Combined Notes for Versions 8.00 to 8.215

Admin

There is now an option to import Supplier Invoices from the Admin / Manage Import Routines menu**. #7834**

Validation has been added into Product import routines so a Supplier account can't be entered if it doesn't exist. The Product import routine will now accept a Selling Unit with up to ten characters in it. **#5875**

Alterations have been made to the System Verification report and the Aged Trial Balance reports for Customers and Suppliers so variances are highlighted and the differences displayed. **#7594**

Standard Descriptions now display in alphabetical order from the look up screen. **#8245**

Importing data for job cost transactions has been updated **#8120**

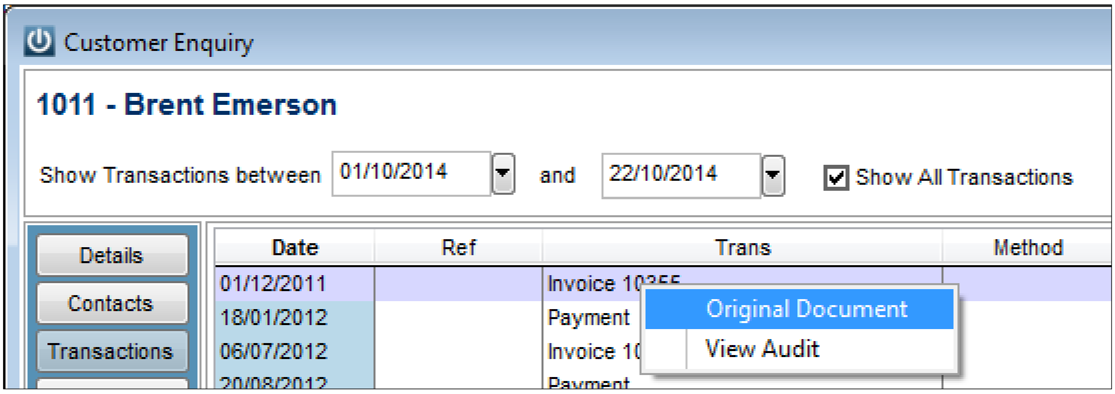
The re-index process now has an option to complete all the Integrity checks for Customers, Suppliers, Products and Financials along with a History rebuild. **#7185**

The selection of the layout to be emailed has been updated **#8824**

As part of the re-index process you can now delete emails and scheduler entries. NOTE: With alterations in 8.200 re-indexing frequency can now be less. Recommended once per month or weekly on very large datasets. **#8903**

Financial Reports updated to print with no cents so whole dollars only. fin3ybs, fin3yrpl, finbs, finbsly, finpl, finplb, finplbv, finplly, finplytd all print with cents and no cents depending on the flag ticked. Finpl12, finpl12b, finplfc, finplqtr, finplqtrb only print with no cents regardless of the flag due to the space constraint of the report **#8997**

Right Click drill down on transactions has been sped up and has a menu option for View Audit and Original Document. **#9274**



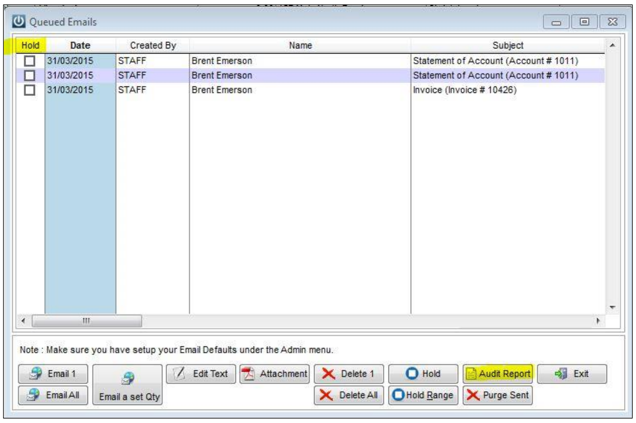
There is now a button on the Queued Emails screen called "Email a set Qty" that when selected allows for entry of a number which determines how many emails will be sent at once. **#7789**

There is now a prompt option to remove all .tmp, .bak, .tbk and .fte files from a dataset when Re-indexing. **#7775**

A new email option to allow use of the user's local email application to send emails to Customers, Suppliers, Invoices, Purchase Orders, Quotes has been added. When this option is used a pop a list of recipients is available for selection. **#9348**

The Location Colour Indicator (Admin / Settings / Products / Manage Locations menu) has been increased in size to run along the bottom of each form **#9915**

The error "Record Is In Use By Another User" on Queued emails has been fixed. A new button has been added to put emails on Hold rather than selecting the Tick box. **#9932**



An issue with selection of the default folder for the backup path and cancelling the backup has been fixed. **#9943**

The selection of the default backup path and option to cancel path selection has been fixed. **#9943**

When Re-indexing, a warning will now be given if the Logo file size is large ie greater than 120kb as this may slow printing and emailing. **#7774**

There are now options for each search type (eg Customers) under Manage System Defaults to default to using the Filtered Search option when searching. **#7788**

The Accounts Portal option has been added to the Registration Screen. **#7609**

Proper case formatting has been removed from Email fields **#7646**

The reindex now runs ALL integrity checks before the reindex and checks for duplicate prodbal records and Jobs with 0 as a location, and exports list(s). **#8446**
The Email Password in Manage Email Defaults is now displayed as ********** **#4962**
When Deleting a Job, the Job Number and Customer Name now display. **#4953**
The Default Location can now be selected when setting up an import routine for Customers under Manage Import Routines **#8724**

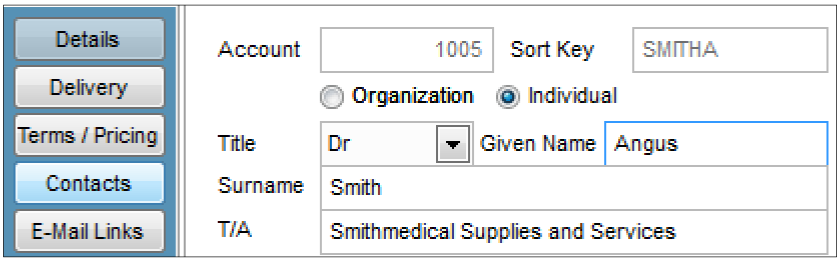
Cashbook
Bank file formats for importing banking transactions and Direct Credit batches have been updated for ANZ and National CSV formats as they have changed. **#7126**
Corrections have been made to the calculation of fields G5, G11 and G12 of the BAS report. **#7679**
When importing a .CSV format ANZ bank file a prompt now appears asking if the file has been created from Direct Link Online or Internet banking - there are now two different formats for these. **#7980**
The issue in Version 7 where a Credit or Debit in the Bank Rec screen could be changed has been fixed. **#7883**
When a Cashdrawer is balanced a record is now created in CBREPS storing the audit number used on the BANKING records and in FINTRANS. This information is to be used in reports that will be created to help track where money has gone **#7221**
When creating banking rules Totalling and Header accounts are no longer available to be selected. **#7796**
ANZ is now a supported bank format for Direct Debits # **6455**
The number of lines is now shown on a Direct Credit batch report # **7911**
The Bank Rec screen now always opens showing the transactions from the top of the list, regardless of the column it is sorting by **#7913.**
Kiwibank is now a Direct Credit Export file option**. #3121**
It is now mandatory to enter the Financial Institution, UPS Name and APCA Number when setting up an Australian bank account. These fields are required for a DC Batch to work. **#7309**
The creation and export process for Direct Debits has been sped up. **#8004**
In the Australian build the GST Detail report Sales now total up correctly. **#8028**
A large warning has been added to the Cashbook if a User elects to change their GST method. **#8679**
The Cashflow Analysis report has been updated to display POS Receipts. **#8816**
Infusion will now allow you to process a Cashbook payment with a zero value where the transaction may have a positive line and a negative line value. This enables 'Journal entries' which includes GST. **#8924**
The DCBATCH report has been amended to now print alphabetically by Other Party. **#8933**
Direct Debit processing has been sped up. **#9216**
The Menu Item to Import Bank Transactions has been moved from the Utilities menu to the main cashbook menu
A new Cashbook Report has been added - Unexported Direct Credits. Please note this is set at Group 1 by default. **#7877**
The GST Detail report for Australia totalling issue has been addressed. **#7638**

Contact Management
The Contact Management screen will now open maximised if the screen is set to this and the Saved option under the Fields button is selected**. #7512**
A Contact Management To Do list/screen has been added for Staff. This screen can be setup to display when logging in from under the Staff \ Login menu or manuallyactivated from Staff dropdown menu. The list will display Follow Ups assigned to the Staff Member **#7613**
A New Contact Management report has been added - Contact Analysis by Staff **#7660**
Drop down selection boxes have been added to the Contact Management reports **#8738**

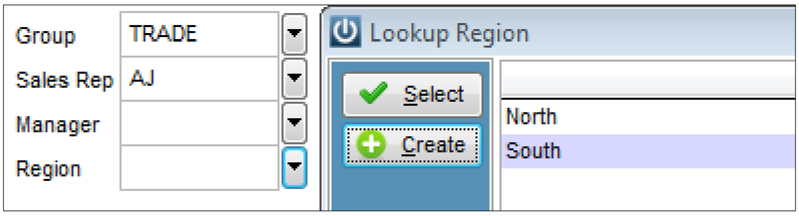
Customer Items
The issue with service invoices not being linked to Customer Items when scheduled through the Regular Services screen has been resolved. **#7520**
The Customer Items Detail Listing report now shows the Item's Serial Number on it. **#5191**
The History button in the Customer Item Modify screen has been moved to the Enquiry screen. **#7926**
The parameters now display at the top of the Servicing report CASCHSRV. **#8037**
The Purchase Date title on a Customer Items Detail screen has been changed to Purchase / Start Date. **#8241**
The History button in the Customer Item Modify screen has been moved to the Enquiry screen. **#7926**
The "CUSTASSETLOOKUP is not an object." error from printing a letter for a Customer Item has been fixed. **#8110**
The "CUSTASSETLOOKUP is not an object." error from selecting a Link under a Customer Item when the file isn't there has been fixed. **#8114**
A Customer Notes pop-up menu now appears when you right click on a Customer Item and select Create Job **#9013**
The Links tab in Customer Items module has been renamed Documents **#9160**
The Overdue Services report now filters by Customer Type. **#7412**

