Adagio® SalesCQ 8.1B (2011.03.18)
Release Notes

The most up-to-date compatibility information is on the **Product Compatibility Info** link at www.softrak.com.

Adagio

Crystal Reports® 8.5-B for Adagio	OrderEntry 6.8A – 8.1D
DataCare 8.1A	Receivables 8.0A – 9.0B (required)
GridView 6.8A - 9.0C	
Inventory 8.0A - 8.1C	**Other Products**
Invoices 8.0A - 9.0A	MS Office 2003, 2007
Lanpak 9.0B, 9.0C	MS Windows XP, Vista, 7
MultiCurrency 8.0C - 8.1B	
ODBC 9.0A	

Upgrade Complexity

From prior version: Easy ●

(Service Pack: Easy ●)

Enhancements and revisions in Adagio SalesCQ 8.1B (2011.03.18)

♦ Compatible with SalesAnalysis 9.0A. Previous versions will not open the database if SA 9.0A data is present.

♦ Compatible with Adagio Inventory 8.1C. In previous versions of SalesCQ adding a new item on the fly while entering quotes caused a data integrity error to be reported in Adagio Inventory.

♦ Added an Excel Direct button to the Scan List and Quote List grid screens.

♦ Added an option to sort transactions in ascending or descending order by date in the edit and view customer functions for Current or Historical transactions (but not for Both). In previous versions, transactions were always sorted ascending. Right-mouse click on the transactions grid to select the sort order.

♦ The customer notes grid in the customer edit and view functions can be sorted to display the most recent notes at the top by right-clicking on the grid and selecting 'Sort Descending'. The selection is remembered.

♦ The customer notes grid in the customer edit and view functions now remembers the 'Sort notes by' selection of User or Date/Time.

♦ In version 8.1B, when emailing, faxing or printing a Mail Merge from the Scan List, a customer/prospect note was not created and integrity errors in the notes files were created. The Data Integrity Check will detect and rebuild these errors.

♦ Specifications with a Type of 'Quote' rather than 'Any' did not show in Specification dropdown list when print quotes.

♦ The Ship To field in Enter Quotes did not accept lowercase codes if Receivables was 8.1A or lower.

♦ Email address fields in quote entry did not allow multiple addresses per field separated by a semi-colon.

♦ When you selected Historical transactions for Receivables on the Transactions tab in edit / view customer, loading the grid was noticeably slow across a network. In addition, if the Transactions tab was the last tab you visited in the customer, the next time you opened a customer it was noticeably slow.

Install Changes

♦ This version moves toward our goal of a more Windows 7 friendly environment for installation. If you are installing to a mapped network drive that is normally accessible, but you cannot see it during the install when attempting to select a drive or folder, you can now install by browsing to the correct folder using the Universal Naming Convention (UNC), for example \\myserver\accounting\. This avoids having to adjust the User Account Control settings, which requires you to restart your computer and temporarily grant Administrative privileges to the user if they are not an administrator.

♦ This version simplifies installation by removing any consideration of the location of the Report Tables Drive (RTD) by the install and program in virtually all cases. Therefore the install no longer prompts for the RTD.

♦ The install writes to the master install log file "AdagioMasterInstall.log" in the \softrak\system folder. An entry is written to this log when any full, upgrade or SP for any Adagio module (with a release date of March 2011 or later) is installed. It shows the version installed and the version being replaced, the name of the Windows user who did the install and the rights for that user. An entry is also written to the log when an updated version of the Adagio Data Source (ADS) is installed, showing the version installed and the

version being replaced. This log can be used to quickly determine the install history for all Adagio programs.

♦ When you select the 'Backup Files' option during an install, the replaced files are now saved in a subfolder named YYYYMMDD in the BACKUP folder, under the programs destination folder (rather than the BACKUP folder itself, where extensions need to be changed to .001, .002, etc. when there are multiple versions of the same file).

♦ The install includes an option allowing you to skip creating entries under Windows Start for cases where you will be manually creating an icon for the user to start Adagio and do not want them starting from Windows Start. During the install, uncheck the option 'Start Menu programs'. This avoids having to delete or change the Windows Start entry that would have been created.

