VERSION 7.63 Update

YOU CANNOT MIX VERSIONS!!!

ALL modules on your system must be upgraded at the same time. Mixing versions can create unexpected errors that **Data Pro will not** be able to support. Effective **January 1, 2024**, the current version of the products now shipping is **Version 7.63.**

You **MUST** upgrade your **Infinity POWER** software from any version *(Version 7.44 or lower)*, to at least **Version 7.50** or higher, to get the latest version of the **DP/Update** product, which is included as part of the **System Administrator** module. This feature allows you to get the latest **Payroll** and other interim updates of the software programs.

Remember, you **MUST** have all users out of the Data Pro software and turn off the **POWERServer** module before installing any new versions. If you're not sure about this, please call out **Technical Support** team at **727-803-1550** or e-mail us at **dpasupport@dpro.com** and we'll be happy to help!

To download the latest version of the **Infinity POWER** applications, go to our web site at **www.dataproaccounting.com/download** to download the products you are licensed for:

Click on the **"set-up.exe"** option from the **FILE TO DOWNLOAD** choices across the top.

Download only those applications you are licensed for. The following screen will provide you with a list of valid choices.

NEW FEATURES

This list of features and changes to the existing programs is for the update to the **Infinity POWER Advanced Accounting** and **Infinity COMMERCE** products released as *Version 7.63*. This includes all new module releases, new features in all of the products and any corrections in the programs.

Infinity POWER (Version 7.63)

GLOBAL FUNCTIONS

- The **DP/SalesTax Service** has been deployed as an option for all users. It is an additional free download application from our web site for all **Version 7.63** users. It currently supports the third-party sales tax services *AvaTax* from *Avalara* and *AccurateTax*. The complexity of sales tax calculations, reporting, and filings have grown to the point many companies need a sales tax service to keep up with the wide range of requirements from various states. State sales tax holidays, by product class and date ranges, added to this level of complexity.

- The original feature for adding a sales tax rate and printing a sales tax report from the **Infinity POWER Accounts Receivable** module still remains in place for those customers with limited sales tax collection and reporting needs.

- Fixed the issue that when you have an option open in **DPWIN** and you minimize it, when you restore the option, it is hidden behind the main screen. It now refreshes it to the front of the main screen.

- Removed the **Accounts Receivable Import Tax Rates** menu option. It is no longer available as an option from Avalara.

- Updated the **"Help, About"** Dialog box and the opening **Infinity POWER "Splash Screen"** with the company's updated new logo and messaging.
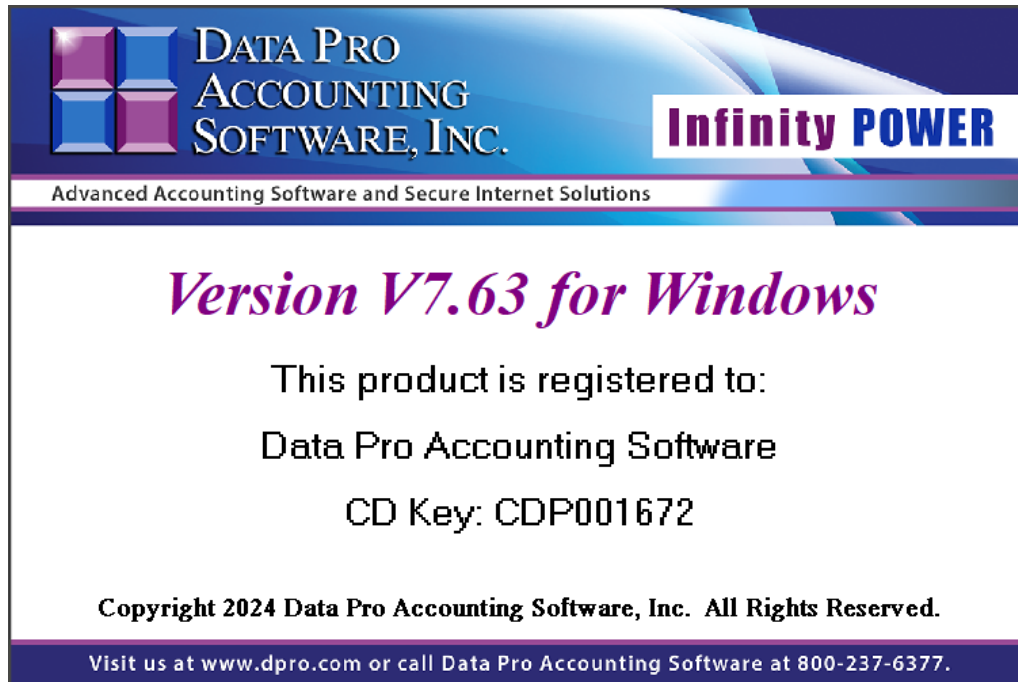
- Changed the status bar to expand the **"Error Message"** panel length to display the complete length of any error or warning messages that are displayed during the use of the software.
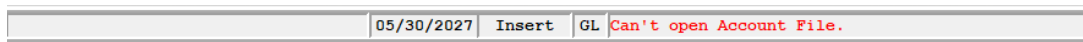
GENERAL LEDGER

