Infusion Software v8.520 Release Notes

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Admin

When using MAPI in FoxyPreviewer to email a report, and then opening any form which has the spelling control (edit box) on it later, the software crashes with a C0000005 error. A new version of FoxyPreviewer has been created which only has two options in the Email tab of the FoxyPreviwer setup screen; MAPI (which uses the workstation's default email client) or Infusion Email Defaults (which uses the Email settings from Manage Email Defaults in the software). This stops the error from occurring.
#13210

A new report: Financial Audit - Date Check is available from the Admin / System Reports menu. This reports on Financial Transactions that are out of balance by date. Selection allows you to select either all out of balance transactions (which will include Reversing Journals) or to only report on unbalanced dates.
#13257

Customers

The "Pending Quotes – Detailed" report has been renamed "Pending Quotes - Detailed by Customer" with the addition of a further report "Pending Quotes - Detailed by Product" [#6139].   The report has been improved to include the following notations: 1. Products included in Buildups are noted with a * and an indented description. 2. Products on quotes from Pricebooks are noted with a #. 3. Kitset products are noted with [ ] around the code.
#6129

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A new report "Pending Quotes - Detailed by Product" has been created and is available from the Invoices / Quotes / Reports menu. The report uses the following notations: 1. Products included in Buildups are noted with a *. 2. Products on quotes from Pricebooks are noted with a #. 3. Kitset products are noted with [ ] around the code.   **#6139**

The "Customer Sales Analysis by Date Range" report has been improved to include Customer Industry as a Sort Order option.   **#12622**

The "Contact Management Report - Contact History" has been fixed to report on the Contact Date rather than the Follow Up Date.   **#13168**

The "Pending Quotes - Summary, By Customer, and By Products" reports have a new option added – 'Include Expired Quotes'. Expired Quotes (if included) are indicated in red. The "Quotes Summary by Status" report has been improved. Values for each status have been added, and the ability to report by user defined statuses has been improved. Quotes are grouped as "Active", "Accepted" or "Declined" and statuses reported within these groups.   **#13199**

Quotes Summary by Status
The Demonstration Company Ltd

Printed : 24/08/2019 12:54:31 PM
Printed By : Default Staff
Page : 1

Account	0	9999999999
Sort Key	** Unassigned **	ZZZZZZZZZZ
Group	** Unassigned **	ZZZZZZZZZZ
Quote Date	01/08/2019	24/08/2019
Quoted By	** Unassigned **	ZZZZZZZZZZ
Customer Type	** ALL Types **	
Location	All Locations	
Include Expired Quotes?	☑	

Status	Count	% of Total	Sub-Total	GST	Total (incl GST)	% of Total Value
Active Quotes						
Active	6	33.33	17913.04	2686.96	20600.00	69.59
Follow Up	2	11.11	1739.14	260.86	2000.00	6.76
Follow up 2	2	11.11	869.56	130.44	1000.00	3.38
Active Quote Totals:	10		20521.74	3078.26	23600.00	
Accepted Quotes						
Accepted	2	11.11	1217.40	182.60	1400.00	4.73
Accepted - Invoice	2	11.11	1565.22	234.78	1800.00	6.08
Accepted - Job	2	11.11	1391.30	208.70	1600.00	5.41
Accepted Quote Totals:	6		4173.92	626.08	4800.00	
Declined Quotes						
Declined	2	11.11	1043.48	156.52	1200.00	4.05
Declined Quote Totals:	2		1043.48	156.52	1200.00	
Grand Totals:	18		25739.14	3860.86	29600.00	

The "Customer Unallocated Payments" report has been improved to separate Customer Adjustments and to report outstanding credits with Deferred Payments correctly.   **#13240**

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A user is now able to define for how many days a customer is considered "new" in the Customer Sales Analysis Reports with New/Existing Customer comparisons.   **#13166**

The Postcode / Zip Finder link has been updated to reflect the changed NZ Post Website address.   **#13226**

An issue where, when a user clicks Enter in the Paying Now column of a Customer Payment, the value is duplicated to the next line, has been resolved.   **#13290**

Invoices

An issue with the "GST Excl - When Sell Rates Incl GST" invoice layout (INV12) has been resolved. The default layout now calculates and displays the GST Exclusive value correctly with a subtotal, GST and total calculation at the bottom.   **#13218**

Job Management

A new report "Job Deposits – Reconciliation" provides a report of the deposits paid and used, and their status at a certain date. The GL balance of the Job Deposits GL code for that date also prints. The report can be used to reconcile the Balance in the GL code. Note that by filtering jobs or locations the report will not balance to the GL account.   **#13149**

An issue where a user was able to open a Purchase Order in edit mode from a Read Only Job has been resolved.   **#13157**

POS

Multiple payments against a POS invoice can now be taken. Once a part payment has been entered and processed the POS invoice is unable to be edited. See the Knowledge Base for more information on multiple POS payments.   **#13059**

Products

A new tab has been added to the Modify Products screen called "Website". The Website tab has: 1. 16 configurable Web Tag fields. 2. 5 configurable Web Category Tag fields. 3. 5 configurable Additional Information note fields. Details and notes on this feature are available from the Knowledge Base.   **#13046**