Customers
There is now an option under Manage Customer Defaults to select if the Country details are pre-populated on line four of the Postal Address when a new Customer is setup. **#7999**
A tickbox option under Customers Details titled Exclude from Accounts Portal has been added. **#7749**
Customer Sales Analysis reports now process faster. **#7782**
Validation has been added to the # Days or # Months Payment Terms fields to avoid an error when specifying large numbers. Negative numbers can't be entered. **#7316**
The Contract Rate report (CUSTSPEC) now shows the Product Group lines as well. **#7425**
On Customer and Supplier Invoices if Account payment terms are set to 30 days after the end of the month, for February these invoices are dated 28/02. **#7422**
The processing of Statements has been sped up **#7667**
Finance Charges are now not included in the Customer Sales figures. **#7678**
ABN and GST numbers can now be entered against a Customer account in an Australian install of Infusion **#7242**
A tickbox option titled No Statements has been added to the Terms / Delivery screen for Customers. This will be used to exclude Customers from having Statements sent to them. **#7644**
In address lines RD (Rural Delivery) is now made uppercase when Proper formatting is turned on. **#7335**
The Customer with No Sales (Custnosl) report has been amended to pick up the correct transactions for the date range specified. **#5653**
A number of tickbox options have been added to the Customer Defaults to require certain Customer account information when creating a new account. The required fields display with a coloured fill. Those not having data entered in show in red. #**7779**
The Customer Survey question fields have been increased in size and display in full on the screen. #**7615**
The Customer Credit Management functionality now works, it had stopped in V8. **#8026**
Two additional sales Analysis Reports have been added to the Customer Sales Analysis Section - Sales **Analysis 13 months Dollars** and **13 months Quantities**. **#8333**
Inactive Customers are now no longer included in the Bulk SMS **#8275**
Rental Hire Invoices now preview and print when selecting the Print button from the bottom of the Customer Enquiry \ Invoices tab screen. **#8198**
A Layby report has been added showing all outstanding Layby Sales **#8467**
The Customer \ Enquiry \ Sale History screen has been sped up **#8459**

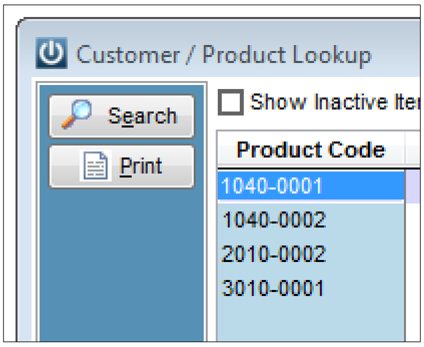
The Management Console Chart now shows 13 months **#8244**
Contacts in the Customer Contacts tab screen drop down box are now sorted Alphabetically **#7086**
Contract rate report changes to handle the three record types Product code (P), Product group (G) and Rental Hire groups (R) **#8150**
The ESC function has been added to the Customer Enquiry screen when the search by date option is selected. **#1024**
You can now no longer delete a Customer with active Jobs **#4145**
Once a Customer on Stop Credit has paid their account a pop up message will appear reminding the user to take them off Stop Credit **#5669**
Freight and Rounding options are now included on the Quote and a Job **#8699**
A new Customer Statement layout has been included. This statement is a balance brought forward style with the overdue items listed after the monthly transactions. **#8772**
A new T/A (Trading As) field has been added to the Customer screen and to the standard layout forms. Customised Invoice, Quote, Statement and Packing Slips will need to be updated to use this feature. **#8786**



An additional field has been added to the Customer screen for Region. The End User may set up the Regions as required. The Region field has also been added to the ranges for the Sales Analysis reporting. **#8787**

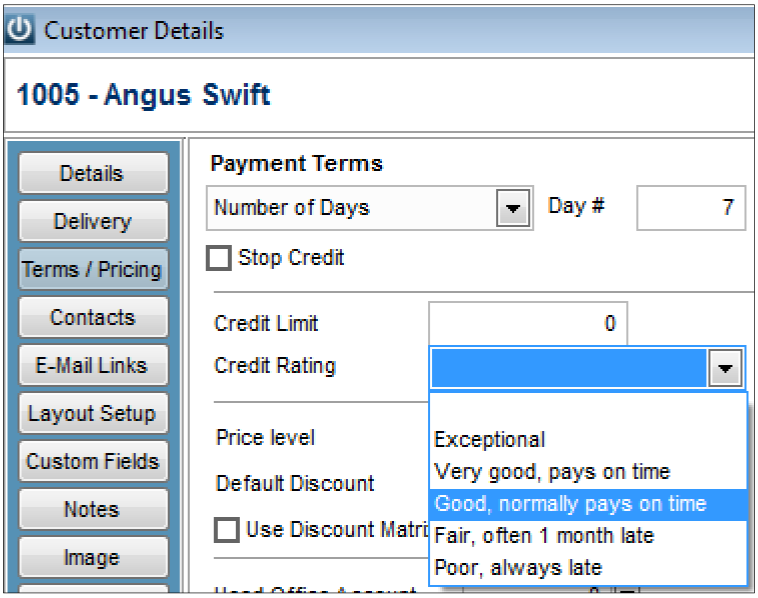


The ability to re-open a Pending Invoice and use the F9 key on the Qty field to review the line Quantity Build Up has been reintroduced. **#8835**
A report can now be printed from the Customer Product History screen showing the Products purchased by that Customer. **#8838**

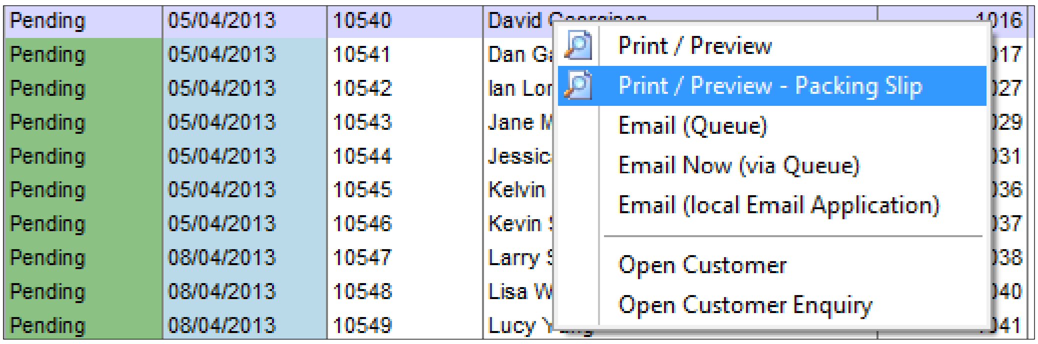


You can again produce a Quote for a Customer that is on Stop Credit. **#8848**
Creating a Customer Price Enquiry has been sped up. **#9058**
You can now store a Default Delivery Method against the Customer to be used whenever an Invoice or Quote is generated - the selection can be overridden at the time if required. **#9067**

An additional field called Credit Rating has been added to Customer Details \ Terms and Pricing tab. Selection options for this field range from A to E. A - Exceptional, B - Very good, pays on time, C - Good, normally pays on time, D - Fair often 1 month late, E - Poor, always late. **#9068**



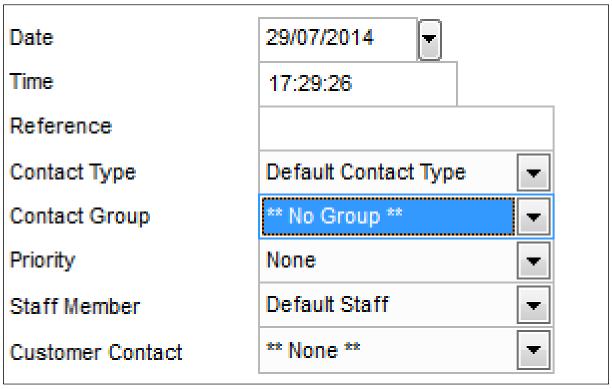
All of the Invoice, Statement, Packing Slip, Quote layouts have been updated to utilize the new format for name and address output allowing for lines to be moved up if line above is blank. **#9138**
A Customer Remittance can now be previewed before printing. **#9196**
Opening a Customer account has been sped up. **#9205**
The Customer Region can now be added to Customer reports as a selection criteria **#9290**
There is now the ability to open a Customer in *Read Only mode when another user has the Customer open. **#9352**
Customer Sales Analysis Reports 01-05 have been updated to include the new Sales Budgets for Staff and Customers **#9465**
A Packing Slip can now be printed from the Manage invoice Screen by right clicking on the pending invoice



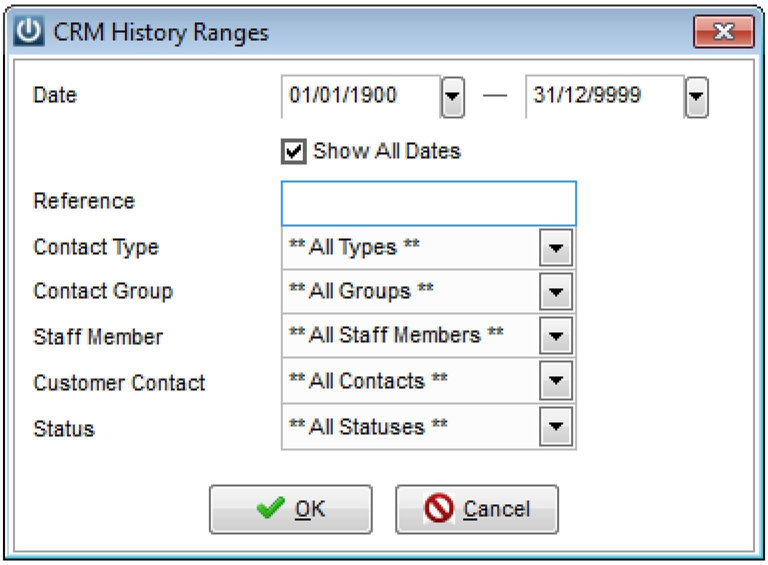
The Customer Region Field can now be set as a required field.
The Customer Sales Analysis report – Date Range now includes the ability to select a range of preferred Suppliers
The "Trading As" field has been added to Manage Customers Filtered Search **#9799**
There is now an option in the Customer \ Defaults menu to require a contact to be added for Organisations before the record can be saved. **#9841**
In the Admin / Defaults Manage Customers Defaults / Invoices the "Stop overwriting Invoice #" option has been reworded to "Stop overwriting Invoice # and Quote #" as it applies to both cases. **#9886**

A Date and TimeStamp has been added to the Invoice file indicating when the Invoice was posted.
Invoice and POS Processing has been sped up. **#8402**
POSUDF and DCBATCH table entries can now be seen when doing a drilldown on a payment. **#8033**

Contact Management
The Assigned To field in the Contact Management tab now defaults to the User logged in.**#7693**
When an individual Customer Contact is selected their contact details are displayed including DDI, Mobile and Email address. **#7694**
When using a Contact Follow up Event you can now create a further Follow up Event from the same screen. **#8042**
A Contact Group has been added to Contact Management across Customers, Staff and Suppliers. **#8762**



A Contact History list now shows on the Contact Event screen. This list can be filtered.



