

Please note a new registration number will be required

Prior to Installation please look at this article for [Terminal Server Installation](#).

Please see here for [Installing Infusion Business Software](#)

Admin

Infusion Certified Partners: a migration utility is now available under Admin / Other / Migration Utility. It produces a report with information for the migration to Infusion Online and generates import files to use on the setup of Financial Reports. **#13442**

New report selection drop down options have been added to the software which include the Stock in Transit location. LOCATION3 which includes the All Locations option. LOCATION4 which only allows selection of one location. **#13459**

Cashbook

A date parameter has been added to the Undeposited Banking report to allow reconciliation to the Balance Sheet GL Code and the Bank Reconciliation as at a certain date. **#12147**

Customers with custom field Check 6 are now excluded from the reconciliation file of the BNZ Finance Export routine as expected. **#13388**

Customer Items

A Customer Item is now able to be tagged as a "Master Item". This will act as a Master for Customer Items assigned to the same Customer Account and Item Type. In Jobs / Bulk Invoice Jobs there is a new option to select "Jobs with assigned Customer Items linked to Master Item" option. This new functionality allows Customer Items to be grouped by, say, Site or customer location, and have all jobs invoiced together on that basis. For full details see [Customer Items - Master Item](#) **#13419**

Manage Customer Items

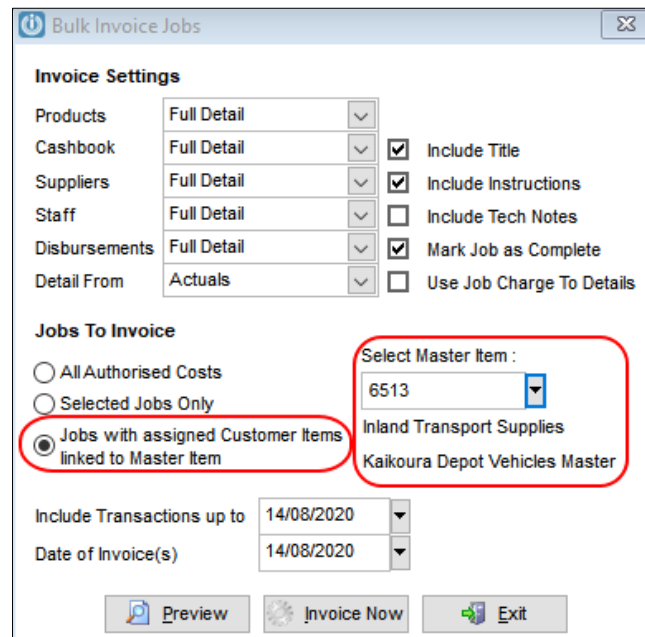
Kaikoura Depot Vehicles Master - (Inland Transport Supplies) This Item is a Master Item Inactive

Customer Account	1052	Inland Transport Supplies	Master Item Link	** Not Selected **
ID	6513	Customer ID	1052 MASTER	Staff Member
Description	Kaikoura Depot Vehicles Master			Grade
Purchased/Started	01/08/2020	Type	Vehicles	0
Serial Number				
Customer Contact	** None **			
Warranty Type	** No Warranty **			
Registration Number				

Manage Customer Items

Hyundai Truck XKC112 - Kaikoura - (Inland Transport Supplies) This Item is a Master Item Inactive

Customer Account	1052	Inland Transport Supplies	Master Item Link	6513 - Kaikoura Depot Vehicle
ID	6514	Customer ID	KAIKOURA1	Staff Member
Description	Hyundai Truck XKC112 - Kaikoura			Grade
Purchased/Started	01/04/2020	Type	Vehicles	0
Serial Number				
Customer Contact	** None **			
Warranty Type	** No Warranty **			
Registration Number	XKC112			

