Admin

An issue with the Character count in the SMS screen where the count was not changing, has been resolved. **#13302**

A problem where only 30 characters of text would import to the Product's Custom Text fields, has been resolved. 40 characters can now be imported. **#13468**

Job status *WOP* (Work In Progress) is a system reserved status and is now restricted from being deleted. **#13491**

Windcave is now available as an Integrated Payment Solution in Australia. **#13557**

Cashbook

The "Cashflow Analysis Report Monthly" and "12 Months" reports have been updated to correctly report on Customer Receipts where discounts have been used on the payment. Job Deposit receipts and refunds are also now included in the report. **#11030**

Where the correct bank account would not show as default in the Customer Invoice Payment tab, Job Deposit Payment form, and Rental Hire Payment forms, this has been resolved. **#12501**

The "Undeposited Banking" report is now able to be run "As At" a certain date. In addition, the Date Deposited has been added to the report if the banking has subsequently been deposited, as well as the Audit Number of the deposit. The "Bank Reconciliation (Reprint)" report also includes a Reconciliation Audit number. A user can reconcile the "Less Undeposited Bankings" figure on a Bank Reconciliation for a specific date by comparing Audit Numbers from the Bank Reconciliation (Reprint) report to the Undeposited Banking report. See [Undeposited Banking Report – Infusion Business Software (zendesk.com)](#) **#13465**

Bank Reconciliation (Reprint)
INFUSION Software Limited
Bank Account 1 - 01-0000-0000000-01
As At 31/08/2020

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Reconciliation Audit: 190

Date	Reference	Transaction	Amount
Opening Bank Balance			**0.00**
Presented Items			
25/08/2020		Cleaning	-64.21
31/08/2020		Inland Revenue Department	452.32
		Total : Reconciled Items	388.11
		Closing Bank Balance	**388.11**
		G/L Balance	**708.11**
		Plus Unexported Direct Credits	**0.00**
		Less Undeposited Bankings	**320.00**
		Expected Cashbook Balance	**388.11**

All Undeposited Bankings
INFUSION Software Limited
As at: 31/08/2020

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Page : 1

Banking Audit	Date	Details	Bank	Branch	Amount	Date Deposited
Bank Account 1						
Daily Bankings						
Cash						
186	31/08/2020	Alice Smith *Debtor Payment*			320.00	
				Total for : Cash	320.00	
				Total for : Daily Bankings	320.00	
Credit Cards						
Mastercard						
191	31/08/2020	Allan Anderson *Debtor Payment*			522.42	15/09/2020
				Total for : Mastercard	522.42	
				Total for : Credit Cards	522.42	
				Total for : Bank Account 1	**842.42**	
				Total Undeposited Bankings	**842.42**	

Customer Items

A Master Item can now be linked to Customer Items of any type, rather than having to match types. See Customer Items - Master Item – Infusion Business Software (zendesk.com) **#13535**

Customers

An issue with the Electronic Marketing export where the Location filter was not working as expected, has been resolved. **#11437**

When merging Customers, the name on the Customer Item was not updated. This is now resolved, and the Customer Name matches the Customer Item following a merge. **#12175**

Customer Required Fields have been expanded to include an option to require a Customer Group. **#12733**

A new field has been added to Customer and Customer Items records to allow the user to store and access Online Electronic Files from services such as Google Docs, and One Drive. The field is available in the "Documents" Tab. **#13536**

Sprockit Only: When a new Customer Record is added or imported, the "Accepts Electronic Marketing" setting will be checked. **#13569**

Financials

General Ledger Accounts set as Transaction function type can no longer be changed to Heading or Totalling function types if they contain transactions. **#11349**

Import / Export

The CRM Export has been updated to include the Company Name as column A of the customer contact export file. Export to CRM – Infusion Business Software (zendesk.com) **#13461**

A digital document import is now available for JA Russell invoices. The import connects to the JA Russell server and downloads invoices on request. These invoices can then be processed as Supplier Invoices through the Supplier / Digital Invoice Import menu. **#13506**

A new export file for Farmlands EDI is included for NZ installations. Please check with Infusion Support who can confirm you have the latest version installed. **#13597**

Invoices

An issue where, when multiple Purchase Orders are created when there is insufficient stock for an Invoice has been resolved. **#13078**

