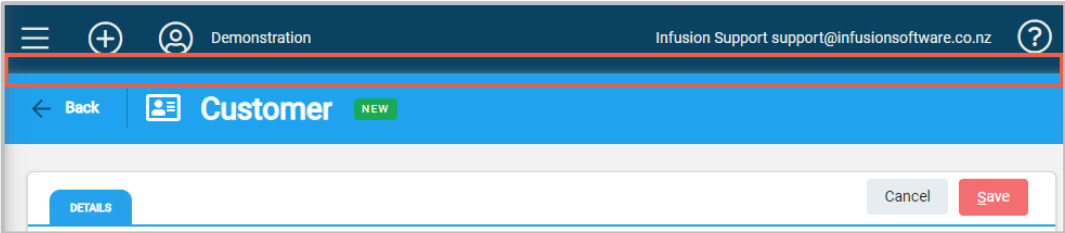
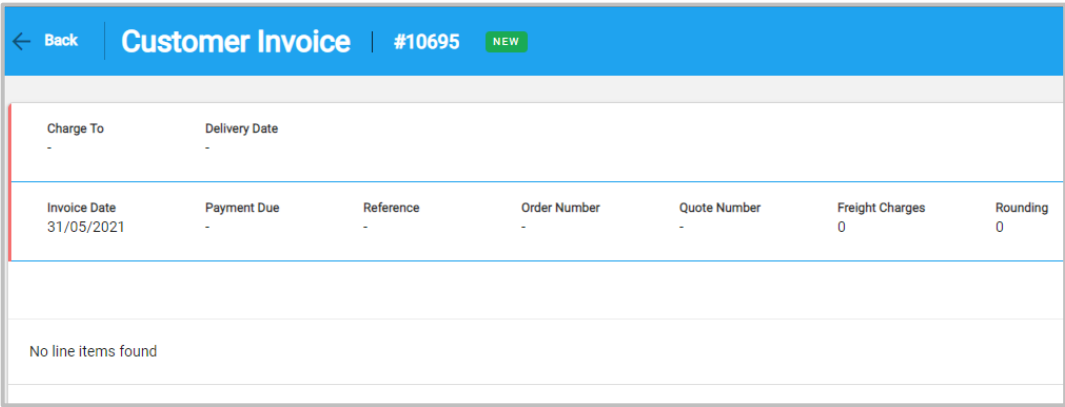


CONTENTS

User Experience	2
Customers	4
Customers – Invoices	6
Suppliers	10
Suppliers - Invoices	11
Products	11
Products - Kitsets	13
Financials	14
Settings	15
Reports	16

USER EXPERIENCE

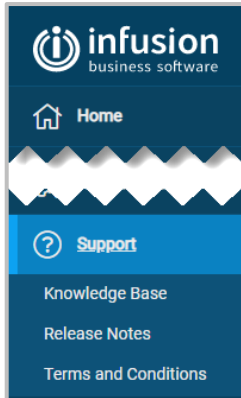
NEW	
#1887	<p>Search Bar Hides when in Edit Mode</p> <p>The search bar now hides when Edit mode is active for transactions or records. This allows more usable screen space.</p> 
#3829	<p>Shortcut Keys – Save and Post</p> <p>Shortcut keys Alt+S and Alt+P have been enabled for ‘Save’ and ‘Post’ buttons.</p>
#4998 / #5043	<p>Required Fields Indicator on a Collapsed Header</p> <p>A red line will display beside a collapsed header to indicate that there is invalid information or required fields that need to be entered before posting the transaction.</p> 

#5020

Release Notes link

A link to 'Release Notes' has been added to the 'Support' menu and directs users to the Release Notes homepage within the knowledge base.

Please note that new Releases will not be deployed at the same time for all Licensees. Please contact Infusion Support for any queries regarding functionality.