You can now create a new Customer Contact when creating a Contact Event. **#7593**
A Priority drop down list has been added to Contact Management. 1 - 5 (Urgent, High, Medium, Low, None) are the system set values. The user can set colours against each Priority. A default value can be set for each module (ie Customers, Staff, Suppliers) **#8761**

File
The Management Console has been updated to run faster. **#7415**

Financials

The P&L - YTD report has been amended so the YTD column is on the right hand side of the report. **#7742**

The Batch Description has been added to the Transaction Journal report. **#7675**

The Financial Transaction journals screen has been modified from v7.0 so that there now isn't a message at the end of each line asking to "Add a new record", if the date for a line is changed it won't revert back to the old date when tabbing through it, arrowing down from the date field will work correctly and the year of a date can be changed without having to change the whole date. **#7324**

For the Balance Sheet reports (FINBS and FINBSLY) lines do not now appear if there is a nil value in the % column. **#7268**

The last two characters of the date field are now not truncated on the Financial Transaction batch report (finbatch) **#7326**

The Totals at the bottom of the Bank Reconciliation Screen have been aligned. **#8412**

A Cashflow Analysis report has been added under the Cashbook \ Reports menu. This can be run for a single or multiple bank accounts. **#8247**

A 12 month Cashbook Analysis report has been added under the Cashbook \ Reports menu. This can be run for a single or multiple bank accounts. **#8246**

Point of Sale Cashup reports can now be printed from the Reprint A Report menu option under the Cashbook\Utilities menu. **#8027**

Kiwi Bank is now a Direct Credit Export file option. **#3121**

Updates have been made to the Australian BAS reports **#8029**

The file extension used for the BNZ Direct Credit batches are now .afi, not .txt **#2329**

Twenty Custom fields are now available under G/L Accounts. Activation and setting of their titles are done from under the Admin \ Defaults \ Manage Financial Defaults \ Preferences screen **#8195**

Two new P&L by quarter reports have been added – with last year and budget figures. **#8297**

When selecting OK or Exit while in the Enter Journals screen the user is now taken back to G/L Journals screen instead of the Edit G/L Batch screen. **#8135**

The Customer / Supplier name has now been added to the description on the G/L Enquiry under Notes. **#1558**

The Australian GST Descriptions have been increased in size. **#8400**

The 12 Month Profit and Loss reports have been updated to correctly report the Opening and Closing stock **#8977**

The Financial reports Profit and Loss with Budgets have been updated to calculate correctly when multiple departments are used with Opening and Closing Stock. #**9793**

General

A number of reports have been edited so the selection screen has the date range at the top **#7045**.

If a user logs on and the system is outside the lockout dates a pop up message now appears warning of this. **#7857**

An option (Excel button) has been added to the Fields section of Manage screens to allow for exporting of filtered and sorted data**. #7785**

Manage Customer, Manage Supplier, Purchase Order, Invoice, Quote and Job screens now show negative values (eg balances) in red. **#7766**

When a record has been locked by a user and another user tries accessing it, the message displaying will now say which PC and the User the record has been locked from. **#7550**

When using a Lookup screen for Products, Customers, Suppliers or Jobs there is now available a MRU list (Most Recently Used list) and a Favourites List. **#8133**

The Backup process has more checks to ensure all files are in the backup ZIP **#7654**

Emailing options have been updated allowing individual users the ability to send emails directly, or via their local email client. These are set up in the Staff \ Login menu #**2125**

The selected layout for Purchase Orders and Quotes are now correctly emailed rather than the default #**6046**

The backup and restore process has been updated to include Images and Documents stored in the new individual locations. **#8758**

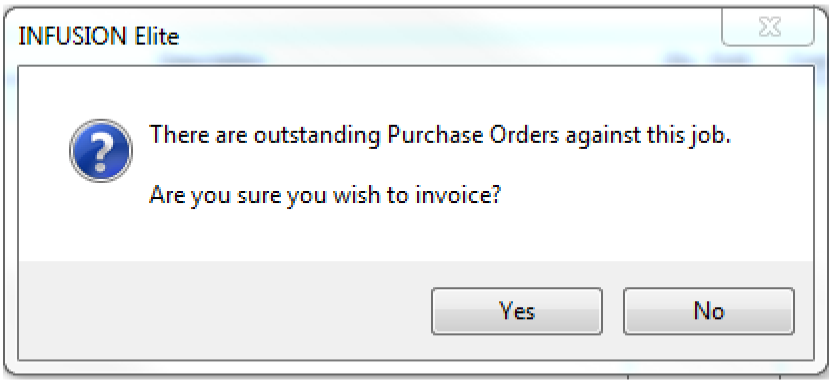
Import / Export Module
Three new tick box options have been added to the Defaults screen when setting up a Supplier Invoice import under Manage Import Data to replace the previous option of "Create Products in Infusion when importing".
The new options are 1) "Don't Search associated Supplier Pricebooks when Importing", "Create new Products when associated Pricebook is present" and "Create new Products when associated Pricebook is not present". For more details on what these options do see the Manage Exports section of the Admin Help manual. **#7894**
The issue with the Mitre10 invoice export file having a double up in the Freight costs has been fixed. **#7652**
Lower case characters in the Product Code field of a Supplier Invoice import file are now being matched / converted to a Product Code in Infusion**. #7895**
The CRT Invoice export routine has been updated so there is a selection option for where the CRT account number is stored ie any of the Char or Text Customer **#6388**
An import option has been added for Chesters P/Os / Supplier Invoices. **#7650**
JA Russell Import has been Updated **#8497**
Supplier Invoice import routines have been updated to handle the crediting and re Invoicing of a Product so the total for the invoice is correct**. #8228**

Invoices
If a Recurring Customer Invoice is created and then Deferred Payment selected as the Payment type, the Invoice will now Post. **#7803**
When two or more Trade In items are on one Invoice all will now be coded to the Trade In Purchases GL code under Financial Control Links. **#7524**
The Trade In process has been modified. 1) Two new Job Types come with standard software (Pre Delivery and Trade In), 2) Post sale processing for the item has been added - Trade In account and Product Type, Group and Subgroup settings can be specified, 3) Fields have been added to the Product Details screen for Trade In / Refurbishment costs, 4) Under Manage Product Defaults additional Trade In defaults can be added for the Trade In account, Product Type, Group and Sub Group. See the Trade In Support Notes for more details. **#6446**
A Pending Invoice created from a Customer Special Order for an International Customer now doesn't include GST. **#6508**
When the "Prompt for Staff Code before accessing Invoicing/Quotes" option from under Manage Customer Defaults is selected the Entered By field in the Invoice or Quote is now automatically populated with the Staff member's code. **#7691**
The error created when Posting an Invoice from the Pending Invoices screen for an Invoice with a Deposit on it has been fixed. **#7311**
The Bin Location for a highlighted item will now display at the bottom of the POS screen **#7643**
A Warranty document can be printed with an Invoice if the item being sold is set up as a Customer Item Type (ie will create a Customer Item against a Customer when sold).This is done by manually ticking the Warranty box on the Invoice screen and having a layout called "WARRANTY" in the custom folder. A file of this name is in the Reports folder in a standard install. **#7668**
Invoice and Quote layouts have now been split so there is a standard layout and one with Deferred Payment terms. The Deferred Payment layout name has a "D" suffix eg INV01 and INV01D. Also Invoices and Quotes can now have Terms and Conditions chained to them. The tick box "Print Terms and Conditions (incl Quotes)" under Manage Customer Defaults / Invoices activates this. The text for it comes from the file TERMS which is in the Custom folder so can be edited from the Report/Label Editor menu. A template TERMS file is in the Reports folder. With this change the Summary section of Invoice and Quote layouts is now available when customising layouts. How Do I Find Allocated Stock? **#7580**
Users will receive a warning if they enter only freight or rounding at the bottom of an invoice; a GL code on a line must be used instead. **#7655**

Invoice layouts now print the footer when there is a kitset on them. **#8075**
Two new packing slip layouts have been added PACK05 and PACK06 these are Landscape with Back order, with price and without prices **#8472**
The GST title in the footer of PACK02 has been removed. **#8222**
There is now functionality to Credit, Recharge or Duplicate a Customer Invoice **#8510** see https://infusionsoftware.zendesk.com/hc/en-us/articles/115008120288-Credit-Recharge-Invoice
Three buttons have been added to the Delivery tab of the Customer Invoice screen to allow printing of A4 Delivery labels**. #8194**
The Quantity field for an item on an Invoice from a Job cannot be changed by Selecting F9 as this corrupts the GST value **#8115**
The Hold and Unhold All buttons on the Pending Invoices screen - the user is now always asked for confirmation **#7356**
There is now a button on the POS screen called CC Surcharge. This allows a fee to be added to the sale when a credit card is being used for payment. **#1582**
https://infusionsoftware.zendesk.com/hc/en-us/articles/360000050875-Credit-Card-Surcharge-GST-Inclusive-Prices
When entering dimensions for a Product on an Invoice or Quote the tab order has been changed back to Length, Width then the Ok button. **#8087**
When using F12 to look up previously sold items in the Invoice window, there is now an option to print this list. **#1887**
A tick box has been added to the Admin \ Defaults \ Manage Customer Defaults \ Invoice screen to "Hold / Unhold the Invoice Date used on the previous Invoice" **#5115**
The Customer Invoice now displays the associated Head Office account on the Invoice screen. **#7815**
Opening a new or Pending Invoice has been sped up. **#9040**
A Manage Invoices screen has been introduced which combines the Pending Invoices and Posted Invoice Register screens. Delivery Address Lines 1, 2, 3, Delivery Method, Customer Payment Terms, Total Weight and Cubic have now been added to the screen. The screen can be filtered by Delivery Method and Invoice range. A tick box option allows Invoices dated for today only to be displayed. **#9287**
There is now the ability to add Delivery Method and Delivery Instructions to the Invoice under the Delivery Tab **#9355**
The process for checking if an Order Number has already been Entered on Customer Invoice has been sped up. **#9865**
The Manage Invoices screen now allows for the ability to Sort / Search on the Reference field when "Include Posted" Invoices is selected **#9892**

