



Compatibility

Adagio

Console 9.2A - 9.3A
DataCare 9.3A
ePrint 9.2A
DocStore 9.3A
GridView 9.2A - 9.3B
Inventory 9.2A - 9.3A
Lanpak 9.3B
MultiCurrency 9.2B
ODBC 9.2A
OrderEntry 9.3A
Receivables 9.3A

Other

MS Office 2010/13/16/19, 365
MS Windows 8, 8.1, 10, 11
MS Server 2012R2 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

New Features

- SalesCQ now integrates with Adagio DocStore. Attach PDFs to Quotes or Prospects directly or from import. View or Attach PDFs on documents from OrderEntry, customers from Receivables, and items from Inventory.
- Multiple Quotes can now be selected on the Enter Quotes grid to print or delete, for either consecutive or non-consecutive quote numbers.
- Item Optional fields are now available on quote details.
- The quote number length has been expanded to 12 characters, to match Order numbers in OrderEntry.
- Print functions for Quotes allow you to select and send/print to multiple Send Methods (Printer, PDF, Email, Fax) simultaneously. The Print, Email, ePrint and Fax buttons on print dialogs have been replaced with a single button called Send/Print. Allows you to quickly print and email a document in one operation.
- The Find button is now available to use when a Filter is active. Records can be found within the filtered results.

Enter Transactions

- The Contact field on the Quote Header tab is now 30 characters long (it was only 18 characters). It was also the incorrect length for Quote specifications and import functions. Entry into Entry Templates and BillTo / ShipTo Contact fields were also limited to 18 characters.
- There is a new option in the Company Profile to set a default order date for Quotes transferred to OrderEntry. On the Quotes tab, the option 'Default order date to' has 3 options: Today, Expected Close Date, or Quote Date. The default Date can be overridden when the Quote is transferred to OrderEntry.

Quotes copied to Open Quotes, will default the new Quote date to the session date. Quotes copied to Template or History Quotes will default to the original quote's dates. Quotes created from OrderEntry Orders or History also default to the session date. If the copy is done from the Quote List, the default Date can be overridden.

- Added a new Item Information inquiry on the Edit Detail screen. Use the 'i' button next to the Item number field to show detailed information about the item selected. The inquiry shows:

Price Levels for the base price list or Alternate Price List

Stock Quantity for the selected or for all Locations

Price History showing invoices for various periods, for the selected or all Customers

Alternate items (if any) showing the Qty on hand / Sales order / PO / RMA.

Highlighting an Alternate item will change the information reported in the other grids to be for that item.

- 'Ordered' quantity for Item details now defaults to 1.
- If IC is 93A, transaction entry supports barcodes.
- In Quote Entry, there is a new button for, 'Update Pricing'. Selecting 'Update Pricing' will do the same updates as the 'Update Item Information And Pricing' option in Copy Quotes.
- Added an option to automatically append string fields from the item to the Item Description when the item is added to an order. The Description field from the item is 40 characters long but the Description on a detail in SalesCQ allows for 75 characters. Added the option 'Auto-append to item Desc.' dropdown field to the Quotes tab in the Company Profile. You can select 1 of the Additional Information fields 1 to 4 to append. Trailing blanks are trimmed from the Item Description and one space is inserted prior to the append.
- The Round to Nearest pricing option introduced in Adagio Inventory 9.3A is now supported in SalesCQ quotes for items and alternate price list items.
- The Quotes List grid now supports the second customer name field. Smart Finder searches can also be performed using Customer Name 2 in the criteria.
- If the Company Profile is set to 'Respect customer Require PO?', and a customer is configured to require a PO number for orders, Enter Quotes and Import Quotes will show an error if no Reference value is included for the quote.

Company Profile

- A 15-character Company ID number has been added to the Company Profile. For form printing: M025, Company ID number, has been added.

