Adagio

Release Notes

Compatibility

Adagio

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

Other

MS Office 2010/13/16/19/21,
365
MS 8, 8.1, 10,11
MS Server 2012R2 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.

Enhancements & Revisions

- If the Company Profile option, 'Use computer date for invoice' is selected, Item Detail dates, Rate dates, Document and Due dates will use the System date instead of the Session Date when documents are imported.

- In the Specification Designer, the C2P Image button shows when the Adagio Payments add-on has not been installed.

- For a ClickToPay Customer, if there were multiple email addresses, posting failed with the message that the Customer Email field is not a valid e-mail address. Only the first email address will be retained for ClickToPay posting.

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

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

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

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

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

Requires Ledger 9.3B 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.

Adagio Invoices and Adagio Inventory 9.3A

Adagio Invoices 9.3A (2019.08.27) and higher can optionally create a retrieval batch (rather than an import batch) for Adagio Inventory 9.3A. Added option 'Create IC shipment for' to the Batch Entry tab in the Company Profile. It can be set to Import or Retrieve.

If you change to using Retrieve, you must do one last import in Inventory first if batches have been posted in Invoices and the resulting shipment batch was not yet imported.

When Inventory 9.3A is used, the shipment import batch file created by Invoices 9.3A (2019.03.18) and higher, uses a new expanded shipment import batch containing links for DocStore. **The new import batch filename is ICS93BTH**. The file for previous versions was ICSBATCH.

If batches have been posted in Invoices but not imported in a version of Inventory prior to 9.3A, you must import shipments once using the 'Shipments Legacy Default' import template in Inventory. All future imports should use the 'Shipments Default' template.

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.