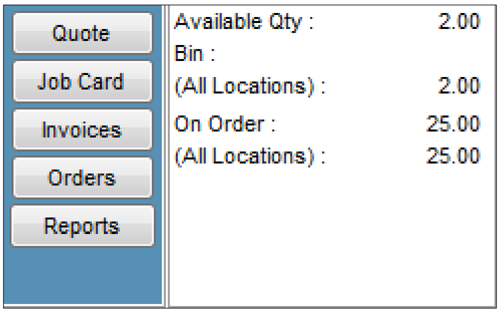
Job Management
On the Job Deposit reports (JMDEPOSITPAYMENT & JMDEPOSITPAYMENT2) there is now a date field for when the Deposit was received. **#7286**
There is now a filter at the top of the Manage Job screen allowing the user to select to show only one Job Type. The selected Type can be saved per user from the Fields / Save option. **#7441**
The Modify Job screen can now be sorted by all columns. **#7376**
An Insert button has been added to the Modify Job screen so the user doesn't have to scroll to the bottom of the entered Costs to add a new one. **#6659**
When Entering Job Costs the message "Warning: You have insufficient stock available" will now display if appropriate after a Location is selected. **#7213**
A Selling Units field has been added to the Enter Job Costs screen. **#7283**
The Selected Jobs to Invoice lookup screen on Bulk Invoicing can now be sorted by Job Title and Site Address. **#7339**
The opening up of Jobs has been sped up. **#7773**
Location Quantities are now not adjusted when entering a non-reducing Product onto a Job from a Location different to the default Job location and a transfer is done. **#6258**
The issue with cancelling out of making a Job Deposit payment and not being able to add the

Payment again has been resolved. **#6943**
When using Latest Cost as the Price level on a Job the Sell rate now populates when receiving a PO onto the Job. **#6977**
A Date and Time have been added to Pinned Notes in the Job Scheduler. This is used to reschedule / move the Pin. **#7288**
When in the Product Code field of a Job and entering costs, if the "Skip to the Codefield after each cost added" option is selected, Tab will now take the cursor to the Description field. **#7628**
When in the Modify Job screen the Quote button text now displays in a red if there is a Quote on the Job. **#7480**
Two staff logged in to the Calendar can now not drag the same Unassigned Job to different staff members to create a double up**. #7683**
The cost entry columns in the Modify Job screen can now be sorted. **#7907**
The Bestrate warning when entering costs in the Enter Job Cost screen with the system set to hold Cost Date, Cost Code but not hold Job ID, does now not appear. **#7304**
When entering a Staff code onto a Job through Enter Job Costs the type **STAFF** is now stored in Jobln. **#7711**
Where staff are working on a Job that hasn't been assigned to them the Job Scheduler will display with green clocks at the beginning and end of the entry (as opposed to clear for the Staff member assigned to the Job) **#7618**
On the Staff Timesheet Analysis - 7 Day report a small error with totalling on one day has been fixed **#7662**
When unticking the "Show completed Jobs" box in the Manage Jobs screen any Filtered search field contents are now not cleared out. **#8021**
Added filtered search for Site Address when in Secondary (incomplete jobs) filtered Search. When searching Site Address in Primary Search (include completed jobs), change Sort Order to Site Address and use % eg %benmark and Tab to Secondary. This will create a list of all jobs with the word benmark in the site **#8300**
Updated the Sell price calculation when adding items to a job from a Purchase Order if the job is set to be cost plus **#8514**
The Job Site Addresses list has been returned to being in alpha order. **#8201**
The Site Address column can now be selected / highlighted when the Include Completed option in the Manage Jobs screen is ticked allowing for it to be searched on from the Primary search. **#8208**
The Job ID column has been added back to the Job management Screen **#8302**
The Job Status "Waiting On Parts" had been added as a standard option. **#8243**
The Create Invoice option on the Right Click of a Job in the Job Management screen has been reinstated. **#8197**
The Status of a Job in the Manage Jobs screen now updates correctly when an Invoice is created from the Job. **#8143**
The dates of transactions associated with a Job Deposit are now correct. **#8168**
Infusion will now warn you if there are Outstanding Purchase Orders on a Job at the time of invoicing. **#1307**

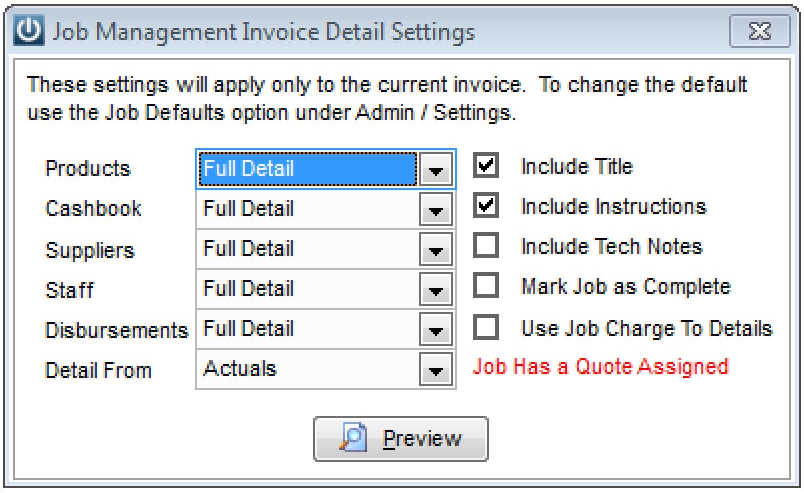


The Combined Manage Job screen can now be maximised. **#2790**

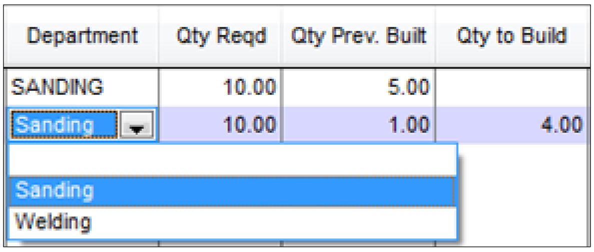
The 'Prompt to load kitset components individually onto a Job' option now works when you use the Combined Modify Job screen. **#4503**
You can now sort by all columns in the Manage Job screen. **#4563**
The Department column is now displayed on the Combined Job screen. **#4631**
When you are in the Enquiry / Modify screen for a Job you now have the ability to sort the Products by Description instead of just Date order. **#4709**
The ability to insert a line on the Job Enquiry / Modify screen has been added. **#5344**
The Job screen now has a separate field for the entry of a freight charge in line with the Quote and Invoice screens. Freight added to the Quote will now transfer to the Job when using the Assign Quoted option. **#5416**
In the Job screen, when using the Assign Quoted option, a new screen displays allowing the User to select specific lines to bring through from the Quote and also to select the required quantity to bill at this time. **#5856**
Lockout dates are now checked when adding costs to a Job **#6849**
Rounding functionality has been added to the Job Screen **#7387**
The Job Management Schedule can now be updated to restrict the Jobs that display by Job Type or Status. **#7535**
When using the Start / Stop clock on Job Costing the times are now stored in 24-hour clock format. **#8672**
Notes are now available for entry when starting and stopping the time clock. **#8755**
Customer Pop Up Notes now appear when creating and invoicing a Job **#8874**
You now have the ability to stop users changing the Price Level a Job is set to. A tick box has been added to the Staff \ Login screen. **#8899**
The Manage Job screen will now display the quantities for the currently highlighted product line at the bottom left of the screen. **#8968**



Opening a new or existing Job has been sped up. **#9053**
You can now set up Project numbers to group related Jobs together. Create and Modify Projects using the menu option Manage Projects on the Jobs drop down menu then assign a Job to a Project via the Job form. **#9079**
When invoicing a Job a red warning will appear if there is a Quote assigned to the Job. **#9147**



Running of the Job Management Detail report has been sped up. **#9179**
Saving a Job has been sped up. **#9183**
You can now set the default quantity to be used on the Job screen from the Manage Product Defaults screen - by default it is set to 1 **#9237**
You can now open a Job in Read-Only mode when it is in use by another User. **#9284**
There is now the ability to add a Delivery Method and Delivery Instructions to the Job Screen from under the Site Details tab. **#9329**
The option to bring details from a Quote when invoicing a Job is now not an option when there is no Quote. **#9359**
Selecting Create Job then selecting the X at the top right of the Job screen won't now create a Job with no Customer - no Job will be created at all. **#9361**
The Customer Order Number has been added to the Primary and Filtered Search options in the Manage Jobs screen. **#9390**
The sorting options of Products on the Stocktake Sheet has been increased **#8461**
The Department Drop Down has been altered to appear on the Job Grid, rather than as a pop up box



The ability to create a purchase order for a job has been added to the right click menu
When Production is activated (this is a Partner configured setting) the Job screen will display a button enabling all items being built to be transferred to the sell column. **#9751**
A new field has been added to display the Total Sales Value of Job (yet to build) on the Job screen. This is only active when Production is turned on (this is a Partner configured setting). **#9766**
Items on an Invoice generated from a Job now display in the same order as the items on the Job. Previously items on an Invoice where be in code order. **#9760**
An option has been added to the Right Click menu when on the Code column only in the Manage Job screen to see the Original Document on a Job line eg. Supplier Invoice. **#9975**
Location Quantities are now not adjusted when entering a non-reducing Product onto a Job from a Location different to the default Job location and a transfer is done. **#6258**
When using Latest Cost as the Price Level on a Job, the Sell rate now populates when receiving a Purchase Order onto the Job. **#6977**
A SELL ALL button has been added to the Job Screen. This is only visible when Production is active. #**10023**
The Price Lookup on the Job Management line entry now uses 15% GST as opposed to 12.5% GST when using the Date control to enter the Date. **#7270**