Designer

There are many new specification codes with this upgrade to CQ9.3A. Please refer to the CQ\$AllSpec.sam (!ALL codes to March 2022) spec.

- In the Form Designer, added Blank on Zero (property on amount fields).
- New Specification codes have been added for customers and customer statistics:
 - C167, Payables use contact code
 - C168, Oldest unpaid invoice date
 - C169, Require PO
 - C170, Order confirmation email
 - C171, Miscellaneous customer
 - C172, Project code (incl. dividers)
 - C173, Project code (unformatted)
 - C174, Cell phone
 - C175, Toll free phone
- Specification codes that print information stored on the Item Master record have had the titles appended with 'IC' to indicate this, as compared to spec codes used for printing quote detail information.

- A new specification code D119 prints the Inventory Item Master Description, which could be different than the quote detail description.
- In the Designer, Properties for Amount fields has a new option for the Thousands separator: None.
- Formula spec codes X001 to X005 are now available to do arithmetic calculations with numeric spec codes, to determine and print amounts that don't have define codes but can be calculated from existing codes. Conditional calculations using an IF function can also be made, provided that the condition is based on a numeric field code.

Controls

- When a grid that supports the Grid Search feature has focus, a hint will appear at the left in the Status bar to indicate that the Ctrl-F keyboard shortcut can be used to open the search, and the Ctrl-Z shortcut for removing the last search level. When the mouse is used within the Grid search window to click an arrow button and change the column, the cursor will remain anchored on the clicked arrow to make it easier to move multiple columns over.
- It is easier to choose the correct field from tables with large numbers of fields in the Column Editor. You can now sort the list, restrict the list using the data type you are searching for (Text, Date, Amount and Value), and type in some text likely to identify the field. Use the Select the Type option on the Select Fields dialog to show fields of that type.
- Standard 93A feature for phone numbers to display as formatted on grids, if the Format Phone Number option is enabled in the Company Profile. Works for Edit Customers, Prospects and Scan Lists.

Import/Export

- Import and Export templates now have the same ability as the Column Editor to restrict the Available Field list to those of selected data types and/or contain specified characters. The Available field list can also be sorted alphabetically.
- Import/Export Prospects has been updated.
- DocStore integration now allows attaching a single PDF to each imported quote

Print Forms

- Installs a new version of the printer driver used to print documents and reports to PDF. The new driver name is AdagioV3PDF. This driver uses novaPDF version 10.
- Print Quotes now has an option, 'Reprint Quotes Already Printed'. Turn this option off if you want limit printing to quotes that have not been printed.
- Print dialogs for Quotes can be saved as Report Favorites and included in Report Sets.
- Print Quotes now has a 'No of Copies' options. Use this field to specify the Number of copies of the form that should be printed.
- Printing a group of quotes now allows attaching an additional PDF along with the quote form, typically used when emailing. This feature was already available when printing single forms from the Enter Quotes grid.

Automation

- Printing or emailing quotes can now be automated in conjunction with Adagio Console, when the Print Quotes process has a Favorite setting defined and used for the Automation Command.

- Those users who have access to the Maintain Automation Log feature can view the automation logs for any user.

Apply Styles

- Optional Field titles are now displayed in the Import and Export Field Selection lists, instead of the generic option field data ftype labels, to select the correct fields more easily.

Miscellaneous

- New Filter criteria for Floating Date Ranges of Last 365 Days and Last 730 days have been added.
- SalesCQ On-Premise and Hosted will launch x64 version of GV if found.
- The 64-bit version of Adagio GridView (if available) is launched from the Adagio menu and for custom Views added to the Inquiries menu. The 64-bit version makes use of more memory (if available), allowing for views on larger databases and it can be faster.
- The Reference field on the Quote Header has been expanded to 24 characters long, to match what is currently available in OrderEntry 9.3A.