♦ The install no longer checks the Opportunistic Locking setting (Oplocks) on the workstation.

♦ The Opportunistic Locking setting (Oplocks) on the workstation is no longer checked when the program is started.

♦ The System Status function in the Help menu (chksys.exe) no longer prompts you to disable Oplocks. It displays the current Oplocks setting and allows you to change it. The 'Check R/W Status', 'Check Specific Folder' function now supports UNC browse, whereas before you would have had to turn UAC off to use it.

♦ SetServerForAdagio and SetReportsTablesDrive utilities have been updated. The latter should virtually never be needed at an Adagio site once any Adagio module dated March 2011 or later has been installed.

Enhancements and revisions in earlier versions of Adagio SalesCQ

♦ Refer to the Readme help file for details of enhancements and revisions in earlier versions or [Historical Enhancements](#) under Products on Softrak's web site.

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 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.

Read the section 'Upgrading to this Version' below before installing an upgrade.

To install Adagio SalesCQ (or an upgrade), 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 View button to open the Readme file 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 only supports Invoices 8.0A and higher. If Invoices 9.0A is used, invoice and credit note transaction from Invoice history are shown on the Transactions tab in Edit/ View Customer but drill-down to history screens is not supported.

NOTE 2: SalesCQ requires Adagio Receivables.

NOTE 3 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 Version 8.1B   Upgrade Complexity: Easy ●

Note: If Adagio Receivables is 9.0A, the following modules (if used) must be at the version indicated, or higher, to be compatible with Adagio SalesCQ 8.1B.

Inventory   8.1A (2009.02.17) Service Pack
OrderEntry   8.1C

Do not install this upgrade until you are certain the upgrades required above have been released and you have them available to install. The upgrades to the other modules may be installed before or after installing the OrderEntry upgrade.

If Receivables 9.0A is used it must be version 9.0A (2009.05.11) or higher. If you have Receivables 9.0A (2009.03.31), you must install the Receivables Service Pack.

Adagio SalesCQ data must be converted for use with 8.1B but Adagio SalesCQ 8.1B remains downward compatible with earlier versions of Adagio Receivables. A conversion will take place even if SalesCQ is used with versions of Receivables previous to 9.0A.

The conversion of databases can be done in any order. It is recommended Receivables be converted before converting SalesCQ.

The Previously Opened database list is now saved by Adagio User rather than for all users. The first time an existing user or a new user logs into Adagio SalesCQ 8.1B they will be asked "Would you like your historical company access list set up?" Answer yes to have SalesCQ add all entries from the Previously Opened list from your prior version. It is no longer possible for all users to share the same Previously Opened list.

The Territory field increases from 2 to 6 characters in SalesCQ. The Territory is 6 characters regardless of the version of Receivables used.

If you have custom reports (CustomRP folder) or modified reports (ModRP folder) for Adagio SalesCQ that reference tables in Adagio Receivables and you are upgrading to AR 9.0A you will have to adjust or recreate these reports. See the Adagio Receivables Release Note or Readme help for details. GridView views for SalesCQ tables that reference AR tables will also require adjustment.

Old formats such as Lotus, Dbase and Clipper that are almost never used any more have been removed from import / export templates, leaving Excel, ASCII CSV (Delimited), ASCII Fixed Length and PSV Delimited. The old formats may be manually turned back on for sites that need them by editing \softrak\acwin\acwin.ini and adding section format lines as required:

    [Import/Export Formats]
    Lotus 123 (Version 1.0 - 2.x)=1
    Lotus 123 (Version 3.0 - 5.0)=1
    dBase III & IV=1
    FoxPro (all versions)=1
    Clipper (all versions)=1
    Symphony (Version 1.0,1.1)=1
    Quattro Pro (Version 1.0 - 6.0)=1

The Import Customers function has been removed. Customers must be imported using the import function in Receivables. Most fields previously found on the Contact tab in the customer in earlier versions can be imported to Receivables 9.0A Contacts/Shipto addresses.

Upgrading from Adagio Contacts 8.0A   Upgrade Complexity: Intermediate ■

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.

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.

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