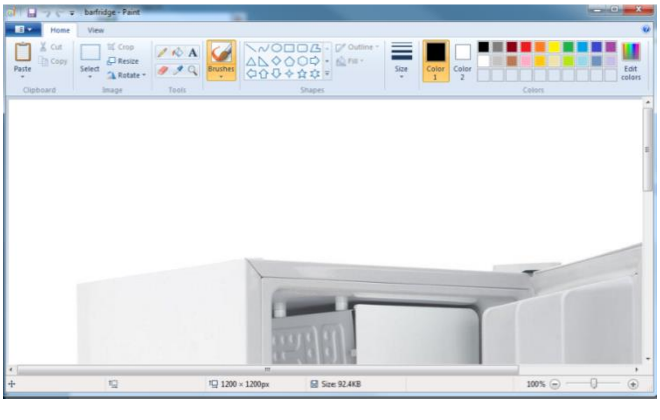
Letters
Inactive Contacts are now not used when sending out Customer Item type Letters. **#7278**

POS
The To Do List now pops when logging in as a POS user **#8036**
A Notes / Memo field can now be added to POS dockets (set from POS Defaults) **#8020**
The Cash Drawer Contents report (POSCONTS) has been fixed so that if you have a Drawer ID set in the POS Defaults you can now see the sales for This Drawer Only. **#7790**
Buttons can now be setup to display at the bottom of the POS screen for use in selecting a Product for a sale. Buttons can be assigned to a Product Code or Group. They can be clicked on using a mouse or touched when set up on a touchscreen. See the POS Help manual for more details. **#7752**

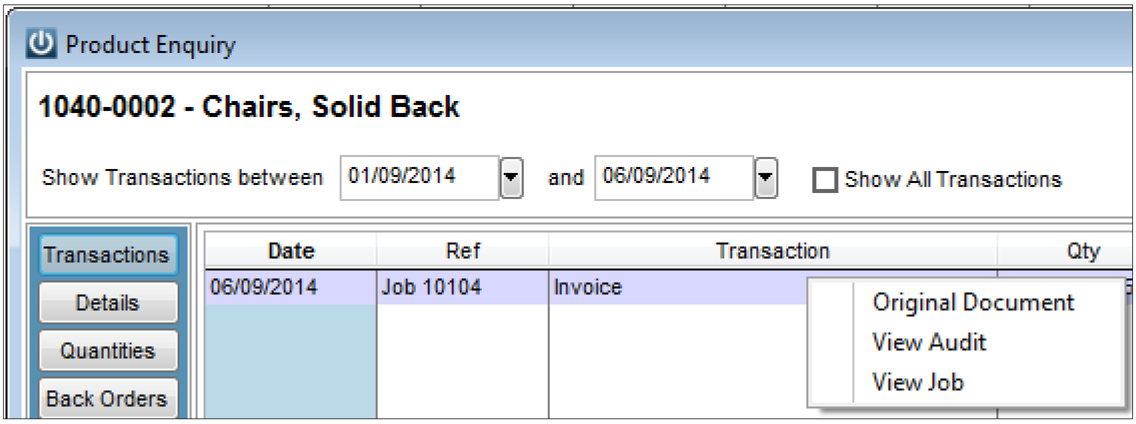
When using the POS Cash Out option the correct GST rate for the GL account selected is used. **#7632**
There is now the ability to enter a date when a Cashdrawer is removed. There is a prompt with a date selection defaulting to the current day. **#7720**
The POS Sales By Staff report now works correctly when entering a Sales Rep code in to limit the report to a single staff member. **#6768**
The TTF POS Invoice layouts have been updated to include the Invoice and Payment message. The Paid By field has been moved to the bottom of the layout **#8424**
Updates to the POS HOUR report to include the number of invoices generated and the average dollar value per invoice **#8470**
A Layby option has been added to POS Screen. This will enable an invoice to be posted against the customer account even if the Customer is set to Cash Sale only. A new field has been added to the invidx table to indicate the sale was a Layby **#8271**
https://infusionsoftware.zendesk.com/hc/en-us/articles/115007968047-Processing-A-Layby-Sale-in-Infusion
A new report has been added to allow users to view the POS sales by hour for a Range of dates, including the average sale value and margin. **#8486**
User can now double click in the amount field next to a payment method and have the invoice total populate the field. On both POS invoice Process Sale and standard invoice **#189**
The POS Contents report now displays in chronological order. **#8091**
A Point of Sale user can now select the layout to print when processing a POS transaction. **The Prompt to Print option** must be set under their POS Defaults for this to occur. **#8154**
Freight can now be added to the POS Screen, additionally a default freight value can now be set up and applied to all sales. **#6166**
POS quick keys can now be copied to other POS Users. **#8145**
Opening POS has been sped up. **#9044**

Products
Pricebooks can now use the 80 characters available for the Product description. **#8023**
When creating Product Subgroups while in the Products screen new Subgroups aren't now associated with the current Product Group. **#8006**
When creating a Trade In item the Sell price now shows correctly relative to the GST Inclusive/Exclusive setting for the system. The Trade In Product cost now includes Refurbishment costs. **#8068**
When creating a new Stocktake and exiting out of the Stocktake Entry screen without saving, the Count figures are now not zeroed. **#8070**
Stocktake sheets now don't include Inactive Products. **#8079**
Running a Product Integrity Check now doesn't remove any allocated quantities associated with a Write Off batch. **#7555**
Two new fields have been added to the barcodes.dbf file - Origin and Reference. Having these fields allows the Invoice number or Order number to be stored when records are created via invoicing or receipting goods from a Supplier meaning they can be used on Product labels. **#7532**
A tick box option has been added to the Products / Settings screen called "Include in Infusion Mobile". This field is also available when setting up a Product import. **#7642**
When using the Swap Product Group option the G/L codes set against the Locations are now updated **#7205**
Pricebooks now work with 80 character descriptions. **#7930**
There is now an option to select a Preferred Supplier for the range of Products when creating a Stocktake. **#7909**
The Inactive Products report has been updated to include a unit cost (Latest), an Extended Line Total and a Grand Total. **#7684**
The Product Sales Analysis reports have been sped up. **#7781**
The Description field on Products has been increased to 80 characters. **#7551**
The A4 and A5 Product Specification sheet reports have been tidied up. **#7517**
The Update Pricebook Prices function now works correctly when selecting the Include Inactive

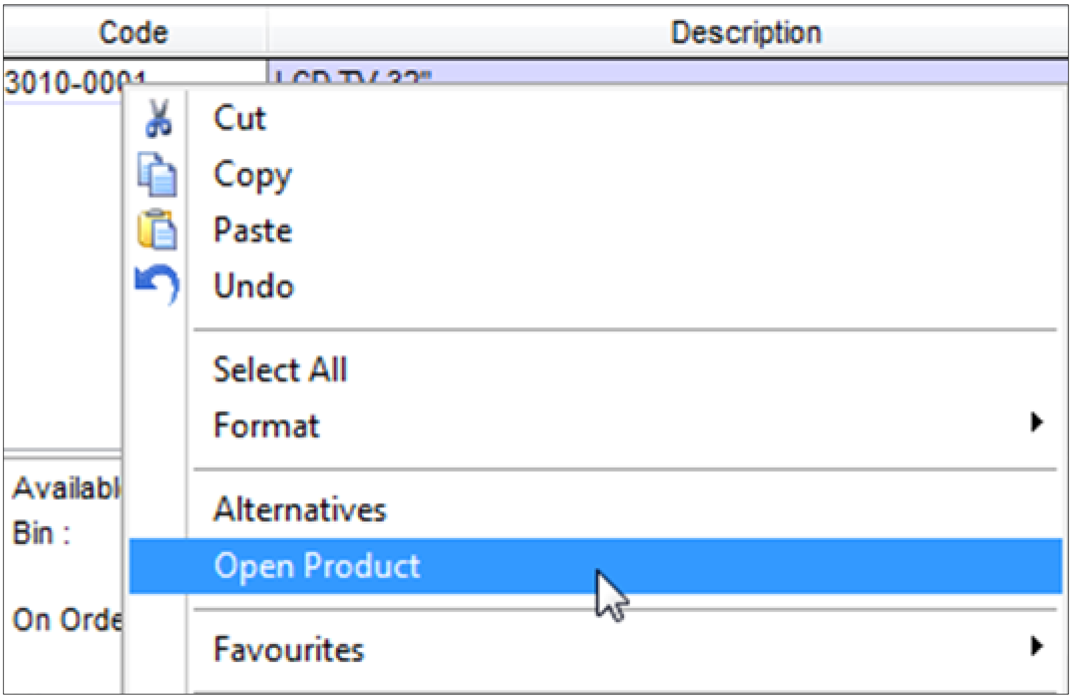
Items option. The Type dropdown option has been corrected to display the Pricebook (not Infusion) Types. **#7340**
When updating Pricebook prices to Products (PBUPDATETOPRODUCTS), if the pricebook prices are GST inclusive the selling Price fields for the Product are now updated correctly. **#7442**
A tick box option "Update Average Cost when receiving Products" has been added to Product Defaults. This is set to be selected by default. It will allow the Average Cost of Products to be updated if the Latest Cost isn't. **#6938**
The Product Top / Bottom report (PRODTOPG) has now the option to sort by Sales value or Quantity sold. **#7375**
The pop up screen appearing when using the Find button on Reference field of the Customer Enquiry / Invoices screen now allows 20 characters to be entered. **#7852**
The two Top/Bottom Product Sales Analysis reports now don't pick up summarised MISC lines from Job Invoices **#7852**
When manually receiving Products the tick box to 'Update Cost Price' now works correctly. **#7664**
When transferring Products that are set to track only SOLD serial numbers, the system will now not prompt and require serial numbers for the transfer. **#7611**
When a Product Integrity is run items on a Saved manual receipt are now not included in Allocated Quantity re-totals **#8511**
There is now a month total to the line for each product on the Product Daily Unit Sales (PRODSA7) report. **#8225**
The Product Integrity Check function has been sped up. **#8255**
The Serial Number field is now automatically populated when a Customer Item is selected as a Trade In from the list of owned items. **#8242**
The Product Exception report (PRODEXCP) now displays the Product's Sell, Latest Cost, Average Cost and Margin (where appropriate) information. **#8223**
The Products **Show History** screen has been sped up. **#8551**
Invoice numbers, P/O numbers etc are now available to print on product labels **#8117**
The ability for a user to see Product Costs when in the Product Lookup screen is now correctly controlled by the system defaults. **#8078**
When using F9 to look up an item in an eg Purchase Order screen the cursor will Now go to the Product used on the last F9 lookup - in v8 it didn't. **#8119**
The new rounding flag for financial reports is checked in Product Sales Analysis reports PRODSA21, PRODSA22 **#8116**
The Product Ratio field can now store 4 decimals for both the Rate and Quantity. **#4683**
The Product Code for a Kitset now displays with surrounding square brackets e.g. [ABC1003] The brackets are not required to be entered; these purely indicate the Product is a Kitset. **#5027**
The Product Description field has been increased to 80 characters - previously this was 40 characters. **#5328**
A warning message has been added when the User tries to change the type of Kitset to When Invoiced if there is still stock on hand. **#8454**
Images can now be opened for editing. Double click an image and it will open in Microsoft Paint or your default Image Viewer/Editor. **#8756**



