://infusionsoftware.zendesk.com/hc/en-us/articles/360000002695-Customer-Sales-Analysis-Date-Range-Sorting-By-Head-Office->)

#12295

Infusion Software v8.450 Upgrade Notes

The **Add/Edit Contract Rate** screen now displays all 80 characters of the product's description, wrapping the text onto the next line if necessary. **#12445**



A problem with the **Address Lookup** for POSTAL addresses has been corrected and now retrieves the RD information for Rural Delivery addresses. **#12447**

Sprockit Australia only: A new report has been added to enable Stihl stores in Australia to report sales made to councils - to be used for a government rebate. The report is called **Stihl Rebate Application** and can be located under Customers / Sales Analysis. If the report is exported to Excel using the button on the parameters screen, it will keep its formatting. **#12466**

The following Customer Sales Analysis reports have been updated to include the ability to filter by Preferred Supplier in order to be consistent with the Customer Sales Analysis - Date Range report. Customer Sales Analysis - 12 Month Sales, Customer Sales Analysis - 12 Month Qty, Customer Sales Analysis - 13 Month Sales, Customer Sales Analysis - 13 Month Qty, Customer Sale Analysis - Dual Date Range. There is also a CUSTSA40PN available for Infusion Partners to use for customisation. This is a copy of the Customer Sales Analysis - Date Range report. **#12475**

Infusion Software v8.450 Upgrade Notes

Invoices

Invoices Recall - By Date report under the Invoices/Quotes reports menu has had the parameter screen updated so it clearly states that the fields for date range refer to the Date1 and Date2 of the custom fields on the invoice screen. **#3955**

An internal check has been introduced for the filter used when the system performs the search for the product GL code being used to post a transaction to to avoid these being assigned to the incorrect GL account. **#11092**

The Customer Invoice screen will now show in red the rate of any product that is not being sold at full rate (full rate being the price entered for each price level). When the rate on the screen is a contract rate or includes a discount or has a promotional price or a quantity break, the amount will show in red. **#12328**

A new utility has been included in the software to allow the printing of customer invoices in bulk. It is located under the Invoices/Quotes menu and is called Bulk Reprint / Email Invoices. It is possible to select a date range and set up some filters within that range or otherwise upload a list of selected invoice numbers for the utility to print. The output can be direct to printer or to PDF, with the option of creating a single PDF document that includes all invoices. **#12352**

Jobs

Pre-Delivery Jobs are now available in Infusion. This is a system reserved Job Type that can be selected on the Job screen. Some defaults need to be in place before-hand. This Job Type is intended for jobs where the user needs to select an item from stock and record materials and labour against it to increase its cost (eg assembly work, inspection work, set-up work) before the it goes back onto the showroom floor or is to be sold. For more information on Pre-Delivery jobs, please refer to the following KB article:

<https://infusionsoftware.zendesk.com/hc/en-us/articles/360000108836-Pre-Delivery> **#12378**

The **Budget Performance - Detail** report from Job Management has been corrected and it now ignores the Notes (/N) and Sub-total (/S) lines if these exist in the Quote linked to the Job. **#12394**

Other

When logging into a new company it is no longer possible to leave the Setup GL screen until a valid data is entered. **#11731**

