Adagio® OrderEntry 8.0A (2005.04.19)
Release Notes

The most up-to-date compatibility information is on the **Product Compatibility Info** link at www.softrak.com.

Adagio
Crystal Reports® 8.5 for Adagio
GridView 6.8A – 8.0B
Inventory 6.8A, 6.8B
Lanpak 6.8A
Ledger 6.8A - 8.0C
MultiCurrency 8.0B
OLEDB 6.8A
Receivables 8.0A
SalesAnalysis 6.8B, 8.0A

Other Products
IMS SerialTracker 8.0
KOM Customer Number Change 8.0A
Purple Purchase Orders 1.1
Wellsprint PrintBoss 4.6 or newer
MS Office 97 - 2003
MS Windows 98-SE, NT, 2000, XP

Enhancements and revision in Adagio OrderEntry 8.0A (2005.04.19)….NEW ONE

♦ Adagio OrderEntry now supports multi-currency accounting. The Adagio MultiCurrency module is required and must be installed. You cannot open or create multi-currency Adagio OrderEntry databases without this module. Adagio MultiCurrency must be 8.0B or higher.

♦ Email invoices and other forms as a PDF attachment through MAPI compliant email clients (such as Outlook) or directly using SMTP. Email cover letters (in text format) may be entered, stored on file and selected by customer when emailing documents. Email cover can include fields from the document and customer. Emailed documents are logged in an email queue. Documents can be viewed and resent from the queue and the queue can be printed.

♦ New customer fields added in AR 8.0A are supported in the Enter Orders/Invoices/Credit Notes function:
- default 'Ship from location', 'Ship-to code', and 'FOB point' for OrderEntry and Adagio Invoices.
- default Ship to code
- default FOB point
- default Picking Slip spec
- default Payment Method. If Payment Method code matches one of the credit cards from the Customer, the credit card information is filled in on the Edit Payment Distribution when applying a payment to an invoice.

NOTE: When Receivables 8.0A or higher is used with OrderEntry 8.0A or higher, an Invoicing tab appears in the Edit and View Customer functions in both products.

♦ Customer Edit and View in OrderEntry support the many new fields and features found in customer in Adagio Receivables 8.0A and higher.

♦ Ship-To Addresses now include Email Address, Contact and Alert.

♦ Documents can now be faxed or emailed to the Ship-to address.

♦ Documents can include user defined optional fields of type string (3 fields), date (2), amount (2) and units (2). Optional fields are entered in the Company Profile. Optional fields default values are included in each document on the 'Optional fields' tab and can be changed when entering documents. If equivalent optional fields are used in customers (Adagio Receivables 8.0A and higher), the optional field values from the customer are included in the document instead.

♦ Each customer can be assigned a specification for Invoices, Order Confirmations and Credit Notes for each of emailed, faxed and printed document types. This allows customers in the same print run in OrderEntry to use different document formats.

♦ New spec codes have been added to allow you to print the new fields in documents and customers on Order Confirmations, Invoices, Credit Notes and Picking Slips. They are: C22-C40, E28-E47, S14-S15, and F38-F42. The OE$ALL.SAM specification includes all the new fields.

♦ Alerts entered for customers in Adagio Receivables will pop-up when a document is entered or edited (but not viewed in Inquiry or History) in OrderEntry.

♦ Alerts on Ship-to Address will pop-up during documents entry.

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♦ Find buttons added to Edit Special Prices and Edit Ship-to Addresses.

♦ The date and time are stored in the document when a document is printed, faxed or emailed. These fields are updated each time the document is re-printed. New spec codes have been added to allow these fields to be printed on documents.

♦ Option to sort documents in reverse order (recent/highest at the top) in the Enter Orders/Invoices/Credit Notes function. To use this option, set 'Reverse order of order list' on the System Defaults tab in the Company Profile.

♦ Added option 'Mark printed to screen as printed' to the Company Profile. Any document (order confirmation, invoice, picking slip, credit note) printed to screen (but not documents previewed or printed to paper from preview) will be considered printed.

