

# Release Notes

## Version 0.42

27.07.22



## Release Notes for Version 0.42

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## USER EXPERIENCE

### ENHANCED

6527

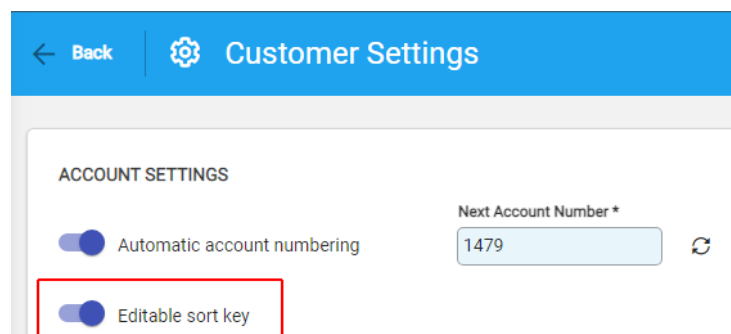
#### Report Parameters have been updated

Report parameters have been updated and improved for drop-down lists throughout Infusion. This update will enable better filtering and exporting of reports.

3327

#### Editing of customer and supplier sort keys

In Customer and Supplier Settings you can now choose to allow editing of sort keys on customer and supplier records.

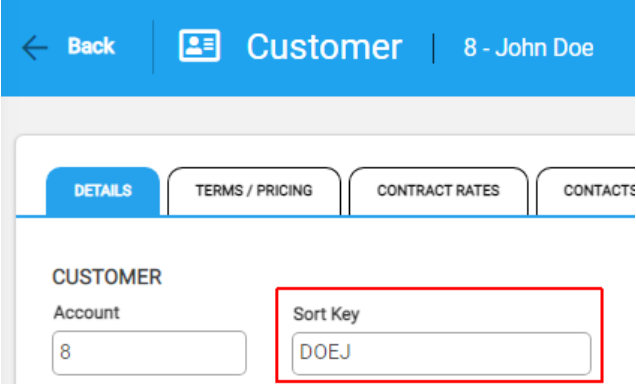


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	<p>Sort keys are identifying codes for customers and suppliers and will be auto-generated on Save if the field is left blank. With the Editable Sort Key setting on, users are able to add or edit a sort key.</p>  A screenshot of the 'Customer' details page in the software. The page has a blue header with a 'Back' button, a 'Customer' title, and '8 - John Doe'. Below the header are tabs for 'DETAILS', 'TERMS / PRICING', 'CONTRACT RATES', and 'CONTACTS'. The 'DETAILS' tab is active. Underneath, there's a 'CUSTOMER' section with two input fields: 'Account' (containing '8') and 'Sort Key' (containing 'DOEJ'). The 'Sort Key' field is highlighted with a red border.
4424	<p><b>Text and formatting in Welcome email improved</b></p> <p>To improve clarity and user experience, we've updated the text and formatting in the Welcome email that people receive when they sign up to Infusion.</p>
5361	<p><b>Keyboard shortcut options for saving and posting a transaction</b></p> <p>Within transactions, you can select ALT+P as the keyboard shortcut for posting (or posting and emailing) a transaction, such as an invoice. So, if a customer is set up for emailing of invoices, the option Post &amp; Email will be the default button in the taskbar, and the option that appears when ALT+P is selected.</p>
6579	<p>The same thing applies when you use ALT+S to Save, or Save &amp; Hold. The shortcut will use the default function.</p>
5317	<p><b>Improvements to imports for customers and suppliers</b></p> <p>On importing new customers and suppliers, sort keys are now automatically generated. Refinements have also been made to ensure that unpopulated columns are taken as 0 and not null.</p>



