

Branch System

Requirements

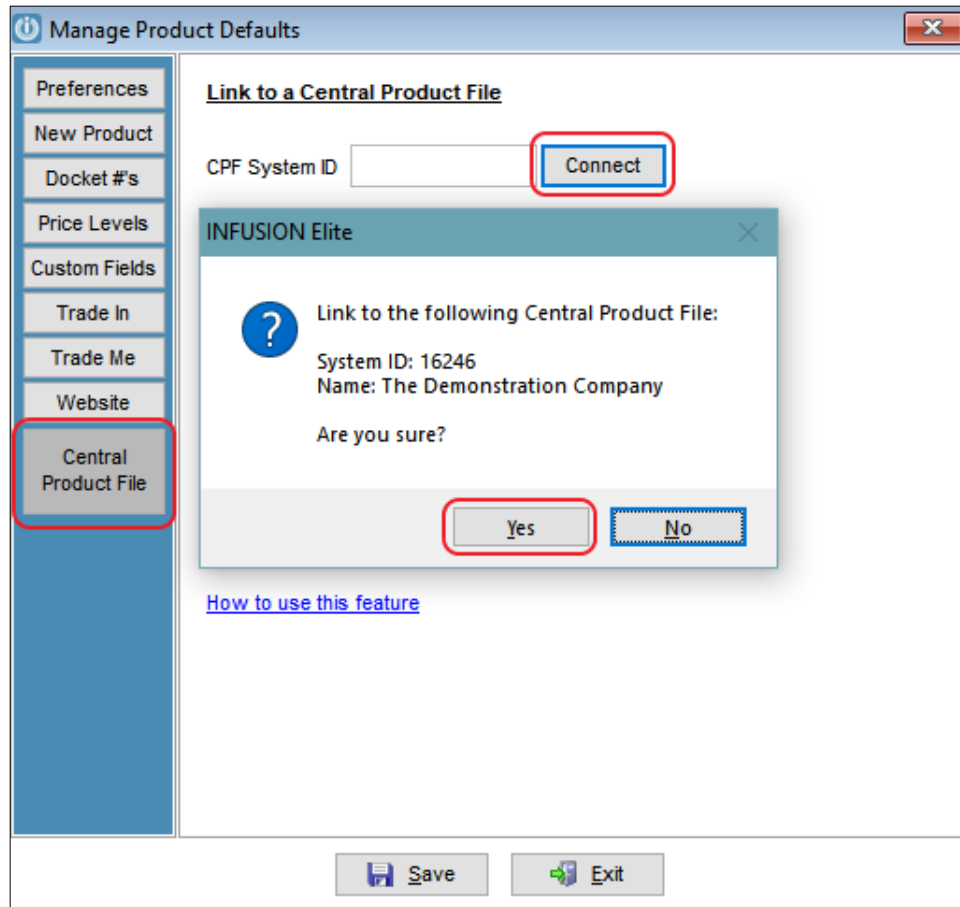
The Branch system does not require any update to their license.

To regularly check for updates, the Branch server must have installed and running the latest IBSSERVICE. Contact Infusion Support to have this installed.