ENHANCED

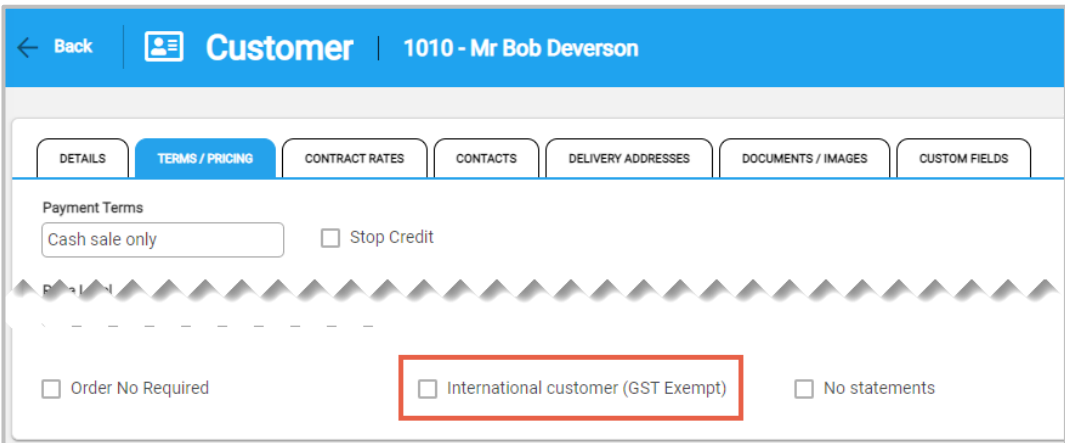

#3783

Record Identifier – Enquiry Screens

The record identifier - Customer/Supplier account number, Bank GL ID, Product code, Journal code etc – now displays consistently across all Enquiry screens.

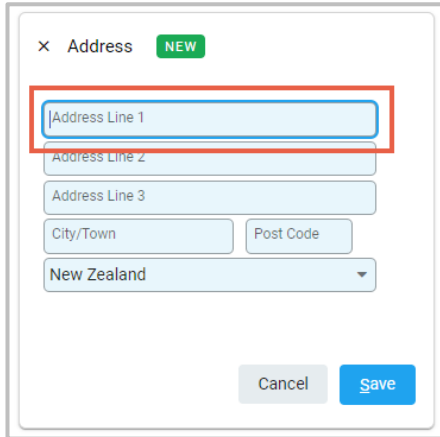


CUSTOMERS

NEW	
#3014	<p>International Customer Setting</p> <p>A setting is now available on the Customer Terms tab to record the Customer as International.</p> <ul style="list-style-type: none">▪ Invoices and Payments will process with Zero Rated GST▪ Adjustments will default to Zero Rated GST, this can be over-ridden <p>A Customer's International status cannot be changed if there are pending Invoices or Quotes for the Customer, this prevents incorrect processing.</p> 
ENHANCED	
#4218	<p>Customer Import / Export – Price Levels Added</p> <p>‘Price Levels’ are now included as a new column in Customer Lists for imports and exports. The entered ‘Price Level’ must match available options within Infusion.</p>
#4368	<p>Customer Adjustment Import</p> <p>The date formatting has been improved to allow standard formatting dd/mm/yyyy. Multiple adjustments per Customer can now be imported.</p>
#4758	<p>Customer Accounts – Title List Updated</p> <p>‘Not Specified’ has been added to the list of titles for Customers. This allows Customers to have titles removed from their account.</p> 

#5045 Customer Delivery Addresses

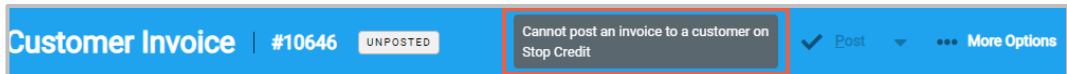
The usability has been improved when adding or editing multiple Customer Delivery Addresses. When adding or opening an address, the first field is automatically active.



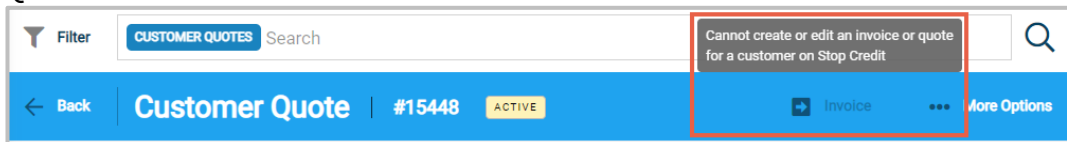
#5050 Stop Credit Messages – Invoices & Quotes

Consistent messages have been applied for 'Stop Credit' messages.

Invoice

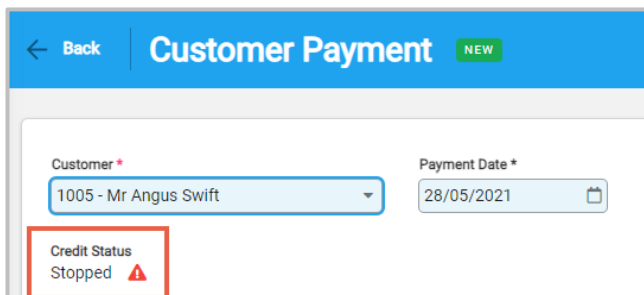


Quote



#5051 Stop Credit Messages – Payments

The Customer Payment screen now shows an alert to show the customer is on Stop Credit.



