Release Notes
Version 0.45
22.03.23

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USER EXPERIENCE

NEW	
6469	**Toolbar Alert Notifications** A toolbar alert has been added which provides links to important functionality such as: • Required system settings • Unread incoming SMS messages • Year End Close required • Bank Feeds requiring refreshing (BNZ Business only)
ENHANCED	
5758	**Field alignment where some fields have prefix icons** The alignment and presentation of custom fields has been improved.
6460	**More information when selecting GL Accounts** When searching for a GL Account in a transaction the GL Function type and Default GST Rate are now also displayed.

7275	**Session Management** Improvements have been made to Session Management. Non-Organisation Admin users are told to "Ask your Organisation Admin to check the sessions logged in. If that's not possible, contact your support partner". An Organisation Admin user can access all sessions, even if there is not one available for them and logout users to free sessions for other users.

CUSTOMERS AND INVOICES

NEW	
6967	**Customer Backorder functionality is now available** Customer backorders are available for Licensees on the Select package. For further information see: https://infusion.helpjuice.com/customer-backorders
7029	**Picking/Dispatch field added to Invoices** New functionality to record the picking and dispatch statuses of posted Customer Invoices is now available. For further information see: https://infusion.helpjuice.com/360003516674-Customer-Invoices/invoice-progress-tracking
7189	**Allow selection of previously sold products on a Customer Invoice** The most recent purchase of any product made by the current customer is now available in Invoices and Quotes when in Edit mode. For further information see: https://infusion.helpjuice.com/360003516674-Customer-Invoices/customer-product-history

RESOLVED

7391	**Duplicating Customer Quote update** An issue where, when duplicating an invoice or quote, the Due or Expiry Date was not updating, has been resolved.
7395	**Next Customer Invoice Number issue** An issue with the Next Invoice Number on migrated licensees has been resolved.
7451	**GST Inclusive amount on Customer Invoice / Quote Lines issue** An issue with the GST calculation when a markup value is entered on an invoice has been resolved.

ENHANCEMENT

2133	**New columns on Customers List** The Sort Key and customer Payment Terms (limited to "Cash" or "Terms") are now available on the Customers List.
2134	**Location on Invoice List screen** The Location of the invoice has now been added to the Customer Invoices List screen. This can be filtered using the Location Name.
2135	**Location on Quotes List screen** The Location of the quote has now been added to the Customer Quotes List screen. This can be filtered using the Location Name.
5060	**Save and Email Option on Customer Quote** A customer quote can be emailed directly from the quote form

5733	**Reverse Customer Payment display** If a customer payment cannot be reversed (eg. it is included in a posted bank deposit) the Reverse option is no longer available in the Spill menu.
6982	**Customer Invoice Source** The source of a customer invoice is now recorded. Options are: 1) WEB (standard software interface) 2) POS - the POS application 3) EXTERNAL - the External API 4) ECOMMERCE - E-Commerce integration
7325	**Organisation / Individual selection option** The Organisation / Individual toggle has been changed to a dropdown list allowing for other future options.
7331	**Customer Terms/Pricing tab update** The Customer Terms / Pricing Tab has been updated to provide more information to the user.
7333	**Customer / Supplier Details tab Sort Key tooltip update** The Sort Key tooltip in the Details tab of both Customers and Suppliers has been improved for clearer user experience.
7335	**No statements toggle logic inverted** The No Statement setting on customers has been reversed to "Send Statements". The default on new licenses is ON - no existing records need to be edited.

7390	**Recalculate Pricing label on invoices & quotes renamed** On a customer invoice or quote, after a user edits the sell price, the user is now offered the option to "Reset pricing". (Previously "Recalculate pricing").

SUPPLIERS AND PURCHASE ORDERS

NEW	
5437	**Purchase Order – Order, Receipt & Invoice in a single step** A user can now receipt goods from a supplier without first creating a Purchase Order. From the Supplier menu, select "+ Purchase Order Receipt and Invoice " from a supplier's Spill Menu. The user can elect to receipt the packing slip and invoice or just the packing slip for later invoicing. For legacy users this equates to the New / Receive Purchase Order option.
RESOLVED	
6257	**Default Delivery Location issue** Where a user is linked to a Staff member that has a default location, starting a Purchase Order will now populate the Delivery Address with that Location's address.
ENHANCEMENT	
5176	**Supplier Purchase Order Enquiry Tidy Up** The formatting and information included in the Purchase Order enquiry screen has been updated for consistency.
5488	**Draft Purchase Order option** If a supplier has a draft Purchase Order(s) the user is offered the chance to leave the new Purchase Order and open a draft Purchase Order.

6747	**Purchase Order Migration improvement** The migration of open Purchase Orders from VFP has been improved so no user intervention is required to receipt or edit the Purchase Order.
6856	**Supplier Direct Credit payment editing** The Code, Particulars and Reference details can now be edited for a Supplier Payment for inclusion in the Direct Credit Export file.
6789	**Tracking Product On Order Quantities** A hover message detailing Purchase Orders is now included in the Product Enquiry > Quantities Tab.
7299	**Supplier Invoices Documents link** The Supplier Invoices list screen has been updated to include a paperclip icon if a document has been stored against it. This allows easy tracking to ensure records are being kept for audit purposes.