A new, Integrated Payment Method for Farmlands cards has been added which allows users to charge a customer invoice to a Farmlands Account without using the Head Office option. See Farmlands EDI Export After Version 9 – Infusion Business Software (zendesk.com) for detailed setup and use instructions. **#13405**

Job Management

An issue where the Product menu wasn't available when a Job and a Purchase Order window were both open has been resolved. **#13464**

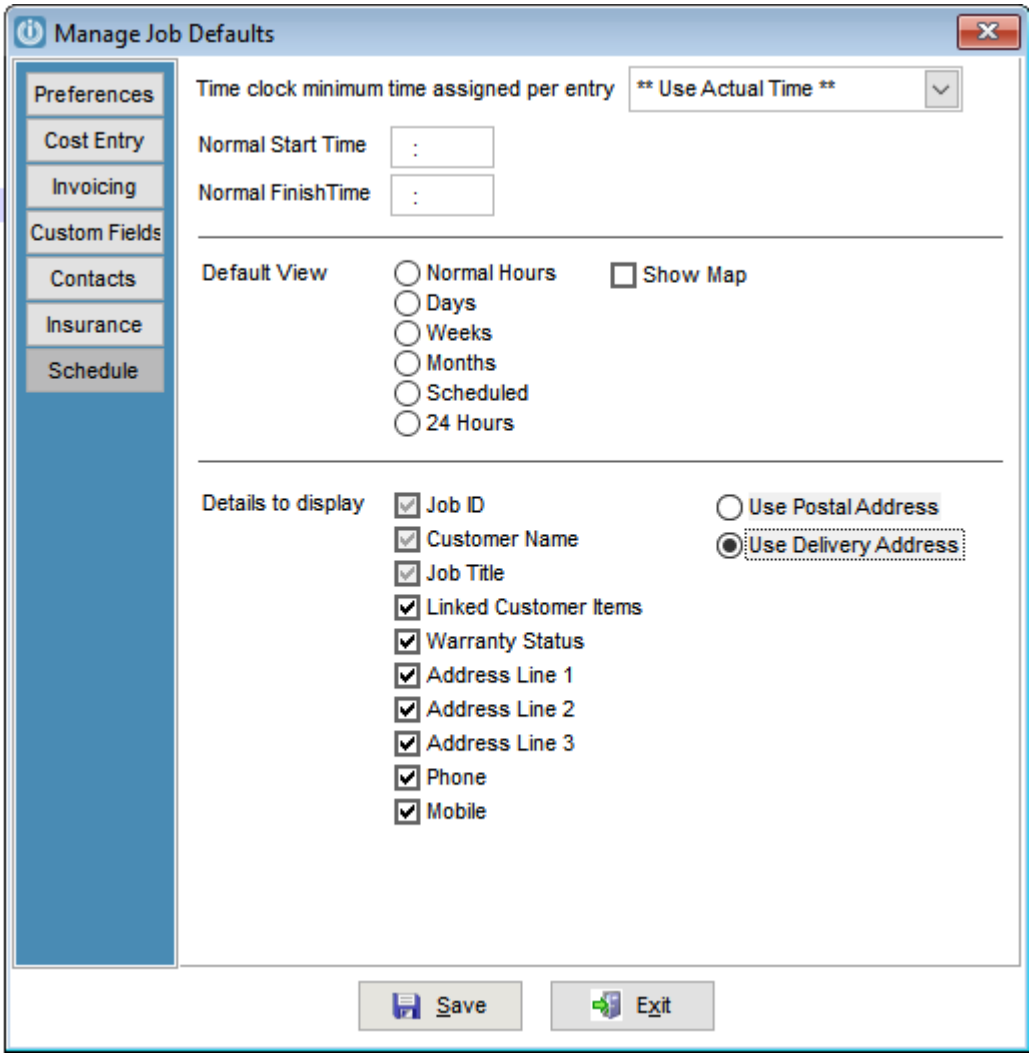
An issue where, if a Customer is set to International, freight added to jobs was not displaying in the total, has been resolved. **#13487**