## CUSTOMERS AND INVOICES

NEW																	
6391	<p><b>Discount Matrix on Customer Quotes and Invoices</b></p> <p>Discounts can be applied to Products on Customer Quotes and Invoices based on a discount matrix. The calculated price is evaluated based on an intersection of a Product Group and Customer Group. Methods for discounting are either Percent above Cost or Percent below Sell. A date range can be set. A Start Date is required with all setups while and End Date is optional. Setup can be done through either a Product Group or Customer Group.</p>																
6365	<p><b>Customer Communications Log</b></p> <p>The ability to record communications with Customers has been added. This is done through the Customer Communications log accessed from the Customer section of the main menu screen. See article <a href="#">Communications Log</a> for more detail</p>																
4974	<p><b>Print an invoice at the same time as posting</b></p> <p>When you post an invoice, you can now choose to print the invoice at the same time. Select the checkbox in the confirmation window to do this.</p> <div style="border: 1px solid #ccc; padding: 10px;"><p>Post and email customer invoice?</p><p>Invoice will be posted and emailed to <b>amberthom2016@gmail.com</b>.</p><table><tbody><tr><td>Charge to</td><td>1002 - Ms Amber Thompson</td><td>Invoice date</td><td>27/05/2022</td></tr><tr><td>Terms</td><td>20 days after EOM</td><td>Due date</td><td>20/06/2022</td></tr><tr><td>Reference</td><td>-</td><td>GST inclusive amount</td><td>\$1,033.97</td></tr><tr><td>Order Number</td><td>-</td><td></td><td></td></tr></tbody></table><div style="border: 2px solid red; padding: 5px; display: inline-block;"><input checked="" type="checkbox"/> Print invoice after posting</div><p style="text-align: right;">Cancel    <a href="#">Confirm</a></p></div>	Charge to	1002 - Ms Amber Thompson	Invoice date	27/05/2022	Terms	20 days after EOM	Due date	20/06/2022	Reference	-	GST inclusive amount	\$1,033.97	Order Number	-		
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Reference	-	GST inclusive amount	\$1,033.97														
Order Number	-																



### 6363 Custom Fields on Invoice and Quote Lines

Custom fields can now be added to Invoice and Quote lines. See article [Custom Fields on Invoice and Quote Lines](#) for more detail.

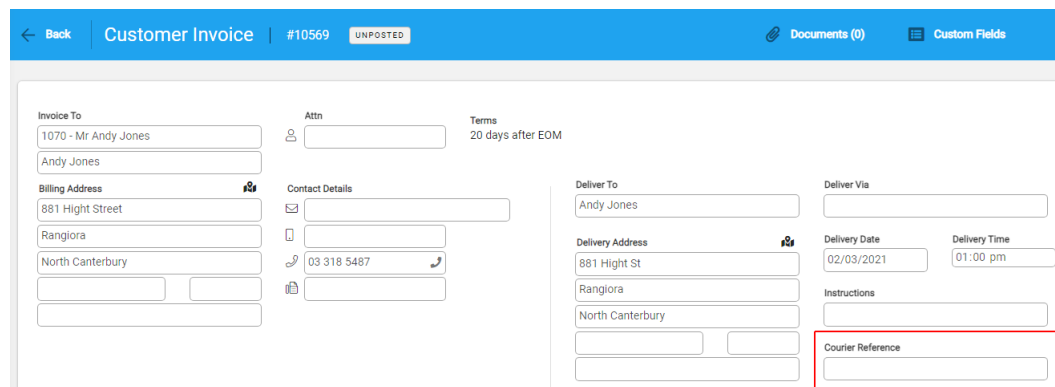
### 6463 No Statements option for Customers

The No Statements setting in Customer Terms has been implemented to ensure statements are not included in bulk statement runs for specific customers.

A screenshot of the 'Customer Terms / Pricing' form in the software. The form is titled 'Customer 8 - John Doe' and has several tabs: DETAILS, TERMS / PRICING (selected), CONTRACT RATES, CONTACTS, DELIVERY ADDRESSES, DOCUMENTS / IMAGES, and CUSTOM FIELDS. The 'TERMS / PRICING' tab is active, showing fields for 'Payment Terms' (set to 'Given day after EOM'), 'Day After EOM \*' (set to '20'), 'Stop Credit' (unchecked), 'Price Level' (set to 'Retail'), 'Default Discount (%)' (set to '0.00'), and 'Head Office Account' (a dropdown menu). At the bottom, there are three checkboxes: 'Order No Required' (unchecked), 'International customer (GST Exempt)' (unchecked), and 'No statements' (checked). The 'No statements' checkbox is highlighted with a red border.

### 5843 Courier Reference field on Customer Invoices

A new field Courier Reference has been added to the Customer Invoice form and is available for customisation in delivery labels and invoice and packing slip data sources.



The screenshot shows the 'Customer Invoice' form for invoice #10569, which is 'UNPOSTED'. The form includes fields for 'Invoice To' (1070 - Mr Andy Jones, Andy Jones), 'Attn' (empty), 'Terms' (20 days after EOM), 'Billing Address' (881 Hight Street, Rangiora, North Canterbury), 'Contact Details' (phone: 03 318 5487), 'Delivery Address' (881 Hight St, Rangiora, North Canterbury), 'Delivery Date' (02/03/2021), 'Delivery Time' (01:00 pm), and 'Instructions' (empty). A new 'Courier Reference' field is highlighted with a red border at the bottom right of the form.

