

Adagio® OrderEntry 8.1A (2007.08.26)

Release Notes

The most up-to-date compatibility information is on the [Product Compatibility Info](#) link at www.softtrak.com.



Adagio

Contacts 8.0A
Crystal Reports® 8.5 for Adagio
DataCare 8.0A, 8.1A
GridView 6.8A – 8.1A
Inventory 6.8A – 8.1A
Lanpak 8.1A
Ledger 6.8A - 8.1A
MultiCurrency 8.0B – 8.1A
OLEDB 6.8A – 8.1A

Receivables 8.0A – 8.1A
SalesAnalysis 6.8B – 8.1A

Other Products

MS Office 97 – 2003, 2007
MS Windows 2000, XP, Vista

Enhancements and revision in Adagio OrderEntry 8.0A (2007.08.26)

- ◆ Compatible with Windows® Vista™.
- ◆ Compatible with Adagio Lanpaks 8.1A. Lanpaks must be 8.1A for all Adagio 8.1A modules.
- ◆ Smart Finder can now search on multiple criteria.
- ◆ Contents of disabled fields are shown in blue rather than dimmed gray. This may be easier to read on some monitors at higher resolutions.
- ◆ Adagio download files, installs, workstation installs, all workstation install (\\softtrak\\allwkst\\allwkst.exe), programs and the Adagio Check System utility (chksys.exe) are now signed with a digital certificate using VeriSign to allow you to verify the Publisher is Softtrak Systems Inc.
- ◆ Vista does not support the old style Windows Help (.HLP files). All .HLP files were converted to compiled HTML help (.CHM files), which are supported by Vista.
- ◆ For security reasons Windows does not permit .CHM help files to be run from a network drive. This is true in XP as well as Vista. The .CHM files must be run from a local drive. Adagio 8.1A installs all .CHM help files to your local hard drive and loads them from there. The workstation install also copies .CHM files to the local drive.
- ◆ Fax document image files were created in earlier versions using the Softfax printer driver. This driver is not compatible with Vista. In 8.1A versions, faxing documents created with the Specification Designer (orders, invoices, etc.) creates a fax image file directly. The Softtrak Softfax driver is no longer used. However, the driver is installed for use by third-party products. Third-party products that use the driver should eventually be updated to support faxing on Vista. Until that time they will continue to be able to fax on XP and earlier versions of Windows. Note that to run the Adagio fax server (Fax/Email | Fax Queue) you must have a 'true' fax card (with an on-board fax chip) rather than a Win Fax modem (which emulates a chip in software).
- ◆ When switching window/task in Vista with Alt-Tab or the new Flip 3D (Windows-Tab) an image of the current Adagio screen is shown rather than just the icon of the Adagio program.
- ◆ You can now backup Adagio data in zip form to WebSafe, a web-based storage facility. WebSafe is a service which allows you to store your important information in a secure location that you can access from anywhere in the world. See www.websafe.com for details.
- ◆ The formatting of dates and text sent to Excel from Smart Finder results has been improved.
- ◆ Adagio OrderEntry is Adagio Ledger 9.0A ready. Fields required for future drill-down from Ledger to OrderEntry are included in the GL transaction batch and will be retrieved by Ledger 8.1A.

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- ◆ A 'User defined' field has been added to the G/L Description 'Send to' options in the Company Profile. This allows you to format the G/L Description field sent to the GL using a combination of fields from the order, invoice or credit note, and free form text. The following specification codes are supported.

Code	Description
%cst	Customer code
%cnm	Customer name
%ref	Reference
%dno	Document number
%des	Description
%cm1	Comment 1
%cm2	Comment 2
%odn	Original Document
%os1	Optional string 1
%os2	Optional string 2
%os3	Optional string 3
%od1	Optional date 1
%od2	Optional date 2
%oa1	Optional amount 1
%oa2	Optional amount 2
%ou1	Optional unit 1
%ou2	Optional unit 2
%cs1	Cust Opt string 1
%cs2	Cust Opt string 2
%cs3	Cust Opt string 3
%cd1	Cust Opt date 1
%cd2	Cust Opt date 2
%ca1	Cust Opt amount 1
%ca2	Cust Opt amount 2
%cu1	Cust Opt unit 1
%cu2	Cust Opt unit 2

- ◆ The specification designer toolbar now fits on one rather than 2 lines at most common screen resolutions.
- ◆ The designer allows you to open specifications by using the spec Title under File | Specification Options. This is the same list of titles displayed in OrderEntry when selecting a document to print, fax or email. Previously you could open the specification by its file name only.
- ◆ Many updates, improvements and corrections have been made to the on-line help and manual.
- ◆ Lines printed on invoices, order confirmations and credit notes can now be printed sorted by Location/Item, Location/Picking Sequence or Line Number. Previously lines were always printed sorted by Line Number. Printing of picking slips already had these sort options.
- ◆ Fields for Ship-to Code and Tax Status (on miscellaneous charge lines) have been added to order import.
- ◆ Letters in the Postal Code are now forced to upper case during entry.
- ◆ If the 'Prompt if over credit limit' option is off in the AR Company Profile the credit limit check is not performed in OE. If you do not use credit limits you do not need to enter a large credit limit figure in each customer to avoid this warning in OE.
- ◆ When printing a document from current or history to email or fax, a 'Customer' option has been added to the 'Send to' print options dialog box. Use this option in cases where the document was entered and posted before the email address or fax number were known, or if accidentally left blank in the document, or have changed since the document was originally posted. This avoids having to enter or change the email address or fax number in the queue before the document can be sent. For example, the 'Customer' option looks first at the 'Invoicing email' on the customer, and if that is blank the standard customer email address.
- ◆ Picking slips are no longer printed for standing orders.
- ◆ If the Standard Cost is zero for an item or alternate price list item the Most Recent Cost is used for the markup calculation of the calculated price.
- ◆ Starting OE is faster for the first user and even a little faster for addition users after that.
- ◆ If you used an entry template that skipped the Salesperson field but did not provide a default Salesperson, and the Salesperson field was left blank in the customer, the Salesperson was left blank in the document, preventing Day End from completing. The Data Integrity Check detects and rebuilds this by setting the blank Salesperson in the document to the first Salesperson on file. To change the Salesperson in a rebuilt document you must issue a credit note and re-invoice using the appropriate Salesperson.

