Softrak
PACKAGES OF INTELLIGENCE

Compatibility:

Accounts Receivable 6.1A, 6.5A	Quik History 6.5A
Adagio Inventory 6.8A	Quik Invoice Plus for DOS 6.5A, 6.7A
Adagio Lanpak 6.8A	Quik Reports 6.5A
Adagio Ledger 6.5A, 6.6A, 6.8A	Quik Reports for Windows 6.2A, 6.2B
Adagio Receivables 6.5A, 6.8A	Sales Analysis (AI) 6.1A
Client Receivables for Windows 6.5A	Sales Analysis (Softrak) 6.5A
General Ledger 6.1A, 6.5A, 7.0A	MS Windows 95, 98, NT, 2000
Inventory Control 6.1B, 6.5A	
Job Costing 6.1A, 6.5A	

Adagio® Invoices Release Notes   6.8A (20010516)

Enhancements and problems fixed in Adagio Invoices 6.8A (20010516)

♦ Adagio Invoices now uses the Adagio Data Source (ADS) to interface to the database rather than the Softline Database Interface (DBI) used in earlier versions of Adagio Invoices. ADS is faster than the DBI in many cases. Some functions in Adagio Invoices may be up to twice as fast using ADS.

♦ Adagio Invoices now uses Adagio Lanpaks to increase the number of licenses available to access the database in multi-user installations rather than the Softline Multi-User Packs (MUPs). The method of licensing used by Adagio Lanpak is different than the MUP. Refer to the Adagio Invoices or Adagio Lanpak Readme help file for details.

♦ Notes have been added to customers. For each customer, you can record unlimited additional comments in a memo field with word-wrap. You can also record unlimited date and time stamped notes by user for each customer. Spell checking with a customizable dictionary is provided for all notes. Notes can be viewed during batch entry and can be printed reports in Adagio Receivables. Note: this feature is only available if you are also running Adagio Receivables 6.8A or higher.

♦ A problem using the smart finder when searching historical invoices if you have invoices sorted by document number has been fixed.

♦ In some cases, the smart finder search condition was not saved on the persistent smart finder list. This has been corrected.

♦ In rare cases, you would receive an "illegal operation" or "access violation" error when starting Adagio Invoices. This has been corrected.

♦ In some cases, the paper orientation (portrait / landscape) set in the invoice specification was not overriding the Windows default for the printer. This has been corrected.

Enhancements and problems fixed in Adagio Invoices 6.7A (20010223)

♦ Grayscale bitmap logos did not print correctly on invoices and credit notes in version 6.7A (001214). This has been corrected.

♦ Memo fields did not print on invoices and credit notes in version 6.7A (001214). This has been corrected.

♦ Some rare and intermittent problems causing database errors and tax calculation problems when multiple documents were open have been corrected.

♦ In previous versions, an error could occur in some cases if a button was clicked a second time because it appeared that there was no response on the first click. Some, but not all, of these problems were fixed in version 6.7A (001214). These problems have now all been corrected.

Enhancements and problems fixed in Adagio Invoices 6.7A (001214)

♦ Adagio Invoices is now a 32-bit application.

♦ A Backup feature has been added to the File menu. It allows 3 options for backing up your data: 1) Adagio Invoices data only, 2) Adagio Invoices and related data (Adagio Receivable and Adagio Inventory), or 3) all data for the company. Backup files are saved in standard ZIP format.

♦ Menu level security has been added. It allows you to restrict users from accessing particular menu functions. In addition, you can use security to control other options by user, including preventing editing of printed batches, inserting lines in invoices and displaying of costs.

♦ A Salesperson file has been added to allow you to keep track of your sales people directly in Adagio Invoices. A salesperson listing report has also been added. Up to 5 different commission rates can be calculated (if Order Entry not used) and used for reporting.

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- An Adagio menu choice has been added to allow you to start other Adagio applications directly from within Adagio Invoices, without having to login (enter user ID, password and select database) to the application.

- The results list for the Smart Finder is now persistent. This allows you to select an item in the list, edit it, and then return to the list to choose another item, without having to redo the search. In addition, the results list remains persistent across windows in the application, allowing you to search on one screen and recall the results on another screen.

- The results list from the Smart Finder can now be printed. By using the column editor, you can control which fields appear on the print out, the order of the fields, the width of fields, and the column titles.