## RESOLVED

### 6594 An issue with clickable area on a customer invoice has been resolved

The size of the clickable area around the 'Unposted invoices' link on a customer invoice meant that users could easily accidentally collapse the screen instead of opening the unposted invoices. This has now been resolved.

### 6760 Error when calculating Customer Sell Rate

An issue where, if a product is subject to Product Group Markup pricing and a customer has a percentage of sell contract rate, the price was not calculated correctly, has been resolved.

### 4976 Expiry Date disappears with a Multi Serial Tracked - Sales Only

An issue where the expiry date was not visible when a serial number was re-checked on a pending customer invoice, has been resolved.

## SUPPLIERS AND PURCHASE ORDERS

### NEW

4084

#### Duplicate a supplier

You can now duplicate a supplier within the Suppliers module. Go to the main Suppliers screen and select the Spill button next to the supplier you want to duplicate, and then Duplicate. This will copy most of the details across, apart from certain fields that need to be customised, such as bank accounts. Fields will still be available for editing.

5665

#### Remittance report available for suppliers

After paying a supplier, you can now generate and send a remittance report to advise the supplier of what has been paid. You can choose to include the payment note on the remittance, or to leave it off.

A remittance for a posted supplier invoice can be reprinted, but not for a saved payment. This is intentional to ensure that a supplier cannot be sent a remittance for a payment that isn't posted and could potentially be changed.

### RESOLVED

6725

#### Direct Credit Batch Not Exporting

An issue where a direct credit would not export if there were non-alphanumeric characters in the supplier's name, has been resolved. These characters are removed during the export as per the bank's specifications.

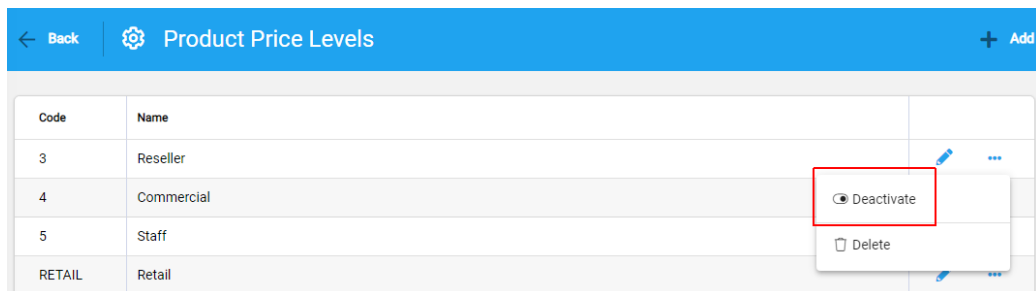


## PRODUCTS

NEW																					
6394	<p><b>Promotional Pricing</b></p> <p>A Promotional Price can be set under the Promotions tab of a Product. These are set per Price Level. A date range and pricing method (Fixed Rate, Percentage above cost or Percentage below selling) can be specified. Unlimited Promotional Pricings can be setup against a Product.</p>																				
6382	<p><b>Quantity Breaks</b></p> <p>Discounts on Products can be setup based on quantities a customer purchase. This is done under the Product. Each Price Level can have unlimited Quantities Breaks set against it.</p>																				
2860	<p><b>New hover information for allocated product quantities</b></p> <p>On the Quantities tab on a product's Enquiry screen, you can now hover over the Allocated column to get information on which transactions the product is allocated to.</p> <table border="1"><thead><tr><th>On Order</th><th>In Stock</th><th>Allocated</th><th>Available</th></tr></thead><tbody><tr><td>1.0000</td><td>6.0000</td><td> ⓘ 2.0000</td><td>4.0000</td></tr><tr><td>0.0000</td><td></td><td>1.0000 Customer Invoice #10708 1.0000 Customer Invoice #10681</td><td>0.0000</td></tr><tr><td>0.0000</td><td>3.0000</td><td>0.0000</td><td>3.0000</td></tr><tr><td>0.0000</td><td>10.0000</td><td>0.0000</td><td>10.0000</td></tr></tbody></table>	On Order	In Stock	Allocated	Available	1.0000	6.0000	ⓘ 2.0000	4.0000	0.0000		1.0000 Customer Invoice #10708 1.0000 Customer Invoice #10681	0.0000	0.0000	3.0000	0.0000	3.0000	0.0000	10.0000	0.0000	10.0000
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0.0000	3.0000	0.0000	3.0000																		
0.0000	10.0000	0.0000	10.0000																		

### 4992 Deactivation of a Price Level

A price level can be deactivated in **Settings > Product Price Levels**. It cannot be deactivated if assigned to any customers. This excludes this price level from any lookups and product pricing visible to the user, but retains any pricing loaded against products should the price level be reactivated.