PRODUCTS

NEW	
7053	**Product Variants functionality** Product Variants are now available to manage multiple variants of a single product. For further information see: https://infusion.helpjuice.com/product-variants
7229	**Product Status Export** A Products With Stock Status export is now available from the Products > …More Options > Exports menu.
7247	**Barcode scanner entry on Stocktake Quick Entry** The Quick Entry feature of a stocktake now supports barcode scanning to find a product.
ENHANCEMENT	
793	**Internal Notes and Public Notes to Product Details tab** Public and Internal notes are now available on the Product Detail tab. These can be imported through the standard product import / export routine.
6923	**Duplicate a Product - Additional Pricing options** Additional Product Pricing methods (Quantity Breaks, Promotional Pricing and Discount Matrix setting) are now offered when a product is duplicated.
7081	**Allocated Product Hover Message** The hover information on the allocated value in the Product Enquiry > Quantities tab has been improved to include the Invoice number, date, customer name and account number.

7272	**Number of characters stored for serial numbers** The size of the serial number field has been increased to allow for 50 characters.
7518	**Migration of Website settings** Settings from the Website Tab of a product now migrate from VFP. Note: Categories and Tags are not yet included in the migration.
7526	**Internal Notes and Public Notes on Product CSV Imports / Exports** The Product Import / Export routine now includes Public and Internal Notes. For more information see: https://infusion.helpjuice.com/360003566573-Products/products-%7C-importing-and-exporting
7589	**Website and Custom field toggle** To improve on migrated custom field data availability, a custom field on a product can be converted to a Web Tag and vice versa. This is available in Settings > Products > Custom Fields or Website Tags. This functionality allows migrated users to recategorize custom fields historically used as website fields to be viewed in the correct place. The functionality is not available for Option/Tag List types.
RESOLVED	
7371	**Product Promotions tab filtering issue** An issue with the filter on the Products > Promotional Pricing tab after a new Promotional Price has been added has been resolved.
7441	**Average Unit Cost of quantity on hand calculation issue** An issue with the Average Cost calculation on the first transaction of a product has been resolved.

7493	**Inventory Valuation Adjustment update issue** The Inventory Valuation Adjustment journal now updates based on the average cost valuation if that is the system setting.
7494	**Saving of Promotional Price Level issue** A promotional price record cannot now have its price level switched - a new record must be added.
7571	**Product Price Level import** An issue where the Product Price Level import did not behave as expected if 4 decimal places weren't used has been resolved.

FINANCIALS

ENHANCED	
2138	**New column on GL Accounts List** The Default GST rate of the GL Account has been added to the General Ledger list screen.
5707	**Bank Deposit screen sorting** When creating a bank deposit, the list of undeposited customer payments and cashbook receipts is now sortable by date, amount and method.
7021	**GST Audit Trail Export update** The Account column available in the GST Return audit tab has been added to the GST Audit Export.
7246	**Bank Feed login notification** An alert is shown on the Home Page to the user that last modified the bank feed settings when the Bank Feed requires a One Time Password (OTP) or Multi Factor Authentication (MFA) to allow the transactions to download. This only applies to certain banks and certain types - eg. BNZ Business Accounts.
7440	**GST Amount on Cashbook Lists** A new column - "GST ($)" displays the GST content of the transaction next to the "Amount ($)" column on the Cashbook list.
RESOLVED	
7434	**Financial Journals error messages** Messages, when Debit and/or Credit amounts do not pass validation on a Financial Journal, have been improved to provide the user with more information.

SETTINGS

NEW	
5796	**Quote Message** There is now an option under the Customer / Invoices and Quotes Settings menu to add a message that is used on Quote layouts.
6883	**New Products Default Settings section** The Settings pages have been reformatted to give better visibility of the Default settings for new Product records. Settings available for new products are: (defaults indicated in brackets). * Enable stock level tracking (ON) * Allow Sales Discounts (OFF) * Allow Discount Matrix pricing (OFF)
6886	**New Customers Default Settings section** The Default Settings for New Customers have been tidied for clearer user experience. Settings available for new customers are: (defaults indicated in brackets). * Account Type - (Individual) or Organisation * Require an order number on quotes and invoices (OFF) * International Customer (OFF) * Send statements (ON) * Accept backorders (ON) * Allow discount matrix pricing (ON) * Include pricing on packing slips (OFF)
7291	**Standard Note Settings added to Admin User Roles** Standard Note Settings are now available to the appropriate Admin / Manager / Controller roles.

7304	**New Suppliers Default Settings section** The Default Settings for New Suppliers have been tidied for clearer user experience. Settings available for new suppliers are: (defaults indicated in brackets). * Account Type - Individual or (Organisation) * Payment Terms (Given days after EOM – 20)
ENHANCED	
7326	**Rewording of fields in account settings sections** The wording in the Account Settings section of Customers, Suppliers and Product Settings has been updated for a clearer user experience.