Adagio® SalesCQ 8.1C (2015.02.26)
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
DataCare 8.1A - 9.1A
ePrint 9.0A
GridView 8.1A - 9.2A
Inventory 8.1A - 8.1E
Invoices 8.1A - 9.1A
Lanpak 9.0D – 9.2A
MultiCurrency 8.1B, 9.2A
ODBC 9.0A, 9.1A

OrderEntry 8.1A – 8.1F
Receivables 8.1A – 9.1A (required)

Other Products
MS Office 2007, 2010, 2013
MS Windows Vista, 7, 8, 8.1

Upgrade Complexity
From prior version: Intermediate ■

Enhancements and revisions in Adagio SalesCQ 8.1C (2015.02.26)

♦ Compatible with future release of Adagio Payables 9.2A. Earlier versions of SalesCQ will not open if Payables 9.2A data is present.

♦ Supports shutdown by Adagio XConsole.

♦ When an item detail is imported for a quote the Default Picking Sequence was used instead of the Picking Sequence for the Location specified in the import file.

♦ When an OE order was created by transferring a quote, if the Picking Sequence for item details was for a Location, it reverted to the Picking Sequence for the item.

♦ You could not save a ShipTo address in a customer if OrderEntry and Inventory are not used.

♦ Bill To and Ship email addresses changed on a quote from the defaults in the customer were not retained when the quote was transferred to an order in OrderEntry.

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.

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 <u>before</u> 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 in 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 versions or higher.

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 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 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.

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