

Adagio® SalesCQ 8.1C (2012.10.12)

Release Notes

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



Upgrade Complexity

From prior version: **Intermediate** ■

Adagio

Crystal Reports® 8.5-B for Adagio
DataCare 8.1A, 9.0A
ePrint 9.0A
GridView 8.0A - 9.0E
Inventory 8.0A - 8.1D
Invoices 8.0A - 9.0B
Lanpak 9.0D
MultiCurrency 8.1B
ODBC 9.0A

OrderEntry 8.0A – 8.1E
Receivables 8.0A – 9.0C (required)

Other Products

MS Office 2003, 2007, 2010
MS Windows XP, Vista, 7

Enhancements and revisions in Adagio SalesCQ 8.1C (2012.10.12)

- ◆ In Adagio SalesCQ 8.1C (2012.09.17), printing or previewing a quote containing item detail lines having a Price of zero resulted in a "Floating point division by zero" error. The problem did not affect your data.

Enhancements and revisions in Adagio SalesCQ 8.1C (2012.09.17)

The changes and improvements to Adagio SalesCQ with this release are significant. To make it easier to review the various changes that have been made, we have grouped them by function in this release note.

Quote Entry

- ◆ In Adagio SalesCQ 8.1C (2012.09.17), printing or previewing a quote containing item detail lines having a Price of zero resulted in a "Floating point division by zero" error. The problem did not affect your data and no further action is required after installing the Hot Fix.
- ◆ Added Salesperson, Sales Manager, Territory, Comment 1 and Comment 2 fields to the column editor in the Edit Quotes function.
- ◆ A 'Find Item' button has been added to the detail screen in the Edit Quotes function and the Item Inquiry functions. This allows you to look up items by Description.
- ◆ On the BillTo / ShipTo tab, the Alt-H key now moves to the Ship To field to allow you to quickly enter a Ship To address. Useful when you ship to an address one time only so it is not worth entering a permanent ShipTo Address.
- ◆ Ship-to addresses can now be added "on the fly" when entering quotes.
- ◆ A note is automatically added to the new customer when a prospect is turned into a customer. For example: "Customer AAA123 was created from prospect XYZ456." If the customer is created by transfer of a quote then those numbers are included. For example: "Customer AAA123 was created from prospect XYZ456 by transfer of quote 1234-A to order 5678".
- ◆ Spell check is now available on the Comment, Instruction and Text detail fields in quote entry.
- ◆ Creating an order in Adagio OrderEntry from a quote now updates OE Document styles and filters.
- ◆ When quotes are converted to orders the email information in the order is updated from the Invoicing tab in the customer.
- ◆ Supports the 'Active' flag in items in Adagio Inventory 8.1C and higher in the Edit Quote and Item Inquiry functions. Added 'Active records only' flag to the Column Editor on item grids and finders. When you add an inactive item to quote a warning is displayed.
- ◆ The Created By and Last Updated By User, Date and Time fields in the A/C O/E Quote Header table are now updated. These fields are accessible in GridView and Crystal Reports for Adagio. Note: These fields are not available on quote grids or finders.
- ◆ You can now multi-select on the quotes details grid, allowing you to select and delete multiple lines.

Quote Entry relating to cost and profit

- ◆ The Ext Cost and Ext Profit fields in the quote details are now calculated and populated when a quote is entered. In previous versions these fields existed in the table but were only used as temporary fields by reports and were always zero. A Margin field has

been added to the quote details as well. These fields are available for selection on the quote details grid and in GridView. Profit and Margin quote spec fields have been added.

- ◆ Ext Cost, Profit and Margin fields have been added to the quote Edit Detail screen. They are shown if 'Display cost information on quotes' is set in the Security Group or Quote Template.
- ◆ The Unit Cost field on the quote Edit Detail screen now always shows the cost stored with the quote detail, rather than the current cost from the item in inventory (based on the Display Cost in previous versions), which may be different if it has changed since the quote was originally entered. Therefore the Ext Cost field always equals the Unit Cost times the Ordered quantity.
- ◆ The Costing Type is now shown beside the Unit Cost and units on the Edit Detail screen.
- ◆ The 'Cost to display' field was removed from the Security Group and Quote Template. Instead, the field 'Cost to use' has been added to the Quotes tab in the Company Profile. This forces the cost in all quotes, and thus also Profit and Margin, to be the same for all users across the company. Note: the cost in SalesCQ is an estimated cost - the actual cost is not determined until Day End is run in OrderEntry.
- ◆ Added new option 'Cost used in costing' in the new 'Cost to use' field. If this option is selected, SalesCQ uses the costing method from the item, rather than using a specific costing method regardless of the costing method of the item.
- ◆ Added a Re-cost button to the quote Edit Detail and Edit Quote screens. This allows you to re-cost individual details or an entire quote to use the current cost of the item(s) in inventory. These buttons are shown if 'Display cost information on quotes' is set in the Security Group or Quote Template.