Edit

- In Edit Styles, it is now possible to limit the list of Adagio Styles to those that are App specific and Generic. Make sure the program prefix (CQ or AC) is the first 2 characters of Style code description. If this option is selected, when you create a new filter, the Style codes available will be limited to match the application prefix.
- When a Filter is active on the Edit Prospects grid, the Find button is now still available to search within the filtered list of records.
- Data Integrity Check and Transferring Prospects to Customers now checks for invalid values in Control Account Sets, Billing Cycle, Terms and Salesperson fields on Prospects.

Transfer Quotes

- You can now multi-select quotes from the Edit Quotes grid and click the order button to transfer them all to new orders in OrderEntry. New orders will use the automatic next order number and the customer cannot be changed. Customers created from Prospects will have the same customer codes as the prospect codes. If any quotes cannot be transferred because of security or other restrictions, they will be skipped and others will continue to have orders created.
- A new company profile option allows selecting the Default Order Date for new OrderEntry orders. Choices are Today, Quote Date and Expected Close Date. The Transfer Quote screen now includes an Order Date field where you can see the default date and change it if desired.
- If OrderEntry is configured to not allow creating orders for customers On Hold, now quotes for these customers cannot be transferred to new orders.
- When a Quote is transferred to OrderEntry with a new Order date, if the Expected ship date is not blank, it will be recalculated based on the OrderEntry Company Profile Processing Options setting for Expected Shipdate spread.
- Optional fields may now be defined for Quote Details in addition to the Quote Header. When the optional field titles match what are defined for Adagio Inventory Items, adding items to quotes will use optional field values from the item records. When the optional field titles match what are defined for Adagio OrderEntry details, creating orders from

quotes, or quotes from orders, will transfer the optional field values to the new document.

User Preferences

- User preferences have been added to control the behavior of double clicking in a Dialog field. You can also choose to apply banding to those grids that do not display Styles and choose a date format to use in the Adagio Grid. Telephone numbers are now formatted in grids.
- New User Preference options have been added to give a quote print success confirmation message and to close the print quotes screen after completion. This matches what is available in Adagio OrderEntry.

Security

- A new Entry Template option has been added to disable editing the Unit Cost field though still allow displaying the value. Data conversion initially sets this value to True for the main entry template and all security groups

When the Entry Template option to Display cost information on quotes is disabled, this will now also hide the Unit Cost field when the item has the User Specified Costing method configured, in the same way as for items with other costing methods.

- A new security group option has been added to prevent users from editing the Credit Limit value on Prospect records.
- The Adagio Login dialog permits browsing to a UNC. The Create database button is hidden unless "/C" is included on the command line. New databases are created with the extension "ADB" or the extension used by existing modules in the selected Folder.

Quote Templates

- A new Entry Template option to Show I/C Item Price Grid has been added to assist with keyboard entry and overriding quote item unit prices. Tabbing or clicking into the Unit Price field will pop the pricing grid to display customer/quantity discounts and other sale prices.

Others

- When emailing quotes, the choice to send emails either Now or to the Queue is remembered for the next time.
- Added 'Outlook' option in Email Setup. This corrects a problem where you could not send email using the 'MAPI' setting or you had slow performance sending emails if you use Outlook and Windows 10 in some cases.
- Quote Detail grid rows now support Automatic and Manual font Styles from Inventory items. Other detail types may have font Styles applied as well.
- A "Backup" button has been added to the Adagio Toolbar. Backup Options select whether the button saves the module data, related data or the entire database and whether exclusive access is required for the backup to proceed. The backup now includes the Automation Batch Folder.

Backup options enable automatic or prompted backups prior to Period End and Year End Processing. You can choose the number of these backups that will be saved.

- When Adagio Console is integrated, a new Automation command is available to Refresh Scan Lists. The Scan command can be configured to refresh all scan lists for a specified user ID.

- Refresh Sample Data function has been added to the Help menu. It allows you to refresh single and multi-currency sample data to its original state at install time.
- Word Wrap is now supported for blocks of text copied and pasted in Quote Entry for the Item Detail Description Text.