- All reports in Adagio Invoices have been extensively enhanced, and a Report Options function has been added. New report features include:
  a) optional footers containing name of user, print date and time (as opposed to the login date) and comment
  b) an optional comment can be entered in the report dialog and will appear in the footer
  c) shading with user-defined color has been added to headers, footers and sub-totals
  d) lines and hair-lines have been added to separate sections and transactions for improved readability
  e) date formats are now user-defined for the header/footer and detail sections
  f) time format is now user-defined
  g) an option to show selection parameters on only the first page or all pages
  h) an optional group tree at left of the report preview window allows you to drill down to find particular transactions on the report.

- Reports have been designed to use less paper. For example, smaller fonts are used where appropriate, detail headings are only repeated when necessary, and header and detail are placed side-by-side when possible.

- Batch reports include the option "Paging by batch number" to reset the page number to 1 on change of batch when printing two or more batches at the same time.

- The option "Page break on change of batch" has been added to start a new page after each batch when printing two or more batches at the same time.

- A "Listing" button has been added to the batches screen to allow you to select and print batches from the grid rather than having to use the Reports menu.

- Optional fields on the invoice header now print on the batch listing.

- The Invoice Designer now allows you to view each copy (page) of a multi-part invoice independently, to easily differentiate fields that appear only on one of the copies.

- New fields can now be printed on invoices and credit notes The computer date (the date the invoice was printed as opposed to the invoice date) (S01), the computer time (S02), the user's initials (S03) and the user's name (S04). The new codes are located in the section "Totals & SubTotals", "System Information".

- You can now place sub-totals by style code in the footer rather than sub-totaling by style code in the detail section and having to keep details sorted by style code to do so. The new spec codes are "Subtotal Style Code A" (E201) through "Subtotal Style Code Z" (E226), and are located in the section: "Totals & SubTotals", "Style code Subtotals".

- Fax dialing now handles local numbers requiring an area code but not the "1".

- Faxing invoices and credit notes from Adagio Invoices is now supported on Windows NT and Windows 2000.

- An option has been added to prevent the user from editing, copying, moving or deleting an invoice once it has been printed.

- Adagio Invoices now has a method for marking Adagio Inventory items as discontinued to prevent them from being added to an invoice. To mark an item discontinued, enter "XXXX" in the picking sequence.

- You can now insert invoices in the middle of a batch or archive batch using the "Insert" key. This allows you to keep invoices in archive batches in customer order when you need to add an invoice for a new customer.

- You can now calculate and view the aging for outstanding transactions when viewing or editing a customer.

- The customer balance is now shown on the Transactions screen when viewing or editing a customer.

- Next and Previous buttons have been added to the view history detail screen to allow you to jump to neighboring detail lines without having to close the detail window.

- A hint showing the path to the database has been added and is displayed when the mouse cursor is over the company name on the status bar.

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- Options to display text and raised buttons on the toolbar have been added.

- The selected line on grids now changes color from blue to gray when the grid does not have focus. This provides a better visual cue that the grid is not active (up / down arrow and Enter keys are not active), and that some other button or field has focus.

- Adding an item priced at $0.00 to an invoice caused the tax and total for the invoice to be incorrect in some cases. This has been corrected.

- The use of blanks as delimiters in the Inventory Control item number format is now supported.

- You are now protected from posting a batch when any invoice in the batch has been opened using the Invoice Search function.

- The Smart Finder now allows you to search on boolean fields (Yes/No). To search on a boolean, enter "1" for "Yes" and "0" for "No.

- All invoice and credit note specifications in the sample data include detail sections for all style codes in the sample data. This allows invoices to be printed containing items with any style code, without getting an error message.

- After creating a new user, the user could not log in until you edited the user record and reentered the password. This has been corrected.

- When the option "Include tax on transfer to Job Costing" in the company profile is on, and the invoice is not taxable, a $0.00 "Other Charge" was sent to the Job Costing billing batch. This has been corrected.

- For Retainage invoices, the Original Invoice field must now have a valid invoice number.

- You can no longer post a credit note with retainage unless an Original Invoice number has been entered to apply the credit note to.

- The retainage due date was not recalculated when the invoice date was changed. This has been corrected.

- In Edit Items, optional fields of type Unit, could not be saved with decimal places and were being rounded to 0 decimals. This has been corrected.