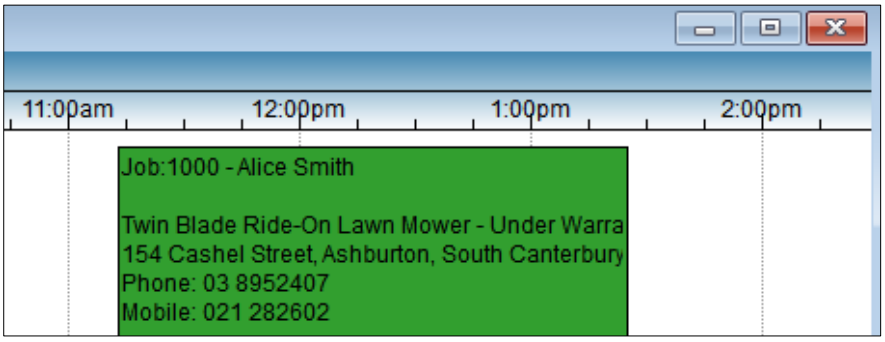
A change in behaviour between entering time to jobs in bulk or entering time within a job has been resolved. Using F6 in the Job will now create the same line description whether the line was entered through "Enter Job Costs" or within the job itself. **#13496**

The Job Enquiry screen has been updated to include the Job Number on the top ribbon. **#13507**

An issue where the "Build All / Sell All" screen was no longer invoked when converting a Quote to a Job if Production is activated, has been resolved. **#13521**

A number of details are now available to be added to the Job Schedule to improve workflow and identification of jobs within the Schedule. In Job Defaults / Schedule tab, there are 7 further fields available and the Address type can be selected. In the Schedule the selected fields are now displayed. Setting up Job Scheduler – Infusion Business Software (zendesk.com) **#13527**



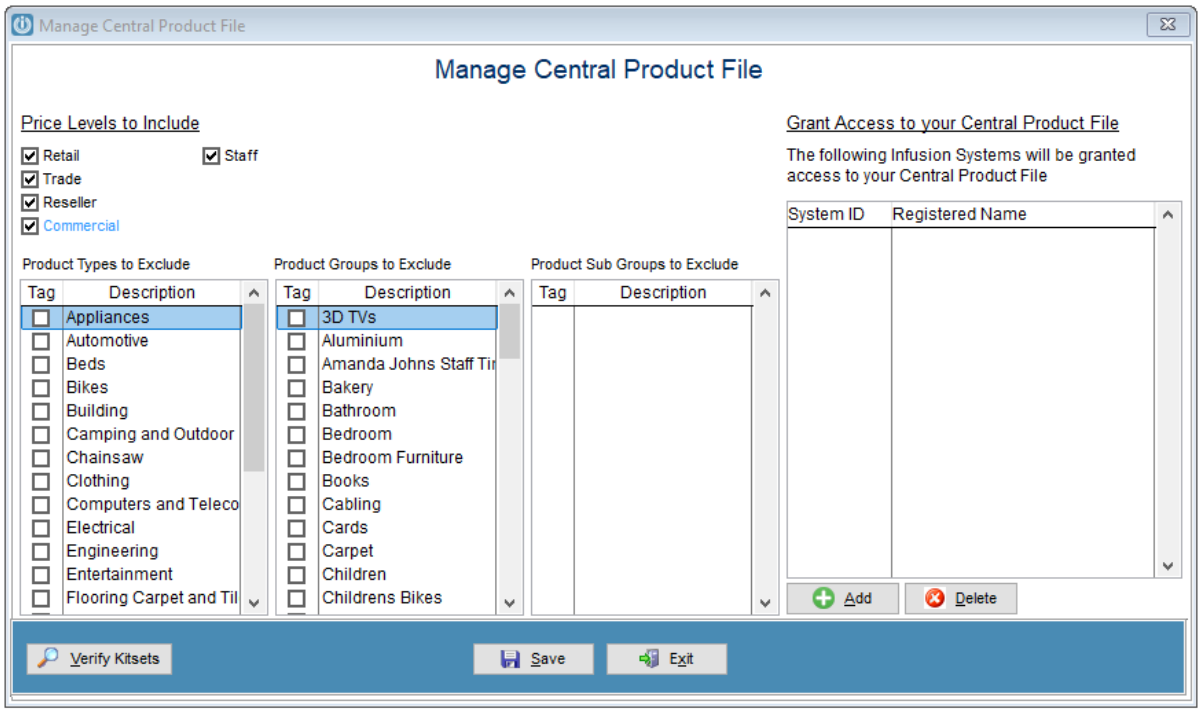


An error seen since V9.001 when recalling a saved Purchase Order while creating a Purchase Order from within a Job, has been resolved. **#13544**