- Removed the General Ledger **"Export to TurboTax"** menu option. This no longer applies.

ACCOUNTS PAYABLE

- If a Vendor is setup to **"Pay by EFT,"** when you write a single check or enter a manual check, the system will now skip the process of creating the **EFT** batch entry.

INVENTORY MANAGEMENT

- Added the ability to print **"Bin Labels"** during Item Inquiry.
- Added ability to print **"Item Labels"** during Item Inquiry.
- Optimized the **"Inventory Transaction Report"** when functioning in the **SQL** database mode.

SALES ORDER ENTRY

- Modified the **"Sales Order Entry"** option to use the unit price decimal places defined in the **Accounts Receivable** module instead of the **Inventory Management** module.

PAYROLL

- Updated the Payroll Federal and State Tax Tables, Social Security and Medi-wages changes for the **2024** year.

DP/AUTO

- This kind of interfacing happens with a wide range of products which is why there is a separate Data Pro **"Add-On Products Price List"** available for users to see the various types of scripts available. This includes **Point of Sale, Front Desk PMS Software, Payroll products, Positive Pay, FedEx Ship Manager, UPS WorldShip, Direct Deposit Notifications, Fixed Assets** integration and much more!

DP/DASHBOARD

- Added the menu option under the **Sales & Purchasing** section to **"List Open Orders."** This includes all outstanding **Proposals** and valid **Sales Orders**. Users can choose one or the other and/or both to be included in the listing. Once the listing is displayed on the screen, a specific **Sales Order** or **Proposal** can be chosen. When it is displayed, the user can **"Print the Order, Print the Packing List, Modify the Order, Copy the Order to Create a New Order from the Existing Order, Schedule a Calendar Event around the Order"** and even **"Upload Related Documents and Images"** relative to the order. This could include images of the items on the order, receiving documents, packing lists, delivery documents and much more!

- Added the menu option under the **Sales & Purchasing** section **"Inventory Count Report."** This option shows the current items within the defined range of inventory items specified by the Beginning and Ending **"Bin Number"** range. A listing will be displayed that includes the following fields: **Bin Number, Item Number, Description, Unit of Measure, Quantity On-Hand, Physical Count and Counted (Y/N).** This option is used along with the **DP/Scan** or **DP/ScanPC** products when performing physical counts. By selecting a bin number range, you can view the current on- hand quantities and the physical count quantities and whether or not they have already been counted.

  If you are ready to perform another count for the bin number range, then you can click on the **"Clear Physical Counts"** button to set all of the physical counts to zero and flag them as counted. Then, use the **DP/Scan** or **DP/ScanPC** product to actually enter each item's physical count. The purpose of setting the counted flag to **Y**(es) is so that if a particular item is completely gone, then the item's count does not have to be scanned or entered as zero.

Once the counts have been entered, then go to the **Infinity POWER Inventory Management** module. The **"Print Inventory Shrinkage"** report should be run. Then, the option **"Update Book Value After Count"** should be run. The **COPY TABLE** link will copy the entire table to your clipboard so that it can be pasted into Excel.