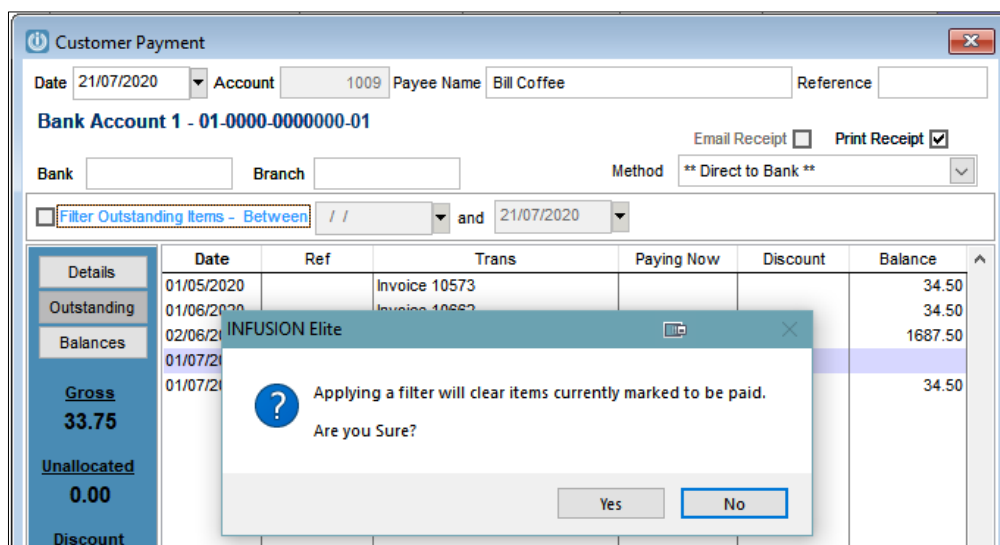


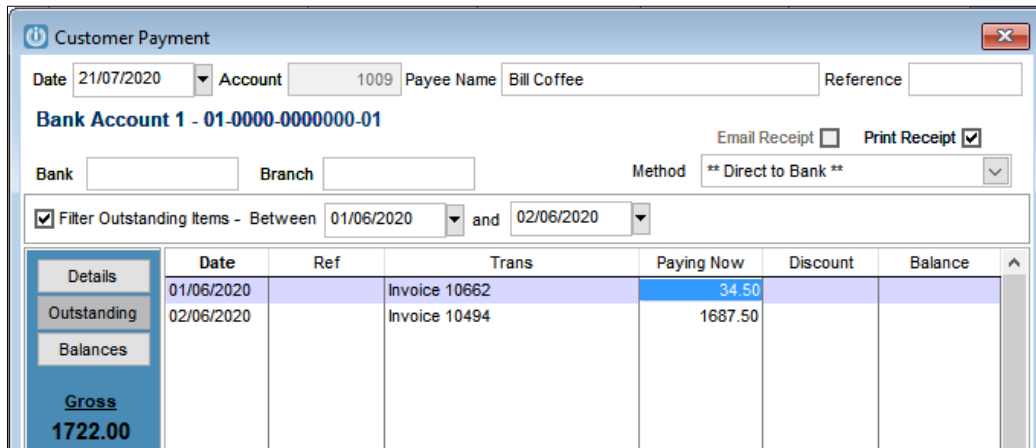
Customers

An issue with the Address Lookup utility where an apostrophe was entered into the address has been resolved. **#12103**

Fixed a problem on environments with EFTPOS Integration where a manually created EFTPOS payment method linked to the integration would not work for separate customer payment transactions but worked fine on invoice/payment transactions. Now all situations will prompt to swipe the card on the manually created method. **#13371**

A date filter has been added to the Customer Payment screen to view only outstanding transactions between two dates. The Auto Pay and Pay All buttons will only affect the filtered results. **#13406**





Import / Export

The Mitre 10 Payment import routine has been fixed to remove an error. **#12152**

Invoices

The Post Time of an invoice is now recorded against the invoice for both POS and Non-POS invoices. Previously this was only recorded for POS invoices. This value can now be accessed for invoice or packing slip layouts. **#13401**

A problem allowing posting of an invoice twice on a multi-user environment when one of the users had the Print dialogue box or invoice lookup screen open has been resolved. **#13403**

A problem with the shortcut key F5 which was stopping the cursor from being moved to the freight field has been corrected. **#13408**

A problem preventing the shortcut key F6 from opening the Weight/Cubic pop up on customer invoices has been corrected. **#13409**

Job Management

An issue where the Job Instructions and Tech Notes had been swapped on opening from the side panel has been resolved. The Notes panel now opens to Instructions. **#13340**

Updated the Pre Delivery functionality which had an inconsistent behaviour depending on the selection of System Default "Go to Code". Now if "Go to Code" is FALSE the job no longer causes problems selecting a serial number and the cost prices and quantities are correctly updated. A right click option has also been added to allow users to select a new serial number if an incorrect one is selected. See [Pre Delivery](#) for full instructions. **#13431**

An issue with the date reverting to 'today' when entering job lines has been resolved. **#13194**