#5074 Customer Adjustments – Improved Usability

The usability within Customer Adjustments has been improved if the GL Account is selected before the amount is entered.

CUSTOMERS – INVOICES

ENHANCED

#3540 Exclude Inactive Staff Members

Inactive Staff Members are not available in the drop-down on Customer Invoices.

#4098 Customer Invoice Enquiry – Product Section

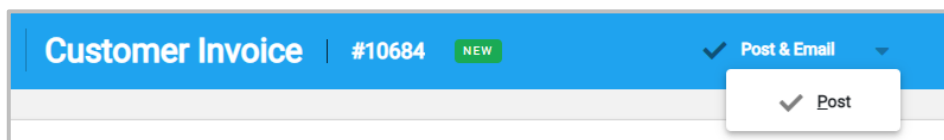
Header titles have been updated for clarity and the product description is now included with the product code.

PRODUCT TRANSACTIONS			
Date	Product		Stock Movement
15/05/2021	1296 - 8Kg Front Loader Washing Machine	Auckland	-1.0000
15/05/2021	1299 - 6Kg Condenser Clothes Dryer	Auckland	-1.0000

#4127 Post & Email Default Option on Customer Invoices

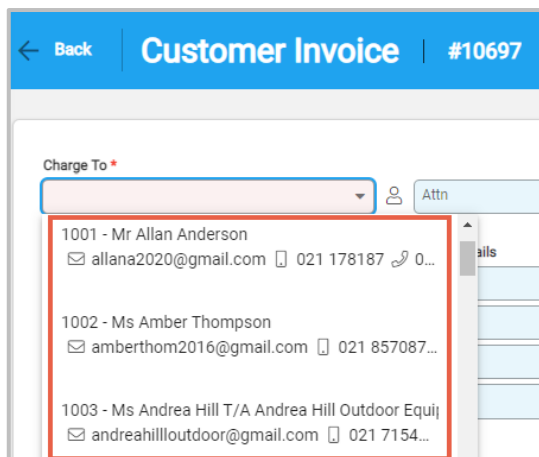
If a Customer has an email address stored on their Customer Account, 'Post & Email' is the default option when posting an invoice.

The drop-down arrow can be used to select 'Post' if the invoice does not need to be emailed.



#4802 Customer Search Detail

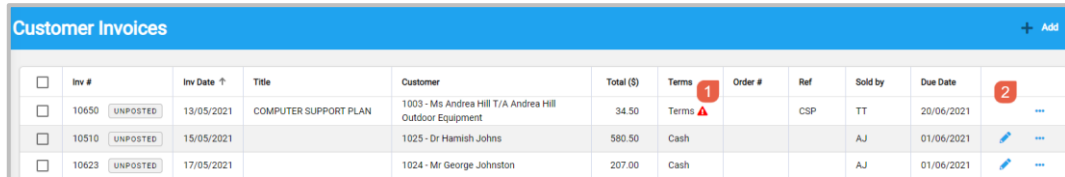
More detail is included in Customer search fields. This allows easier identification of the record to select.



#4858 Stop Credit Customers - Disable Edit Invoice Features

Alert icons have been added to the unposted Customer Invoice lists to highlight the ‘Stop Credit’ status.

Edit Icons have been removed from Customer Invoice lists.



Customer Invoices												+ Add
<input type="checkbox"/>	Inv #	Inv Date ↑	Title	Customer	Total (\$)	Terms	Order #	Ref	Sold by	Due Date		
<input type="checkbox"/>	10650	UNPOSTED	13/05/2021	COMPUTER SUPPORT PLAN	1003 - Ms Andrea Hill T/A Andrea Hill Outdoor Equipment	34.50	Terms 1		CSP	TT	20/06/2021	2
<input type="checkbox"/>	10510	UNPOSTED	15/05/2021		1025 - Dr Hamish Johns	580.50	Cash		AJ		01/06/2021	
<input type="checkbox"/>	10623	UNPOSTED	17/05/2021		1024 - Mr George Johnston	207.00	Cash		AJ		01/06/2021	

The Edit button has been removed from within an unposted invoice.

Standard Customer:



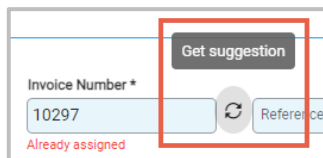
Stop Credit Customer:



#4899 Assigning Unique Numbers to Customer Invoices

For Licensees with Invoice number editing enabled:

A message ‘Already Assigned’ displays, with an icon to select the next available number if a previously used number is entered.