Edits / Inquiries

- ◆ Added the 'Active records only' option in the column editor for Prospect grids and finders.
- ◆ The Reason code Description field has been increased from 30 to 60 characters.
- ◆ The Callback code Description field has been increased from 30 to 60 characters.
- ◆ If Edit Customer is disabled for a Security Group, the Customer button now opens the Customer Inquiry. Edit Notes button has been added to the View Customer grid.
- ◆ If Edit Prospects is disabled, the Prospects button now opens the Prospect Inquiry.
- ◆ Edit Notes button has been added to the View Item dialog.

Scan

- ◆ The Mail Merge function and default letter template have been updated to include new fields in SalesCQ and new customer fields added in Receivables 9.0A.

Printing Quotes and the Spec Designer

- ◆ When the 'Use Customer Specification' option is used, the Specification field on the print dialog became disabled. Choosing this option now leaves the field active and you can pick any specification. This means that if there is no customer spec, there is a primary fallback spec before attempting to load the secondary fallback spec in the company profile.
- ◆ When printing quotes the Specification Option can now also be set to 'Use document specification'. This choice forces the document to print using the specification saved with the quote. This is useful if you want to reprint a quote with the same specification with which it was originally printed.
- ◆ When printing quotes with the Specification Option set to 'Use customer specification' or 'Use document specification' and the specification is blank in the customer or document, you can now select a specification to use on the print dialog screen. If you don't then the default specification in the Company Profile is used. In previous versions the Company Profile was the only fallback for a blank specification on the customer.
- ◆ Added Detail Tax Jurisdiction 1-5 to Section Type to support Environmental Levy on quotes.
- ◆ Added new quote designer spec codes for customer, including the new name field 2 appended to the customer name, and 2 additional address lines to handle addresses requiring many fields (city, state, country and zip/postal code):

C157, Name 1 + 2

C158, address 6 (formatted)

C159, address 7 (formatted)

C164, Address line 6 (compressed)

C165, Address line 7 (compressed)

- ◆ Added new spec codes to show the preferred method(s) for sending quotes for the customer. These fields can be used by

PrintBoss™:

C161, Send method print
C162, Send method fax
C163, Send method email

- ◆ Added spec C160, Report group, to allow printing this field on quotes.
- ◆ The dimension fields (W x L x H) for the item and for its packaged dimensions added in Inventory 8.1C can now be printed on quotes using the following spec codes:

D69, Packaged length,
D70, Packaged width
D71, Packaged height
D72, Item length
D73, Item width
D74, Item height

- ◆ Added new spec codes for the 15 Tax Levy fields from items in Inventory 8.1C or higher to print environmental or other levy amounts on invoices:

D81, Tax Levy 1 through D95, Tax Levy 15.

- ◆ Added new spec codes for Profit and Margin:

D75, Profit
D76, Margin
F37, Total profit
F38, Total margin

- ◆ Added new spec codes for quote header user, date and time fields:

H097, created by user
H098, created date
H099, created time
H100, last modified by user
H101, last modified date
H102, last modified time

