Adagio® SalesCQ 9.2A (2017.02.21)

Release Notes

Upgrade Complexity from 8.1C   **Intermediate** ■

Compatibility

Adagio

Console 9.2A
DataCare 9.2A
ePrint 9.2A
GridView 9.2A - 9.2B
Inventory 8.1A – 9.2A
Invoices 9.1A – 9.2A
Lanpak 9.2B
MultiCurrency 9.2B
ODBC 9.2A
OrderEntry 9.2A
Receivables 9.2A

Other

MS Office 2010, 2013, 2016,365
MS Windows 7 (SP1), 8, 8.1, 10
MS Server 2008R2 SP1 or higher
Crystal Reports® 2013, 2016
     (requires Adagio ODBC 9.2A)

Note

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

Enhancements in SalesCQ

- Adagio SalesCQ is now available on Adagio Cloud. Note: Mail merge is not supported on Adagio Cloud.

Quote Entry and Posting

- Adagio ePrint users can view a PDF of quotes from the Edit Quotes list.

- Adagio ePrint users can view Adagio OrderEntry and Adagio Invoices PDFs of invoices / credit notes from the item history inquiry grid on the Prices dialog for items while entering quotes.

- When a Prospect is transferred to become a Customer, and when a quote for a Prospect is transferred to an order in Adagio OrderEntry, all quotes in current and history are changed to be for the new customer.

- If you edit a quote and change the Location on the header, you are asked if you want to change the Location in all quote details. Likewise, if a quote is created from an OE order or by copying, and the customer number is changed or a quote is edited and the customer number is changed, if the new customer has a different Ship from Location the Location is changed on all quote details, not just on the quote header.

- Optional text fields in quote entry and Prospects now support validation and controls (Edit only, Combo box and Finder).

- Supports the Specific Due Date terms added previously in Adagio Receivables. Allows you set the due date to any date in the future.

- You can double-click on the Qty On Hand grid on the Edit Detail screen to select a Location to ship from for the item when entering a quote. Previously, to change the Location you had to enter or select it in the Location field.

- Added 'Permit transfer of quotes' option to Options in Security Groups to allow you to prevent users from transferring quotes to orders in OrderEntry.

- Improved options when copying quotes to make selection easier to understand.

- Added 'Created By' and 'Last Updated By' Date, Time and User stamp fields to quotes. They are available in grids and finders, custom reports and in GridView.

Edit and Inquiry functions

- For Adagio ePrint users, the Quote Inquiry supports viewing PDFs of open quotes.

- The Edit and View Customer functions in SalesCQ support customer changes in Receivables 9.2A. Edit and View Prospects has also been updated. RMA documents are shown in the transactions grid for OrderEntry when Adagio RMA is used.

- The View Item function in SalesCQ supports item changes in Adagio Inventory 9.2A, including showing 'Qty. on RMA' if Adagio RMA is used.

- For Adagio ePrint users, the Edit and View Customer functions in SalesCQ support viewing PDFs of invoices/credit notes from Adagio OrderEntry and Adagio Invoices, and open / history quotes from SalesCQ.

- For Adagio ePrint users, the Edit and View Prospect function supports viewing PDFs of open / history quotes from SalesCQ.

- For Adagio ePrint users, the Item Inquiry with Costs function in SalesCQ, Transaction History tab, supports viewing PDFs of invoices / credit notes from Adagio OrderEntry and Adagio Invoices, and open / history quotes from SalesCQ.

- The OrderEntry current and history inquiry functions in SalesCQ support customer changes in Adagio OrderEntry 9.2A.

- For Adagio ePrint users, the OrderEntry current and history inquiry functions in SalesCQ support viewing PDFs of invoices / credit notes from Adagio OrderEntry and Adagio Invoices.

Print Forms and Designer

- You can attach a PDF document (such as product literature) when emailing, faxing or printing quotes.

- Fields and objects on quote specifications can now have custom colors, with full control of hue, saturation and luminosity. Colors in the sample data specifications and templates in the designer have been updated accordingly.

