Adagio® SalesCQ 9.2B (2017.12.13)

Release Notes

Upgrade Complexity from 8.1C   **Easy** ●

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 9.3A
MultiCurrency 9.2B
ODBC 9.2A
OrderEntry 9.3A
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

- Compatible with and required by OrderEntry 9.3A. Note: SalesCQ 9.2B is not compatible with earlier versions of OrderEntry.

- Addresses on quotes can be formatted, including dedicated fields for City, State/Prov and Country.

- Supports unlimited Miscellaneous Charges and unlimited Ship Via codes in OrderEntry 9.3A.

- Notes on quotes can optionally be included when a quote is transferred to an order in OrderEntry. Quotes created from current or historical orders or invoices in OrderEntry can optionally include notes from those documents.

- Installs an updated version of the AdagioPDF driver. The updated driver name is AdagioV2PDF and will appear in Windows Control Panel, Devices and Printers. When installs are performed from a Remote Desktop Services connection to Microsoft Server 2016 or from a Windows 10 station, the security warning related to the AdagioPDF printer driver no longer appears.

New Features in Quote Designer

- Added new Company Profile specification codes:
    M19 Current Date
    M20 to M24 company address 1..5 (compressed)

    Note: M01 has been renamed from 'Date' to 'Sign on date'.

- Added new Customer Info specification code:
    C166, City, State/Province, ZIP/Postal (formatted)

- Added new Bill To specification codes to support formatted addresses:
    H104 address 6 (compressed)
    H105 address 7 (compressed)
    H106 customer name 2
    H107 customer name 1+2
    H108 to H114 address 1..7 (formatted)
    H115 City
    H116 State/Province
    H117 Country
    H118 City, State/Province, ZIP/Postal (formatted)

    Note: H043 zip/postal code (compressed) was renamed to:H043, address 5 (compressed).

- Added new Ship To specification codes to support formatted addresses:
    H119 ship-to address 6 (compressed)

H120 ship-to address 7 (compressed)
H121 ship-to customer name 2
H122 ship-to customer name 1+2
H123 to H129 ship-to address 1..7 (formatted)
H130 ship-to City
H131 ship-to State/Province
H132 ship-to Country
H133 ship-to City, State/Province, ZIP/Postal (formatted)

Note: H059 zip/postal code (compressed) was renamed to:H059, address 5 (compressed).

- Added 'Blank on zero' to Properties for quantity, amount and other numeric fields.

- OrderEntry 9.3A has unlimited Miscellaneous Charges and SalesCQ 9.3A can print them on quotes. Added new Footer specification code for unlimited Miscellaneous Charges in the Quote Totals section. Select the Miscellaneous Charge in the Subtotal field by clicking Properties for each F39 spec code used.

  F39 total by misc charge description

Note: Prior versions were limited to 10 Miscellaneous Charges. Totals for each of those 10 were printed using codes F07 to F12, and F17 to F20. These existing codes continue to work so that existing specifications continue to work without change. If you use more than 10 you will need to use F39.

Problems Fixed

- A time-stamped note could not be added when entering a brand new quote. You had to save the quote first and then edit it to add time-stamped notes.

- When a quote was transferred to an order, the Unit of Measure for the Unit Price was blank on the resulting order, if the 'Update Item information and pricing' option was enabled for the transfer.

- Corrected problems displaying quote notes when using Previous/Next buttons in the View Quotes function.

- After editing a customer with quotes on file, when you edited a different customer, the quotes for the first customer appeared in the grid on the Transactions tab in some cases.

- When viewing a customer in SalesCQ 9.2A, the Previous/Next buttons on the View Order screen for OrderEntry documents did not work.

- There was an error in the Import Quotes function for databases where OrderEntry data was not created with a version of OrderEntry prior to 9.2A.

- The Location field set as a default in a quote import template was not used for the quote if the customer had a default Ship-To code.