- Added the menu options under the **Sales & Purchasing** section **"Add a New Vendor"** and **"Change Vendor."** Similar to the existing **DP/DashBoard/CRM** menu option to be able to **"Add a New Customer Profile,"** and **"Change Customer Profile"** to the Accounts Receivable data files, this option works for the **Accounts Payable** data files to allow the addition of new vendors and the ability to change vendor records. This allows users to view **Accounts Payable Aging** reports, by Vendor, which provides a myriad of drilldown capabilities and to utilize the new **DP/DashBoard/CRM** feature added throughout that includes the ability to **"Upload Related Documents and Images"** relative to the vendor. This could include images that relate to the vendor, insurance documents, packing lists, delivery documents, copies of invoices and much more!

- The ability to **"Upload Related Documents and Images"** has been embedded throughout a host of menu options within **DP/DashBoard/CRM** including **"Change Customer Profile," "Inventory Item Inquiry," "Change Existing Jobs," "Accounts Payable Transactions and Drilldowns," "Accounts Receivable Sales Reporting and Drilldowns," "View Purchase Order Details," "Add/Change Sales Orders,"** and more. It is a very compelling and powerful feature that can be used in a variety of ways important to all aspects of a company's daily business needs.

The following image provides a preview of how an image may be uploaded to a specific **"Job Number"** for viewing by the team who has to work on a renovation project. This can be viewed on a PC in an office with a browser or a tablet device in the field, just as easy.

When you click on the **"View"** button, the image will open in another window for previewing as shown on the following screen:

DP/PAYMENT

- Built into **DP/DashBoard/CRM,** the **DP/Payment** feature has been added as a capability for all invoice and statement features found throughout the application. This payment system feature provides **Data Pro Infinity POWER** customers **(Merchants)** with the ability to include an on-line payment option for their customers to pay their **Invoices** and **Statements** with either **Credit Cards** and/or **ACH Payments** with a simple click of a link at the bottom of either invoices or statements.

Using Data Pro's latest **API** technology, this encrypted link will automatically link the customer directly to their account, in real time, and present them with a current look at the **"open items"** currently due for payment. The system will list the open items and allow the customer to click a box next to each of the open items they want to pay and it will automatically calculate the total amount due to pay.

Based on the **Infinity POWER** customer's decision on which payment methods to offer **(Credit Cards, ACH bank check payments, or both)** the customer can choose the method they would like to use. Once the customer chooses their desired payment method, they will be presented with the necessary fields for payment.

Once that information is entered and submitted, if authorized and successful, the customer will be presented with a receipt on the screen that can be printed and the merchant will receive an email notification of the successful payment authorization. The payment will be posted immediately to the customer's account within the Merchant's accounting system and no other steps are required by their staff.

This does require the **DP/Charge Payment Server** be configured and active with a **Payment Innovator's Merchant ID** for processing *(all at no charge)*. **(Call Glenn Witt at 800-310-3880) or email to: glenn@pipay.io**

See an example on the following invoice:

This on-line link is configured by Data Pro and allows us to include your company logo on your statements and much more.

This master configuration setup also allows us to define your email server settings, your company information, address information, phone number, company slogans, web site addresses and more.

Whether you accept **ACH Payments** is literally a simple **Yes/No** answer:

When your customer clicks the secure encrypted link, they are calling the **Data Pro API** to access their account within your **Accounts Receivable Open Item** data files. Every time they click this link, it will make a new call to your files and only display back to them the **"open items"** that are currently not paid in your system. If they made a payment an hour ago, those items will not show up the next time they click this link. The system will display a payment page like the following page with all outstanding items to be paid:

Statement

Please enter your payment information below.

Stop Your Car. Display Your Message.