Bugs Fixed

- Automating Import Quotes now works correctly.
- During Conversion, the Company Profile, Quotes tab option to 'Copy Quote Number To' has been disabled and removed from the Company Profile. The Quote and Revision number are transferred to the Quote No and Revision fields in the OrderEntry 93A Order Header.
- The window size and positions are now correctly remembered for quote entry and view order screens.
- Entering or Importing Quotes was not correctly calculating prices when Rounding methods were saved on Inventory items.
- The company profile option to remember prospect tab was removed as it didn't work correctly.
- When transferring Prospects to new Customers, the chosen customer code is now correctly validated against the customer number format in the Receivables company profile.
- The Last Maintenance Date on Prospects now correctly uses the System Date instead of the Sign-on Date when a change to a prospect record is saved.
- Creating a new prospect record with a formatted address required 4 additional tab key presses after the postal code to put the cursor into the next field Contact Name.
- Creating a new prospect properly uses the Default Invoicing Send Method values from the Receivables company profile.
- Viewing a quote detail within Prospect Inquiry and the Transactions tab previously gave an access violation error.
- Transferring a Prospect to a new Customer now correctly writes the Prospect code to the respective field on the customer record.
- More functions are now logged in the Application Log data file when using Edit Prospects, Edit Scan Lists and Enter Quotes.
- Viewing Prospects and the Transactions tab did not correctly display records after using the Previous or Next button to view a different Prospect.
- In some cases, Email Setup settings were saved to the wrong location, making it appear that they were not being saved at all. Changes made in the Email Setup within SalesCQ were being written to the OEWININI data file rather than the ACWININI data file.
- Copying a quote from either the Template or History list to a new Open Quote now defaults the quote number to AUTO, so that the next quote number from the company profile will be used. Previously, the new quote number defaulted to the value being copied.
- Viewing a quote for a customer on hold no longer displays the credit check screen, because viewing a quote cannot set the quote on hold status. Editing the quote will continue to display the credit check screen.

- If a Salesperson record is deleted in Receivables, quotes that refer to this record in either the Salesperson or Sales Manager fields no longer give data integrity errors.
- When Quote Revisions use alpha characters, typing a revision value for Quote Find or Copy now forces an uppercase character.
- When the Company Profile, Quotes option for 'Cost To Use' was set to Average and the Selling Unit did not match the Stocking Unit, the Unit Cost was incorrectly displayed for the Stocking Unit instead of being converted to the cost per Selling Unit.
- Tax was not calculated correctly when jurisdictions had a specific combination of Taxable and Include Tax Jurisdiction options enabled.
- Deleting the customer code from a quote no longer asks the question to create a new customer on the fly.
- If a customer is configured to require a PO number for orders, Import Quotes now gives a verification error if no Reference value is included for the quote in the import file or Template default.
- Importing Quotes now properly verifies invalid Optional text field values.
- Export and Import Prospects now correctly limit choosing Optional Fields from those defined in the Receivables Company Profile.
- The Import Prospects import template now has a Finder for the Territory field when selected on the Field Defaults tab.
- Importing with Field offset was trimming the import field on the right instead of the left.
- If there was a currency mismatch between the customer and tax group on an imported quote, and import was set to not Validate before Import, instead of skipping the quote, the items were included on a different quote. This has been fixed.
- Searching OrderEntry History by Item was extremely slow if the Customer Number range was not blank to ZZZZZZ (i.e. when searching for specific customers).
- When optional fields are not configured for OrderEntry transaction headers, viewing OE Historical orders did not display the Notes / Optional Fields tab. This has been fixed.
- When Quotes are transferred to OrderEntry, the Quote number and Quote Revision number are included in the information that may be displayed on the Order Log tab.
- Added a DIC check for orphaned extension records.
- Inventory item optional fields now display correctly on quotes when more than 4 optional fields are defined.
- Improved performance and corrected problems on the quotes, orders and history grids, including scrolling and clicking on rows, when Adagio DocStore is used and there are links to documents on the grids.
- If a quote specification was defined with a Spec Type of Quote, printing quotes using this specification gave an error that the spec type was invalid. The workaround was to set the specification type as Any. This error has been fixed.
- The Customer tab on the Entry Template has had default fields removed that would never be used because that information would always come from the Customer record, to prevent confusion about how new quote fields are populated.
- The Prospect List and Statistics report previously did not use the page break on the primary sort field when selected.