#5013 Customer Invoice Standard Layouts

Unposted Invoices updated to include ‘Proforma’ in the header when viewing.

Payment details display in a fixed location at the bottom of the page, allowing for better handling of longer or complex lines on invoices. ‘Freight’ and ‘Rounding’ is clearly defined in the payment details.

The Demonstration Company

PO BOX 8197
 RICcarton CHRISTCHURCH

accounts@thedemoco.co.nz
www.thedemoco.co.nz
 Phone: 03 111 2222
 GST No: 123-456-789


1 Proforma Invoice 10682

Invoice To :
Belinda Davidson
 178 Blenheim Road
 Timaru
 NEW ZEALAND

Deliver To :
Belinda Davidson
 327 Blenheim Road
 Timaru

Date	28/05/2021	Account	1008 - Belinda Davidson		
Rep	Ted Thompson	Reference	Order No		

Item	Description	Quantity	Rate	%Disc	Total
1206	Women's Mountain Bike 20 Speed	1	1,800.00		1,800.00



Please pay direct into our bank account The Demonstration Company XXXXXX XXXXXX XX
 Please reference your invoice number on your payment

Freight	50.00
GST Exclusive	1,850.00
GST	277.50
Rounding	0.00
GST Inclusive	2,127.50
Paid	0.00
Balance	2,127.50

Due Date: 04/06/2021

Printed : 28/05/2021 12:06:34

2

Page 1 of 1

#5019 Customer Invoice Screen – List Improvements

The Customer Invoices screen has been improved to provide better visibility of invoice details on screen.

- Sales Rep – Staff Code only, the name has been removed
- Terms – Either ‘Cash’ or ‘Terms’, specific terms have been removed
- Stop Credit Customers – Alert symbol identifies a Customer is now on Stop Credit

Customer Invoices + Add											
<input type="checkbox"/>	Inv #	Inv Date	Title	Customer	Total (\$)	Terms	Order #	Ref	Sold by	Due Date	
<input type="checkbox"/>	10510 <small>UNPOSTED</small>	15/05/2021		1025 - Dr Hamish Johns	593.40	Cash ▲			AJ	15/05/2021	...
<input type="checkbox"/>	10511 <small>UNPOSTED</small>	19/05/2021		1026 - Mr Harry Helms	1,725.00	Cash			AJ	19/05/2021	✎ ...
<input type="checkbox"/>	10513 <small>UNPOSTED</small>	25/05/2021		1028 - Mr James Mathewson	593.40	Terms			AJ	01/06/2021	✎ ...

RESOLVED

#4441 Edited Product Descriptions Reverting

An issue where a edits made to a product description were removed when re-opening the line for editing has been resolved.

#4705 Deleted, Unposted Payments Visibility on Payment Enquiry Transactions Tab

An issue where a deleted, unposted Customer Payment was still visible on the Enquiry tab of a Customer or Supplier Invoice or Adjustment has been resolved.

#4965 Markup Updates when Editing Rates

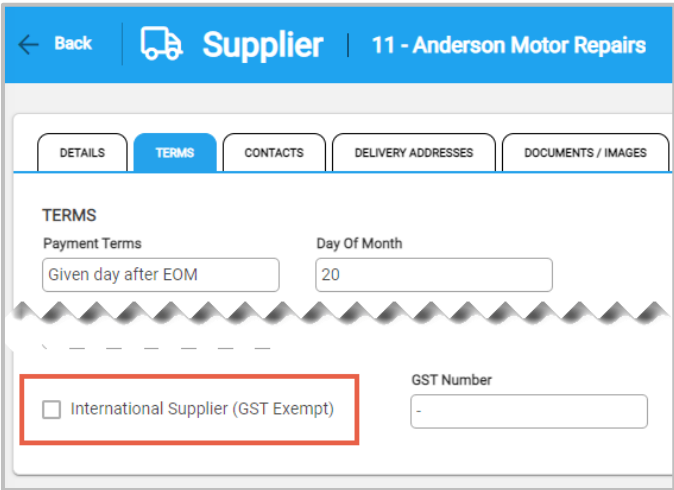
An issue where the markup is not updating on an invoice line when the rate is edited has been resolved.

This issue was only apparent on GST Inclusive Licensees.

#4966 Markup on Discounted Product Line

The markup figure on a discounted product line on a Customer Invoice is now calculating correctly.