- Added these new quote specification codes:
  H102, quote/revision number
  M18, Current user name
  D101, Qty on Hand (Item)
  D102, Qty on Hand (Loc)
  D103, Unit Discount (D50-D51)
  D104, Item Price List code
  D105, Item Pricing Percentage
  D106, Item number (unformatted)
  D107, Base unit price per selling unit of measure
  D108, Item Cost 1
  D109, Item Cost 2

- Added 'Export name code' field Report Options tab in the Company Profile. It defaults to %dno. Use this field define the filename used when printing quotes to a file.

- Added Preferred Send Method on the Quotes tab for customers and prospects. Printing quotes will select only those for customers and prospects having the same Preferred Send Method set in their record as the send method you use on the print dialog. The option is ignored when printing a single quote from the grid.

- Added %CMP code (Company Name) for use by Adagio ePrint for folder names.

Reports

- Adagio SalesCQ's standard reports are now created using Crystal Reports 2016, replacing the Crystal Reports 8.5 Print Engine (CRPE32.dll). Reports must be edited or created using Crystal Reports 2013 or higher and Adagio ODBC for access to the data files. Users will notice minor changes to some of the visual elements in the module and

a new Print Preview window. The size and position of the Print Preview window are now remembered between sessions by user, so the Workstation options controlling this function have been removed.

- Fields from tables that are not in the original standard report can now be added to modified reports. There are three restrictions: 1) tables can only be added to the main report, not sub-reports; 2) only tables from 9.2A dictionaries can be used; and 3) additional tables must have physical files in the data folder.

- Installs Adagio PrintTool (PT) 9.2A. PT allows you to print / preview custom reports without needing to run Crystal Reports itself or without placing the report on the Custom Reports menu in an Adagio module, and allows reports to be placed on the Windows desktop.

- A 'Report set' button has been added to the toolbar.

- Improved options when printing reports to make selection easier to understand.

General Features and Miscellaneous

- Supports Automation when Adagio Console is installed. Automation allows you to automate functions in Adagio modules and view, print or email the results from an automation log.

- You can now start other Adagio modules from toolbar buttons showing the icon for the module. This allows easy switching between Adagio modules.

- Adagio SalesCQ now logs user activity within the module, including login/out, menu choices, create/edit and print documents. Logs may be viewed with Adagio Console or Adagio GridView.

- Grids now display the total number of records, as well as a count of the displayed records when a Filter is active. Ignore Style Color button toggles grid between no color and Style colors or no color and banding (if it is enabled in User Preferences).

- Grids may be "banded" with a User Selectable color and banding frequency set under File | User Preferences. Filter Styles may be disabled and replaced with regular banding if desired.

- Filters can now be sorted by Priority.

- Added Filter criteria 'Before today' and 'After today' for Floating Date Ranges.

- Added several new SalesCQ specific Styles for use in Filters.

- Mail merge templates have been changed to use .dotx rather than .dot files.

- Supports Transport Layer Security (TLS) / Secure Socket Layer (SSL) for secure email servers when emailing documents. Added option 'Use TLS/SSL' added to Email Setup function.

- A Listing button was added on the Group Setup window and prints all options or enabled options only for a range of groups. An Entry Templates button in the Group is now used to set up templates rather than having tabs on the Group.

- The status bar at the bottom of the main window now shows activity of various steps when the program is starting up and the database is opening.

- The Column Editor screen can be sized. The size is remembered by module on the workstation.

- Updated splash screen with new Adagio logo and colors. Updated icon and toolbar button images.

- The Data Integrity Check (DIC) saves results for the last 9 previous runs in files ACWINERR01..09.dat (where .dat is your company data file extension). The current DIC information will always be in ACWINERR. If you do check/rebuild/check without closing the DIC function the results are appended to the same file.

- Adagio SalesCQ 9.2A now installs to the \Softrak\SalesCQ folder and the program name is SalesCQ.exe. Previous versions were installed in \Softrak\ACWin and had program name ACWin.exe.

- New export templates created for Excel format default the file extension to .XLXS rather than .XLS.

- Security Groups are now supported by the Copy Definitions function in Adagio Console.

- The Open Data screen can be sized horizontally to allow you to see the full data path.

