

## Release Notes

The most up-to-date compatibility information is on the [Product Compatibility Info](#) link at [www.softtrak.com](http://www.softtrak.com).



### Adagio

Crystal Reports® 8.5 for Adagio  
DataCare 8.0A, 8.1A  
GridView 6.8A - 8.1A  
Inventory 8.0A - 8.1A  
Invoices 8.0A, 8.1A only (note 2)  
Lanpak 9.0A (note 1)  
MultiCurrency 8.0C, 8.1A  
OLEDB 6.8A – 8.1A

OrderEntry 6.8A – 8.1A (note 4)  
Receivables 8.0A – 8.1A (required, note 3)

### Other Products

MS Office 97 – 2003, 2007  
MS Windows 2000, XP, Vista

### Enhancements and revisions in Adagio SalesCQ 8.1A (2008.03.14)

- ◆ Compatible with Windows® Vista™.
- ◆ Compatible with Adagio Lanpak 9.0A. Upgrades to all Adagio modules require the Lanpak to be the currently shipping version at the time of the release of the new version.
- ◆ Contents of disabled fields are shown in blue rather than dimmed gray. This may be easier to read on some monitors at higher resolutions.
- ◆ Adagio download files, installs, workstation installs, all workstation install (\\softtrak\\allwkst\\allwkst.exe), programs and the Adagio Check System utility (chksys.exe) are now signed with a digital certificate using VeriSign to allow you to verify the Publisher is Softtrak Systems Inc.
- ◆ Vista does not support the old style Windows Help (.HLP files). All .HLP files were converted to compiled HTML help (.CHM files), which are supported by Vista.
- ◆ For security reasons Windows does not permit .CHM help files to be run from a network drive. This is true in XP as well as Vista. The .CHM files must be run from a local drive. Adagio 8.1A installs all .CHM help files to your local hard drive and loads them from there. The workstation install also copies .CHM files to the local drive.
- ◆ When switching window/task in Vista with Alt-Tab or the new Flip 3D (Windows-Tab) an image of the current Adagio screen is shown rather than just the icon of the Adagio program.
- ◆ You can now backup Adagio data in zip form to WebSafe, a web-based storage facility. WebSafe is a service which allows you to store your important information in a secure location that you can access from anywhere in the world. See [www.websafe.com](http://www.websafe.com) for details.
- ◆ The formatting of dates and text sent to Excel from Smart Finder results has been improved.
- ◆ Printer Setup button added to the print preview window. Allows you to select a different printer after previewing a report.
- ◆ The Smart Finder speed has been improved by a factor of 2 to 10 times when the database is on a network drive.
- ◆ Adagio Contacts now includes a complete quote management system for customers or prospects. To reflect this major addition the name of the product has been changed to Adagio SalesCQ. The "CQ" in the product name stands for "Contacts" and "Quotes".
- ◆ Create and manage quotes, sending them to Adagio OrderEntry when the quotation is accepted. Management reports remind you of quotes about to expire. Confidence levels and quote statuses assist in inventory planning. Analyze lost sales by reason. Keep quotation templates on file to speed data entry. Retrieve any order or invoice to generate a new quote for repeat business. Quotes can also be imported.
- ◆ Enter quotes while orders are being finalized with your customer. Quotes do not commit inventory, and there is no risk of accidentally shipping an incorrect or partial order. Quotes contain complete, customer specific pricing, and include all tax calculations for pricing confirmation.

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- ◆ Track quote revisions, and record notes and comments on a quote while the sales cycle is progressing. Purge expired quotes. Automatically purge prospect information when no quotes exist for the prospect. Import quotations from other systems.
- ◆ General reports added: Callback Codes, Customer Notes, Prospect Notes, and Scan List Notes.
- ◆ Analysis reports added: Customer List and Statistics, Prospect List and Statistics, and Scan List. The Scan List report allows you to report on what is left to do.
- ◆ Edit Customer now supports Adagio Invoices 8.0A on the Transactions tab. Unlike Edit Customer in other Adagio modules, in SalesCQ provides full drill-down to Adagio Invoices with screens, not just transaction grids.
- ◆ You can now have multiple scan lists per company, per user. The option for local Scan lists has been removed. Local Scan lists could not be accessed by GridView or Crystal Reports for Adagio, and were not included in backups. **See important information regarding local scan lists in the section 'Upgrading to this Version' below.**
- ◆ You can now email to prospects and customers from the Scan List.

