

Release Notes Version 0.48

21/11/2023

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CUSTOMERS AND INVOICES

RESOLVED

6577 Allow swapping customer on a saved quote

Customers can now be changed when editing a previously saved quote.

8551 Customer import for Cash Sale Customers with Credit Limit

Error message reporting on customer imports has been improved. Specifically, all cash sale customers in the import file, with an assigned credit limit will now show an error for each customer on the import error screen.

ENHANCEMENT

525 View weight and volume information on Invoice

The current weight and volume information for the product is visible on the invoice screen.

525 View weight and volume information on Quotes

The current weight and volume information for the product is visible on customer quote screen.

7179 Improved Rounding on Customer Adjustments

Improvements have been made to the rounding calculation on transactions.

8472 Customer import speed improvements

Speed improvements have been made to the Customer Import function, greatly reducing the time taken for the import to complete.

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8648	<p>New filter added to the Customer Price List (Standard) report</p> <p>A new filter “Only print products previously purchased” has been added to the Customer Price List report.</p>
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SUPPLIERS AND PURCHASE ORDERS

NEW	
8038	<p>Allow or disallow posting a receipt and invoice in different months.</p> <p>A new setting has been added for purchase orders, prevent the receipt of the purchase order and corresponding invoice to be in different calendar months. This has been activated by default, but can be changed by going to Settings > Supplier Purchase Order and Payment Settings and enabling the option "Allow Purchase Order Receipt and Invoice dates in different months"</p>
8145	<p>Credit a posted non-Purchase Order Supplier Invoice</p> <p>Posted non purchase order Supplier Invoices can now be credited or duplicated by Infusion automatically, rather than having to be manually entered in.</p>
RESOLVED	
8772	<p>Notes and Separator lines on the Purchase Order Report layout</p> <p>The purchase order report layout now correctly includes note and separator lines when displaying the report.</p>
8849	<p>Report Product Reorder - By Sales (Standard) fails if filtered by product location</p> <p>Resolved an issue where the Product Reorder – by Sales (Standard) report would fail, if the report was filtered by a product location.</p>

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ENHANCEMENT

8243 Supplier Imports exclude certain columns

When performing a supplier import, not all columns need to be included in the import file for the import to be successful. Columns not included in the import file will not be updated as part of the import process. This allows only certain information, such as phone numbers, to be updated without importing in all information.

PRODUCTS

ENHANCEMENT

5197 Sortable fields on the Product Serial Number enquiry

When running the Product Serial Number enquiry, all columns are able to be sorted on in ascending and descending order.

5374 Custom 100% GST option removed from a Product's Purchase GST Setting

Products can no longer have 100% GST set as a default rate option set.

6243 Movement Column Replaced with Transaction Details

The movement column on Transaction lines tab within the Product Enquiry page has been replaced to display Transaction Detail information. This allows an at a glance view of more information about the transaction, reducing the need to open a transaction to see what it was for.

7533 Display totals added to Inventory Valuation Adjustment

Totals have been added on the inventory Valuation Adjustment screen, at the bottom of each column.

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<p>7534</p>	<p>Display information about previous Inventory Valuation Adjustment</p> <p>The summarised details of the previous Inventory Valuation Adjustment are displayed on the Inventory Valuation Adjustment screen.</p>
<p>7686</p>	<p>Purchase Order Custom Fields</p> <p>Custom Fields have now been added to Purchase Orders.</p>
<p>7879</p>	<p>Pick and Pack screen refinements</p> <p>Changes have been made to improve the usability and function of the Pick and Pack screen.</p>
<p>8012</p>	<p>Weight and Volume information added to Product Summary</p> <p>If an item has weight and volume information recorded, that information is available on the Product Summary window</p>
<p>8019</p>	<p>Available number of kitsets displayed</p> <p>The number of available kitsets, based on the on hand quantity of each component, is displayed on the “Kitset Availability” in the Product Enquiry.</p>
<p>8244</p>	<p>Product Imports to exclude certain columns</p> <p>When performing a product import, not all columns need to be included in the import file for the import to be successful. Columns not included in the import file will not be updated as part of the import process. This allows only certain information, such as pricing, to be updated without importing in all information.</p>
<p>8476</p>	<p>Add "Include in Web" flag to Product Import Export</p> <p>Product import and exports now contain the Include in Web tag.</p>

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8508	<p>Selling Unit added to Product Summary</p> <p>The selling unit information has been added to the Product Summary window</p>
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FINANCIALS

RESOLVED

8619	<p>Information on the Budget vs Actuals tab when there is no previous year’s transactions</p> <p>When viewing the Budget vs Actuals tab on a GL Account, if there are no previous year’s transactions, only the current year will display. Once a second year’s worth of information begins being entered in, both the current and previous year’s information will be displayed.</p>
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ENHANCEMENT

6732	<p>Conversion date must be entered before closing off the financial year</p> <p>The financial year cannot be closed off without a conversion date being entered into Infusion. A prompt, linking back to the financial settings, will display if closing the financial year is attempted without a conversion date.</p>
7463	<p>Warn if P&L GLs are being set as Control Accounts</p> <p>Warnings have added when selecting an income or expense account as a control account for GST, Customer and Supplier accounts, advising Infusion is expecting an asset or liability account to be selected.</p>

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REPORTING

ENHANCEMENT

6455 Include price origin for reports

Applicable reports can now use the origin of the price charged information, allowing for additional filters

8772 Notes and Separator lines on the Purchase Order Report layout

The purchase order report layout now correctly includes note and separator lines when displaying the report.

OTHER

RESOLVED

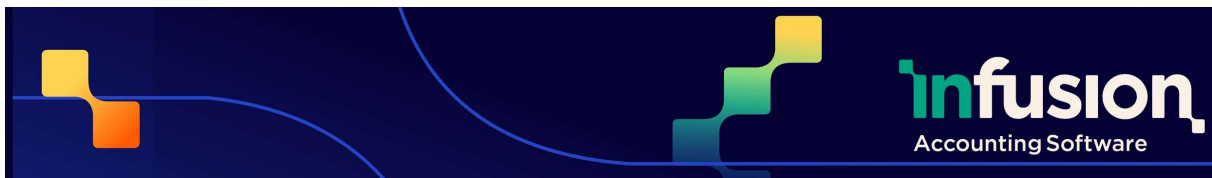
8412 Updated Sales Manager role

The sales manager role can no longer attempt to create product promotional pricing through the Product Promotions tab. This ability is now correctly restricted to the Sales Admin role.

ENHANCEMENT

7756 Restrict access to deleting Customer Quotes and Invoices

The user roles “Sales Staff” and “POS Staff” no longer have the ability to delete customer quotes and invoices.



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8026	Added Expired badge When a promotion, contact rate or discount matrix reaches its expiration date, an expired badge is added to the line. This helps easily identify expired promotions amongst other lines.
8500	Improved bulk email handling When sending out bulk emailing, a notification displays at the end of the process showing which emails have been successfully emailed.
8501	Date and Time display improvements The date and time stamp on the POS Balancing and Cash Drawers tabs, and email log has been updated to show the exact date and time the email was sent.