General Enhancements

- ◆ Installs the AdagioPDF printer driver. All reports and printouts from Adagio can be printed to the AdagioPDF printer to create a PDF document in the data folder.
- ◆ Supports the features in Adagio ePrint. When ePrint is installed you can print reports to PDF files in configurable folders determined by the Report Type (General, Transaction or Audit). Fields can be embedded to establish the file and folder names (User, Session Date, System Date, Time). Click the ePrint button (red "EP" icon) on any report dialog to print the report to PDF. The Paperless Reports option forces all reports to be printed to PDF. Reports can be printed to PDF and attached to an email (MAPI) with a single button click.
- ◆ You can now have SalesCQ create a PDF archive of quotes you send to customers and prospects. The Company profile, Options tab, has the new option 'Archive PDF customer/prospect copy?'. If this option is turned on, when printing quotes, SalesCQ will create archive copies in the a folder called SOFTPDF under the data folder (not the Relative base folder, if it is set in Adagio ePrint). The PDF files are created regardless of whether you print to printer, file, PDF, fax, email, or screen (but not if you preview a quote). The filename for these PDFs includes the customer/prospect number, "AC", the quote number and quote revision. The conflict strategy for the archive document is overwrite.
- ◆ Report Favorites allow saving Reports with specific options chosen. Click the Favorite button (a star icon) on any report dialog to create a Favorite. Favorites for a report can be accessed from the report dialog in a drop-down field. Private Favorites are yellow, Public Favorites are blue. Added Favorite Reports and Print/Delete Favorites functions to the Reports menu. Multiple favorites can be defined for the same report. Favorites can be private to the Adagio user or public for use by all users.
- ◆ Report Sets allow the grouping of Report Favorites into a single print job that will run unattended. Report Sets may be printed to printer or PDF files. Report Sets may be launched from a command file or a scheduled Windows task by running tbwin.exe with the parameter /R followed by the Report Set (ex. /RMonthEnd). A progress dialog lists the reports in the Report Set, the printing status of each, the destination folder, filename and conflict strategy. A log is generated that records the printing status of each report in the

set. Use Report Sets to automate the printing of all your daily or month end reports.

- ◆ Added User Preferences under the File menu. It allows you to set certain options by user that were previously global, including options previously found under File | Options, Reports | Report Options and the Company Profile. Includes new options 'On Start-up', 'Alphabetically sorted field list' and 'Exclude Ranges'. The preferences can optionally be set for all users and preferences can be printed. If no individual user preferences have been set up for a user, all preferences originally set for the Adagio System Administrator, user SYS, will be used.
- ◆ You can now specify a desktop background color, image and/or text constant to display on the Adagio desktop. Use this feature to display your company logo. Use the text strings to make the company name prominent on the desktop. Any JPG or other graphic image can be centered or stretched to fit on the main program desktop. These settings are made on the Appearance tab in the User Preferences function.
- ◆ The option 'Auto-advance smart finder' has been added (in the User Preferences function). It controls whether the focus is on the previously found grid or on the search criteria field when the smart finder is opened. Select the option if you want focus to be on the next row in the grid, allowing you to press F6, Enter and march through the found list. Turn it off if you usually want to search by a new criteria each time the smart finder is invoked. In either case the position is advanced in the grid each time the finder is opened.
- ◆ The option 'Alphabetically sorted field list' has been added (in the User Preferences function). Turn this option on if you want field lists in the Column Editor and Filters fields sorted alphabetically.
- ◆ The option 'Remember report settings?' has been added (in the User Preferences function).
- ◆ The option 'Close report dialog after print?' has been added (in the User Preferences function). Turn this option on unless you frequently reprint reports for differing ranges or options.
- ◆ Column Editor settings are now saved by grid by user by database.
- ◆ Added the Excel Direct button to additional grids, including: Details tab in Edit Quotes, Quotes Inquiry, View IC Items, View IC Items with Sales and Costs, View OE Orders/Invoices/Credit Notes, and View OE History.
- ◆ Alt-X now selects the Excel Direct button on grids where it is available. In previous versions you had to use the mouse to select Excel Direct.
- ◆ New program icon and toolbar buttons provide a cleaner look and differentiate this new version visually. If you are installing an upgrade to 8.1C, to see the new icon you will need to edit the properties of any existing SalesCQ shortcuts, click the Change Icon button and select the new image.
- ◆ Added Prospect, Quotes and History Styles and Filters to grids and finders in SalesCQ.
- ◆ Customer Styles and Filters in Receivables 9.0B and higher are supported in customer grids and finders in SalesCQ.
- ◆ Item Styles and Filters in Inventory 8.1C and higher are supported in customer grids and finders in SalesCQ.
- ◆ Supports 'Active records only' option in the column editor for Items grids and finders.
- ◆ On the Open database dialog you can now use Alt-B to open the browse and Alt-F (for Favorites) to open the previously opened list. In previous versions you had to use the mouse to select the folder buttons.
- ◆ The vitalEsafe upload progress dialog has been improved and the progress bar now accurately shows the percentage. It is no longer necessary to install the vitalEsafe patch.
- ◆ The Adagio menu now includes the module from which it was selected to allow you to quickly open another instance of the same module.
- ◆ Most Access Violation (AV) errors are now recorded in an exception log text file. The file is located in the program folder: `\sofrak\acwin\acwin.error.log`.
- ◆ The System Status function can create a snapshot of detailed information about your Adagio installation and package it in a single zip file that can be sent to Softrak Technical Support or your Adagio dealer to assist them when answering questions or tracing problems.
- ◆ The Help | About screen has been redesigned and includes a link to a documentation page for the module that shows New Features, What's New video and manuals.
- ◆ The Not For Resale (NFR) version for Adagio dealers now allows future-dated Callbacks beyond the NFR expiry date.
- ◆ When SalesCQ is opened after installing an upgrade, a dialog is displayed with a link to a short video highlighting the new features. The dialog is displayed for each user until they tick 'Don't show this message again'. The video also be viewed anytime by visiting the Softrak website. Note: the dialog also appears when Adagio is installed at a new site.