Bill To
Shelby American, Inc.
6405 Ensworth Street
Las Vegas, NV 89119

Remit To
Popstops Marketing, Inc.
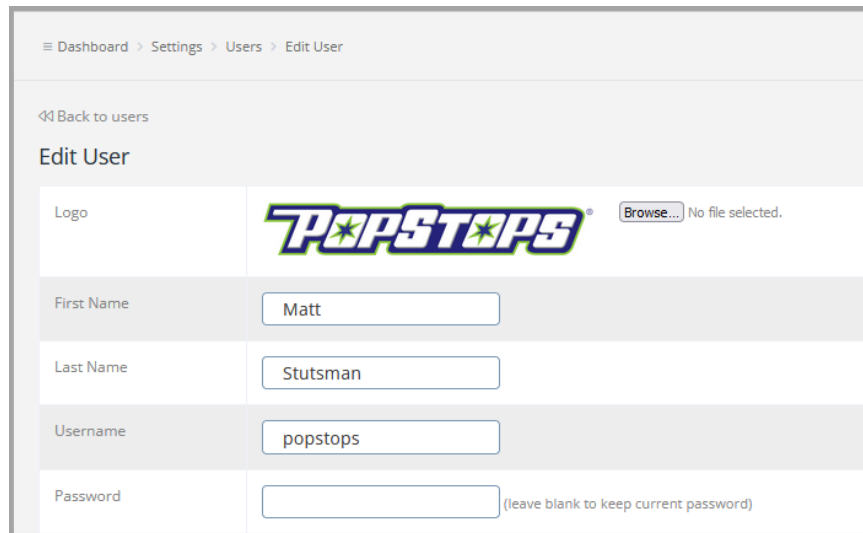111 2nd Avenue Northeast
Suite 1201
St. Petersburg, FL 33701-3443
sfenimore@popstops.com
www.popstops.com

Pay	Due	Invoice	Amount
☐	01/13/22	Invoice #18015 Order #: 266747.	$82.44
☐	02/27/22	Invoice #18046 Order #: 267971.	$156.69
☐	02/27/22	Invoice #18047 Order #: 268149.	$156.69
☐	02/27/22	Invoice #18048 Order #: 267989.	$156.69
☐	03/02/22	Invoice #18049 Order #: 270210.	$120.94
		Total	**$0.00**

The current **"Total"** will automatically default to zero until they click on at least one of the boxes on the left next to one of the open items that are available to be paid. When they do, that amount will be added to the running total at the bottom right of the screen.

Pay	Due	Invoice	Amount
☑	01/13/22	Invoice #18015 Order #: 266747.	$82.44
☑	02/27/22	Invoice #18046 Order #: 267971.	$156.69
☐	02/27/22	Invoice #18047 Order #: 268149.	$156.69
☐	02/27/22	Invoice #18048 Order #: 267989.	$156.69
☐	03/02/22	Invoice #18049 Order #: 270210.	$120.94
		Total	**$239.13**

In this example, if they clicked on the top two items above, the **"Total"** increased to **$239.13**. The items they click do **NOT** have to be in sequence. They can choose whatever items they desire. No credit or debit memos will appear on this listing. That is an internal accounting department/management decision to determine how to allocate those kinds of transaction types, not a customer decision.

Once the customer has chosen the open items that they want to pay, they would simply scroll down on the same screen to the payment section. This is shown in sections due to space. The default payment choice is **"Credit Cards"** as shown on the following screen:

Pay	Due	Invoice	Amount
☑	01/13/22	Invoice #18015 Order #: 266747.	$82.44
☑	02/27/22	Invoice #18046 Order #: 267971.	$156.69
☐	02/27/22	Invoice #18047 Order #: 268149.	$156.69
☐	02/27/22	Invoice #18048 Order #: 267989.	$156.69
☐	03/02/22	Invoice #18049 Order #: 270210.	$120.94
		Total	**$239.13**

Payment Details

I want to pay via

◉ Credit Card   ○ ACH Payment

Email Receipt to: invoices@shelby.com

Name on Card:

Card Numbers:

Expiration: MM / YY

Security Code:

[Make Payment]

The default **"Email Receipt to"** address is pulled from the customer's master file. This can be overwritten during the time of each payment, if the person needs to redirect it to another email address. The next fields are the standard credit card number fields, expiration date and the three/four-digit security code. Once this information is entered, the customer will simply click on **"Make Payment."** If the payment is approved, it will generate a payment receipt on the screen immediately. This receipt has a **"Print"** option available. If not, it will display a message to the contrary. If successful, it will also generate an email to the email address that is defined in the Merchant's Master Configuration, where email notifications are to be sent.