SUPPLIERS

NEW	
#3014	<p>International Supplier Setting</p> <p>A setting is now available on the Supplier Terms tab to record the Supplier as International.</p> <ul style="list-style-type: none"> ▪ Invoices and Payments will process with GST Exempt ▪ Adjustments will default to GST Exempt, this can be over-ridden <p>A Supplier’s International status cannot be changed if there are pending invoices for the Supplier, this prevents incorrect processing.</p> 
#4933	<p>Supplier Adjustments Import/Export</p> <p>Supplier Adjustments can now be imported and exported via More Options on the Supplier window.</p>
#4991	<p>Supplier Lists Import/Export</p> <p>Supplier lists can now be imported and exported via More Options on the Supplier window.</p>
ENHANCED	
#5074	<p>Supplier Adjustments – Improved Usability</p> <p>The usability within Supplier Adjustments has been improved if the GL Account is selected before the amount is entered.</p>

SUPPLIERS - INVOICES

RESOLVED

#4956 GST Calculation on Supplier Invoice with Freight

An issue where GST was being incorrectly apportioned if freight was included on a Supplier Invoice has been resolved.

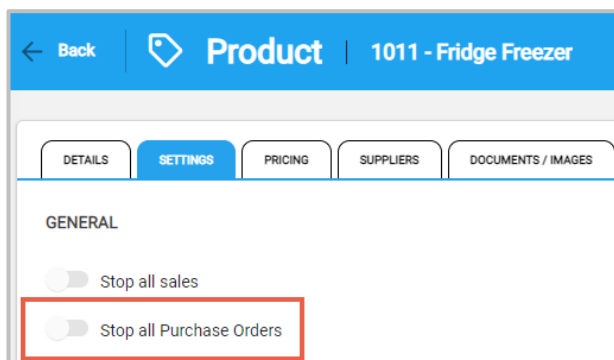
This issue was only apparent on Payments Basis GST Licensees.

PRODUCTS

NEW

#5085 Product Setting – Stop all Purchase Orders

A new Product Setting – ‘Stop all Purchase Orders’ is available. When turned on, the product is excluded from the selection list within a Purchase Order.



ENHANCED

#3277 Exclude Inactive Product Locations

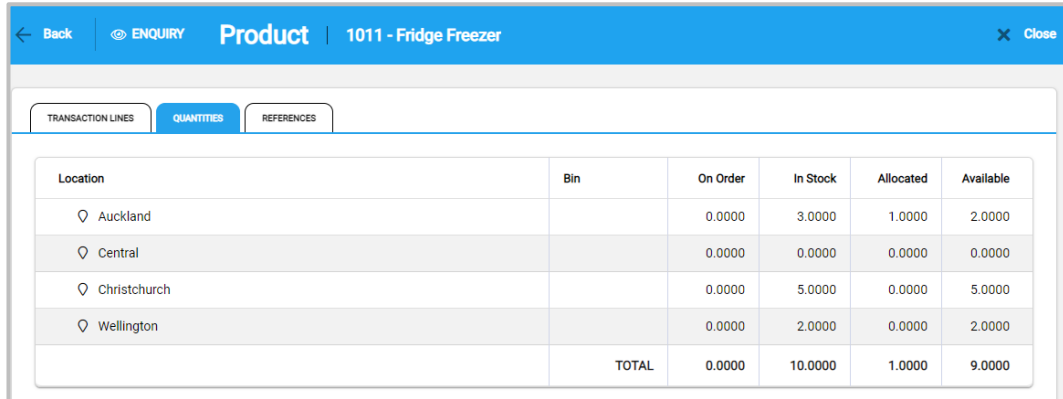
Inactive ‘Product Locations’ are now excluded from selection lists in Product Transactions.

#3668 Price Level Sorting

Price Level lists are now sorted by the ‘Price Level’ code. Licensees can create their own sorting sequence using the code.

#4090 Product Enquiry – Quantities Tab

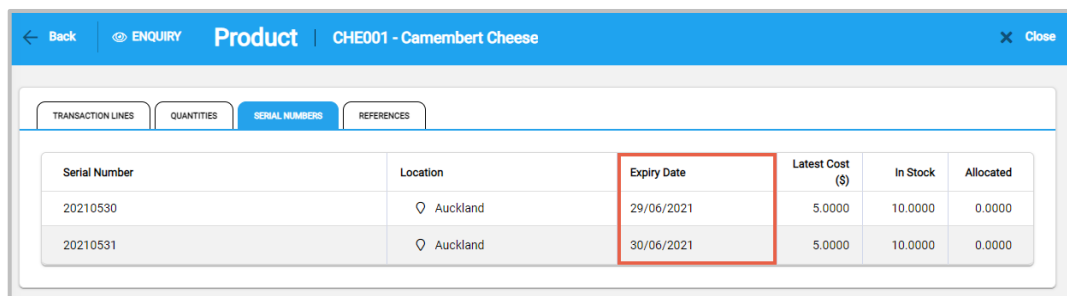
Additional information been added to the Quantities tab on Product Enquiry. Further columns include 'On Order' and 'Available', and 'Totals' are included.