- ◆ The Shade Color for reports found in the Report Options tab in User Preferences now uses the full color pallet rather than just 8 solid colors.
- ◆ Grids and finders now display translated filed values instead of the raw data values.
- ◆ The Notes window is now sizeable for customers, prospects and quotes.
- ◆ Link entries have been added in the quote tables to support GETEXTERNALDATA in GridView to link from Quote Detail to Quote Header.
- ◆ Adagio SalesCQ is now logging Access Violation errors in an exception log text file. The file is \sofrak\acwin\acwin.error.log.
- ◆ Installs a version of the Adagio Data Source (ADS) that allows the Data Integrity Check to display "Checking Index x of y" on files with multiple indexes so for large files you know it has to cycle through the records multiple times and which pass it is currently on. For example: " A/C Quote List Current 1234 of 45678 (Checking index 1 of 4)"
- ◆ Installs a version of the Adagio Data Source (ADS) that prevents 4105 type errors (e.g. "Error 4105 occurred when attempting to append record to <filename>."). A 4105 error can occur due to environment or resource locking problems when multiple users are writing to the same file. Preventing the 4105 error allows the Adagio application to continue to run, without data loss, when such problems occur. However, if there has been a problem that would previously have caused a 4105 error, the Data Integrity Check (DIC) will report an error. A rebuild in the DIC will repair the error and there should be no loss of data.
- ◆ Station Logs now indicate memory information for the station or Remote Desktop Services session in these variables:

Total Memory	- total Mbytes of physical memory
Available Memory	- free Mbytes of physical memory
Memory Load	- percent of memory in use.
- ◆ Station Logs now show the bitness of the application and the station OS in the variable "Environment".
- ◆ When an Adagio application is running it now prevents the station from going into sleep mode (which causes errors or causes the application to stop responding). It does this regardless of the power option settings on the station.

Problems Fixed

- ◆ When entering quotes, the test to display the warning "The unit price of \$xx.xx/unit is below the cost of \$xx.xx." is now calculated the same way as in OrderEntry.
- ◆ The Quote finder on the Find Quote dialog was sorted by customer instead of by quote number.
- ◆ If the option 'Order numbering' was on in the Company Profile in OrderEntry but the option 'Increment quote numbers' was off in the Company Profile in SalesCQ (which should be irrelevant), when a quote was transferred to OE, the Order field on the transfer dialog did not contain the word "AUTO" and you got the error "Please enter a valid order".
- ◆ When editing a quote, the Quote Number field was not in tab sequence if the 'Increment quote numbers' option was off.
- ◆ Posting a quote was slower when the 'Reverse order of quote list' option was on in the Company Profile. This was very noticeable at sites with a very large number of quotes in current.
- ◆ Although these fields were not used by SalesCQ in 8.1B, the City, State, and Country fields for the Billing and ShipTo addresses were blank in the Quote Header file when new quotes were created for customers with a formatted address. These fields are now populated during quote entry and the conversion from 8.1B to 8.1C populates them for existing quotes. These fields are now populated when importing quotes as well.
- ◆ If the option 'Increment quote numbers' was off in the Company Profile, when you created a quote from an OE document, you were not prompted for a quote number, resulting in quote number of zero or blank.
- ◆ With 'Increment quote numbers' off in the Company Profile, when you copied a quote and entered the new quote number manually, history was not checked for a duplicate quote.
- ◆ The short-cut to the Optional tab in quote entry has been changed from Alt-F to Alt-I to be the same as in OrderEntry.
- ◆ The Expected Ship Date on the header and detail did not support entering the minimum number of characters to change the date.
- ◆ Editing a quote that had already been printed did not reset the Printed status. Likewise, revising a printed quote did not reset the Printed status in the revised quote.
- ◆ SalesCQ now calculates markup price using the Standard Cost rather than the Average Cost. If the Standard Cost is zero then it uses the Most Recent Cost. Thus it now calculates the markup price the same way as Adagio OrderEntry.