### 5289 Allow Discounts on all New Products by Default

We've introduced a global setting that enables you to allow discounts by default for all new products, instead of needing to adjust individual products. The setting on previously created products will not be changed.

### 6716 Product Barcode on Product List

The Barcode of a Product can now be seen in the Product List screen

Code	Description	Type	Group / Sub group	Barcode
1000	 Double Bed	1600 - Furniture	16100 - Furniture - Bedroom	92211446325  

### 1730 Cost and Sell Price in Product Enquiry Screen

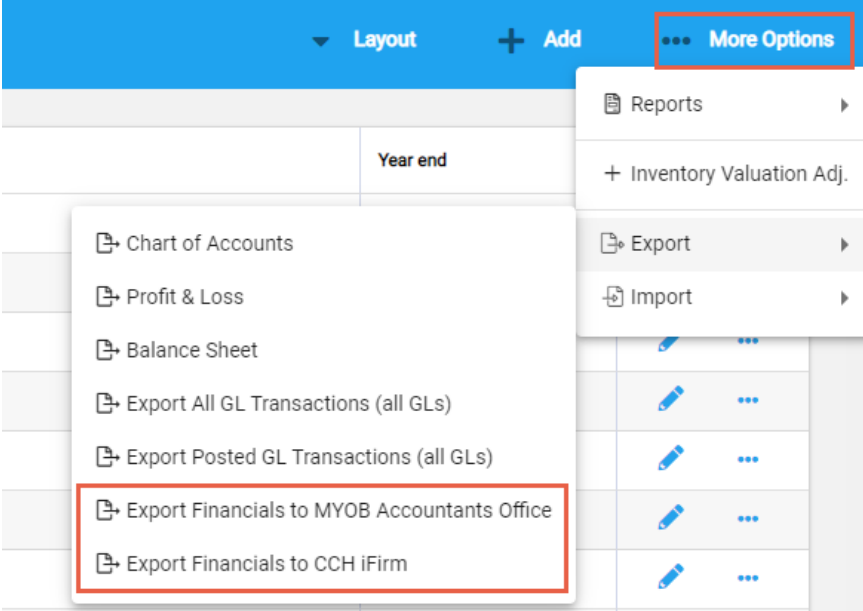
The Cost and Sell values for a Product transaction now display in the Products / Transaction Lines screen

TRANSACTION LINES							
Source	Date	Movement #	Location	Sell (\$)	Cost (\$)	In	Out
Customer Invoice #10763	22/07/2022		Auckland	498.0000	195.0000		1.0000





### FINANCIALS

NEW	
552 553	<p><b>Export financials to MYOB and CCH iFirm</b></p> <p>You can now export financials to MYOB and CCH iFirm. The export generates a CSV file that can be imported to your chosen software</p>  <p>The screenshot shows a software interface with a blue header bar containing 'Layout', '+ Add', and 'More Options'. A dropdown menu is open from 'More Options', listing 'Reports', '+ Inventory Valuation Adj.', 'Export', and 'Import'. A secondary dropdown menu is open from 'Export', listing 'Chart of Accounts', 'Profit &amp; Loss', 'Balance Sheet', 'Export All GL Transactions (all GLs)', 'Export Posted GL Transactions (all GLs)', 'Export Financials to MYOB Accountants Office', and 'Export Financials to CCH iFirm'. The last two options are highlighted with a red box.</p>
ENHANCED	
6643	<p><b>Text on Close Off confirmation window updated</b></p> <p>Updated text now appears when users attempt to close off a financial year. You will now see the warning 'Opening journals may be added in previous financial years if allowed in Financial Settings'.</p>
5135	<p><b>GL Enquiry information has been improved</b></p> <p>On the Enquiry screen for GL accounts, the account label now appears in the notes field on the transaction lines for Customer Invoices, Customer Payments, Customer Adjustments, Supplier Invoices, Supplier Payments and Supplier Adjustments.</p>