That way you know when you have been sent payments right away! If you have made **ACH Payments** available as an option, and the customer selects this option for payments, then the following fields will be displayed:

As with Credit Cards, the **"Email Receipt to"** will default to the email address on file for the customer's account. They can override it during the process of posting payments. Next, they must choose whether the bank account information is for a **"Checking Account"** or a **"Savings Account."**

Next, they will enter that account's **"Routing Number"** and then the **"Account Number."** Then, they will click the **"Make Payment"** button. If the payment is approved, it will say so and email both the customer's email address that is entered into that field and to the email address that is defined in the Merchant's Master Configuration where email notifications are to be sent. That way you know when you have been sent payments right away!

Additionally, an email copy of the receipt is sent to the address that was specified during the **"Payment Details"** portion of the transaction. That could have been the **"default"** email address of the customer account or the **"temporary"** email address the customer may have typed in for this particular transaction.

In the meantime, an email has been sent to you, as the **Merchant**, to notify you that a payment has been made on your on-line portal. It is a copy of the payment receipt the customer has just seen above.
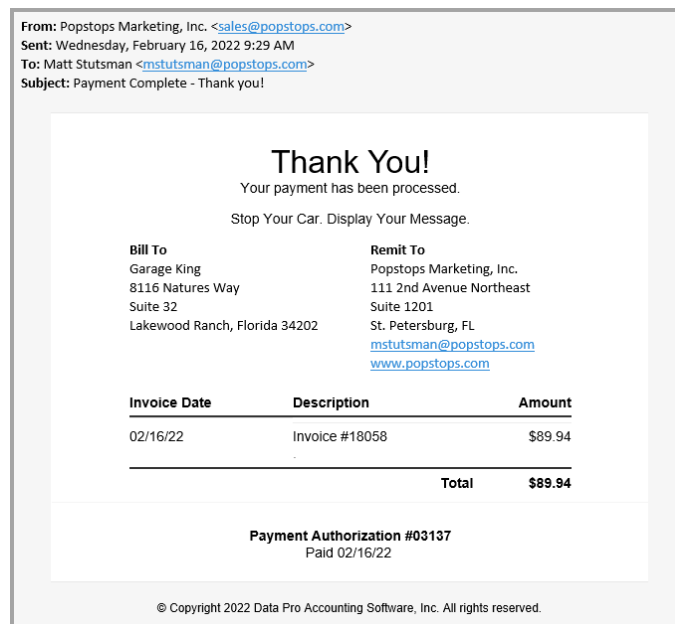
F9 – FINANCIAL STATEMENT REPORT WRITER FOR EXCEL (VERSION 6) NOW AVAILABLE!

- **F9** is an easy-to-use financial reporting tool that dynamically links **Microsoft Excel to Data Pro's Infinity POWER General Ledger** data files. Everything you know about spreadsheets can now be applied to the financial reports you create using **F9!**
- Excel-based functionality ensures ease of use.
- Formula Calculations eliminate re-keying of numbers.
- **"Business Intelligence"** Reporting offers KPIs, Table and Pivot Table Analysis.
- Report Publishing, Drilldown Viewer and Analysis.
- Report Analysis diagnoses errors in a report.
- Drill-Down capability by Account Segments, Transactions, Pivot Details.
- Budget Write-Back to the General Ledger.
- Consolidations over Multiple Companies, Multiple Years and Databases.
- Ad-hoc reporting using the Report Wizard.
- Scheduling, Report Calculation, Distribution and E-mail.
- **F9** does all of this through a dynamic link to the General Ledger, ensuring that all numbers are timely, consistent, and complete. You will never have to manually create and customize your spreadsheets again. With a few simple steps you will be able to create the reports you need quickly and easily. You can manipulate your reports and refresh simply by pressing the **F9** key on your keyboard.
- **F9** solutions maximize accounting resources, enhance productivity, and deliver in-depth flexible reporting for improved profitability. Out-of-the-box queries and reports get your personnel up-and-running quickly.