Location	Bin	On Order	In Stock	Allocated	Available
📍 Auckland		0.0000	3.0000	1.0000	2.0000
📍 Central		0.0000	0.0000	0.0000	0.0000
📍 Christchurch		0.0000	5.0000	0.0000	5.0000
📍 Wellington		0.0000	2.0000	0.0000	2.0000
TOTAL		0.0000	10.0000	1.0000	9.0000

#4559 Product Enquiry – Serial Number Tab Expiry Date

The expiry date now displays for serial tracked products in the Products Enquiry – Serial Numbers tab.

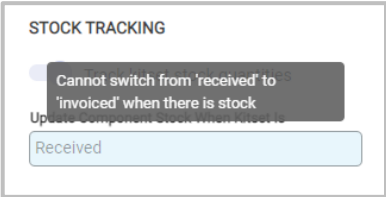
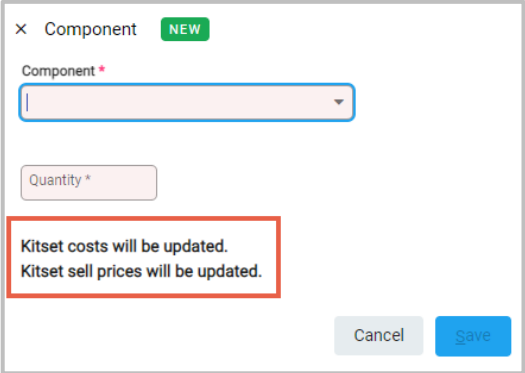
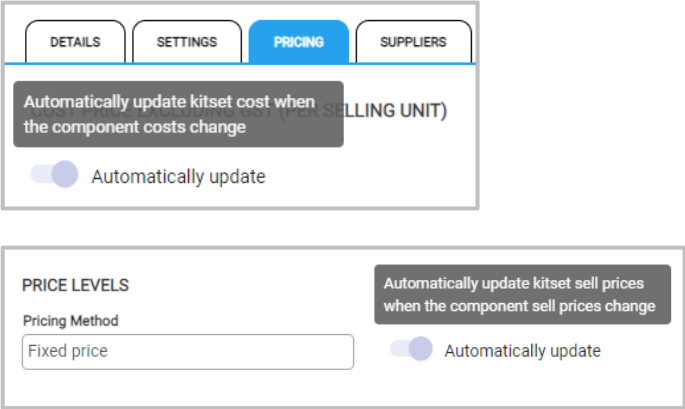


Serial Number	Location	Expiry Date	Latest Cost (\$)	In Stock	Allocated
20210530	📍 Auckland	29/06/2021	5.0000	10.0000	0.0000
20210531	📍 Auckland	30/06/2021	5.0000	10.0000	0.0000

#4784 Credit Serial Tracked Products

Serial tracked products are now able to be credited.