You can now store an unlimited number of images against each Product. **#8789**
The Kitset screen has had a major update and now includes additional fields from the product file and a Sequence field showing which order the components should be used in. The screen can now be re-sized. **#8827**
A new Compatibility tab has been added to Products to indicate which makes or models this Product Code will be compatible with. **#8967** https://infusionsoftware.zendesk.com/hc/en-us/articles/360000144975-Product-Compatibility
Alternative Product codes can now be added under the Products \ Alternatives tab. This provides options \ alternatives when a product is not available. Alternatives can be viewed from the Product Lookup screen by highlighting a Product then selecting the Alternatives tab from the left hand menu. An item can then be selected to add to an eg Invoice from the Alternatives Lookup screen. **#8970**
Inactive Products can no longer be added to a Kitset. **#8976**
Opening the Product screen has been sped up. **#8986**
The Modify Product screen now has an extra tab called "In [Kitsets]". This will display a list of the Kitset codes that use this component. **#8987**
A Discount can now not be applied to a Build Up header line. **#9276**
Right clicking on a Transaction in the Product Enquiry screen now enables you to view the Job the item was put on to **#9275**



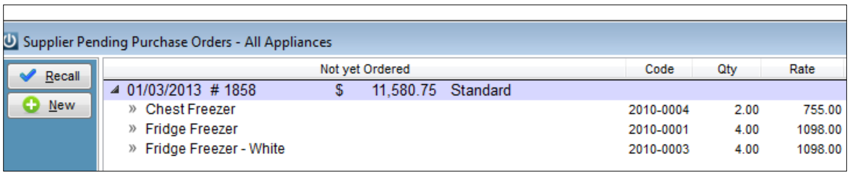
When setting up a new Product Code you can now set the Product Job Management Type to Product, Staff, Disbursement, Resource or Consumable. The two additional options have been added as part of the changes for the Job Production functionality. **#9293**
There is now the ability to open a Product in *Read Only mode when another user has the Product open. **#9353**
The Location in a Product receipt will now default to that set against a Staff member **#9480**
The Ability to edit a product has been added to the Purchase Order, Invoice, POS, product Receipt, Transfer and Quote screen, enabling the product code to be edited and modified. This will assist users who wish to update product descriptions, bin locations and pricing details for the product without having to leave the screen.



A tick box has been added to the "Duplicate to Product Code" pop up screen when duplicating a Product to allow the Preferred Supplier information to be copied. **#7369**
The Stock Transfer report now includes the Bin Locations **#8746**
The Kitset Screen has been updated to include the Quantity of components on Hand and also the latest cost for the components.
The Preferred Supplier Name now displays on the Detail screen of a Product. **#4027**
Additional security has been added to the Staff Login screen allowing staff to modify the Product Settings tab. **#9765**
On the Manage Products screen the colour of the On Hand Qty field is now RED if the stock on hand figure is negative. **#9796**
On the Manage Products screen the Sell prices 1 to 8 will display in red if they are equal to zero or if the Sell rate is less than or equal to the Latest Cost price. **#9797**
Suppliers now display in a grid under the Modify Product screen. **#9669**
Decimal places can now be entered for Supplier Latest Cost (under the Suppliers tab of a Product). **#9881**
Changes have been made to the structure of the Prodbals file which will reduce its size by up to 75%. This will improve the speed, size and operation of the backup. **#9921**
When multiple Suppliers are set against a Product, deleting one now won't remove the code tor the Second supplier as well. **#10081**

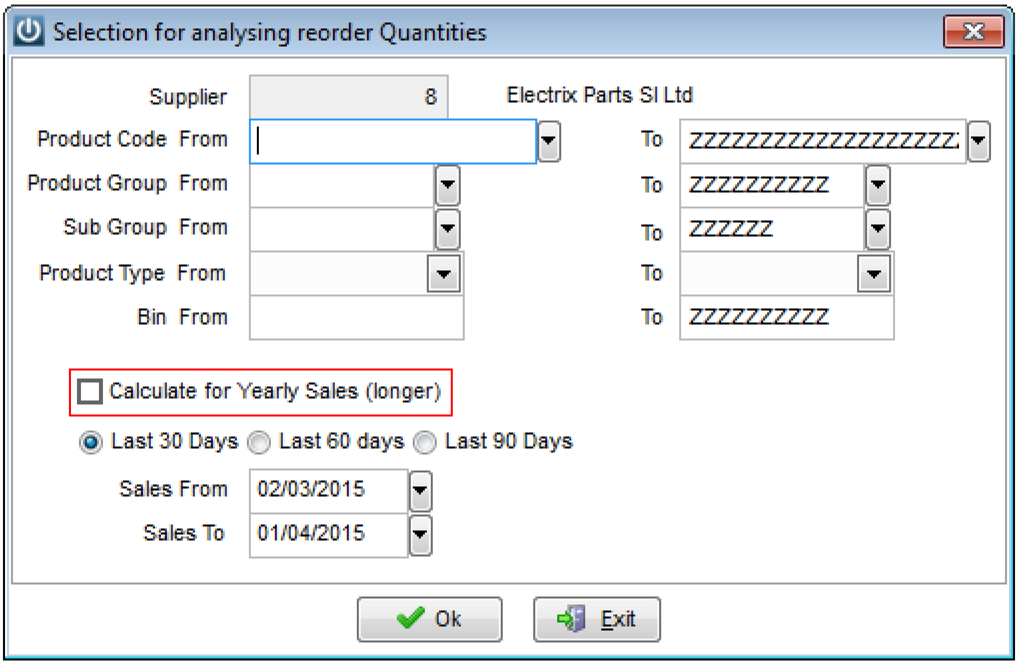
Purchase Orders
When in Purchase Order (Creating and Receiving Product) screens the On Hand quantity text on the bottom left of the screen has been changed to Available Quantity to reflect that the value is the total On Hand less the Allocated quantity. **#7315**
When Saving a Purchase Order generated from right clicking on a Supplier and selecting Create a Purchase Order, the screen now goes back to the Manage Suppliers screen as opposed to asking for another Supplier account. #**7568**
The "CODE is not unique and it must be qualified." error seen when running the Purchase Orders Not Yet Processed report (SUPPUPO) with the report sorted by Product Code has been fixed. **#7419**
A new report called Purchase Order Receipt/Invoice Date Check (PINVLM) has been added. This report will show Purchase Orders that have been receipted in one month and the Supplier Invoice processed in a different month. **#7797**
The error seen (only in v7) when using the Auto-order option in a Purchase Order screen for a multi-location data file has been fixed. **#7432**
Notes can now be added to the Description of an Item on a Purchase Order at the Create,

Receipt and Process Invoice stages as it did in v6.21. The F11 function key is now used to do this. **#7501**
Users are no longer able to enter invalid General Ledger accounts onto Purchase Orders eg keying in /NS had resulted in an auto created GL account (user had intended to use N/S product code). **#7501**
The Purchase Order screens will now save any resizing. **#7995**
When a Job Management Purchase Order is created and "Deliver to Job site" is selected as the "Deliver To" option the system will now ask for the Serial Number of any Serial Tracked Products on that Purchase Order. **#8025**
In the Purchase Order entry screen the cursor now tabs from the Our Order # field to the Product Code field. **#8071**
The 1705 File access denied error from printing the default Product Label layout when Receipting in a Purchase Order has been fixed. **#8365**
There is now a "Prompt for Auto Order" tickbox option under Supplier Defaults. When Selected Infusion will prompt the user to use the Auto Order function when creating a new Purchase Order**. #8240**
There is now a new Purchase Order report which has multiple sorting options. This new report will ultimately replace the existing nine outstanding P/O reports**. #7406**
The correct quantity is now pre-entered when user selects F11 (for labels to print) on a new purchase order line **#8137**
The Auto Order option is now available on Job Management Purchase Orders. **#7850**
The ability to create a Purchase Order for a product has been added to the Product right click menu. The Purchase Order will be created for the Preferred Supplier. If there is more than one Supplier of the Product a Supplier selection list will pop up to choose from. **#2787**
Labels can now be printed for Job Management Purchase Orders when the Purchase Order is receipted in. There is a tick box option for this under Manage Supplier Defaults \ Orders **#8935**
The Pending Purchase Order screen (which displays Saved orders already created for the selected Supplier) allows you to drill down on a Pending Purchase Orders. **#8953**