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6688	<p><b>Number of characters increased for Batch IDs</b></p> <p>Batch IDs of up to 20 characters can now be created or imported.</p>
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## REPORTS

NEW																																													
6372	<p><b>Custom Reports can now be added</b></p> <p>Please contact Infusion support about adding custom reports.</p>																																												
6737	<p><b>Picking List Report</b></p> <p>A Picking List report is now available from a customer invoice. It is available from the spill menu of an invoice.</p> <p>Picking List #10762</p> <div data-bbox="379 1010 1331 1411" data-label="Image"><table border="1"><caption>Picking List 10762</caption><tr><td colspan="2">Deliver To :</td><td colspan="2">Delivery Information:</td></tr><tr><td colspan="2">Bob Deverson</td><td colspan="2"></td></tr><tr><td colspan="2">707 Benmark Street</td><td colspan="2"></td></tr><tr><td colspan="2">Christchurch</td><td colspan="2"></td></tr><tr><td>Date</td><td>19/07/2022</td><td>Account</td><td>1010 - Bob Deverson</td><td>Order No</td><td>464567</td></tr><tr><td>Rep</td><td>Ted Thompson</td><td colspan="2"></td><td>Reference</td><td></td></tr><tr><th>Item</th><th>BIN</th><th>Barcode</th><th>Description</th><th>Ordered</th><th>Picked</th><th>Check 1</th><th>Check 2</th></tr><tr><td>1000</td><td>AA1_1</td><td></td><td>Double Bed</td><td>1</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></table></div> <p>This is intended as an internal document for picking and packing an order. It includes the product's barcode and Bin number, and is optionally sortable by Bin number. Weight and volume are calculated from the product's data.</p>	Deliver To :		Delivery Information:		Bob Deverson				707 Benmark Street				Christchurch				Date	19/07/2022	Account	1010 - Bob Deverson	Order No	464567	Rep	Ted Thompson			Reference		Item	BIN	Barcode	Description	Ordered	Picked	Check 1	Check 2	1000	AA1_1		Double Bed	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deliver To :		Delivery Information:																																											
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1000	AA1_1		Double Bed	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
6761	<p><b>Quantities Option on 13 Month Sales Analysis report</b></p> <p>A Sales Analysis 13 Month report is now available from the <b>Customers &gt; More Options</b> menu. A setting is available to run this report by either Quantity or Sales value. There is an option to round amounts to nearest whole number.</p>																																												

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### ENHANCED

4220	<b>Product Price List Report Enhancements</b>  Product Pricelist reports have had multiple improvements including additional selection and filtering options.
3691	<b>Customer Transaction Report - add a filter to select customer range</b>  The Customer Transactions report now has filtering selection parameters for Customer Type / Group and Account Number.
6851	<b>Balance Sheet Standard - Update for Excel Export</b>  The Balance Sheet standard report layout has been updated to ensure better exporting to Excel. All header, detail and totalling rows are included in the exported file.
6539	<b>Reports Lookup Improvements</b>  A number of reports have been improved so that the parameter selections are lookup tables instead of free text
4772	<b>Customer Aged Trial Balance report formatting improvements</b>  Totals have been added to the Customer Aged Trial Balance report when individual invoices are included.
6710	<b>Access Customer / Product Custom Fields in Invoice/Packing Slip / Quote reports</b>  Custom fields on Products, Customers, Invoices & Quotes and Invoice & Quote lines are now accessible within the data sources for quotes, invoices and packing/picking slips allowing for additional report customisation.
6736	<b>Report Datasource updates</b>  Additional product information is now available in the customer invoice data source including volume, weight, barcode tracking information allowing for further customisation of layouts.

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6792	The held status of an invoice is now included in the data source allowing this to be used for customisation purposes.
6830	<b>Financial Transaction report update</b>  The report has been updated with better formatting for export, gaps removed where notes are not included, transaction descriptions not included in the notes field. The GL Code filter is now from and to.
<b>RESOLVED</b>	
6637	<b>Customer Aged Trial Balance with Outstanding Transaction issue</b>  An issue with the Customer Aged Trial Balance with outstanding transactions has been resolved. Customised reports will need to be replaced. Contact Infusion Support with any issues.



## SETTINGS

### ENHANCED

5061

#### Email settings have been moved to the Email Settings page

Instead of the default email settings sitting under the settings for Customer Invoice and Quote, and Supplier Purchase Order and Payment, these settings have been moved. You'll now find these within **Settings > Email Settings**.