Other

A warning will display on opening the software if any file in the Data Folder is greater than 1.8GB. The maximum file size allowed is 2GB. This warning serves to ensure that the user follows the instructions to ensure the maximum file size is not met. If the warning is ignored, significant data corruption can be caused, leading to data loss and expensive retrieval efforts. [Data Files Approaching System Maximums – Infusion Business Software (zendesk.com)](#) **#13165**

The Central Product File (CPF) allows a Central System to push out product updates to branches via a Central Infusion server. The Central Licensee must apply for an update to their Infusion License. The Central System must grant, and the Branch System must accept access to the CPF. See [Central Product File – Infusion Business Software (zendesk.com)]() **#13528**

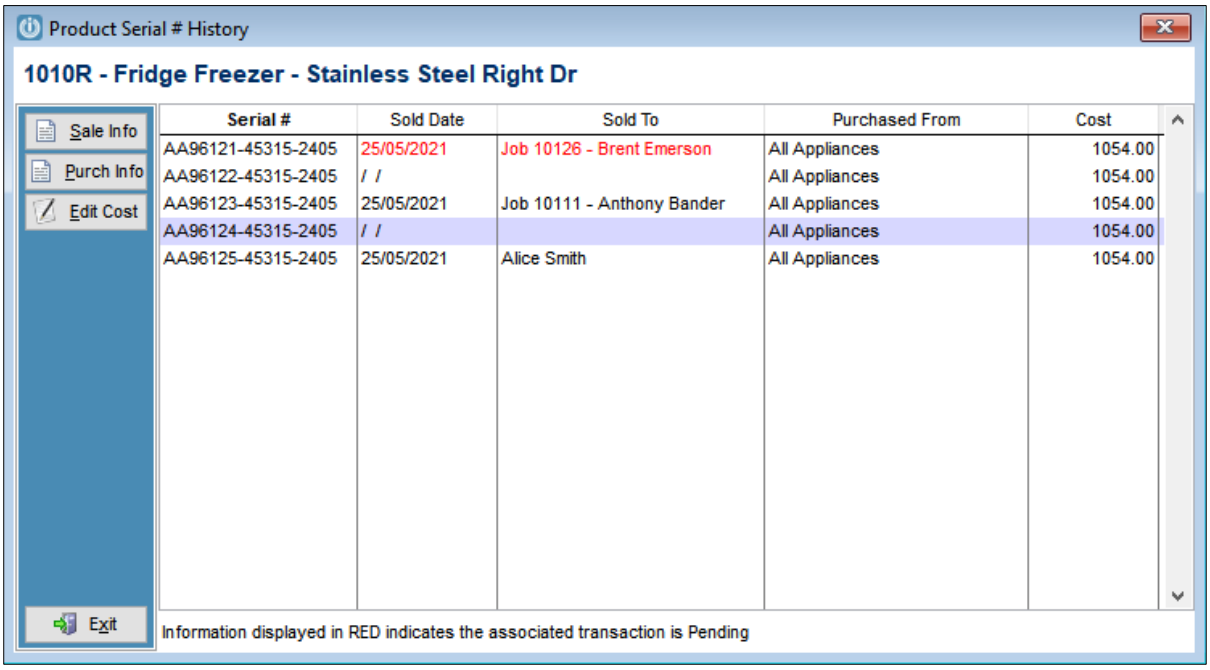


Products

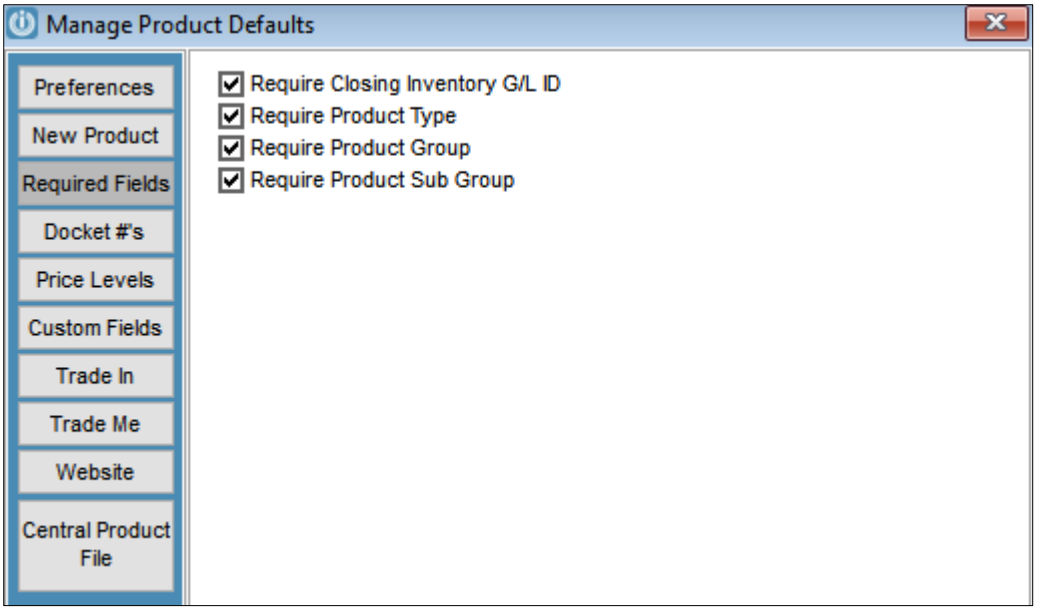
The Product Ratio field can now store 4 decimals for both the Rate and Quantity. **#4683**

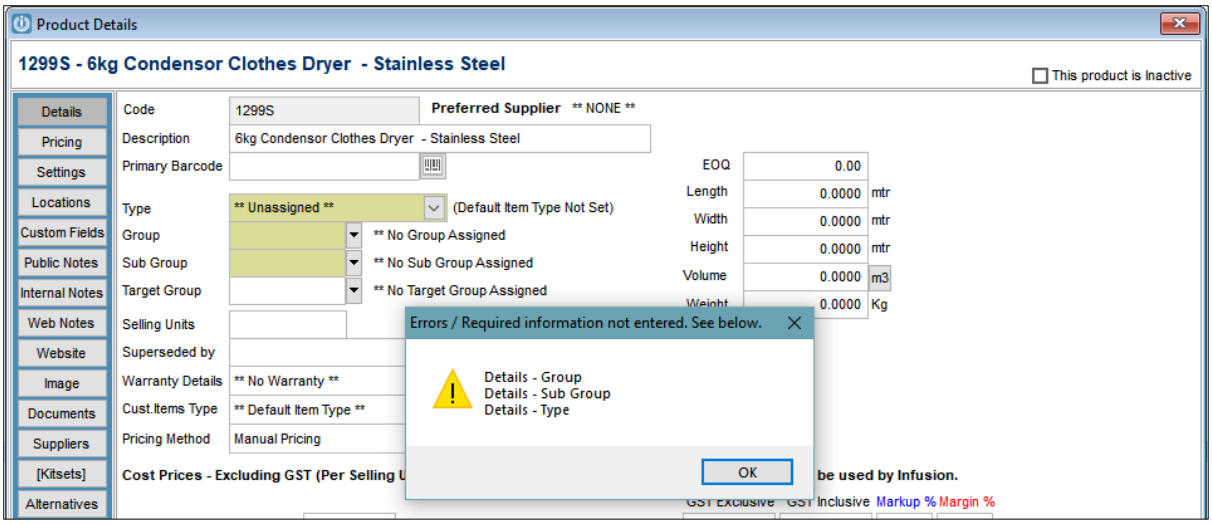
The Product Merge utility has been updated to allow multiple merges to be carried out one after another without needing to re-open the utility. **#10655**