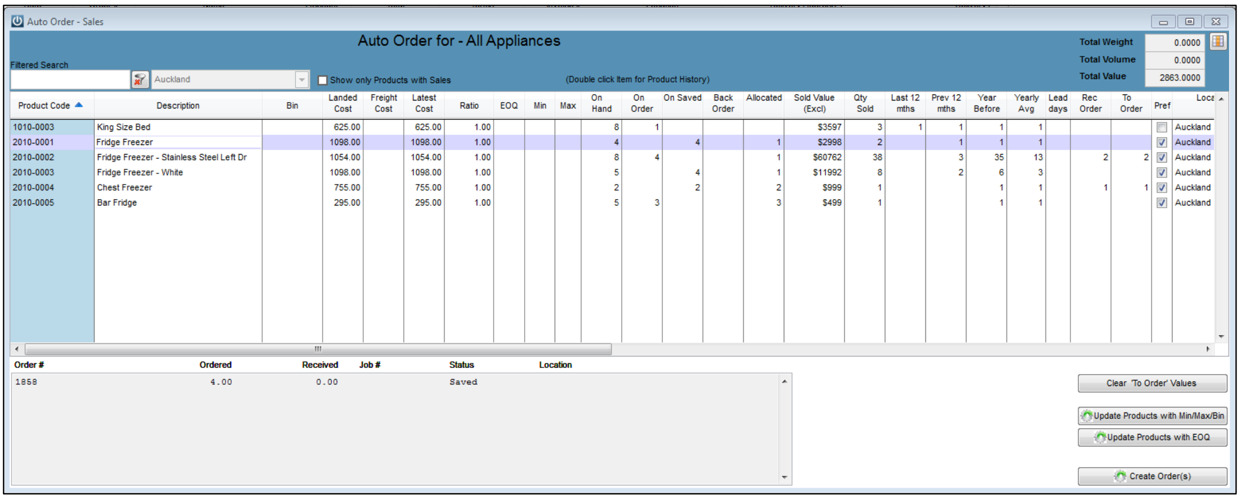


Selecting Auto Order on a Purchase order now no longer overrides items added manually. **#8993**
Opening a new or existing Purchase Order has been sped up. **#9045**
Opening Receive Products (from Order) has been sped up. **#9046**
Supplier Receive Invoice (from Order) has been sped up. **#9047**
Entering a Supplier Invoice (No Products) has been sped up. **#9048**
When you delete one line from the packing slip at the Supplier invoice stage, Infusion will remove the entire packing slip from the Suppliers invoice **#9340**
Min, Max and EOQ values are now displayed per line item when in Order Entry forms. **#9489**
Users can now only add a Packing Slip to a Supplier Invoice once **#9379**
There is now the ability to open a Purchase Order in *Read Only mode when another user has the Purchase Order Open. It also opens in Read Only when the Purchase Order is 'Completed' on the new Manage Purchase Orders screen. **#9381**
There is now a Manage Purchase Orders screen which displays all Saved. Ordered, Part Fill and All Received Orders. Purchase Orders can be created along with Packing Slips and Invoices processed from this screen.
A facility to copy an existing Purchase order that is **Saved, Ordered or Part Filled** to another supplier has been added. This will copy Items **Not Received** to a new Saved Order. The copy will need details such as freight etc altered to suit.
There is now a default to only use the Preferred Supplier when creating an Auto Order Purchase order. **#9615**

A new column has been added to the Manage Purchase Order screen to display the Purchase Order Type. **#9713**
The Manage Purchase Order screen has been sped up. **#9772**
The Supplier Purchase Order screen can now be resized vertically and the system will retain the size and position next time it is used. **#9871**
Purchase Orders which have the same Order number now show separately in the Manage Purchase Orders screen. **#9883**
Auto Order Sales - an option to Calculate Reorder Quantities On Yearly Sales has been added. **#9911**



Auto order Sales has been extended to allow entry and update of Bin locations. The Sales Value for the selected period has been added. Sorting of all columns is now available. **#9912**

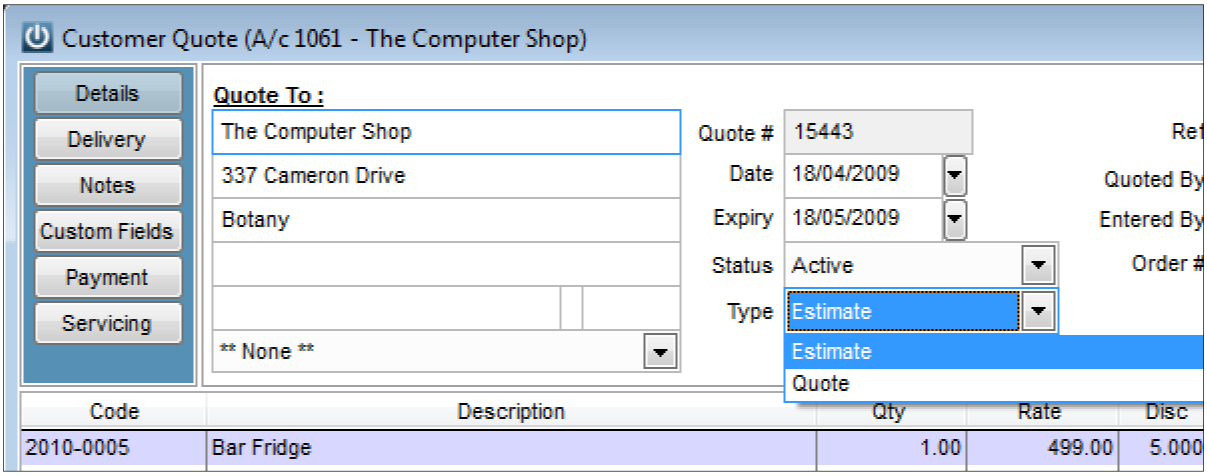


The Date 1 field is now visible and working. **#10012**

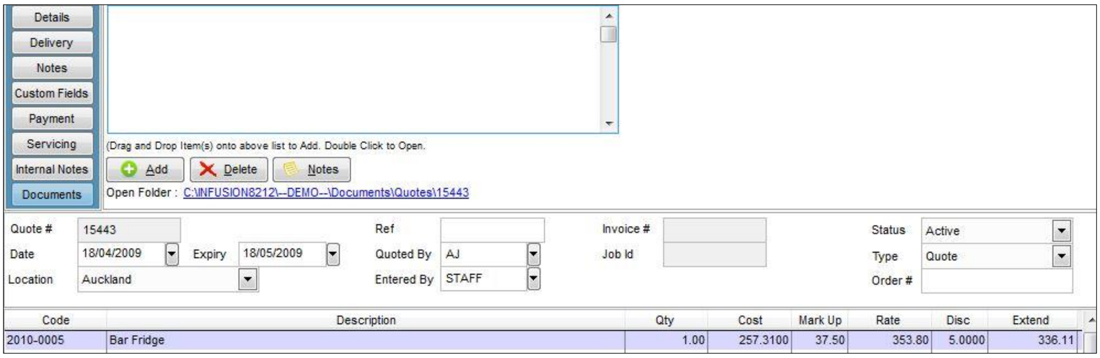
Quotes

When creating a Quote, Department information is now saved. **#7378**
The issue when a Pricebook item is added to a Quote and not being able to be Discounted after the Quote is saved has been resolved. **#7349**
There is now a Remove Discounts button on the Quote screen which removes all discounts from the Quote when used. **#8126**
Creating and opening an existing Quote has been sped up. **#9057**
A Manage Quotes screen has been created. This combines the previous Pending and Accepted Quote screens. **#9347**
A Quote Status has been added

Quote Types have been added. When producing a Quote, the user now has the ability to change the wording from Quote to Estimate. Standard Type options are Quote and Estimate. Additional Types can be added from Admin \ Settings \ Customers \ Manage Quote Type. **#2503**

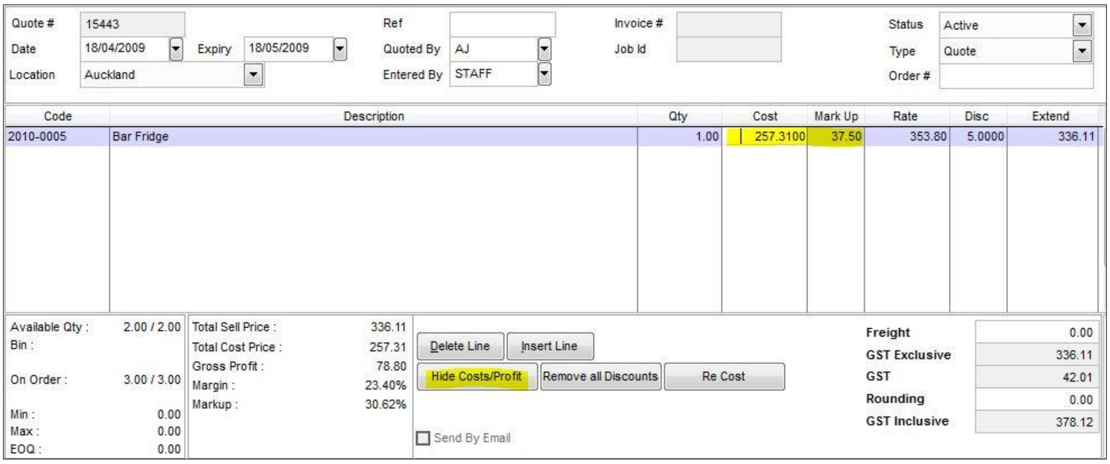


The ability to sort by Status has been added to the Manage Quote Screen. **#9731**
The ability to delete a single Quote from the Manage Quotes screen has been reintroduced. **#9681**
The Quote Screen has been updated to include a Documents tab. **#9775**



An Internal Notes tab has been added to the Quote Screen. This has been added to allow users to record notes specific to the follow up events for this Quote. The information is not printed on the Customer's Quote. **#9776**

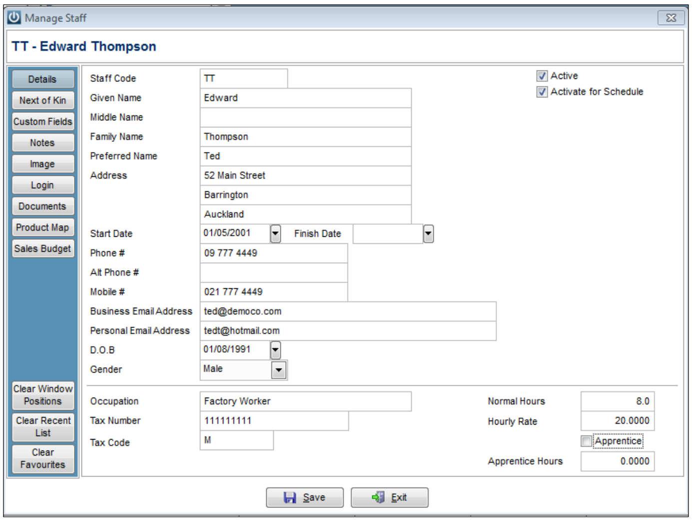
The width of the Quote screen has been increased to include the Cost price and the Margin columns for each product line. You can now adjust the Cost, Margin, and or Sell price per line item for this Quote. The "Show Costs / Profit" option at the bottom of the screen will toggle these fields on and off. The visibility of these fields is controlled by the option to see / hide cost prices. **#9876**



