Release Notes
Version 0.42
27.07.22

Release Notes for Version 0.42

USER EXPERIENCE

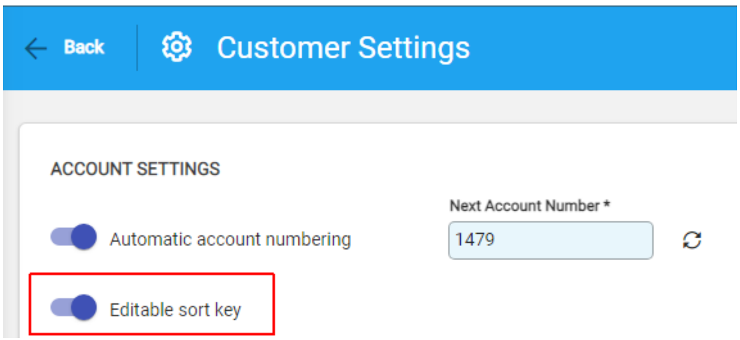
ENHANCED

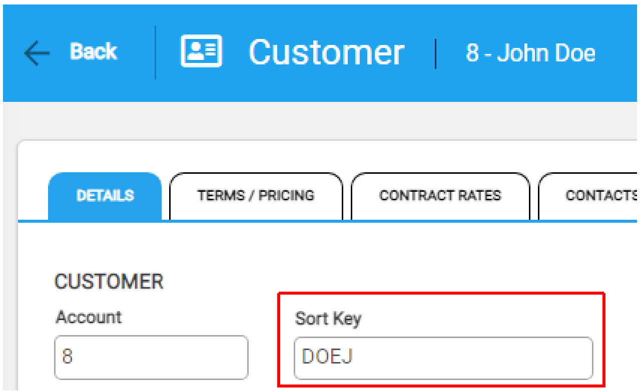
6527 **Report Parameters have been updated**

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.



	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. 
4424	**Text and formatting in Welcome email improved** 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.
5361 6579	**Keyboard shortcut options for saving and posting a transaction** 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 & Email will be the default button in the taskbar, and the option that appears when ALT+P is selected. The same thing applies when you use ALT+S to Save, or Save & Hold. The shortcut will use the default function.
5317	**Improvements to imports for customers and suppliers** 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.

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CUSTOMERS AND INVOICES

NEW

6391 **Discount Matrix on Customer Quotes and Invoices**

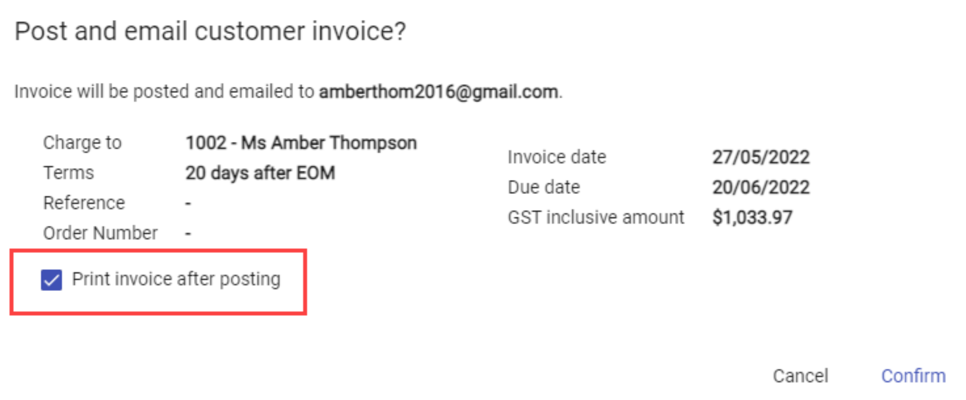
Discounts can be applied to Products on Customer Quotes and Invoices based on a discount matrix. The calculated price is evaluated based on an intersection of a Product Group and Customer Group. Methods for discounting are either Percent above Cost or Percent below Sell. A date range can be set. A Start Date is required with all setups while and End Date is optional. Setup can be done through either a Product Group or Customer Group.