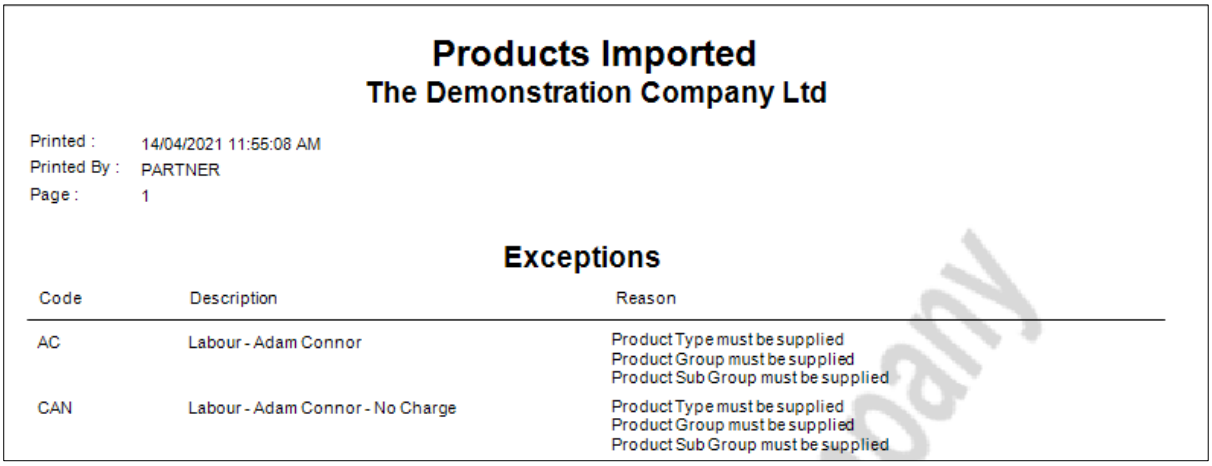
The Product Serial Number History form has been updated to include the date of sale if the item was added to a job. In addition, the line will show in red if the item has not yet been invoiced from the job. (Elite and Sprockit systems only) **#12024**



Product Defaults now include the ability to set Required Fields. If selected, a product will not be able to be created, saved or imported unless these fields are populated. The Product Exception report has been improved to report on these exceptions if the Group Checks are included. **#12820**







Products Imported

The Demonstration Company Ltd

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Exceptions

Code	Description	Reason
AC	Labour - Adam Connor	Product Type must be supplied Product Group must be supplied Product Sub Group must be supplied
CAN	Labour - Adam Connor - No Charge	Product Type must be supplied Product Group must be supplied Product Sub Group must be supplied

An issue where a Kitset was not returned to a standard product when the all of the components are deleted and the Kitset Components saved, has been resolved. **#13233**

The Merge Products utility has been updated to prevent users from adding a blank space at the start of the destination code. **#13389**

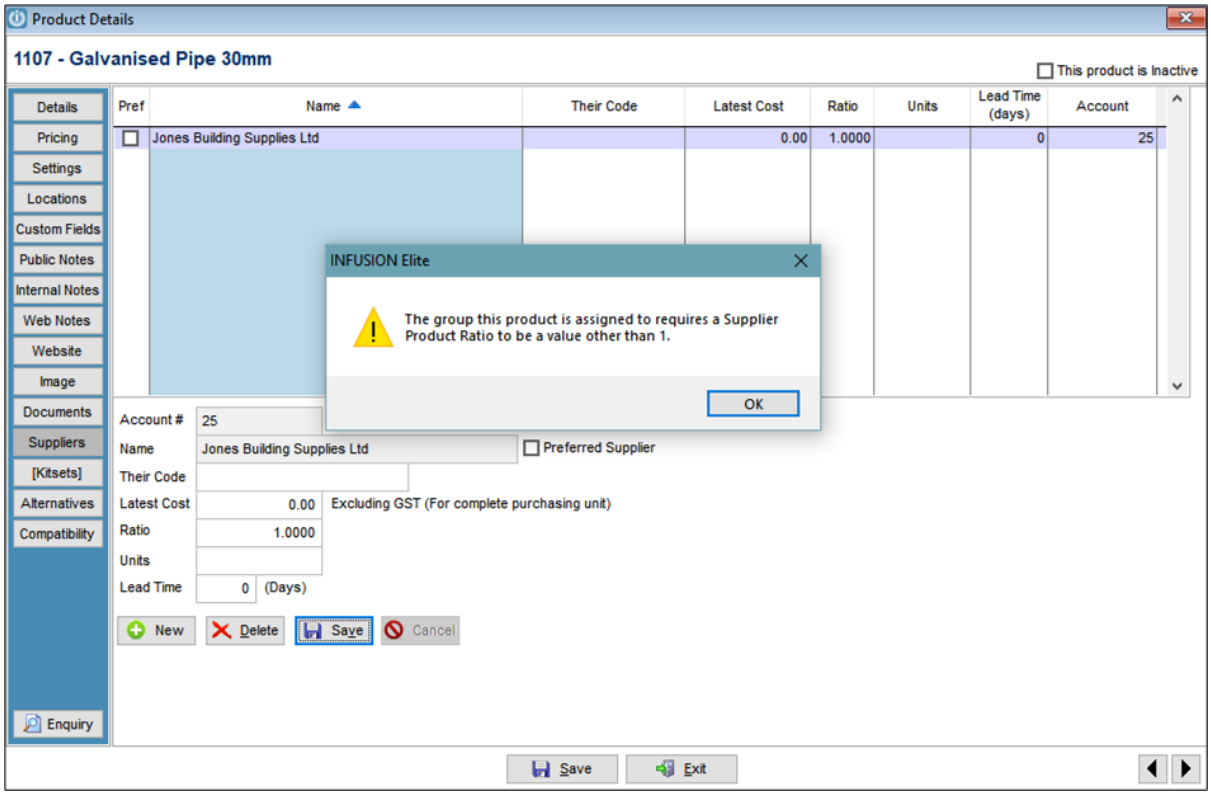
An issue with editing Web Tag Lists for Tags 10-16, has been resolved. **#13457**