- Print Quote Notes in Note Format: Extended for Historical quotes was not working in some case.
- The Quote Listing report did not print the Billing Country field value for some formatted customer addresses. This has been fixed.
- The quote list report now prints all 6 characters of the Territory field when the value has all capital letters.
- When printing Report Sets using either AdagioV2PDF or AdagioV3PDF as the specific printer, instead of using PDF Document as the destination, the report log now stores the PDF file name and save location instead of simply 'Printed to AdagioV3PDF'.
- There are now separate security options for creating either new customers or prospects on the fly within quote entry.
- Users who do not have security rights to edit Quotes no longer have the ability to create quotes from OE Current or Historical Orders.
- Entering just the day to change a date value no longer gives an invalid date message with the Windows Short Date format include a dash character.
- Quotes for inactive or invalid items can no longer be transferred to OrderEntry.
- Transferring quotes to orders was previously not sending the Terms Description value.
- When OrderEntry company profile options 'Quantity shipped on orders' and 'Default shipped as ordered' are both enabled, transferring quotes to new orders will write the item quantity values to both the Qty Ordered and Qty Shipped fields.
- The security group option to 'Permit transfer of quotes' has been separated into two separate options for transferring either customer or prospect quotes. These are independent to the other security option for 'Permit transfer of prospects'.

Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or the [Change Log](#) under Product Documentation 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.

The All Workstation does not support Inventory 9.3A yet. Future releases of other Adagio modules will install a version that does support 9.3A.

Adagio SalesCQ 9.3A (2022.04.06) installs a new version of the SAP Crystal Reports™ runtime engine for .NET Framework (SP25) used to print/preview reports. **This will require a workstation install on all stations that run Adagio**, regardless of whether Adagio SalesCQ is run from a given station, unless another module that installs SP25 has already caused a workstation install for this reason. If a station does not run SalesCQ then untick the shortcuts and Start Menu options. Other modules with a release date after October 23, 2019 may or may not install SP25. Eventually, all modules will do so.

After installing SalesCQ (or any other module that installs Crystal SP25) **you must do a workstation install for SalesCQ** (or the other module) **on each workstation**, even if the station never runs SalesCQ (or the other module). When SalesCQ is run on a workstation for the first time it will trigger a workstation install. If other modules are started before the SalesCQ workstation install is done they will display an error and reports will not print. If a workstation install of other modules is needed on a station the SalesCQ workstation install should be done last.

When installing Adagio at a new site or to a new server, Adagio SalesCQ 9.3A should be installed last (any module that installs the new version of the Crystal Reports runtime engine (SP25) can be installed last instead). If after installing SalesCQ you install other modules with a release date older than the date of this SalesCQ release, the error "Failure to initialize the Adagio Reporting environment." will be displayed when you start the module. To correct this, run the System Status function from the Help menu of any module (that runs without error) or run \Softrak\System\chksys.exe. You need to have administrator rights on your station to do this. If User Account Control is enabled you will be prompted to allow the program CHKSYS.EXE to run and must do so. The following message will be displayed and you should proceed to update the files.

Reporting File Needs Updating! This utility has detected that the Softrak Reporting DLL [SoftrakSystems.Adagio.Reporting.dll] needs to be updated in one or more Adagio folders. Unless you have specific circumstances to delay this action, you should update the needed files now. Do you want to update the needed files?