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- ◆ Print Labels from the dialog (Orders or Invoices) shows the '# of labels' field, which can be edited. Printing and saying everything printed OK changes the value of the label count in the order or invoice. The number can be changed in the order by editing the previously posted order, however:
 - If the invoice has already been posted it is too late. Labels can be printed for the order but usually the shipping department works from invoices
 - Requires giving the shipping department ability to edit orders, which they don't want to allow.
- ◆ In the conversion of Softline Invoice/Order History transactions to Adagio OE history, the unit amount for Miscellaneous Charges was 100 times too big. The conversion has been corrected. Invoices reprinted from history for already converted data do not have a problem because the spec prints the extended amount, which was converted correctly. However, restoring from history will result in an incorrect amount for any Miscellaneous Charges.
- ◆ When commission was calculated based on the Salesperson rate, rather than the Category rate, the salesperson totals were not decremented when a credit note was posted. This has been corrected but previously day-ended credit notes will not get changed to show the correct commission. However, going forward commission will be correct.
- ◆ In Adagio OrderEntry 8.0A the Import Orders function did not allow negative Miscellaneous Charges.
- ◆ When the 'Remember form settings' option is on, the settings are now remembered without having to actually print a document. In previous versions the settings were not remembered if you selected a range that did not result in any documents being printed. This prevented you from remembering the desired default settings and in some cases led to documents being reprinted by mistake if the user did not carefully check the settings.
- ◆ The 'Reprint orders already printed' option always defaults to off when printing a range of documents. This helps prevent the accidental reprinting of documents, which in some cases could lead to accidental re-picking, invoicing and shipping of orders.
- ◆ Copying a customer did not trim leading zeros from the new customer number. Creating a new customer on the fly did not trim leading zeros either. Leading zeros are not allowed in customer numbers.
- ◆ Copying a single segment item number did not trim leading zeros from the new item number. Leading zeros are not allowed in item numbers.
- ◆ If the Order Mask/Template 'Skip Field' was selected and the default value was left 'blank' for the Location, the Location field was blank on order header, causing Day End to fail resulting in an integrity error.
- ◆ When the 'Misc. charges from main list' option was used, miscellaneous charge lines printed on the invoice even when the 'On Invoice' option was set to 'Total only' in the miscellaneous charge.
- ◆ Loading the list of specifications on the document print dialog was slow in some cases (over a network, with a large number of possible specs, where the specs contained images or logos of unnecessarily high resolution).
- ◆ The option 'Use base price list if not on alternate' is now supported when importing orders containing items that are not on the alternate price list for the customer.
- ◆ Added a the new spec code D70 'Item Pricing Percentage' to show the price list discount percentage rather than calculated discount percentage, which may show too much precision in some cases (for example: 24.9 or 25.1 instead of 25%). D70 can be used in lieu of D9. It will print if the discount is by percentage. It will not print if discount is by amount.
- ◆ The option 'Misc Charges from main list' is now supported when importing a miscellaneous charge, reading the miscellaneous charge from main list (with a blank price list code).
- ◆ Recurring charges can now be added to a customer when the customer is edited from within OrderEntry.
- ◆ You can no longer save the company profile if there are gaps (a blank line between 2 populated lines) in the tax status descriptions. Blank lines caused an error during day end, causing it not to complete and resulting in a corrupt database that could not be opened. Although blank lines can no longer occur and cause the problem, the Data Integrity Check now detects and repairs this situation for existing databases.
- ◆ Dayend only copied completed invoices and credit notes from current to history if they had also been printed.
- ◆ The Unit Price field in the grid on the Transactions tab, OE details, in the Edit Customer function, shows the correct amount with proper decimals for Miscellaneous Charges.
- ◆ When the Tax Tracking report was back dated, printed and cleared in a multi-currency database, instead of clearing the records printed all tax tracking records were cleared.
- ◆ Costing was not correct in some cases for items with residual cost (quantity on-hand was zero but cost was not zero).

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Enhancements and revisions in earlier versions of Adagio OrderEntry

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

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 8.1A 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 or higher 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 or higher before opening your OE data with Adagio OrderEntry 8.1A.**

Adagio OrderEntry 8.1A requires Adagio Inventory 8.0A or higher when used with a multi-currency database.

When upgrading from previous versions of Adagio OrderEntry (6.8B or earlier), 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 8.1A converts import / export templates. Templates created by 8.1A cannot be used with earlier versions.

Form specifications created or edited with Adagio OrderEntry 8.1A cannot be used with earlier versions.

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