Infusion Software v8.450 Upgrade Notes

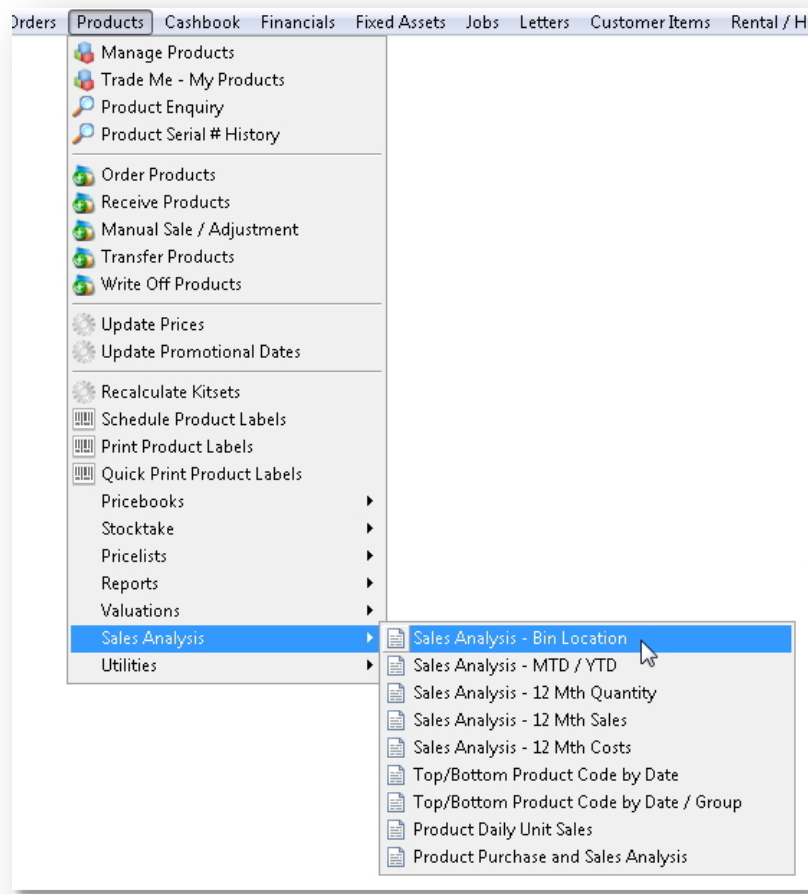
POS

The POS invoice screen will now show in red the rate of any product that is not being sold at full rate (full rate being the price entered for each price level). When the rate on the screen is a contract rate or includes a discount or has a promotional price or a quantity break, the amount will show in **red**. **#12344**

A problem with POS true type font layouts not including the date when emailed from the POS screen has been corrected. **#12405**

Products

A new **Product Sales Analysis - Bin Location** report has been added to the Products - Sales Analysis sub-menu. The report is based on the Customer Sales Analysis, that is, on actual invoice data rather than on product history data. The report has fixed sorting of Bin Location and then Product Code. **#12379**



Infusion Software v8.450 Upgrade Notes

Product Sales Analysis Bin Location

The Demonstration Company Ltd

17/01/2018 - 17/01/2018

Printed : 17/01/2018 11:52:20 AM

Printed By : Default Staff

Page : 1

Product	** Unassigned	ZZZZZZZZZZ	Customer	0	999999999	Customer Type	** ALL Types **
Product Group	** Unassigned	ZZZZZZZZZZ	Customer Group	** Unassigned	ZZZZZZZZZZ	Marketing Source	** ALL Sources **
Product Sub Group	** Unassigned	ZZZZZZZZZZ	Sales Rep	** Unassigned	ZZZZZZZZZZ	Price Level	** ALL Levels **
Preferred Supplier	** Unassigned	999999999	Manager	** Unassigned	ZZZZZZZZZZ	Product Type	** ALL Types **
Hire Item	** Unassigned	ZZZZZZZZZZ	Region	** Unassigned	ZZZZZZZZZZ		

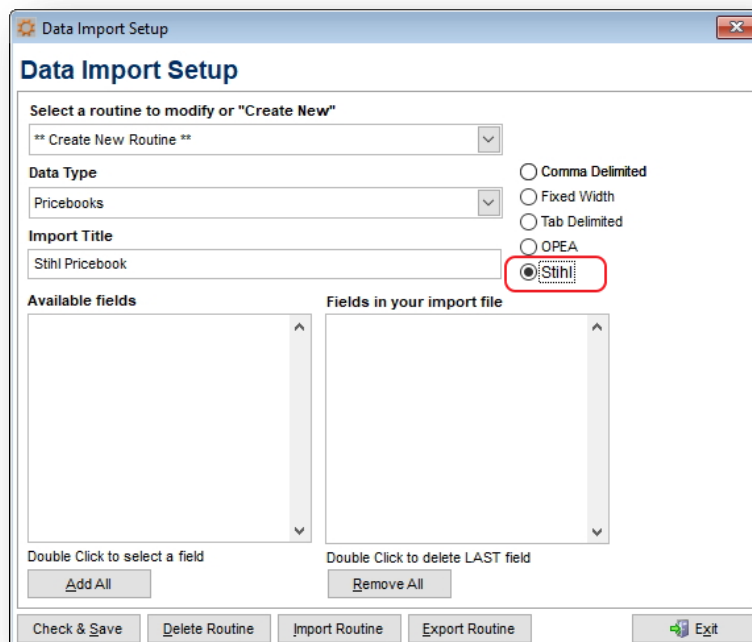
		Qty	Total Sell	Discount	Nett Sell	Cost	Profit	
Bin :								
1000	Double Bed	1.00	855.00		855.00	457.81	397.19	46%
	Total for : Bin :	1.00	855.00		855.00	457.81	397.19	46%
Bin : A7-985								
1024	Notebook 13"	1.00	1500.00		1500.00	999.00	501.00	33%
	Total for : Bin :	1.00	1500.00		1500.00	999.00	501.00	33%
Bin : B8-654								
1310	Ride On Mower 48" Cut	1.00	1738.26		1738.26	1200.00	538.26	30%
	Total for : Bin :	1.00	1738.26		1738.26	1200.00	538.26	30%
		3.00	4093.26		4093.26	2656.81	1436.45	35%

The Product Classification report is now available also in Sprockit Australia, matching all other packages.