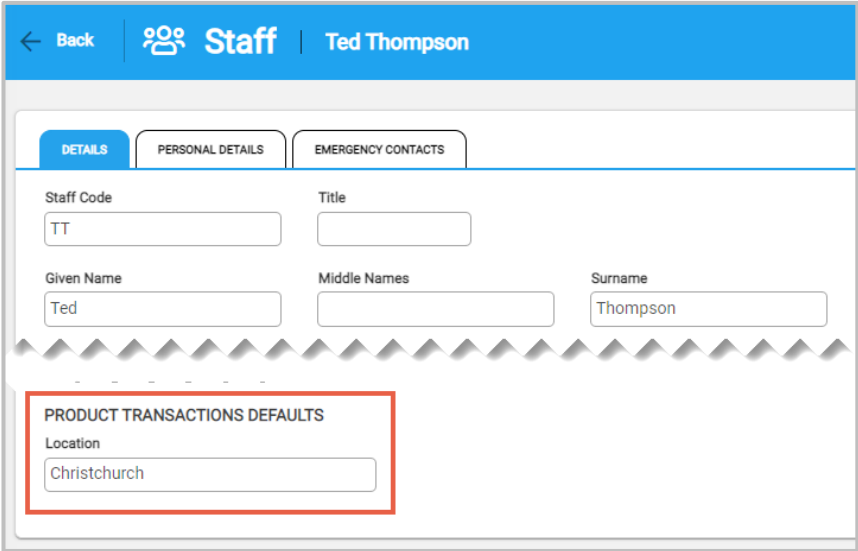
PRODUCTS - KITSETS

ENHANCED	
#4203	<p>Kitset Type Changes</p> <p>A 'When Received' kitset cannot be changed to 'When Invoiced' if the Kitset has In Stock values.</p> 
#4338	<p>Kitset Components Notifications</p> <p>Notifications on the Kitset Components tab inform the user that 'Sell' and 'Cost' pricing will be updated when components are added or removed.</p> 
#4340	<p>Kitset Pricing Notifications</p> <p>Hover messages have been introduced on the Pricing tab to provide guidance.</p> 

FINANCIALS

NEW	
#4386	<p>\$0.00 Deposits can now be Deposited</p> <p>Bank deposits totalling to \$0.00 can now be entered, allowing transactions to be cleared from the bank deposit list.</p> <div data-bbox="320 571 884 824" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"><p>Post bank deposit?</p><p>Deposit: \$ 0.00</p><p>To: Bank Account 1 - 01-0001-0000002-000</p><p>Date: 31/05/2021</p><p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="Confirm"/></p></div>
ENHANCED	
#4343	<p>Additional Bank Imports now Supported</p> <p>The following bank formats are now supported to import:</p> <ul style="list-style-type: none">▪ BNZ Business – OFX▪ BNZ Business – Visa▪ ANZ Personal Credit Card - CSV
#4385	<p>Bank Reconciliation – Suggestions Exclude Inactive Records</p> <p>Inactive records (Customers, Suppliers, GL Accounts) are now excluded from suggestions within the Bank Reconciliation.</p>
RESOLVED	
#4406	<p>TSB Statement Import</p> <p>An issue with an import from a TSB Bank account has now been resolved.</p>
#5133	<p>Supplier Transactions in the Bank Reconciliation</p> <p>An issue where Suppliers were not learnt after selection in a bank reconciliation has now been resolved.</p>

SETTINGS

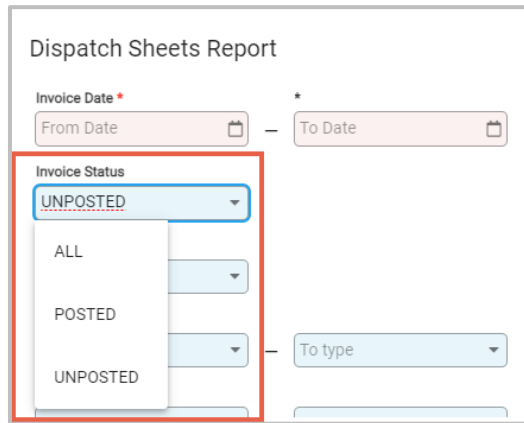
NEW	
#4836	<p>Change User Email Address</p> <p>A User will now be notified by email if the Organisation Admin changes the email address recorded against the user.</p>
#5065	<p>Staff Member Settings – Default Location</p> <p>A Default Location has been added on the Staff Member account. This will be the default for Product Transactions and Purchase Orders once enabled.</p>  <p>The screenshot shows the 'Staff Member Settings' page for 'Ted Thompson'. It features a blue header with a 'Back' button and a 'Staff' icon. Below the header are three tabs: 'DETAILS', 'PERSONAL DETAILS', and 'EMERGENCY CONTACTS'. The 'DETAILS' tab is active. The form contains fields for 'Staff Code' (TT), 'Title', 'Given Name' (Ted), 'Middle Names', and 'Surname' (Thompson). A new section titled 'PRODUCT TRANSACTIONS DEFAULTS' is highlighted with a red box, containing a 'Location' dropdown menu with 'Christchurch' selected.</p>