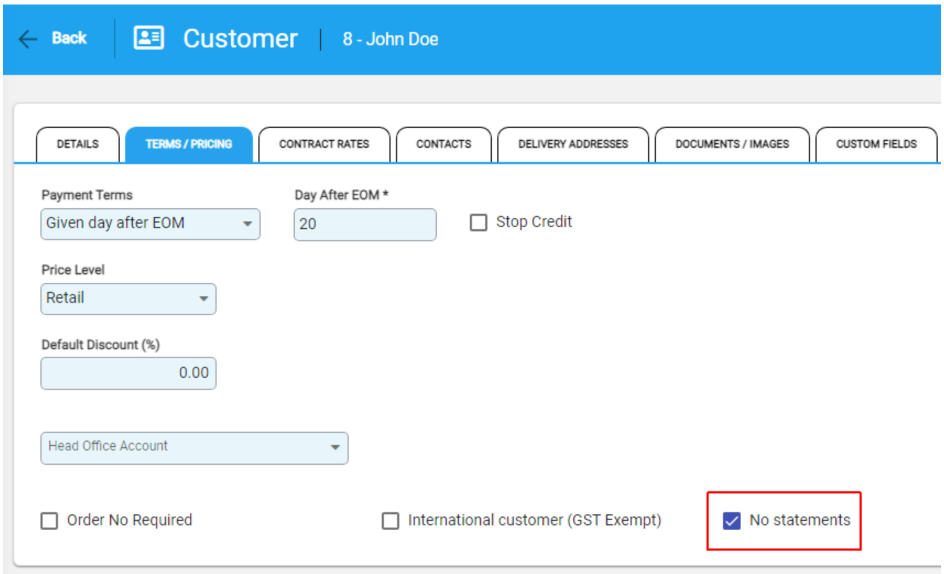
6365 **Customer Communications Log**

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 Communications Log for more detail

4974 **Print an invoice at the same time as posting**

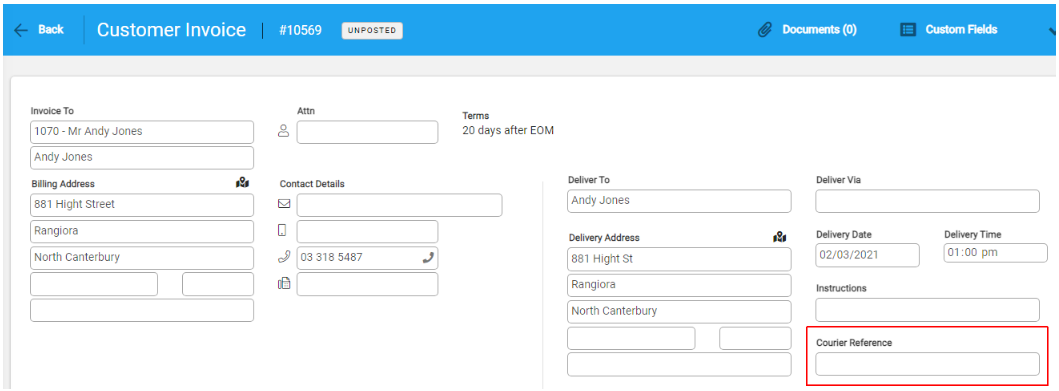
When you post an invoice, you can now choose to print the invoice at the same time. Select the checkbox in the confirmation window to do this.



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. 

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.



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.