#12424

A new file format called STIHL has been added to the **Manage Import Routines** screen. This file type is for Data Type Pricebooks and it is intended for Stihl Australia. It has a pre-determined format, meaning that no fields have to be selected for it.

#12436



The screenshot shows the 'Data Import Setup' window. At the top, it says 'Select a routine to modify or "Create New"'. Below this, there's a dropdown menu with '** Create New Routine **'. Under 'Data Type', 'Pricebooks' is selected. In the 'Import Title' field, 'Stihl Pricebook' is entered. On the right, under 'Comma Delimited', 'Fixed Width', 'Tab Delimited', and 'OPEA', the 'Stihl' radio button is selected and highlighted with a red circle. Below this, there are two empty list boxes: 'Available fields' and 'Fields in your import file'. At the bottom, there are buttons for 'Add All', 'Remove All', 'Check & Save', 'Delete Routine', 'Import Routine', 'Export Routine', and 'Exit'.

Infusion Software v8.450 Upgrade Notes

The **Product Serial Number Listing** report has been updated to include the date of receipt and the days in stock. **#12442**

Product - Serial Number Listing
The Demonstration Company Ltd
All Locations

Printed : 23/02/2018 10:14:54 AM
Printed By : Default Staff
Page : 1

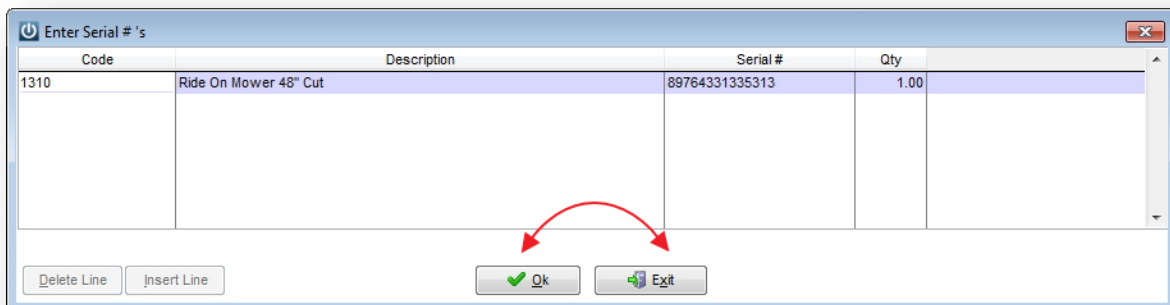
Product Code ** Unassigne	ZZZZZZZZZZ	Product Sub Group** Unassigne	ZZZZZZZZZZ
Group ** Unassigne	ZZZZZZZZZZ	Product Type	** ALL Types **

Serial #	Reference	On Hand	Allocated	Location	Receipt Date	Days Stocked
Product Code : 1310 - Ride On Mower 48" Cut						
41578962	PO 1873	1.00	Ea	Auckland	09/03/2017	362
41589527	PO 1873	1.00	Ea	Auckland	09/03/2017	362
41589536	PO 1873	1.00	Ea	Auckland	09/03/2017	362
41589675	PO 1873	1.00	Ea	Auckland	09/03/2017	362
41589726	PO 1873	1.00	Ea	Auckland	09/03/2017	362

There is now a **Multiplier** on the Dimension screen that pops up when invoicing a Product set to use dimensions, giving the ability to multiply the current Resultant Quantity needed based on the area of a product. **#12454**

Purchase Orders

The Exit and Okay buttons in the **Enter Serial #'s** screen which appear when receiving a Serial Number tracked item on a Purchase Order have been swapped around so they are consistent with other screens on the system and the Okay button now accepts the shortcut Alt+O as well. **#12102**