- The default filenames for import quote files now start with "AC" rather than "QT" to match SalesCQ data files.

- When running from a network drive, the .DOTX Word templates did not appear in the drop-down list for selection in Mail Merge.

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Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or Change Log under Documentation for this module 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 9.2B **requires Adagio OrderEntry (if used) to be version 9.3A** or higher. SalesCQ 9.2B is **NOT** downward compatible with earlier versions of OrderEntry. **If you use SalesCQ 9.2B, you MUST upgrade OrderEntry to 9.3A or higher.**

Adagio SalesCQ 9.2B **requires Adagio Lanpak (if used) to be version 9.3A** or higher.

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

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

Adagio SalesCQ 9.2B requires a database conversion from earlier versions. You should perform a Data Integrity Check (DIC) in your current version of SalesCQ 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. **If you use OrderEntry you should run the DIC in SalesCQ before upgrading and converting your OrderEntry to 9.3A.**

Upgrading

Upgrading from 9.2A   **Upgrade Complexity:**   **Easy ●**

If you use Adagio OrderEntry, it must be version 9.3A or higher.

Adagio SalesCQ 9.2B requires a database conversion from 9.2A. **If you use OrderEntry you must convert its database to 9.3A (or higher) before you can convert your SalesCQ database.**

Adagio SalesCQ 9.2B supports "formatted addresses" in quotes - it maintains separate fields for City, Province/State and Country; whereas in previous versions, this information was contained in free-formatted address lines. It will convert the information in address lines from previous versions to populate the City, Province/State and Country fields, at the same time removing this information from the address lines. Generally, you should only use formatted addresses if you are located in Canada or the USA, and if you format addresses in OrderEntry.

The conversion will ask you if you want to attempt to format your addresses according to conventions used. The conversion only formats addresses in quotes for Customers and Prospects in North America. It will populate the Country field for international vendors if it can, although the address will be left unformatted.

Existing quote specifications from versions prior to 9.2B will continue to work without requiring changes, regardless of whether you elected to format addresses. However, you may want to adjust your specifications to use the new formatted address fields.

SalesCQ 9.2B sends the Quote Number and Revision fields to new dedicated fields in the order in OrderEntry 9.3A. Therefore, the 'Copy quote number to' option on the Quotes tab in the Company Profile is no longer needed. However, it has been retained for 9.2B to allow any custom report or GridView view you may have to continue to work. You should make changes to use the new dedicated fields, as this option will not be supported in the next release of SalesCQ.

The sort options for OrderEntry active and historical documents have been removed from the Options tab in the Company Profile. The sort of active and historical OE documents in the OE inquiry functions in SalesCQ is controlled by settings in the OE Company Profile.

The naming of quote PDF files for Adagio ePrint users has changed to always use 3 characters for the Revision regardless of the actual number of characters (1 to 3). This is supported by Adagio ePrint and future release of Adagio DocStore and requires no action on your part unless you are reading or creating quote PDFs with a third-party program.

Upgrading

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

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 9.2B. 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.

Adagio SalesCQ 9.2B requires a database conversion from 8.1C. . **If you use OrderEntry you must convert its database to 9.3A (or higher) before you can convert your SalesCQ database.**

To start the conversion, open your current database for the first time with SalesCQ 9.2B. 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 9.2B, it must not be used with earlier versions.

SalesCQ 9.2B 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 9.2B 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.

The option 'Permit transfer of quotes' was added to Options in Security Groups. **Note: If you use Security Groups, you should check them to ensure this option is on for users who transfer quotes to orders in Adagio OrderEntry.**

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 and higher 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 and higher 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 9.2B. 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-9.2B' (@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-9.2B'. 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-9,2B' 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-9.2B 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 9.2B. 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 9.2B 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-9.2B dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2A-9.2B 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 and higher 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 9.2B from these versions, **before installing the upgrade**, it is important to review this information in the 8.1C Release Notes on Softrak's website.