

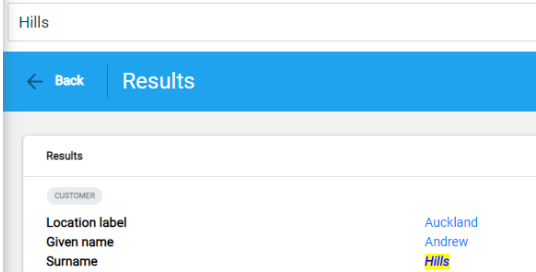
# CONTENTS

New Features	2
User Experience	3
Customers	4
Customers – Invoices	5
Suppliers	6
Products	7
Products – Kitsets	9
Financials	9
Settings	11

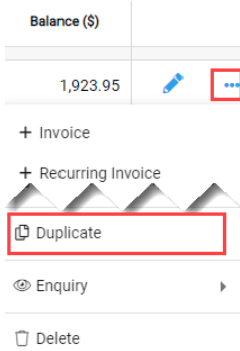
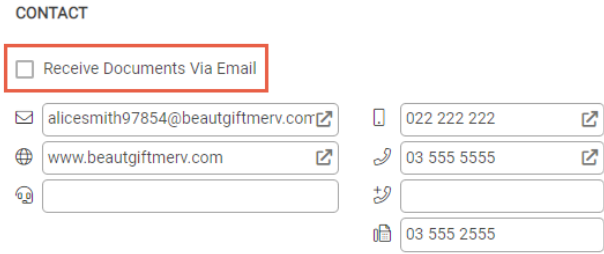
## NEW FEATURES

NEW	
5593	<p><b>Supplier direct credit</b></p> <p>You can now pay suppliers by direct credit by selecting 'Direct Credit' as the Banking Method in supplier or cashbook payments. View our knowledge base articles <a href="#">Make a Supplier Payment</a> and <a href="#">Create a Direct Credit Batch for Export</a> for more information.</p>
5463	<p><b>SMS messaging</b></p> <p>You can now send and receive SMS messages to customers, staff, and suppliers from within Infusion. View our knowledge base article about <a href="#">setting up SMS Messages</a>.</p>
5271	<p><b>Head office</b></p> <p>A customer can now be linked to a Head Office. This will allow invoices to be recorded against the customer record, but have the outstanding value of the invoice be charged to the Head Office. View our article on <a href="#">Head Office accounts</a> for more information.</p>
5469	<p><b>Email subscriptions</b></p> <p>There is now the option for customer and supplier contacts to receive documents such as Invoices, Quotes, Packing Slips, and Statements via email.</p> <div style="display: flex; justify-content: space-around;"> <div style="width: 45%;"> <p><b>CONTACT</b></p> <p>Title: Mrs Given Name: Alice Surname: Smith Trading As: Beauty and Giftware of Remuera Deliver Via: Courier Post</p> <p><b>CONTACT</b></p> <p><input checked="" type="checkbox"/> Receive Documents Via Email</p> <p>alicesmith97854@beautgiftremuera.com www.beautgiftremuera.com VoIP</p> </div> <div style="width: 45%;"> <p><b>CONTACT</b></p> <p>Title: Mr Given Name: Kevin Position: Accounts Address: 24 Post Avenue, Marshlands, Auckland 1234, New Zealand</p> <p><b>RECEIVE DOCUMENTS VIA EMAIL</b></p> <p><input checked="" type="checkbox"/> Purchase Orders</p> </div> </div>

## USER EXPERIENCE

NEW	
5674, 3529	<p><b>New list option for custom fields</b></p> <p>A new type of custom or web field has been introduced to allow a pre-defined list to be created. This is now available for all custom fields.</p>
ENHANCED	
5585	<p><b>Global search now shows links to records</b></p> <p>The global search bar results have been improved to allow better linking to the relevant record. For example, searching for a customer contact now includes links to take you to that customer and related transactions.</p>  <p>The screenshot shows a search interface with a search bar containing 'Hills'. Below the search bar is a blue navigation bar with a 'Back' button and a 'Results' label. The main content area is titled 'Results' and shows a 'CUSTOMER' entry. The customer details are listed as: Location label: Auckland; Given name: Andrew; Surname: Hills.</p>
5939	<p><b>Order of items in product menu improved</b></p> <p>An adjustment has been made to the order of items in the Product menu to improve usability.</p>
RESOLVED	
5938	<p><b>Messaging if report has reached maximum pages</b></p> <p>An error message will define why the report has failed should a report run over the maximum 1000-page limit.</p>