- The email password for servers that require authentication is now encrypted in the file containing email settings for the 'Direct' email method.

- Adagio ePrint users can view a PDF of quotes and any attached documents from the Email Queue.

- Adagio ePrint users can attach additional PDFs and other types of documents to emails in the queue, such as Word or Excel. Attachments are shown in a tree view on the Edit Email Entry dialog. Right-click on the tree to add a document. Default folders for attachments can be specified on the Reports Options tab in the Company Profile. These folders are relative to the ePrint relative folder path (or to the data folder if ePrint is not installed).

- Added Excel Direct button to email queue.

- SalesCQ now renders dialogs properly on Ultra High Resolution displays when the font size is anything other than 100% of normal on Windows 8.1 or higher. All Adagio releases dated in September 2016 and later have this problem fixed. For releases prior to this date, the utility program SetScreenForAdagio.EXE is installed in the \Softrak\System folder to correct the problem.

- The Help | About function now has a Consultant tab showing the contact information for your Adagio consultant if they have enabled this option at your site.

- The F1 key now launches Help when no windows are open.

Problems Fixed

- When quote revisions are used, quote notes made on a revised quote were saved for the previous revision.

- Discount % fields on quotes printed with 2 decimals even when Decimal Places was set to 0 in the field properties in the specification editor.

- A false message indicating price is below cost was displayed when entering quote details for items where the pricing unit is different than the stocking unit, and the 'Display cost information on quotes' option was off.

- When entering a quote for a ShipTo Address that has no Tax Group, the Tax Status defaulted from the Customer instead of the ShipTo Address.

- An error occurred when you created a quote for a Prospect from an OE order.

- The Detail Type for lines entered in a quote was not remembered for user SYS.

- To skip the Salesperson field in an entry template, a default no longer needs to be selected.

- Fields on Email Cover Sheets, where the same field exists in customers, prospects and quotes, such as the Salesperson, are now loaded as expected. The name of the field from the quote has been changed to include the word "Quote" (e.g. Quote Salesperson). The Prospect Data section has been removed. Use the Customer Data section instead. The fields will be loaded from the Prospect if the quote is for a Prospect. Note: you may need to adjust your existing Cover Sheets.

- SalesCQ stopped responding when a quote was emailed 'Now' or 'Add to Queue' on stations running Windows 10 "Anniversary Update" (Feature update, version 1607, or later).

- When a range of quotes was emailed from the Print Quotes function, information on the email cover sheet from the first quote was used for all quotes.

- When emailing quotes Now for Prospects, some of the Name and Contact fields were blank in the email subject and cover sheet. A mail merge from the Customer and Prospect functions had the same problem.

- The report filename codes (eg. %USR) were not being saved in report favorites.

- Import Prospects now supports formatted addresses. Address fields can now be imported to their full length. Note: not all fields in Prospects can be imported, for example statistic fields.

- The 'Header Included?' option in the Import Quotes function should not have been there and has been removed.

- If you started SalesCQ 8.1C from a shortcut with all command line parameters to bypass the login screen, a registration warning message was displayed, when in fact the program was registered.

Enhancements and revisions in earlier versions

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 instruction email sent to you by Softrak Systems.

If you are installing an upgrade, you need the upgrade serial number and install code from the 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" sections 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 for detailed installation instructions

in the Readme help. If Adagio SalesCQ is installed on a network, you may also need to do a workstation install at each station running Adagio SalesCQ.

To determine if a workstation install is required, start Adagio SalesCQ at the workstation. The workstation install will be automatically started if required. Note: If you are updating multiple applications at the same time, it may be faster to run the All Workstation install to update all applications at once on the station. Refer to "Installing on a Network" in the Readme for instructions.

Adagio SalesCQ 9.2A **requires Adagio Lanpak (if used) to be version 9.2B** or higher.

Adagio SalesCQ 9.2A **requires Adagio MultiCurrency (if used) to be version 9.2B** or higher.

Adagio SalesCQ 9.2A **requires Adagio Receivables 9.2A or higher.**

Adagio SalesCQ 9.2A requires a minor database conversion from earlier versions. You should perform a Data Integrity Check in your current version of SalesCQ <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.