REPORTS

#5125	<p>Support for 'DejaVu Sans' Font</p> <ul style="list-style-type: none"> DejaVu Sans font has been added to allow non-alpha characters such as tick boxes to be added to reports
NEW	
Customers	
<p>#3475 / #5001</p>	<p>Pending Invoices</p> <ul style="list-style-type: none"> Report on invoices with a status of Unposted within a defined date range <div data-bbox="368 734 890 1256" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Customer Pending Invoices Report</p> <p>Invoice Date * *</p> <p>From date <input type="text"/> <input type="calendar"/> — To date <input type="text"/> <input type="calendar"/></p> <p>Required Report Type</p> <p>Summary <input type="text"/></p> <p>Location</p> <p>All locations <input type="text"/></p> <p>From product group <input type="text"/> — To product group <input type="text"/></p> <p>Product Sub Group</p> <p>From product sub group <input type="text"/> — To product sub group <input type="text"/></p> <p>Product Code</p> <p>From product code <input type="text"/> — To product code <input type="text"/></p> </div>
EDIT	
Customers	
#4806	<p>Customer Quotes</p> <ul style="list-style-type: none"> 'Date Type' field added to define date range parameters; options available are Quote Date or Expiry Date 'Report Type' menu updated to include 'Summary by Status' <div data-bbox="368 1585 919 1899" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Customer Quotes Report</p> <p>Date * *</p> <p>01/05/2021 <input type="text"/> <input type="calendar"/> — 27/05/2021 <input type="text"/> <input type="calendar"/></p> <p>1 Date Type</p> <p>Quote Date <input type="text"/></p> <p>2 Report Type</p> <p>Summary <input type="text"/></p> </div>

#4810 Dispatch Sheets

- 'Invoice Status' field added to define status; options available are All, Posted or Unposted



#4819 Sales Analysis MTD/YTD

- Grand totals have been reinstated along with minor formatting fixes.
Refer also #4852

Customer Sales Analysis - MTD/YTD
The Demonstration Company
As at: 28/05/2021

Customer Type :	ALL	Sales Rep	ALL
Customer Group :	ALL		
Customer Account :	ALL	Sorted By:	Customer Account Number

Account	Customer name	MTD	YTD
1001	Allan Anderson		600.00
1008	Belinda Davidson	999.00	999.00
1010	Bob Daverson	1,000.00	1,250.00
1051	Home and House Painters Ltd		160.00
1056	Ellen James Windows		999.00
1065	Tom Smith	1,000.00	1,000.00
1067	Donald Holt	540.00	540.00
Grand Total:		7,236.22	15,615.22

#4852 Sales Analysis Reports

- New filter 'Sales Rep' added to following reports; Sales Analysis, Sales Analysis MTD/YTD, Sales Analysis Top Sales
- Sales Analysis – filter applies to Sales Rep added to an invoice
- Sales Analysis MTD/YTD and Top Sales – filter applies to Sales Rep assigned to a Customer Account

Sales Analysis

Invoice Date *
 –

Group By #1 *

Staff Rep Code
 –

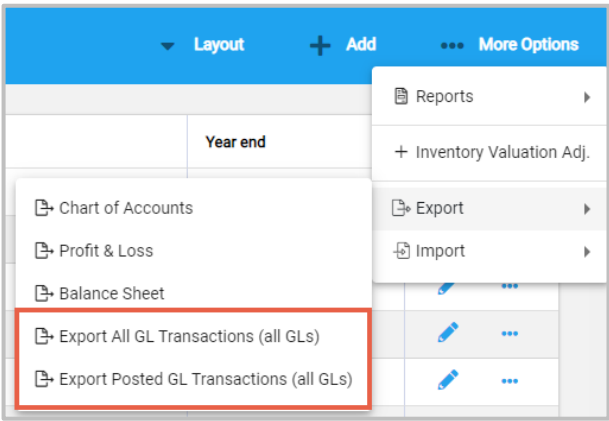
Product Type

Customer Type

Customer Sales Analysis
 The Demonstration Company
 01/01/2021 - 28/05/2021
 Sales Rep

Product Code: ALL	Customer Account: ALL	Customer Type: ALL
Product Type: ALL	Customer Group: ALL	Sales Rep: A ... M
Product Group: ALL	Customer Region: ALL	Marketing Source: ALL
Product Sub Group: ALL		

	Qty	Total Sell	Discount	Net Sell	Cost	Profit	%
AJ - Amanda Johns	155.30	73397.92	411.45	72986.47	46155.95	26830.52	37
FE - Francis Edwards	22.00	4669.98		4669.98	1988.72	2681.26	57
Total:	177.30	78067.90	411.45	77656.45	48144.67	29511.78	38

Financials	
GL Transaction Export	
#4821	<p>There are now two options for the GL Transaction Export; All and Posted Transactions.</p> <ul style="list-style-type: none">All Transactions – export Posted and Unposted transactions and JournalsPosted – export only posted transactions 
#4888	<ul style="list-style-type: none">User roles have been defined to provide access to the GL Transactions (all GLs) exports to enable non system roles access
#5022	<ul style="list-style-type: none">A new column – ‘Export Account ID’ - has been added to the GL Transactions (all GLs) exports; if the GL Account has an Export Account ID recorded, this is included on the export
#5040	<ul style="list-style-type: none">Individual GL Account transaction exports have been expanded to also include All, or Posted options; access via the spill buttons 