



## Compatibility

### Adagio

BankRec 9.2A (180209)  
Console 9.1A - 9.2B  
DataCare 9.1A - 9.3A  
DocStore 9.3A  
ePrint 9.2A  
GridView 9.1A - 9.3B  
Inventory 9.2A (180512)  
JobCost 9.2A (180604)  
Lanpak 9.3A  
Ledger 9.1A - 9.3A  
MultiCurrency 9.2B  
ODBC 9.1A, 9.2A  
OrderEntry 9.3A (180410)  
Payments 9.3A  
Receivables 9.3A (required)  
SalesAnalysis 9.2A (180519)

### Other

MS Office 2010/13/16, 365  
MS Windows 7 (SP1), 8, 8.1, 10  
MS Server 2008R2 SP1 or higher  
Crystal Reports® 2013 - 2016  
(requires Adagio ODBC)

### Note

The most up-to-date compatibility information is on the Product Compatibility Info link at [www.softrak.com](http://www.softrak.com).

## Enhancements & Revisions

- Enhanced compatibility with future release of Adagio Inventory 9.3A. Document links for Adagio DocStore are sent to Inventory 9.3A. The item description from the invoice / credit note is sent to Inventory (in case you change it from the description in the Inventory item).
- Compatible with Adagio DocStore for future release of Adagio SalesAnalysis 9.3A. Document links are sent to SalesAnalysis.
- An 18-character Job-Phase-Category field has been added to import invoices.
- Posting invoices containing IC items with serial numbers and a quantity of zero prevents an error when importing the batch in Inventory.
- For Adagio Payments users, pre-authorized amounts were rounded up to the nearest dollar to avoid potential penny rounding issues when the invoice amount was captured. In some cases, this caused unnecessary credit/debit transactions to be processed and doubled amount of the credit limit used on the customer's credit card account in some cases. Authorized amounts are no longer rounded up to whole dollars if 0% is set as the 'Authorization overage %' in the Payment Processor in Receivables.

- In Invoices 9.3A (2018.06.23) or higher, if Receivables (2018.11.09) was installed and you did not have Adagio Ledger data in the dataset, after posting batches in Invoices, there were errors printing from the Print/Consolidate G/L Transactions function in Receivables.
- The Import Invoices Items function did not import optional fields for existing items when the 'Overwrite records?' option was used.
- When importing invoices in Invoices 9.3A (2018.11.20), Detail using I2 did not read info from the import file. I2 is now correctly reading detail info from the import file and the Unit price is updated in the Invoice Item detail only.
- In Invoices 9.3A (2018.11.20), the message "Unable to access QI Global" was received when posting a batch after editing batches. The posting could not be completed. This occurred if 'Increment' option on the Batch Entry tab in the Company Profile was not enabled.
- When using the 'Outlook' method for sending emails, attachments showed the full path and file name. This has been corrected so the email only shows the filename.

## 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 Invoices 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 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 a previous version.

### **Read the section 'Upgrading' sections below before installing an upgrade.**

To install Adagio Invoices 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 Invoices is installed on a network, you may also need to do a workstation install at each station running Adagio Invoices.

To determine if a workstation install is required, start Adagio Invoices 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.

**Invoices 9.3A requires Adagio Receivables to be version 9.3A** or higher. Receivables 9.3A requires several other modules to be at certain versions or have certain Service Packs installed. See Receivables the 9.3A Release Notes for details.

You should not install Invoices 9.3A until you are certain the required versions of other modules have been released and are available to you.

**Invoices 9.3A requires some Adagio modules to be at a certain version** or higher. See compatibility information below or the Adagio Compatibility Chart.

Invoices 9.3A requires Adagio Lanpak (if used) to be version 9.3A or higher.

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

Requires Ledger 9.2A or higher to use the new feature in Ledger 9.2A that allows separation of subledger batches on retrieval by Batch Number. Earlier versions may be used.

Requires these modules (if used) to be at these versions or higher:

BankRec 9.2A (2018.02.09)  
Inventory 9.2A (2018.05.12)  
JobCost 9.2A (2018.06.04)  
OrderEntry 9.3A (2018.04.10)  
SalesAnalysis 9.2A (2018.05.19)

If you are upgrading from a version earlier than 9.2A and have custom reports and/or views for Invoices created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.3A. You should not install the upgrade or convert Invoices 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

Requires Receivables 9.3A. You must convert your Receivables data to 9.3A before converting Invoices data. The order of database conversions is significant. See the Receivables 9.3A Release Notes for details.

Invoices 9.3A cannot convert databases prior to version 9.0A (2010.05.03).

Adagio Receivables and Adagio Invoices 9.3A support on-line payment (credit card) processing (if Adagio Payments is installed). They are compliant with the Payment Card Industry Data Security Standard (PCI DSS). In order to achieve PCI compliance, if you have credit card numbers stored in batches or history, the Receivables conversion will remove them and replace with a field containing only the last 4 digits. This is the case even if you do not use Adagio Payments. See the Receivables 9.3A Release Notes for details.

**You should not install the upgrade or convert your data until you have a plan in place for a new process to handle credit cards.**

Adagio Invoices 9.3A does a minor database conversion from Invoices 9.2A.

After converting, you should immediately run a Data Integrity Check.

Existing invoice specifications from versions prior to 9.3A will continue to work without requiring changes.

Existing import and export templates are converted and will continue to work without adjustment. The credit card number field is removed and replaced with 'E128, cc number (last 4)'. New credit card related fields are available.

If you are using Adagio DocStore, it is imperative the DocStore database be included with all backups of your Invoices database. All backup zip files created by the File | Backup functions in Invoices include the DocStore database. In Adagio DataCare, the DocStore database is backed up by Jobs checking 'Adagio Common Files' with the 'Include in backup' option enabled. For a manual backup, include all data files beginning with "SD".

Drag and Drop of batches and batch entries to invoke copy/move is no longer available in Adagio Invoices in order to allow Drag and Drop of documents for Adagio DocStore. It has also been removed from History.

### Upgrading from 9.1A or earlier

**Upgrade Complexity:** Intermediate ■

These Release Notes do not cover upgrading from these versions. If you are upgrading to 9.3A from these versions, **before installing the upgrade**, it is very important to review this information in the 9.2A Release Notes on Softrak's website. You may also review the information in the Readme Help file. Adagio Invoices 9.3A does not convert databases older

than 9.0A (2010.05.03). If you have earlier versions, both Receivables and Invoices will have to be converted with intermediate versions. Contact your Adagio consultant.