- ◆ If the user's Security Group or the company profile disable the display of cost information on orders, the markup percentage or amount are no longer displayed on the Pricing screen, thus preventing the user from figuring out the cost of items.
- ◆ Transferring quotes to OE orders caused the error message "Document statistics will now be updated due to an inaccurate count of orders, invoices and credit notes. If this message reoccurs you should run a data integrity check." to be displayed in some cases by the 'Enter Orders/Invoices/Credit Notes' function when in fact there was no actual problem with the counts.
- ◆ Deleting quotes with the Delete Quotes function, moving quotes or when transferring quotes to OrderEntry, while other users were posting quotes or importing quotes, could result in a file integrity error (phase 1 type error) in the quote header or detail files. Sometime after this happened an error such as "Error 4105 occurred when attempting to append record to Quote Header" occurred when posting quotes if the original error was not rebuilt by the Data Integrity Check.
- ◆ Installs a version of the Adagio Data Source (ADS) that attempts to recover from a resourcing problem when posting quotes, by introducing a ½ second delay and retrying a record append before reporting an error back to the user. It should also improve the behavior if a 4102 error occurs, limiting data lost as compared to previous versions.
- ◆ If a 4102 error occurred when transferring a quote to an order a message saying "Order nnnn already exists" was also displayed, when in fact the order did not already exist. The quote was then deleted, even if you had not selected the option 'Delete original quote' during the transfer. The "already exists" message has been changed to say the order could not be created, and the quote is no longer deleted.
- ◆ Fixed a problem where transferring a quote in SalesCQ to an order in OrderEntry, or posting a document in OE after transferring from CQ, received the error message "4102 - Random file is corrupt".
- ◆ The quote spec code 'D20, Unit weight' did not respect the decimals set in properties.
- ◆ The C050, Current Balance quote spec code did not work.
- ◆ The Data Integrity Check did not detect or remove orphan quote lines in some cases.
- ◆ DataCare falsely reported an invalid salesperson on quotes for new salespersons added in Receivables 9.x.
- ◆ If a new item was added "on the fly" in SalesCQ while entering quotes, DataCare reported an error on the quote.
- ◆ If the number of detail lines on a quote did not match the count in the quote header, in some cases DataCare displayed an improperly formed message such as "%s has too few lines, found %d expecting %d". This prevented a DataCare job being run after hours from completing.
- ◆ When viewing Prospects and clicking the Next/Previous buttons, the quotes displayed on the Transactions tab did not change for the next/previous Prospect.
- ◆ When you tried to delete a customer who had notes, if the Prospects grid was open and you had edited a prospect with notes, you received a locking error and the customer could not be deleted until you first exited SalesCQ.
- ◆ Issues with the Customer and Prospect view functions when the Security Group disables editing were corrected.
- ◆ Problems were fixed with ranges by Territory in the Sort by fields on various reports.
- ◆ The Win/Loss Analysis and Profit Analysis reports did not save the Quote status properly.
- ◆ The Territory fields for the range on the Quote List report were 2 characters instead of 6 characters.
- ◆ The Customer List and Statistics, Prospect List and Statistics and Scan List reports printed the last session date from Receivables rather than SalesCQ at the top right.
- ◆ If the smart finder window for items was sized smaller than the width required to display the extra field when searching by 'In the range of', the Search, Excel and Print buttons were not shown until you sized the window and reopened it.
- ◆ The vertical scroll bar was cut off at the right on the item smart finder window on Vista and Windows 7 in some cases.
- ◆ The F1 key now works on all screens in the quote specification designer.
- ◆ The import and export of some Prospect fields, including Optional Fields, did not work.
- ◆ The Find did not work correctly for selecting a customer with a leading zero in the Name field, such as for a numbered company. As a result a quote could not be created for the customer.
- ◆ SalesCQ suppressed "Canada" in the Bill-to and Ship-to addresses if the Home Country in the Receivables Company Profile was "USA" and the 'Suppress home country on forms' option was selected. It also suppressed "USA" if the Home Country was "Canada".
- ◆ When a Callback range other than blank to zzzzzz was used in a Scan, customers/prospects outside the range of the Callback Dates were selected.