♦ Sample data has been updated to demonstrate the new fields and features in this release.

♦ Multi-currency sample data has been added and is installed in \softrak\OEWin\mcsamdata. It includes data for Adagio OrderEntry, Adagio Receivables, Adagio Ledger, and Adagio MultiCurrency (currency codes, tables and exchange rates). When opening the OE multi-currency sample data for the first time the EZFile Directories dialog will appear. In the Currency Path field you must enter \softrak\OEWin\mcsamdata.

♦ The function 'Active Users' has been added to the Help menu. This function lists the users and the applications they have open for the company you have open.

♦ GridView has been added to the Adagio menu. For users to be permitted to create or edit views in GridView when launched from the Adagio menu you must edit the User and select the new option 'Edit GridView'.

♦ Users of Adagio GridView can add views to the Inquiry menu. To use this feature, create a Workspace in GridView containing one or more Views, copy the Workspace (.gvs) and Views (.gv) it uses to \softrak\oewin\views. GridView must be version 8.0A or higher.

♦ The document designer was updated. The menu bar, property dialogs, and Spec Codes list positioning have been improved.

♦ The F2 key now supports Windows standard behavior by editing the line selected on a grid (same as clicking the Edit button).

♦ The F6 key now opens the smart finder directly from any grid where you can do a find. You do not have to press F5 or the Find button first to invoke the smart finder.

♦ The Windows calculator can added to and launched from the toolbar by selecting 'Calculator button' in File | Options.

♦ The date of the last data integrity check is now displayed in the status bar.

♦ The Data Integrity Checker memo now shows the date the integrity check was run, the starting and ending time, the path and extension of the data and the user name.

♦ The Data Integrity Checker now writes full details of the integrity check into the log file (OEWINERR.xxx, where xxx is your company data extension).

♦ Added an extension to the Adagio menu to allow Adagio Developer Partners to add their products to the Adagio menu in Adagio OrderEntry.

♦ The source files for all reports in Adagio OrderEntry are installed in the StandardRP sub-directory rather in the program directory \Softrak\OEWin. You can modify the built-in reports using Crystal Reports for Adagio and place them in \Softrak\OEWin\ModRP. Adagio OrderEntry will print the modified version of the report from ModRP directory. This allows future installations of Adagio OrderEntry to update report files without over-writing custom versions of the report. Note: customizations to built-in reports should be redone on any updated report file to take advantage of revisions in the updated version.

♦ All grids now display quantities with no decimals unless the 'Handle Fractional Quantities' option is on.

♦ An Import / Export Items function has been added for stand-alone operation (Adagio Inventory not used).

♦ An Import / Export Alternate Items function has been added for stand-alone operation (Adagio Inventory not used).

♦ The import and export functions include many enhancements and revisions, including but not limited to the following items relating to import/export.

♦ Import functions write errors to a log file (OEIMPERR.xxx, where xxx is your company data extension). The file is located in the data directory. It is cleared at the beginning of each import. Errors are written to the log file regardless of whether 'Validate before importing' is turned on or not.

♦ Default fields in import templates now have finders and are validated when entering the template.

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- If you copy your database to another directory, the path to the import file in the default import template is automatically updated to the new path.

- If an import template had Bill-to and Ship-to fields, but there were no Bill-to or Ship-to lines in the import file, the first detail of the order was not imported. You can import a file without these lines even though they are listed in the template.

- Import failed if the last character of string field was a comma or if there is a comma in 2 consecutive fields in the import file.

- In import orders, the field "Hdr-Invoice Discount Amount" has been added and the field "Hdr-Discount %" now works.

- Instead of defaulting to 30 days, the 'Purge from Current after days' now defaults to 365 days when Adagio OrderEntry data is created.

- The Margin was incorrect on the Sales report in some cases.

- Spec code C40 has been added for the Customer Identity Number.

- If you have a Price List on the order header but you have no Miscellaneous Charges defined for that Price List, the default list of Miscellaneous Charges is displayed instead of an empty list.

- The Cost was added rather than subtracted for credit notes on the Sales report.