## CUSTOMERS

NEW	
<p><b>4082</b></p>	<p><b>Duplicate a Customer</b></p> <p>Customers can now be duplicated with optional settings to include Details, Terms &amp; Pricing, Contract Rates, Contacts, Delivery Addresses, Documents &amp; Images, and Custom Fields. View the article <a href="#">Duplicate a Customer Account</a> for more information.</p> 
<p><b>710</b></p>	<p><b>Email contact settings for customers and suppliers</b></p> <p>Customer and supplier contacts now have the option to receive documents such as Invoices, Quotes, Packing Slips, and Statements via email.</p> 
RESOLVED	
<p><b>3309</b></p>	<p><b>Issue with navigation from customer transaction resolved</b></p> <p>Improvements have been made on links from the customer transactions enquiry screen.</p>
<p><b>5627</b></p>	<p><b>An issue with customer price levels not importing has been resolved</b></p> <p>Importing customer price levels as part of the customer import has been improved to ensure the price level is correctly populated.</p>

## CUSTOMERS REPORTS

4353	<b>Resolved: Customer and Supplier reports: Aged Trial Balance</b> An issue with the speed to download large reports has now been resolved.
5327	<b>Resolved: Customer reports: 13 Month Sales Analysis</b> An issue with selected date ranges has now been resolved.

## CUSTOMERS – INVOICES

### NEW

4297	<b>Lockout date for customer invoices and adjustments</b> A new lockout date has been introduced to allow a licensee to set the last date that customer invoices and adjustments can be posted. You can access this via <b>Settings &gt; Financials &gt; Lockout dates</b> . Setting a lockout date allows licensees to: <ul style="list-style-type: none"><li>• prevent users from posting customer invoices or adjustments after the Customer Statements have been sent</li><li>• continue to allow Supplier and Financial transactions to be posted into the previous month.</li></ul> View article <a href="#">Settings   Lockout Date</a> to find out more.
5006	<b>Credit a posted customer invoice or credit note</b> An option has been added to the spill menu of a posted customer invoice or credit note to Credit or Re-invoice. This creates a pending transaction with the quantities on the original invoice or credit note reversed.
5430	<b>Head Office functionality</b> A customer can now be linked to a Head Office. This allows invoices to be recorded against the customer record but have the outstanding value of the invoice charged to the Head Office. See the article on <a href="#">Head Office accounts</a> for more information.

ENHANCED	
5341	<b>Recurring invoice option removed for cash sale customers</b> Customers on Cash Sale Terms are unable to use Recurring Invoices. This menu item has been removed to prevent a recurring invoice being started.
5010	<b>Invoice number assigned on saving, not opening invoice</b> Invoice and Quote numbers are now assigned on saving or posting the transaction rather than on opening. This prevents the use of invoice numbers where a transaction is started, then cancelled.
RESOLVED	
5046	<b>Change in quantity on an invoice no longer changes the rate</b> We've resolved an issue that meant when someone edited the rate in a product line and then the quantity, the rate was recalculated. This no longer happens.

## SUPPLIERS

ENHANCED	
5209	<b>International supplier invoices</b> International supplier invoices are now created as GST exclusive by default.
SUPPLIERS REPORTS	
4353	<b>Customer &amp; supplier reports Aged Trial Balance issue resolved.</b> An issue with the speed to download large reports has now been resolved.