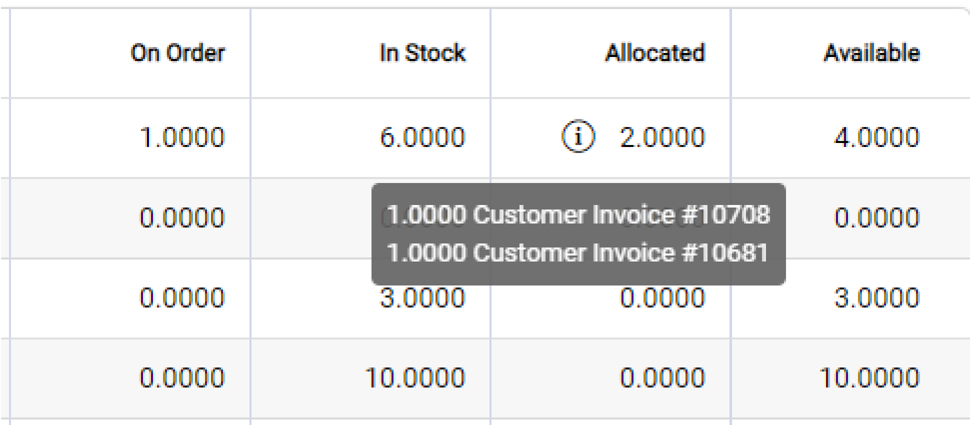
SUPPLIERS AND PURCHASE ORDERS

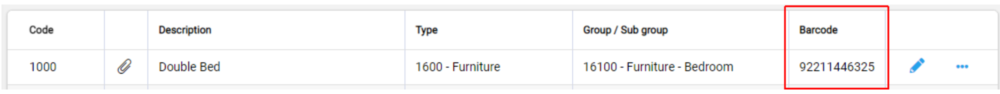
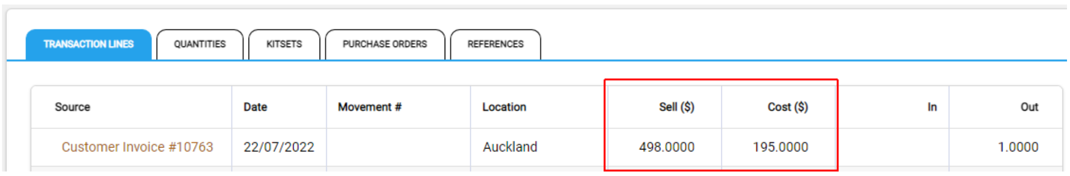
NEW	
4084	**Duplicate a supplier** You can now duplicate a supplier within the Suppliers module. Go to the main Suppliers screen and select the Spill button next to the supplier you want to duplicate, and then Duplicate. This will copy most of the details across, apart from certain fields that need to 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-alphanumerical 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	**Promotional Pricing** 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.
6382	**Quantity Breaks** 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.
2860	**New hover information for allocated product quantities** 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.

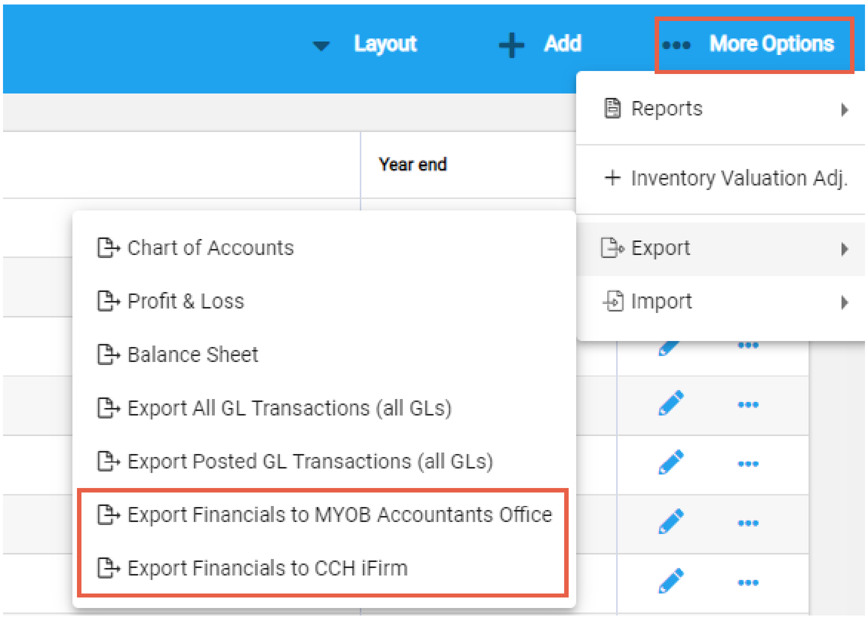


4992	**Deactivation of a Price Level**
	A price level can be deactivated in **Settings > Product Price Levels**. It cannot be deactivated if assigned to any customers. This excludes this price level from any lookups and product pricing visible to the user, but retains any pricing loaded against products 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 
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 