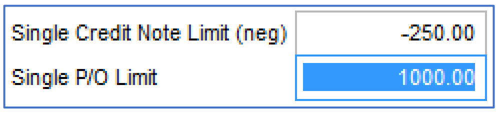
If a Quote has an associated Job # or Invoice # this now shows on the Quote - both on the Quote and in the Manage Quotes screen. **#9889**
The ability to Search for associated Job# and Invoice # has been added to Quote Management. **#9898**

Rental Hire
A Rental / Hire module has been added to Infusion Software. See the Rental Hire support manual for notes on how this operates. **#7035**
The processing of a Rental Hire and its payment on a Cash Sale account now works correctly. **#8060**
You can now use a negative quantity to create a credit invoice on account. **#7952**
When logged in as a Point of Sale user and issuing a Rental Hire credit the correct financial transactions are now posted. **#8013**
Opening a Rental Hire has been sped up. **#9054**
Extending a Rental Hire has been sped up. **#9055**
Rental Hire Return has been sped up. **#9056**

Staff
Opening up of a Staff member account (from the Manage Staff screen) has been sped up. **#7784**
A Location field and colour option can now be added against a Staff member from under the Staff / Login screen. **#7777**
A tick box has been added to the Staff login tab Allow access to customer Terms and Pricing, by default this should be selected as true. If this is unticked then the user can not select the terms and pricing tab on the customer screen. **#8334**
Another two Tick Boxes have been added to the Staff member login TAB **Allow Editing of Selling prices** and **Allow editing of Cost prices** Unless the user has these selected, they will not be able to edit the prices in the products screen **#8335**
A Tick box has been added to the Staff Login screen – **Only display pending invoices for the Staff location assigned**. This will then only display pending invoices which are assigned to the location matching the staff member, and also when they create a new invoice, only pending invoices for the assigned location will show. **#8336**
Additional Custom Fields have been added to the Staff module. **#9042**
The Staff record has now been updated to include Preferred Name, Gender, Occupation, Tax Number, Tax Code, Normal Hours Worked Per Day, Pay Rate, Apprentice and Apprentice Hours. **#9149**



Individual Staff members can be assigned a Price limit to which they may create Purchases Orders up to. This is set in the Staff \ Login screen **#9388**



Each individual Staff member can now be assigned a Credit Invoice limit. Infusion will not let them exceed this limit but instead save the Credit Note for approval by another staff member. It is set under the Staff \ Login menu. The Credit Note cannot be printed by the Staff member either **#9389**

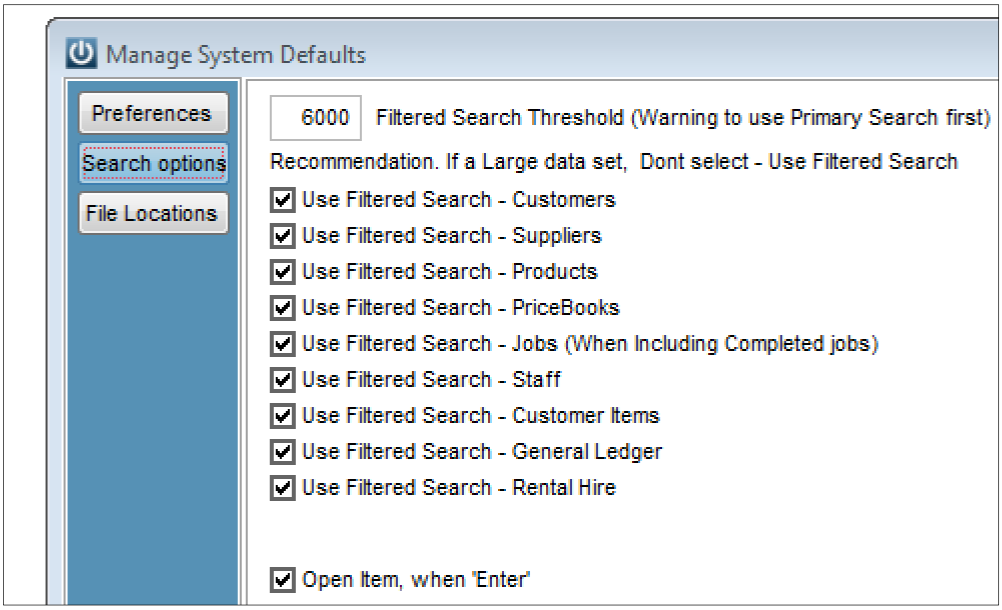
Suppliers

Deferred Payment terms can now be set up for Suppliers (on Enter Invoices (No Products) and Purchase Orders) **#3223**
Running of the Supplier Sales Analysis reports has been sped up**. #7782**
The network performance issue created when two users are simultaneously processing Supplier Payments has been resolved. **#7553**
The Outstanding Items on the Supplier Payment screen now display in Date order not by Ref. **#8083**
The Supplier \ Enquiry \ Show History screen has been sped up Bulk supplier payments can now be made (from the Supplier dropdown menu) **#6231**
https://infusionsoftware.zendesk.com/hc/en-us/articles/115007965187-Bulk-Supplier-Payments-
Functionality has been added to be able to delete a Payment made against a Supplier. **#2815**
The cursor on the Supplier Invoice now starts in the Date field. **#4875**
The ability to swap a Pending Order to another Supplier has been added (in the Manage Purchase Orders screen). **#6069**
A tick box default to "Use Economic Order Quantities for Purchase Order Auto Orders" has been added under the Manage Supplier Defaults \ Orders screen. When the Auto Order option is selected from the Purchase Order screen the calculation for how many to order will use multiples of Economic Order Quantities not just the amount that will bring the stock holding back to maximum level (set under the Locations tab of the Product). **#6145**
The Purchase Order Status of "All Received" has been added indicating that the user is awaiting the Supplier Invoice. **#6171**
The questions prompted at the completion of a Purchase Order / Supplier Invoice ie Packing Slip Number, Date of Receipt, Invoice Number, Due date, are now all asked on the main screen. **#6443**
The Debit and Credit heading under the Supplier Enquiry Window have been updated **#7119**
Contact Management has now been added to the Suppliers module. **#7704**
Supplier Bulk Payments now handle Invoices with Deferred Payments correctly **#8681**

The Supplier Remittance can now be previewed before printing. **#9197**
Opening a Supplier has been sped up. **#9206**
You can now store the Default Delivery Method against the Supplier Account **#9291**
There is now the Ability to open a Supplier in *Read Only mode when another user has the Supplier account open. **#9354**

System
The following message has been added to the lockout date pop up screen: Please review your Transaction Lockout Dates settings on the Admin / Defaults / Manage System Defaults screen. **#7572**
The dbf repair tool CMRepair has been added to Infusion (Admin menu) to assist in the repair of corrupt files. **#7521**
A tickbox option has been added to the Manage System Defaults screen called "Don't display cents on reports". This setting will be used to progressively update reports causing issues with asterisks due to the data being too wide for the field. **#7754**
The error message screens in Infusion now pick up the entered Certified Partner details to direct the end user to who should be contacted if assistance is required. **#7234**
The Customer Invoice and Supplier Purchase order screens have been set to not use Proper formatting by default. **#7322**
Bank Reconciliation Summary and Check reports have been added to the Partner menu. These reports assist with finding issues in the Bank Reconciliation. They are guides only and will only highlight potential issues. **#7297**
The Aurora convertor has been updated to accommodate the new SRCE field in **#7207**
The way filtered searching works has been changed. See associated support notes **#7826**
Due to issues with Infusion data files being locked when backups were being done (and consequently missed) the Infusion Gateway file has been updated. The Gateway file now requires a third party application to logon and record when it is used to access Infusion data. Unless the Logon function is called, none of the other functions within the DLL are able to be used. While a third party application is logged on to the DLL a prompt to backup Infusion on exiting the software won't appear. Third party applications currently using the Gateway file will need to be updated to use the new version. Applications will still be able to run using the old gateway file (ibsgw.dll) if the End User upgrades to v8. **#7457**
You can now display a Chart/Graph of historical data using the ‘to’ date in the Management Console screen. It shows 12 months inclusive of ‘to’ date month. **#7614**
Location(s) can now be colour coded which affects the display of the following screens - Job, P/O, Customer Invoice, Supplier Invoice **#7616**
Customer Invoices can now be exported cleanly to RTF/Word, Excel and PDF. **#7619**
The Excel Export option under the Fields button is now controlled by the same Menu Group level as the Utilities menu for the related module. **#8022**
Two additional options are now available under the Help menu - **Infusion Support options** and **Infusion Knowledgebase #8500**
The Manage Financial Control Links menu has been renamed Manage Financial Defaults **#8239**
There is now a tickbox option called **Go To Code** under Manage System Defaults that when selected the cursor will start in the Code field for Invoices, Quotes and Purchase Orders. If not selected the cursor will start in the first row of the Customer Details section. **#8224**
There is now the ability to Drag text from inside Infusion and from 3rd Party software eg Word, Outlook, Editors etc and Drop into Infusion. **#8565**
The Check Customer, Product and Supplier Integrity options have been increased in speed **#8294**
Users are now shut out when an upgrade is being done. A prompt will appear telling the user that a backup, upgrade, reindex is in progress if they attempt to log in. A Partner password is required if the user wants to log in. **#8030**
The SMS Password is now displayed as ******** **#4612**
The registration screen has been updated to include options for Automated backup, Software Rental, and a link to the Hosted Server Sign up screen **#8704**

System wide, drop down combo boxes have been increased in size. **#8737**
The Management Console now displays the count of both GST Inclusive and GST Exclusive Invoices. **#8748**
Fixed Assets, Products, Customer Items, Staff, Customers and Suppliers all now have the ability for multiple images. **#8757**
The ability to drag and drop Images and Documents (and Multiples) into Infusion from external files has been added. **#8785**
Search options have been updated so that the highlighted item in a Filtered Search will open if the Enter key is selected. #**8810**



A new refresh mechanism has been added to Infusion to increase speed on grids when there are multiple users in Infusion. It will also dramatically reduce data polling on a LAN. NOTE: The compromise is that Users may not see changes being reflected in the grids that another user makes on another Workstation for up to 60 seconds. **#9416**
The ability to add notes to the Job Cost Entry Screen with /N has been introduced. **#9749**
The ability to add a ruled line across the length of the description field using ***//*** has been added. **#9750**