An issue with large margins in the "Top/Bottom Product" Sales Analysis report has been resolved. **#13495**

An issue with the Stock in Transit functionality where a transfer was saved before processing has been resolved. **#13511**

An error seen if Stock in Transit was used with more than 10 locations, has been resolved. **#13549**

A new setting is available against a Product Group: "Require Supplier Ratio (Other than 1)". If ticked, any product in this group will not be able to be saved if it has a supplier - unless the supplier's record for that product has a ratio other than 1. The Product Exception Report has been updated to include Invalid Supplier Ratios when "Group Classification Checks" is ticked. **#13553**



An issue when products are transferred or written off and the incorrect serial number is entered has been resolved. The product will now show the correct on hand quantity for both serial numbers. **#13590**

Purchase Orders

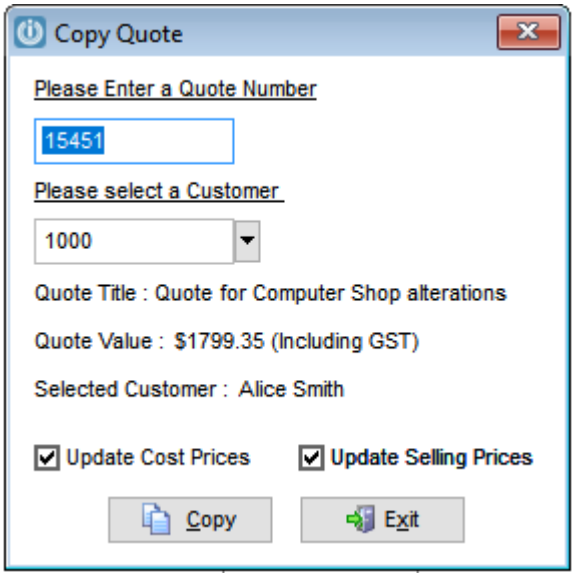
An update has been made to Purchase Orders so that the Custom Fields carry through to the Packing Slip and then to the Supplier Invoice. **#11191**

An issue where, if a value less than 1 was outstanding on a Purchase Order, the Order displayed as All Received instead of Part Fill, has been resolved. **#12326**

Additional custom fields have been added to the Purchase Order form with the fields now on their own tab. These fields are carried through to Packing Slips as per ticket #11191. **#13463**

Quotes

When duplicating a Quote, the user is now given the option to update costs and/or sell prices. If selected the sell prices are recalculated to the customer's current pricing including all normal pricing calculations. (Contract Rates, Default Discounts, Discount Matrix, Quantity Breaks etc). The defaults for these options are set in Customer Defaults / Invoices Tab. See [How Do I Duplicate A Quote – Infusion Business Software (zendesk.com)]() **#12184**



Staff

The Staff Password has been replaced with 10 Asterisks. **#11244**

Suppliers

Target reporting has been added to the system. This will allow users to group products and set yearly targets for sales and report on the results. See [Quarterly Target Reporting – Infusion Business Software (zendesk.com)](#) **#11830**

A display issue with the Supplier Invoice (no products), has been resolved. **#13520**