If you have custom reports and/or views for SalesCQ created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.2A. You should not install the upgrade or convert SalesCQ data until you have a plan in place to update any custom reports and views critical to your operation. See the sections below on converting reports and views for details.

Upgrading

Upgrading from 8.1C   **Upgrade Complexity:**   **Intermediate** ■

Adagio SalesCQ 9.2A requires a minor database conversion from 8.1C. You can convert your SalesCQ database at any time.

To start the conversion, open your current database for the first time with SalesCQ 9.2A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup before proceeding with the conversion if you have not already done so. The conversion should only take a few moments. After converting a database to 9.2A, it must not be used with earlier versions.

SalesCQ 9.2A is compatible with Receivables 9.2A; however, SalesCQ limits Customer name and address fields to 30 characters, although these fields are 40 characters in Receivables.

SalesCQ 9.2A now installs to the \Softrak\SalesCQ folder and the program name is SalesCQ.exe. Previous versions were installed in \Softrak\ACWin and had a program name of ACWin.exe. When an Adagio SalesCQ 9.2A upgrade is installed, it automatically uninstalls any prior version of Adagio SalesCQ.

The upgrade install cannot change any custom icons you may have created to launch SalesCQ and will display a "Problem with Shortcut" error if they are launched. You must change these icons manually to run SalesCQ from \Softrak\SalesCQ\SalesCQ.exe or create new ones.

Changes were made to Email Cover Sheets to correct problems. Where the same field exists in customers, prospects and quotes, such as the Salesperson, the name of the field from the

quote has been changed to include the word "Quote" (e.g. Quote Salesperson). The Prospect Data section has been removed. Use the Customer Data section instead. The fields will be loaded from the Prospect if the quote is for a Prospect. **Note: you must check your email covers and adjust them as needed.**

Adagio 9.2A uses the current version of the Crystal Reports runtime engine with Adagio ODBC drivers to view and print reports, replacing the Crystal Reports 8.5 Print Engine (CRPE32.dll). Adagio 9.2A installs Crystal Reports runtime and if not already installed on your machine, the Microsoft® .NET Framework. The Adagio install will automatically download these install packages from the internet as required. Adagio ODBC drivers are installed by version 9.2A applications – Adagio ODBC does not need to be installed to print reports.

While users are printing / previewing reports, the Active Users List function in Adagio shows the User Name in application "Adagio Reporting". The Active Users List in Adagio Console and the Currently Logged In List in Adagio xConsole show a grid row with App Prefix of "OD" (ODBC) for users printing / previewing reports. A Lanpak license is not used to print or preview reports.

Reports in Adagio SalesCQ have been converted for Crystal Reports 2016 and can be modified with Crystal Reports 2013 or 2016. Custom reports created with Crystal Reports 2013 or 2016 can be added to the Reports menu by placing them in \Softrak\SalesCQ\CustomReports. The Report Tables Drive settings and Crystal tables in the \QRASP folder are not used by version 9.2A modules.

The report viewer remembers the window size, position and zoom level. Therefore, the Print/Preview options, including Preview Zoom Factor and Preview Window State (Full screen / Partial screen) were removed from Workstation Options.

Adagio module buttons have been added to the toolbar for 9.2A. They will be enabled by default. The 'Adagio Toolbar' option in User Preferences on the General tab is used to configure the toolbar.

Converting GridView Views

A data dictionary change from 'Adagio SalesCQ 8.1C' (@A81C) to 'Adagio SalesCQ 9.2A' (@A92A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio SalesCQ should be recreated using tables from 'Adagio SalesCQ 9.2A'. GridView has the ability to convert existing views to a new table.

Note: The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by its reports. The table Descriptions for the module start with "A/C or AC" and ones for use by its reports do not. When creating new views, you must use the tables starting with "A/C or AC". GridView 9.2B and higher hides tables used by the reports so they cannot be used inadvertently. Tables starting with "AC" (no slash) are composite tables and can be used to create views.