POS

ZIP integrated payment is now available for POS users in Australia. The integration sends a request to ZIP and allows the customer to confirm the charge - this is sent back to the software to

confirm the purchase. For more information on setting up and using [ZIP Payment](#) click the link.
#13264

Fixed a problem occurring when trying to do a refund in POS using the Quick Payment Method buttons 1 and 2 or F2 "EFTPOS". The tick box in Customer Defaults to ask for refund method must be ticked for this to work. **#13369**

Resolved a problem in the "Process Sale (F7)" screen getting the payment methods disabled if the initial method selected was incorrect and then changed for another. **#13416**

ZIP integrated payment is now available for POS users in New Zealand. The integration sends a request to ZIP and allows the customer to confirm the charge - this is sent back to the software to confirm the purchase. This is the same functionality that is available for users in Australia, with the only difference being that ZIP NZ uses the Original Invoice Number in a Refund situation, not the [ZIP Payment](#) Reference. **#13423**

The option to apply a credit or unallocated payment at the Point of Sale has been updated and now can also be used on cash sale accounts - the software will prompt if they are in credit to apply that credit (or part thereof) to the current sale. The amount is the maximum that can be applied (either sale total or available credit). This change will help in situations where a deposit is taken on a customer account for sales that will be processed once the goods have arrived. Also, fixed a bug to stop the prompt when the transaction is a refund. **#13425**

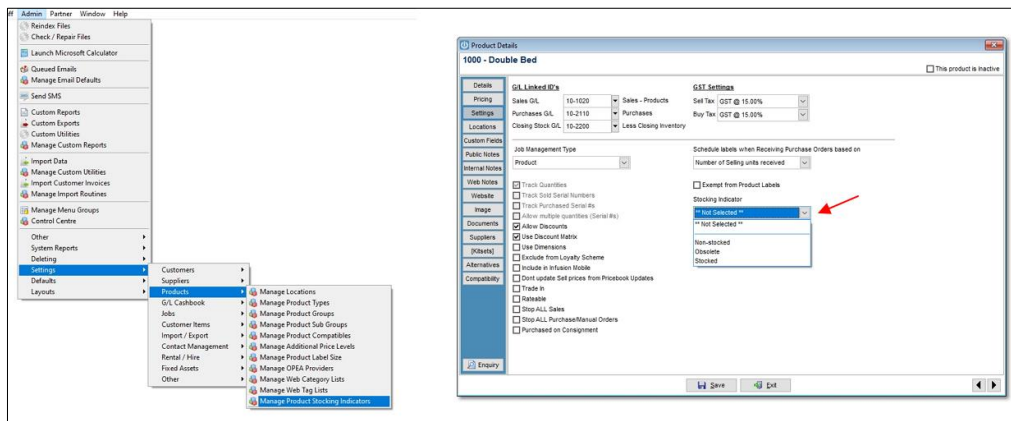
The ZIP integrated payment functionality for Australia and New Zealand has been updated to support multiple refunds applied to a single invoice. Requires InfusionToAPI.DLL version 1.0.0.7 or higher and Infusion Version 8.525 or higher. **#13438**

Products

Corrected a problem where Automatic Pricebooks List was not pulling down from website.
#11745

The report "Stocktake Sheets - Serial Numbered Products" has been updated to exclude products that only have the "Track Sold Serial Numbers" checked. Only products that have "Track Purchased Serial Numbers" checked will be included. Inactive products are now only included on the report if they have in stock values. **#12706**

A new field called Stocking Indicator has been added to the Settings tab of a Product. The field allows selection of an option from a drop-down list. To set up the Stocking Indicator values go to Admin > Settings > Products > Manage Product Stocking Indicators. See [Stocking Indicator](#) for further information. **#13341**



A **Stock in Transit** option has been added which allows transfers between locations to be sent on one date, and then received by the destination location at a different date. Relevant reports allow reporting on the Stock in Transit location and it can be set to use a separate Closing Stock GL to report on at the end of month. This is an optional setting. See the [Stock in Transit](#) for details **#13439**

Product Quantities

Product Code : 1204 - Womens Road Bike 10 Speed

Location	Bin Location	In Stock	Allocated	On Order	Backorders
Auckland					
Wellington		1.00			
Christchurch		4.00			
(Nelson)					
(Dunedin)					
(** Unassigned **)					
(** Unassigned **)					
(** Unassigned **)					
(** Unassigned **)					
(** Unassigned **)					
** Stock In Transit **		2.00	2.00		
Totals for All Locations		7.00	2.00	0.00	0.00