- Move to back and bring to front in the specification designer did not work correctly in some cases.

- Special Prices would not accept lower case customer numbers.

- Lost Sales figures were incorrect in some cases for partial shipments and if the backorder quantity was overridden.

- When editing an existing order previously put on hold, the 'On hold' box was not ticked on the Credit Check screen although the order was in fact on hold. Viewing the order from the Display Orders/Invoices/Credit Notes function did show that order on hold.

- The number of columns and column titles in the Historical Transactions tab in the Customer became mixed up in some cases.

- When 'Adagio Receivables batch type' was set to 'Direct, the Credit Note Audit list always showed the AR Batch field as "0" rather than the invoice batch created in AR.

- When you deleted an Alternate Price List code, you got a message saying the Alternate Price List items associated with that code would also be deleted. However, they were not deleted.

- When you deleted an item, you got a message saying the Alternate Price List items associated with that code would also be deleted. However, they were not deleted.

- If OE data was created with Adagio OE and IC data existed, it caused a problem for Purchase Orders for Adagio (POA) in some cases. This has been corrected, and when OE opens the database it corrects the problem in the database. A Service Pack for POA also corrected this problem.

- When you copied an order to a customer who is over their credit limit, no credit check warning screen appeared.

- If you edited an order that was partially shipped (some completed details), the completed details had the Quantity Originally Ordered set to 0 the next time the order was posted.

- The cost displayed in enter orders was incorrect if your purchase unit was different than your stocking unit. It should have displayed the cost recalculated to the stocking unit.

- If you copied or restored an invoice from History that had a Miscellaneous Charge, and you did not set the option 'Quantity shipped to quantity ordered' in the process, then edited the item detail, shipped the quantity and created an invoice, the Miscellaneous Charge line was not printed, although it was included in the invoice total.

- If you went to add a payment on an order and the terms provided for a discount, but you did not enter a Check Number (to accept the payment) and clicked OK (not Cancel), the payment discount was added to the invoice total, but not the amount of the payment itself. The amount due and payment discount on the invoice were incorrect in this case.

Enhancements and revisions in earlier versions of Adagio OrderEntry

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

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Installing

To install Adagio OrderEntry from the Adagio Product CD, you need the serial number and install code from the Product Label that came with the 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 OrderEntry 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 Service Pack, you do not need to enter a serial number or install code. However, a previous version of Adagio OrderEntry 8.0A must be installed before the Service Pack can be installed.

To install Adagio OrderEntry (or an upgrade), insert the CD in the drive. If the install program does not start automatically, run ADAGIO.EXE from the root of the CD. Once the install program is running, you can click the View button to open the Readme file for detailed instructions. If Adagio OrderEntry is installed on a network, you must also do a workstation install for each workstation running Adagio OrderEntry. Refer to "Installing on a network" in the Readme for instructions.

To install the Adagio OrderEntry Service Pack, run the Service Pack program and follow the instructions on the screen. After installing the Service Pack, a workstation install may be required at each station running Adagio OrderEntry. To determine if a workstation install is required, start Adagio OrderEntry 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.

Upgrading to this Version

Adagio Receivables 8.0A is required. Adagio OrderEntry 8.0A is not compatible with earlier versions of Adagio Receivables. You must open your AR database at least once with Adagio Receivables 8.0A before opening your OE data with Adagio OrderEntry 8.0A.

Adagio OrderEntry 8.0A requires Adagio MultiCurrency 8.0B or higher when used with a multi-currency database.

Adagio OrderEntry 8.0A requires Adagio Inventory 8.0A or higher when used with a multi-currency database.

When upgrading from previous versions of Adagio OrderEntry, if you had specific specifications selected in File | Options they must be must be reselected. To allow OrderEntry to run with multiple companies from the same workstation, the specific specifications are now stored by company rather than by workstation.

Adagio OrderEntry 8.0A converts import / export templates. Templates created by 8.0A cannot be used with earlier versions.

Sites running Adagio Multi-currency Lite wishing to convert to full multi-currency should contact their dealer or Softrak Systems for conversion information.

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