- The status of a "Printed" invoice is now changed back to "Open" when you add (but don't edit) a new line to an invoice, or edit any field on an existing invoice.

- The Item code and Description have been added to the window title in Edit Items so you can easily see which item you are editing when on the Options tab.

- The totals by customer tax status were incorrect on the Tax Summary report in some cases, if both the customer and item tax statuses were changed when entering an invoice. This has been corrected.

- In previous versions, an error could occur in some cases if a button was clicked a second time because it appeared that there was no response on the first click. This has been corrected.

- When a batch or invoice is restored from archive, the retainage date is now correctly updated when you select the option to revise date fields.

- A licensing conflict with Contact Master™ that occurred when Order Entry data was present has been corrected. In previous versions, you would receive an error message when starting Adagio Invoices if Contact Master was started first on any station.

Enhancements and problems fixed in earlier versions of Adagio Invoices

- Refer to the Readme help file for details of enhancements and problems fixed in earlier versions.

Installing

To install Adagio Invoices from the Adagio Product CD, you need the serial number and install code from the Product Label that came with your CD.

If you are installing an upgrade, you need the serial number and install code from the Upgrade Product Label that came with your upgrade CD. A previous version of Adagio Invoices 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 your previous version.

If you are installing a Program Temporary Fix (PTF), you do not need to enter a serial number or install code. However, a previous version of Adagio Invoices 6.7A must be installed before the PTF can be installed.

To install Adagio Invoices (or an upgrade), run ADAGIO.EXE from the root of the CD. Once the install program is running, you can click the Help button for detailed instructions. If Adagio Invoices is installed on a network, you must also do a workstation install for each workstation running Adagio Invoices. Refer to the manual or help for workstation install instructions.

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To install an Adagio Invoices PTF, run SETUP.EXE and follow the instructions on the screen. A workstation install is not required when installing the PTF.

If you are upgrading Adagio Invoices from version 6.7A or older, and you are using the Softline Multi-User Pack (MUP), it must be replaced by an Adagio Lanpak. . For a limited time, Softrak has an Investment Protection Plan in place to cover the required upgrade. Please contact your dealer or Softrak Systems for upgrade information. To avoid a reduction in the number of licenses available to run your applications, do not install the Adagio Invoices upgrade until you have received an Adagio Lanpak to replace your MUP. The method of licensing used by Adagio Lanpak is different than the MUP. Refer to the Adagio Invoices or Adagio Lanpak Readme help file for details.

Upgrading to this Version

A database conversion is not required to upgrade to this version. If you are upgrading from version 6.5A or older, changes to your existing invoice and credit note specifications may be required (see below). Notes: Adagio Invoices does not support multi-currency. This version of Adagio Invoices is not compatible with Accounts Receivable 7.0A. Adagio Invoices is no longer compatible with Windows 3.1x.

Converting Invoice and Credit Note Specifications from previous versions

Adagio Invoices 6.8A includes a new version of the Invoice Designer. In most cases invoices and credit notes will print correctly from existing specifications designed in earlier versions. However, we recommend specifications created in previous versions be converted before they are used in version 6.8A. To convert a specification, simply open it and save it in the designer. Minor adjustments may be required after the specification is converted, and we recommend you print test invoices and credit notes after installing Adagio Invoices 6.8A to ensure they are printing correctly.

In some cases if the Page Size in an invoice or credit note specification is set to 'Default', it may not print correctly in version 6.8A, depending on your printer settings in Windows. We recommend you change the setting to 'Letter 8 ½ x 11 in' (or other specific size as appropriate).

When specifications are converted, the Autosize property is automatically turned off due to the conversion. Thus the specification may need to be edited to turn Autosize back on for any field where it was on prior to the conversion. If in the old version you had Autosize turned off in the Properties | Formats dialog, there should not be a problem during conversion as most or all fields will not be using the Autosize feature.

Note: Specifications created with Adagio Invoices 6.8A cannot be used with earlier versions of Adagio Invoices.

Order Entry forms printing

The function to print Order Entry orders, invoices and credit notes is no longer supported in Adagio Invoices 6.8A. If you were using this function in an earlier version of Adagio Invoices and need to continue to do so, do not install version 6.8A. There is a work around for users of earlier versions to allow continued use of this function after 6.8A is installed. Please contact Softrak Systems Inc. for instructions prior to installing the upgrade.

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