DPROCLOUD – CLOUD HOSTING FOR DATA PRO CUSTOMERS

- With **DPROCloud**, you get your own **"dedicated private cloud server"** where only your firm is hosted on a special dedicated Windows server just for you! No other companies, or users, are shared on the same server! Therefore, when you look at it, is it not worth the additional **$150** per month and **$21** per user, per month to:
- Not have to keep purchasing a new dedicated **Windows Server** regularly and keep it maintained by a separate IT person or third-party company?
- Having access to your dedicated Cloud Server from anywhere in the world **24/7**?
- Know that every hour, four hours and nightly your Accounting Software programs, Security Data Files and Accounting Data Files are automatically **"backed up"** so you can never lose your data?
- Have all of the latest Data Pro Accounting Software **"updates"** applied automatically every month?
- Have the developers of your primary software application **(Data Pro Accounting Software)** configure and manage your accounting software on demand? That includes adding new users and replacing old users since we become your new **System Administrator (SYSADM)**.
- Have peace of mind knowing that you can also make your own **"personal"** backups of your accounting programs and data files to your own local PC or Server *(daily, weekly and/or monthly)* in addition to the automatic backups made by the Cloud Server?
- Have a secure **"outward facing" SSL Security Certificate** in place so that only your desired users can gain access to the options and data you choose to make available?
- Have the latest Windows updates applied to your server at all times?
- Be able to deploy integrated third-party applications, such as **F9 Financial Report Writer** for Excel, on your dedicated Cloud Server?
- Access your data on the Cloud using whatever device you prefer including Tablets, PCs, iPads, Smartphones and much more, if you have **DP/DashBoard/CRM** installed.

EVM / CHIP CARD FOR CREDIT CARD PROCESSING

Version 7.63 now represents the **ONLY** product release from Data Pro to address the current mandates for software developers for new **EMV** or **"Chip Card"** requirements. This affects only those clients who accept credit cards with Chip Cards at the **"Point of Sale."** Credit card orders processed for customer orders over the phone, fax or over the web are not affected.

If you want to take advantage of **Apple Pay, Samsung Pay, Google Pay** and accept chip card readers, you will need to upgrade to **Version 7.63** and switch your Merchant processor to **Payment Innovators**.

You will have to have the new **"advanced"** version of the **DP/CHARGE PAYMENT SERVER (Part #272)** to support these new **"chip card"** enabled devices that can be used virtually anywhere over your network. All that is needed is an IP address to communicate to the device and your PC. This offers tremendous flexibility to our clients. Plus, they also offer terminals that have portability that are idea for sales people and technicians that need to captures point of sale transactions in the field.

Regardless of whom you are currently processing with, unless you have a **Merchant ID** from **Payment Innovators**, integrated credit card processing won't work without Data Pro's **Infinity POWER (Version 7.63)** and the **DP/CHARGE Advanced Payment Server** software **(Part #272)**. It is also required to deploy the **"DP/PAYMENT"** feature within the **DP/DashBoard/CRM** system.

Please do not confuse **"Payment Processors"** with your favorite local bank! If you are used to banking with **Chase, Wells Fargo, Bank of America, Truist, Regions** or any number of financial institutions across the country, you will continue to be able to do so. They may **"represent"** that they perform card processing services, but they don't provide credit card processing services that are fully integrated through your accounting software system! Credit Card Processors handle your credit authorizations and move your funds to your bank once a transaction has been processed.

It doesn't matter whether this is done through a stand-alone terminal or a fully integrated accounting software system, such as **Data Pro Accounting Software**. The organization that automatically deposits those funds into your company's account is a firm like **"Payment Innovators."**

Feel free to contact **Glenn Witt** with **Payment Innovators** directly at **800-310-3880** or e-mail him at **glenn.witt@paymentinnovators.com** with any questions about the latest **EMV** terminals *(Chip Card Readers)* and hardware or to get the latest rate quotes for your firm.

OpenEdge/Global Payments is no longer a supported Merchant Provider.