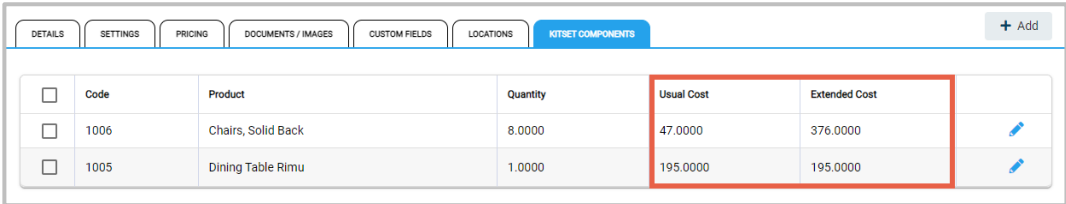
## PRODUCTS

NEW	
<b>4083</b>	<b>Duplicate a product or kitset</b> <p>From within a product or from the product list, there is now a menu item to duplicate a product. You can duplicate each tab of a product: Details, Settings, Pricing, Documents &amp; Images, Custom fields, and Locations.</p> <ul style="list-style-type: none"><li>• Kitsets are duplicated as Kitsets. The components are non-optionally added to the new product</li><li>• Product code and barcode are not duplicated and must be assigned by the user (Code will be assigned automatically on saving if that is the system setting)</li><li>• An indication is given at the edit stage of the new product as to which tabs will be duplicated</li><li>• Other tabs apart from the Details tab will be duplicated when you save the new product. If the original product has been edited and saved in the meantime, these changes will be reflected in the new product in all tabs except the Detail tab.</li></ul> <p>View the article <a href="#">Duplicate a Product or Kitset</a> for more information.</p>
<b>3529</b>	<b>Website tags can now be customised for products</b> <p>Website tags are optional Product fields that web developers can make use of when integrating Infusion with a website. Each product now has a Website tab, and website tags can be configured in settings.</p>
ENHANCED	
<b>5283</b>	<b>Product and GL ID selection improved</b> <p>The matching of an exact product code or GL ID in a lookup list has been improved to allow selection of other matching records, as well as selecting the exact match.</p>
<b>5690</b>	<b>Product tracking</b> <p>Tracking of stock levels for newly created Products is by default set to true for new licensees.</p>
<b>5276</b>	<b>Serial number expiry date format</b> <p>The expiry date on serial tracked products has been reformatted.</p>
<b>5353</b>	<b>Customs GST (100% GST) option removed from product sales</b> <p>The customs GST option has been removed from the product sales GST setting.</p>

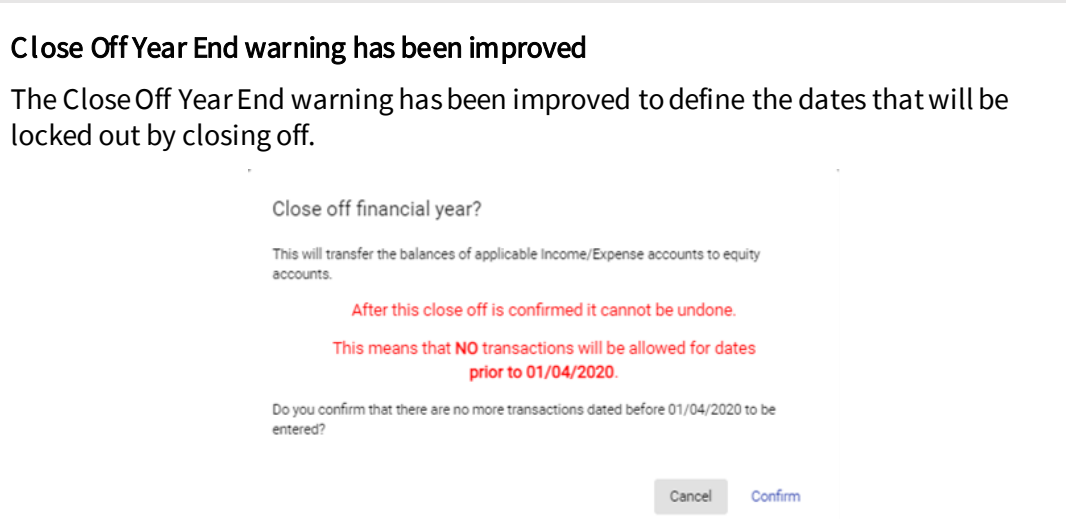
RESOLVED	
5565	<b>Product references tab</b> An issue with the Product References tab link has been resolved.
5266	<b>Product deactivation</b> An issue with In Stock, On Order, and Allocated quantities preventing product deactivation has been resolved.
3281	<b>Product pricing if product is exempt or zero rated</b> An issue has been resolved where if sales GST was charged on a product, the product pricing did not update consistently.
5688	<b>Product pricing export time out resolved</b> The Product Price Level export has been improved to cope with larger datasets.
5902	<b>Product CSV import issue resolved</b> An issue has been resolved where the product CSV import failed for Groups not linked to a Type. The product import has been improved to provide better feedback after validating Product Types, Group, and Sub-Groups.
4191	<b>Cost update from a product receipt with duplicate products</b> The Update Costs from a Product Receipt where there are two lines of the same product with different costs was not updating the cost as expected, with the last line of the receipt expected to be the Latest Cost. This is now resolved.
5641	<b>Average cost calculation issue resolved</b> An issue has been resolved where the Average Cost calculation was resulting in negative values in rare cases.
PRODUCTS REPORTS	
5114	<b>Product Valuation Report issues resolved</b> The Product Valuation report has been improved for formatting and now includes inactive products.