You must do a workstation install for SalesCQ on the station as described above.

Adagio SalesCQ 9.3A installs a new version of the Adagio ODBC driver used to print reports. The new driver is AdagioODBCv3.dll. It is installed in the \Softrak\ODBCV2 folder. Reports printed by all Adagio modules, including all versions, will use this new driver. The prior version of the driver (AdagioODBCv2.dll) remains installed and will continue to be used by existing ODBC connections (for any DSN created with the module Adagio ODBC) without change. Installing Adagio module versions released prior to SalesCQ 9.3A will set the driver used back to AdagioODBCv2.dll. Reports from SalesCQ will continue to work.

Adagio SalesCQ 9.3A installs a new version of the printer driver used to print documents and reports to PDF for DocStore users. The new driver name is AdagioV3PDF. This driver uses novaPDF version 10.

NOTE: Modules that have not been updated to use AdagioV3PDF printer driver cannot print to that driver from the printer list. However, DocStore users will have no problem ePrinting reports to PDF or printing forms to PDF.

Adagio SalesCQ 9.3A **requires Adagio OrderEntry (if used) to be version 9.3A** or higher. SalesCQ 9.3A is **NOT** downward compatible with earlier versions of OrderEntry. **If you use SalesCQ 9.3A, you MUST upgrade OrderEntry to 9.3A or higher.**

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

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

Adagio SalesCQ 9.3A **requires Adagio Receivables 9.3A or higher.**

Adagio SalesCQ 9.3A 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.**

Adagio Receivables 9.3A is compliant with the Payment Card Industry Data Security Standard (PCI DSS). If you are upgrading to Adagio Receivables 9.3A, the conversion of the AR database will remove any credit card numbers from Prospects in SalesCQ. Credit card information can no longer be stored in Prospects. Any credit card numbers in quotes or quote history are also removed. This is the case even if you do not use the Adagio Payments add-on module for online credit card processing.

Upgrading

Upgrading from 9.2B

Upgrade Complexity:

Easy ●

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

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

SalesCQ 9.3A fully supports Adagio DocStore. When integrated with Adagio DocStore, you can Attach and/or View PDFs in the following places: Quotes, Edit Prospects, Edit Customer. Attachments will flow with transactions written to or retrieved from other Adagio applications that support DocStore. Printing quotes will create and attach an archived PDF copy of the spec form. Importing quotes or prospects support include a PDF attachment.

If you ePrint you can attach existing PDFs by running the ProcessSoftPDF function in the DocStore program. This will take existing PDFs and attach them to your current and historical quotations.

If you have the 9.3A version of Ledger, Payables, OrderEntry, PurchaseOrders or GridView, after installing SaleCQ 9.3A, a File Data Integrity error may be reported in the "Adagio

Document Storage” file by the Data Integrity Check (DIC) in any of the modules and DataCare. This error will not cause any problems. It can and should be rebuilt by the DIC in any of the modules or DataCare. After the rebuild, the error will no longer be reported by any module

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 9.2A-9.2B' (@A92A) to 'Adagio SalesCQ 9.3A' (@A93A) 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 9.3A'. GridView has the ability to convert existing views to a new table.

Note: The 9.3A 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 9.3A' 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

Modified and Custom reports created in Crystal Reports for Adagio SalesCQ, specifically those that report on the Quote functions, should be converted or recreated to use the new 'Adagio SalesCQ 9.3A' (@A93A) dictionary.

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with 9.2A to 9.3A and future versions of Adagio.

NOTE: See the Tech-Tip and Show Me How video on the Report Convertor and Speed Improvement Tips for Custom Reports on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>. You must scroll to the Tech-Tips.

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.

NOTE: Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.3A 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 9.3A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

For more detailed information about converting to 'Adagio SalesCQ 9.3A' (@A93A), refer to the Readme help topic Converting Modified and Custom Reports to 9.3A.

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.