FINANCIALS

NEW

552 553	**Export financials to MYOB and CCH iFirm** You can now export financials to MYOB and CCH iFirm. The export generates a CSV file that can be imported to your chosen software



ENHANCED

6643	**Text on Close Off confirmation window updated** 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'.
5135	**GL Enquiry information has been improved** 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.

6688	**Number of characters increased for Batch IDs** Batch IDs of up to 20 characters can now be created or imported.

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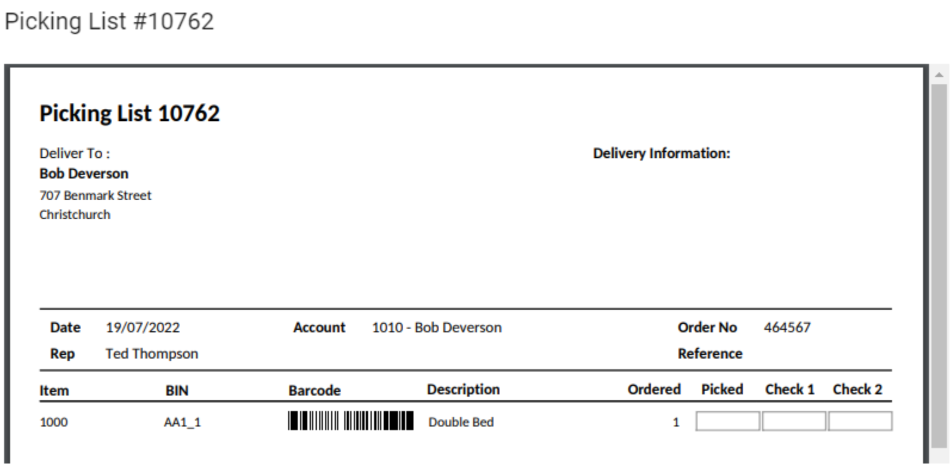
REPORTS

NEW

6372	**Custom Reports can now be added** Please contact Infusion support about adding custom reports.

6737 **Picking List Report**

A Picking List report is now available from a customer invoice. It is available from the spill menu of an invoice.



Picking List #10762

Picking List 10762

Deliver To :
Bob Deverson
707 Benmark Street
Christchurch

Delivery Information:

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			

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.

6761 **Quantities Option on 13 Month Sales Analysis report**

A Sales Analysis 13 Month report is now available from the **Customers > More Options** 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.

ENHANCED

4220	**Product Price List Report Enhancements** Product Pricelist reports have had multiple improvements including additional selection and filtering options.
3691	**Customer Transaction Report - add a filter to select customer range** The Customer Transactions report now has filtering selection parameters for Customer Type / Group and Account Number.
6851	**Balance Sheet Standard - Update for Excel Export** 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	**Reports Lookup Improvements** A number of reports have been improved so that the parameter selections are lookup tables instead of free text
4772	**Customer Aged Trial Balance report formatting improvements** Totals have been added to the Customer Aged Trial Balance report when individual invoices are included.
6710	**Access Customer / Product Custom Fields in Invoice/Packing Slip / Quote reports** 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	**Report Datasource updates** Additional product information is now available in the customer invoice data source including volume, weight, barcode tracking information allowing for further customisation of layouts.

6792	The held status of an invoice is now included in the data source allowing this to be used for customisation purposes.
6830	**Financial Transaction report update** 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.
RESOLVED	
6637	**Customer Aged Trial Balance with Outstanding Transaction issue** 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**.