## PRODUCTS – KITSETS

ENHANCED																
<p><b>4339</b></p>	<p><b>View cost details of kitset components</b></p> <p>The Kitset Components tab has been extended to include the Cost and Extended Cost of individual components.</p>  <table border="1"> <thead> <tr> <th>Code</th> <th>Product</th> <th>Quantity</th> <th>Usual Cost</th> <th>Extended Cost</th> </tr> </thead> <tbody> <tr> <td>1006</td> <td>Chairs, Solid Back</td> <td>8.0000</td> <td>47.0000</td> <td>376.0000</td> </tr> <tr> <td>1005</td> <td>Dining Table Rimu</td> <td>1.0000</td> <td>195.0000</td> <td>195.0000</td> </tr> </tbody> </table>	Code	Product	Quantity	Usual Cost	Extended Cost	1006	Chairs, Solid Back	8.0000	47.0000	376.0000	1005	Dining Table Rimu	1.0000	195.0000	195.0000
Code	Product	Quantity	Usual Cost	Extended Cost												
1006	Chairs, Solid Back	8.0000	47.0000	376.0000												
1005	Dining Table Rimu	1.0000	195.0000	195.0000												
<p><b>4761</b></p>	<p><b>Kitset component deactivation</b></p> <p>Rules around kitsets and their components being deactivated have been improved. A product may not be deactivated if it is a component of an active kitset. An inactive kitset cannot be activated if it includes an inactive component.</p>															
<p><b>4083</b></p>	<p><b>Duplicate a product or kitset</b></p> <p>See information about this feature in the Products section of this article on Page 7.</p>															

## FINANCIALS

ENHANCED	
<p><b>5709</b></p>	<p><b>Close Off Year End warning has been improved</b></p> <p>The Close Off Year End warning has been improved to define the dates that will be locked out by closing off.</p> 

<b>5558</b>	<b>Future transactions omitted from bank reconciliation suggestions</b> Transactions posted forward of the date of the imported bank transaction are no longer offered as suggestions in the bank reconciliation.
<b>5559</b>	<b>Bank reconciliation suggestions relating to invoice number</b> If a bank reconciliation suggestion is based on a match on the Invoice Order Number (not visible on screen), the information icon for that suggestion now defines why the suggestion is included.
<b>5594</b>	<b>Bank reconciliation suggestions</b> The bank reconciliation suggestions have been improved to remove suggestions that are considered 'weak' if there is a strong match available.
<b>4812</b>	<b>Bank reconciliation screen filtering</b> Filtering has been improved with the Bank Reconciliation to allow better loading of the individual tabs.
<b>2200</b>	<b>Function type can now be changed on a GL code</b> Function type can now be changed on a GL Code where there have been no transactions, provided it also meets criteria around Financial and Product settings.
<b>RESOLVED</b>	
<b>5899</b>	<b>GL ID on a cashbook payment or receipt</b> An issue where the GL ID was not visible in a Cashbook Payment or Receipt has been resolved.
<b>5828</b>	<b>Budgets issues for new licensees resolved</b> Budgets have been improved to allow new licensees to better view and edit their data.
<b>FINANCIALS REPORTS</b>	
<b>4889</b>	<b>New Cashflow Analysis Reports</b> Two new reports are now included in the Financials menu: Cashflow Analysis Monthly and Yearly.

## SETTINGS

NEW	
5708	<b>Start of financial year now required for licensee sign up</b> A month for the start of the Financial Year is now required on Licensee Sign up to ensure the first Financial Year is set correctly.
3020	<b>Licensee types now enabled</b> Each licence can now be assigned a Licensee Type based on a fixed list of types (such as 'Demo').
ENHANCED	
5279	<b>Improvement to linking a staff member to a user</b> The full user email address is now available when linking a staff member to a user.
5827	<b>First financial month required in new licensee set up</b> The first month of the financial year is a required setting on a new license ensuring that there is no issue with a partial financial year for a non-April start date.
5818	<b>Financial Years displayed correctly</b> Better support has been introduced for licensees with a January Balance date.
RESOLVED	
5914	<b>Product summary only available to certain users</b> User Roles have been updated to ensure product pricing and costing is only available to appropriate roles.