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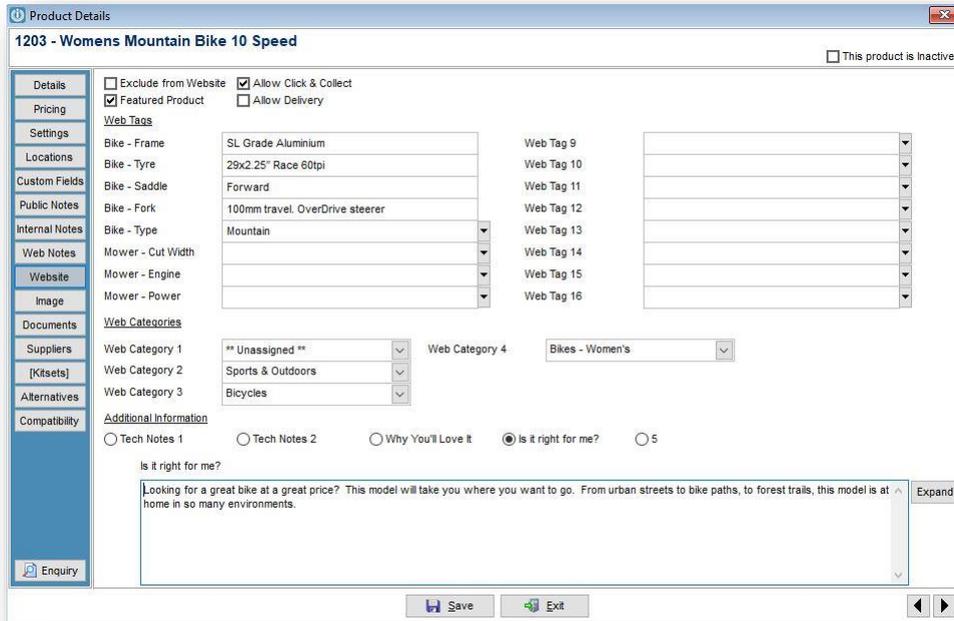
A new tab is now available under the Product record called Website Notes   **#13067**
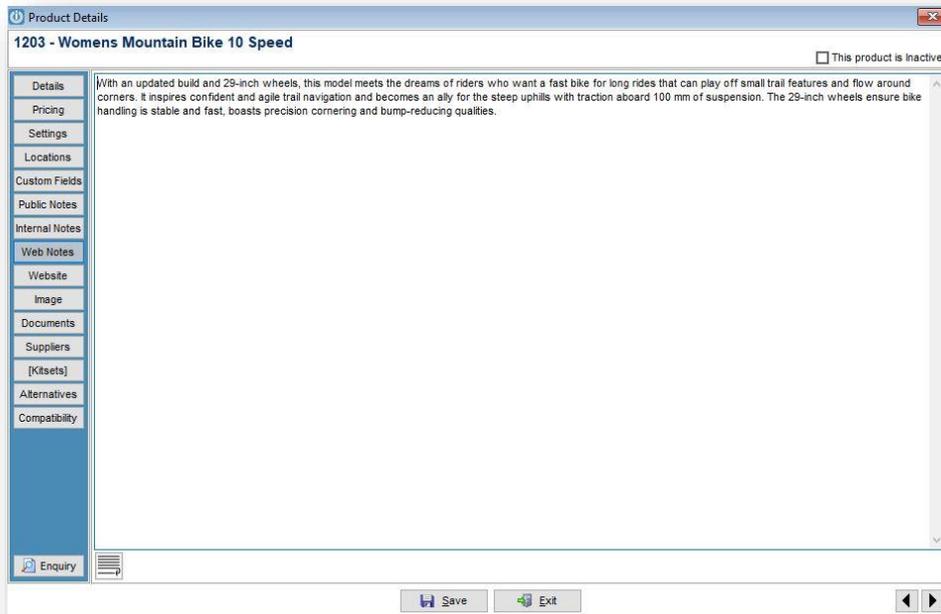
The "Top/Bottom Sales by Code" report under the Product Sales Analysis / Products menu has been improved to include filters for Default Supplier and Product Type, and now includes the total cost for the sales period as well as profit and margin.   **#13256**

The Product Sales Analysis "Top/Bottom Product Code by Date" has been improved to include a selection criteria for Preferred Supplier.   **#13121**

A new report: Pricebook - Retail Price Check has been added to the Products / Pricebook menu. This report finds the most recently imported Pricebook for the nominated supplier, then runs through all products and reports on products where the Pricebook code matches or is linked to the product - once a match is found if the SELL1 price is different, results are marked as above or below and the variance in Sell prices is included as a dollar figure and a percentage figure. All normal product selections are available as well as the option to print only Pricebook Greater than Product and vice versa.   **#13271**

The Product Min/Max - By Location and Product Min/Max - By Preferred Supplier reports have been updated to exclude Inactive Products.   **#13256**

Purchase Orders

Improvements have been made to the "Purchase Order Receipt / Invoice Date Check" report. Orders where two packing slips have been receipted into one invoice no longer incorrectly report.
#12200

Suppliers

A new utility incorporated into the software allows electronic copies of Supplier Invoices to be saved in a consistent format into a digital documents folder extremely quickly. For more details please see the article in our Knowledge Base: https://infusionsoftware.zendesk.com/hc/en-us   **#13253**

The new option to save Supplier Invoices as PDF files has been adjusted so it will only be invoked if Print Supplier Invoices is checked in Admin / Defaults / Manage Supplier Defaults - Invoices Tab.
#13288

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