- ◆ If Edit Prospects is disabled for a Security Group, the View Prospects menu choice did not work.
- ◆ After adding a prospect/customer, the new record is now highlighted in the grid instead of the record above.
- ◆ Mail Merge did not work from the Customer List screen if the grid was sorted by Customer Name or by Phone #.
- ◆ The instance number did not show on the window title in SalesCQ 8.1B in some cases, for example "Adagio SalesCQ (2)".
- ◆ The finder on Email Cover finder in the email Queue was showing email covers from OrderEntry instead of SalesCQ.
- ◆ Location codes in Inventory can only be uppercase. SalesCQ now forces Location to uppercase in all functions.
- ◆ Category codes in Inventory can only be uppercase. SalesCQ now forces Category to uppercase in all functions.

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 download email sent to you by Softrak Systems.

If you are installing an upgrade, you need the serial number and install code that came with the upgrade download instruction email. A previous version of Adagio SalesCQ 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), 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.

SalesCQ requires Adagio Receivables.

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

Adagio SalesCQ 8.1C requires Adagio Lanpak (if used) to be version 9.0D or higher. **Do not install this version or an upgrade before you have installed Lanpak 9.0D if you require multiple users in Adagio SalesCQ.** If you have any prior version Lanpaks installed but no 9.0D Lanpaks the Adagio SalesCQ install will warn you.

Upgrading to Version 8.1C Upgrade Complexity: Intermediate ■

Note: The Edit Customer function now uses a Lanpak license. If another user is already in Receivables this would require Adagio Lanpak to be installed. The View Customer function does not use a license, nor does adding a new customer "on the fly" when entering quotes. SalesCQ does not include a function to edit items and View Item function does not use a license.

A minor database conversion is required. You can convert your database at any time. The program allows you to make a backup before proceeding with the conversion. The conversion from 8.1B should only take a few moments. Once your database has been converted, it must not be used with earlier versions.

You should perform a Data Integrity Check in your current version before installing the new version and converting your database. Any errors should be rebuilt or dealt with in your current version to ensure a successful conversion.

Version 8.1C uses new program icons. To see the new icon you will need to edit the properties of any existing SalesCQ shortcuts, click the Change Icon button and select the new image.

If you have Adagio ePrint, the message "Do you want to turn on Allow PDF printing for this dataset, and enable PDF Printing for all users?" will be displayed the first time you open a database. Answer Yes to save having to manually enable PDF Printing for each user in the User Preferences function.

GridView views originally created for earlier versions of SalesCQ should be adjusted to use the 'Adagio SalesCQ 8.1C' dictionary (@A81C) to ensure that the information displayed is correct. **Views used with GridView-RW MUST use current dictionaries to avoid the possibility of data corruption.**

Refer to the section 'Upgrading to 8.1C – converting custom views' below for further details.

Changes have been made in the way 8.1C calculates and displays cost (an estimate of the ultimate cost used by Day End when a quote is transferred. The field Display Cost no longer used. See cost related changes under New Features above. GridView views may

require adjustment where cost fields are used.

If Unit Cost was not correct or what you expected in existing databases the Extended Cost and Profit may not be what you want after the conversion. In this case use the Re-cost feature to update the Unit Cost from the current cost in C and re-calculate the Extended Cost and Profit figures.

Upgrading to Version 8.1C from Versions Prior to 8.1B

Upgrade Complexity: **Intermediate** ■

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

Inventory	8.1A (2009.02.17) Service Pack
OrderEntry	8.1C

Do not install this upgrade until you are certain you have the above upgrades available to install. The upgrades to the other modules may be installed before or after installing the SalesCQ 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 8.1C. The conversion of databases can be done in any order, however, if you are also converting from Receivables 8.1A or lower, 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 8.1C 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 Oopened 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 or higher, 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 Receivables tables will also require adjustment.

The Import Customers function is not available in SalesCQ if Receivables is 9.0A or higher. 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 9.0x Contacts/Shipto addresses.

Upgrading to 8.1C – converting custom views

GridView views originally created for earlier versions should be adjusted to use the 'Adagio SalesCQ 8.1C' dictionary (@A81C) to ensure that the information displayed is correct. **Views used with GridView-RW MUST use current dictionaries to avoid the possibility of data corruption.** GridView 9.0A (2008.11.06) or higher has the ability to convert existing views when the dictionary changes with the release of an upgrade version of an Adagio module.

GridView view files are located in the folder \softrak\acwin\views if they are launched from the Inquires menu in SalesCQ but may also be located in other folders.

-- end --