GridView views created with the previous dictionary may continue to work without any change; however, it is recommended you convert all your views to use the new 'Adagio SalesCQ 9.2A' dictionary.

Views from your prior version located in \Softrak\ACWin\Views will be copied to the folder \Softrak\SalesCQ\Views.priorversion. Recreated views must be placed in

\Softrak\SalesCQ\Views. When you are certain the original views are no longer needed, you can delete the \Softrak\SalesCQ\Views.priorversion folder.

See the Tech-Tip and Show Me How video on converting GridView views on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php. You must scroll to the Tech-Tips.

You may find the Adagio Data Dictionary Exporter Tool useful for comparing tables in the Adagio SalesCQ 9.2A dictionary to previous versions using Excel. The exporter can be found under on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php.

Converting Modified and Custom Reports

If you have modified any of the standard reports installed by Adagio SalesCQ, you will have to redo those modifications for SalesCQ 9.2A. Modified reports are files with an .rpt extension that you copied from \Softrak\ACWin\StandardRP to \Softrak\ACWin\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version will be copied to the folder \Softrak\SalesCQ\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\SalesCQ\StandardReports to \Softrak\SalesCQ\ModifiedReports and remodified using Crystal Reports 2013 or 2016. Adagio ODBC must be installed to be able to do this. Or, your Adagio dealer or consultant can modify reports for you and deploy them at your site.

When you are certain the original modified reports are no longer needed, you can delete the \Softrak\SalesCQ\ModifiedReports.priorversion folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of SalesCQ will have to be converted or recreated. Your custom reports from your prior version will be copied to the folder \Softrak\SalesCQ\CustomReports.priorversion. Converted or recreated custom reports must be placed in \Softrak\SalesCQ\CustomReports.

A Report Convertor Utility is available from Softrak Systems for the purpose of converting Crystal Reports 7 and 8.5 reports that use the old Crystal Reports Print Engine (CRPE32.dll) to Crystal Reports 2013/2016 format, using the Adagio ODBC driver. Converted reports can be edited and new reports can be created using Crystal Reports 2013 or 2016. Adagio ODBC must be installed to be able to do this. **Only reports built using the most recent QRT*.QRW tables can be converted.**

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with Crystal Reports 7 and 8.5 but will also convert reports from 9.2A to future versions of Adagio.

See the Tech-Tip and Show Me How video on converting reports on Softrak's website at http://www.softrak.com/resources/technicaltips/technicaltips.php.

Softrak provides only limited support on the Report Convertor. We do not support new versions of Crystal Reports itself, except as support is related to assisting you to locate data in the Adagio tables. Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.2A reports use the same data dictionaries as the application, the Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio

SalesCQ 9.2A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2A modules. Standard reports in the modules and custom reports created with Crystal Reports 8.5 for Adagio use tables where the description ends with "(View)" in the DDE. The standard tables used by the module (and by GridView) do not. In Crystal Reports, the View table names end with "crview" (eg. a92aoqxcrview). Standard tables do not (eg. aa92aoqx). Use the "crview" tables for modified reports or when converting existing custom reports. When creating new reports, use the standard tables without "crview". Future versions of Adagio will begin to use the standard tables for reporting. You must create a shortcut and add the parameter /ODBC to include the "crview" tables in the export to Excel.

When you are certain the original reports are no longer needed, you can delete the \Softrak\SalesCQ\CustomReports.priorversion folder.

An updated version of Adagio PrintTool (PT) is installed in \Softrak\PrintTool. PT 9.2A prints custom reports created with Crystal Reports 2013 or 2016. It uses the Crystal Reports runtime engine. Adagio ODBC must be installed to create custom reports but is not required to print custom reports. Your Adagio dealer or consultant can create custom reports for you and deploy them at your site. Note: PT does not print reports created with Crystal Reports 8.5 for Adagio. Existing version 8.5 custom reports must be converted before they can be printed by 9.2A.

Upgrading from 8.1B or earlier
This Release Notes does not cover upgrading from 8.1B or earlier versions. If you are upgrading to 9.2A from these versions, **before installing the upgrade**, it is important to review this information in the 8.1C Release Notes on Softrak's website.