Exit

The **Stock Transfer** report has been updated to include the received details when the transfer included a Stock in Transit movement. **#13456**

The Demonstration Company Ltd

STOCK TRANSFER - 1007

From Location:

Auckland
 99 Greatway Road
 Auckland

To Location:

Christchurch
 11 Picton Ave
 Riccarton
 Christchurch

Via Stock in Transit

Transfer No : 1006
 Transfer Date : 18/09/2020
 Transfer By : STAFF

Received No : 1007
 Received Date : 18/09/2020
 Received By : STAFF

Product Code	Description	From Bin	To Bin	Quantity	Rate	Total
1204	Womens Road Bike 10 Speed Transfer Completed from Stock In Transit Original Transfer #1006			2.00	1300.00	2600.00
Sub Total						2600.00
GST						390.00
Total						2990.00

Purchase Orders

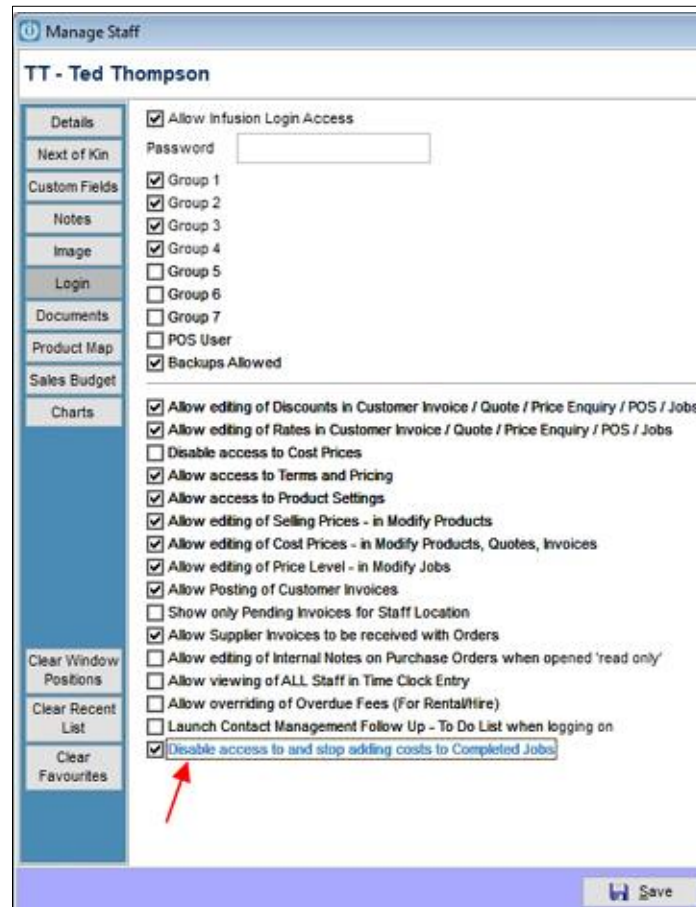
Purchase Order Internal and Receipt Notes are now able to be saved within the Purchase Order without hitting Process. This allows notes to be added and saved during the life cycle of the Purchase Order from when it is Ordered through to when it is Invoiced without affecting or processing any changes to the Purchase Order header or lines. **#13404**

The Purchase Order created to match the MIN / MAX settings now has an additional column to display the suggested quantity, this and information field only and can't be edited. **#13454**

The Auto Order functionality has been improved to include quantities on Saved Purchase Orders in the calculations. The ability to use the Auto Order option multiple times in a Purchase Order has been removed. Once either of the Auto Order buttons has been selected, the Purchase Order is tagged as an Auto Order Purchase Order and from this point on the Location cannot be changed. For full instructions see [Purchase Order - Auto Order by Sales](#) **#13455**

Staff

A new Staff setting: "Disable access to and stop adding costs to Completed Jobs" is available in the Login Tab. Staff members with this setting checked will no longer be able to access Completed Jobs in either Enquiry, Modify or Read Only mode. They will be prevented from adding costs to Completed Jobs. Reporting is unchanged - given the appropriate menu access they will still be able to report on Completed jobs. Further information can be found at [Disable Access to Completed Jobs](#). **#13395**



System

A change within Microsoft Outlook meant the Email from Local Application was incorrectly populating the email address. Infusion now sends the updated information to the email client to populate the Send To, and Subject Lines correctly. **#13324**