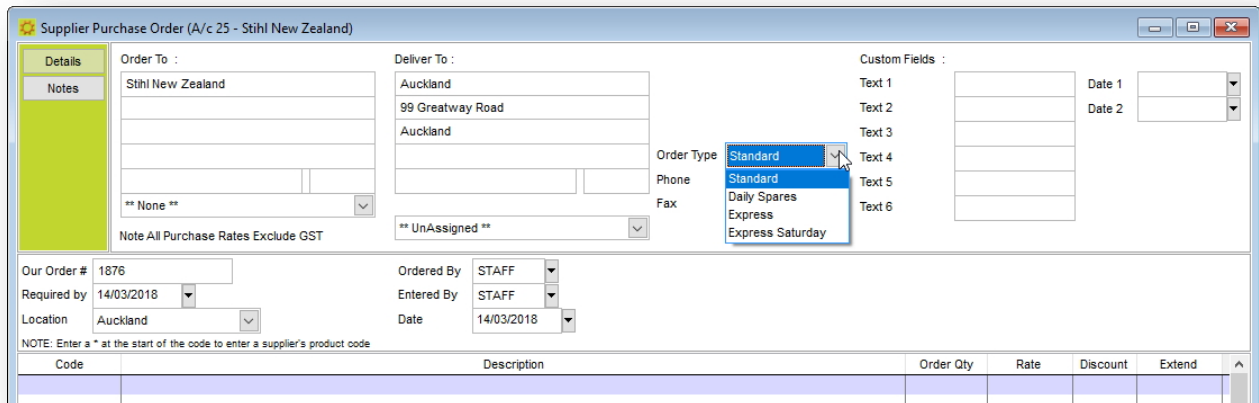


Corrected a problem stopping user from being able to complete a purchase order where the result was a zero quantity order. **#12226**

The **Enter Serial #'s** screen now allows for quantities with decimals on products set to allow Multiple serial numbers. **#12428**

Infusion Software v8.450 Upgrade Notes

Sprockit New Zealand only: The Order Types for Stihl Purchase Orders have been updated as per Stihl NZ's request to the following: Standard, Daily Spares, Express, Express Saturday **#12499**



Quotes

The **Function Key Lists** on Customer Invoices and Customer Quotes has been updated to include the already existing function that shows **Product Quantities per Location** when pressing **F8** on the Quantity field. **#12149**

The Customer Quote screen will now show in red the rate of any product that is not being sold at full rate (full rate being the price entered for each price level). When the rate on the screen is a contract rate or includes a discount or has a promotional price or a quantity break, the amount will show in **red**. **#12329**

Corrected a problem where the Quotes screen was adding a blank line at the top of the grid when using the arrow down key and passing the last blank line of the grid. **#12471**

Suppliers

The **Receipt Confirmation** report for products now includes the bin location and serial numbers of the products received. **#6475**

Infusion Software v8.450 Upgrade Notes



The Demonstration Company Ltd
 PO BOX 8197
 RICCARTON
 CHRISTCHURCH
 Phone : 03 111 2222
 Fax : 03 111 2222

Receipt Confirmation Page No. : 1

Received From :

Swift Mowers Ltd PO Box 4875 Ellerslie Napier	Their Packing Slip / Invoice Number : 154863 Receiving Location : Auckland Our Order Number : 1877
--	--

Receipt Date : 17/01/2018 Account : 23 Received By : Default Staff

Product Code	Description	Bin	Qty	Rate	Total
1310	Ride On Mower 48" Cut	B23-60	4.00	1200.00	4800.00
Serial Numbers					
1310	454873663				
1310	865469969				
1310	756523812				
1310	985663324				

The Xtracta Import process has been updated to check for both the OurRef value AND the GST Number. This allows for multiple suppliers to use the same OurRef value. **#12439**

The supplier report **Invoices Not Authorised For Payment** has been improved: only Credit amounts now show as negative and two new columns have been added to show the original amount and the amount paid at the time the report is printed. **#12457**

Invoices not Authorised for Payment					
The Demonstration Company Ltd					
Printed : 22/02/2018 03:47:52 PM			Account 0 9999999999		
Printed By : PARTNER			Sort Key **Unassigned ZZZZZZZZZZ		
Page : 1			Group **Unassigned ZZZZZZZZZZ		
			Supplier Type **ALL Types **		
Date	Transaction	Reference	Original	Paid	Outstanding
Supplier Account: 1					
		Sort Key: TELECOM	Name: Telecom NZ Limited		
22/02/2018	Unallocated Payment		-800.00	0.00	-800.00
Supplier Total Outstanding					-800.00
Supplier Account: 3					
		Sort Key: ALLAPP	Name: All Appliances		
31/10/2017	Invoice 158	1862	7778.25	4000.00	3778.25
Supplier Total Outstanding					3778.25
Supplier Account: 5					
		Sort Key: JOHNS	Name: Allan and Jane Johns		
12/05/2017	Invoice 687	1872	3795.00	700.00	3095.00
22/02/2018	Invoice 6541		-150.00	0.00	-150.00
Supplier Total Outstanding					2945.00
Supplier Account: 20					
		Sort Key: TFUNR	Name: Total Furniture		
30/09/2017	Invoice 345	1868	1437.50	0.00	1437.50
Supplier Total Outstanding					1437.50
Total Outstanding					7360.75

System

Corrected a problem present since 8.430 where upgrading from version 8.000 or earlier would fail with an error. **#12422**