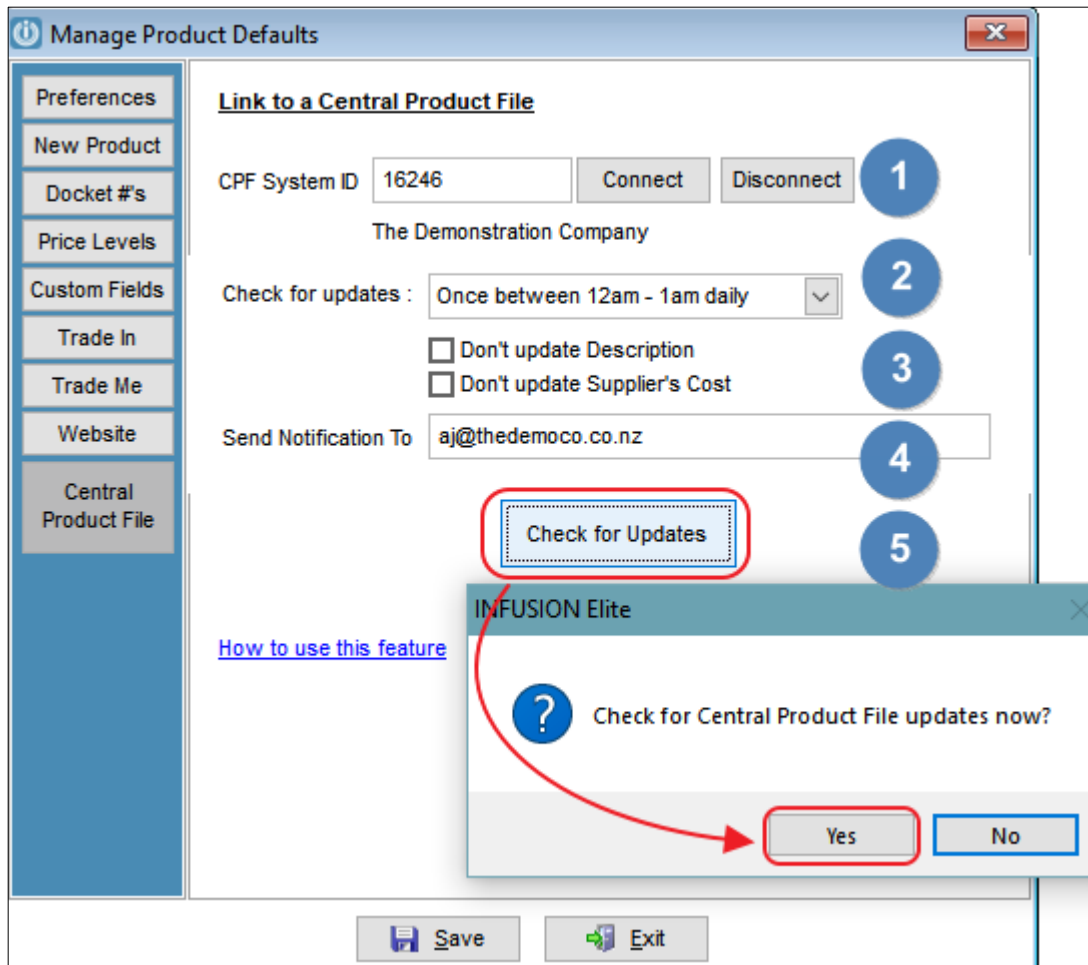
Linking to a CPF

Admin / Defaults / Product Defaults / CPF

Click **Connect** and enter the System ID of the Central System. (The Central System must have granted you access in their system first.)



Setup CPF Downloads



1. **Connect / Disconnect** - Either change or disconnect the Central CPF
2. **Check for updates** – If you are running IBSSERVICE, the service will check for an updated CPF, daily between the times noted. It is recommended that this update is run overnight when users are not logged in. Infusion does not need to be open to allow the CPF update to run.
3. **Don't update** – tick to exclude the CPF updating either Description or the Supplier's Cost.
4. **Send Notification To** - A notification of the update will be sent to the noted email address including notification of new Types, Groups and Sub Groups.
5. **Check for Updates** – This will check for and update the product file from the CPF without waiting for the IBSSERVICE to complete the check.

CPF Products

Products included in the CPF are notified to the users with a red notification at the top of the Modify Products Screen. This indicates to the user that, while the product can be edited, it will be overwritten by the next update.

mp This product is being controlled by the Central Product File

This product is Inactive

1113 Preferred Supplier 1, Phone

Black Bedside Lamp

EOQ

CPF Suppliers

Suppliers can be linked to the Central System's Supplier Account number using the link in the Terms tab of the Modify Supplier screen. This allows the Supplier's details per product to be updated including Code, Lead Time, Units, and, if selected, cost price.

Supplier Details

2 - Jones & Co Maritime Supplies

- Details
- Delivery
- Terms
- Contacts
- Email Links
- Layout Setup
- Custom Fields
- Notes
- Image
- Charges
- Documents

Payment Terms

Given Day After EOM Day #

Credit Limit Associated With

Their Account Ref ** Not A

(This is an association only, ba

Default Discount % (Used when Entering Supplier Invoices - No

Electronic Banking

Bank Format

Bank Account #

Reference

Code

Particulars

International Supplier (GST Exempt)

GST No:

Central Product File

Central Systems Supplier Account Number

Product Data

The following details which data you can expect to be updated and included in the CPF transfer.

Green = Transferred

Blue = Provisional

Red = Not Included

Data Transferred Listed by Modify Product Tab:

Details:

This product is Inactive

Details	Code	5029134	Preferred Supplier	** NONE **																																													
Pricing	Description	Product Description not updated if excluded by Branch																																															
Settings	Primary Barcode		EOQ	0.00																																													
Locations	Type	** Unassigned ** (Default Item Type Not Set)	Length	0.0000 mtr																																													
Custom Fields	Group	** No Group Assigned	Width	0.0000 mtr																																													
Public Notes	Sub Group	** No Sub Group Assigned	Height	0.0000 mtr																																													
Internal Notes			Volume	0.0000 m3																																													
Web Notes	Selling Units		Weight	0.0000 Kg																																													
Website	Superseded by																																																
Image	Warranty Details	** No Warranty **	Last Sale	//																																													
Documents	Items Type	** Default Item Type **	Last Receipt	//																																													
Suppliers	Pricing Method	Manual Pricing	Instock Qty	0.00																																													
[Kitsets]	Cost Prices - Excluding GST (Per Selling Unit)																																																
Alternatives	Note : The GST Inclusive price will be used by Infusion.																																																
Compatibility	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="color: blue;">GST Exclusive</th> <th style="color: blue;">GST Inclusive</th> <th style="color: blue;">Markup %</th> <th style="color: red;">Margin %</th> </tr> </thead> <tbody> <tr><td>Retail</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>Trade</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>Wholesale</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>Staff</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>User 5</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>User 6</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>User 7</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> <tr><td>User 8</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr> </tbody> </table>					GST Exclusive	GST Inclusive	Markup %	Margin %	Retail	0.00	0.00	0.00	0.00	Trade	0.00	0.00	0.00	0.00	Wholesale	0.00	0.00	0.00	0.00	Staff	0.00	0.00	0.00	0.00	User 5	0.00	0.00	0.00	0.00	User 6	0.00	0.00	0.00	0.00	User 7	0.00	0.00	0.00	0.00	User 8	0.00	0.00	0.00	0.00
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User 8	0.00	0.00	0.00	0.00																																													
	Latest Shipping Cost	0.00	Price Levels selected by the Central System are included / updated																																														
	Latest Purchase Cost	0.00																																															
	Refurbishment Cost	0.00																																															
	Latest Landed Cost	0.00																																															
	Average Shipping Cost	0.00																																															
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	Average Landed Cost	0.00																																															

Save Exit

Product Details This product is inactive

Pricing Method: Manual Pricing Selling Prices - Including GST Qty Breaks

	Markup %	Margin %								
Retail	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
Trade	0.00	0.00	0.00	0	0.00	0	0.00	0	0.00	<input checked="" type="checkbox"/>
Wholesale	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
Staff	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
User 5	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
User 6	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
User 7	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>
User 8	0.00	0.00	0.00	Promo	0.00	From	//	To	//	<input type="checkbox"/>

Manage Additional Price Levels

Price Levels selected by the Central System are included / updated

Product Details

Details

G/L Linked ID's

Sales G/L	1020	Sales - Products
Purchases G/L	2110	Purchases
Closing Stock G/L	2200	Less Closing Inventory

GST Settings

Sell Tax	GST @ 15.00%
Buy Tax	GST @ 15.00%

Job Management Type

Product

Track Quantities
 Track Sold Serial Numbers
 Track Purchased Serial #s
 Allow multiple quantities (Serial #s)
 Allow Discounts
 Use Discount Matrix
 Use Dimensions
 Exclude from Loyalty Scheme
 Include in Infusion Mobile
 Dont update Sell prices from Pricebook Updates
 Trade In
 Rateable
 Stop ALL Sales
 Stop ALL Purchase/Manual Orders
 Purchased on Consignment

Schedule labels when Receiving Purchase Orders based on

Number of Selling units received

Exempt from Product Labels

Stocking Indicator

** Not Selected **

If a matching Stocking Indicator is loaded in the Branch - Admin > Settings > Products > Manage Stocking Indicators, then the Stocking Indicator is included /

Enquiry

Save Exit

Locations

Location Data (Min/Max, Bin Locations, Last Stocktake, GL Settings) is not included or updated.

Custom Fields

Custom Field Data is updated and included.

Custom Field Names are not updated or included.

Public Notes

Public and Prompt Notes are updated and included.

Internal Notes

Internal Notes are not updated or included.

Web Notes and Website Settings

Web Notes and Website Settings, Categories, Tags, and Additional Information are not updated or included.

Image and Documents

Images and Documents are not updated or included

Suppliers

The screenshot shows a 'Product Details' window with a table of suppliers and a detailed view of a selected supplier record. The table has columns for Pref, Name, Their Code, Latest Cost, Ratio, Units, Lead Time (days), and Account. A checkbox 'This product is Inactive' is present in the top right. The detailed view shows fields for Account #, Name, Their Code, Latest Cost, Ratio, Units, and Lead Time, with various annotations and a 'Preferred Supplier' checkbox.

Details	Pref	Name ▲	Their Code	Latest Cost	Ratio	Units	Lead Time (days)	Account
Pricing								
Settings								
Locations								
Custom Fields								
Public Notes								
Internal Notes								
Web Notes								
Website								
Image								
Documents								
Suppliers								
[Kitsets]								
Alternatives								
Compatibility								

Account # [] **Supplier record is included and updated if the Supplier Account is linked in the Branch Supplier record**

Name [] Preferred Supplier

Their Code []

Latest Cost [0] **Excluding GST (For complete purchasing unit) Supplier Latest Cost not updated if excluded by Branch**

Ratio [1.0000]

Units []

Lead Time [0] (Days)

Kitsets

Kitsets are updated and included.

Alternatives and Compatibility

Alternatives and Compatibility records are not updated or included.