## Enhancements and revisions in earlier versions of Adagio SalesCQ

- ◆ Initial release of SalesCQ.

## Installing

To install Adagio SalesCQ you need the serial number and install code from the Product Label that came with your Product CD or in the an email from Softrak Systems.

If you are installing an upgrade, you need the serial number and install code that came with your upgrade. A previous version of Adagio SalesCQ or **Adagio Contacts** should already be installed on your computer before installing the upgrade. If a previous version is not already installed, you can still install the upgrade. After entering the upgrade serial number and install code, you will also have to enter the serial number and install code from a previous version.

To install Adagio SalesCQ, insert the CD in the drive. If the install program does not start automatically, run ADAGIO.EXE from the root of the CD. Or, if Adagio SalesCQ was downloaded, run the program file you downloaded. Once the install program is running you can click the Help button for detailed instructions. If Adagio SalesCQ is installed on a network, you must also do a workstation install for each workstation running Adagio SalesCQ. Refer to the manual or "Installing on a network" in the Readme help for instructions.

NOTE 1: SalesCQ requires Adagio Lanpak 9.0A or higher. Adagio modules require the Lanpak to be the currently shipping version at the time of the release of the new version.

NOTE 2: SalesCQ only supports Invoices 8.0A and higher.

NOTE 3: SalesCQ requires Adagio Receivables.

NOTE 4 SalesCQ requires Adagio OrderEntry if quotes are used. SalesCQ works with OrderEntry used stand-alone with a price list (Adagio Inventory is not used).

## Upgrading to this Version

Local Scan Lists (file located on your station rather than on the server) are no longer supported. Local Scan Lists were originally provided for performance reasons but in practice they did not provide any measurable performance increase. Local scan lists did not support multiple company databases as you were limited to one scan list per station. Local Scan lists could not be accessed by GridView or Crystal Reports for Adagio, and were not included in backups. For these reasons they are no longer supported.

Local scan lists are not converted. Existing local Scan Lists should be completed or entries noted prior to installing and converting to SalesCQ. Scan Lists can be regenerated easily in SalesCQ, and with the added benefit of having multiple Scan Lists.

The 'Disabled text color' option has been removed from the company profile, options tab. This is consistent with other Adagio products. The color of the text will be the standard blue, regardless of what it was set to in Adagio Contacts.

Adagio SalesCQ 8.1A requires Adagio Lanpak to be version 9.0A or higher to run multiple users. Upgrades to all Adagio modules require the Lanpak to be the currently shipping version at the time of the release of the new version. Do not install the SalesCQ upgrade until you have upgraded your Lanpaks.

The sample data includes Adagio Ledger sample data for version 9.0A, which can only be opened with Adagio Ledger 9.0A.

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The Crystal Reports for Adagio table installed by Adagio Contracts has been changed from qrtACW80 to qrtCQ81A.. While existing custom reports will continue to work, all new reports should be created from the new table. The original table for Contacts is not installed. Therefore existing reports should eventually be changed to use the new table.

You cannot do a mail merge fax from the Scan List using MS Word on Vista. You can do mail merge faxes from XP machines. Vista users can email from the San List, which was not possible in Adagio Contracts.

## **Importing ContactMaster**

Adagio Contacts can read in a ContactMaster™ for ACCPAC® Plus™ database. ContactMaster for DOS 6.1D to 6.1E and ContactMaster for Windows 1.0B to 2.0A can be read. Contact Softrak Systems if you require other versions to be read in.

## **Importing QuoteMaster**

Adagio SalesCQ can import a QuoteMaster™ for ACCPAC Plus database from versions 6.0A, 6.1A and 6.6A. Contact Softrak Systems if you require other versions to be imported. The import from QuoteMaster picks up fields from the Adagio customer file that do not exist in ACCPAC Plus Accounts Receivable. For example, quotes are populated with the customer's email address rather than leaving it blank in the quote as quotes in QuoteMaster do not have this field.

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