

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 9.0A
Ledger 6.8A – 9.0A
MultiCurrency 8.0B – 8.1A
OLEDB 6.8A – 8.0A

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

Other Products

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

Enhancements and revisions in Adagio OrderEntry 8.1B (2008.03.26)

- ◆ New inquiries have been added into the OrderEntry History file to allow quick lookup of sales by customer / item or item customer. Display History allows inquiries by customer/item and by item/customer for a range of dates. Quantities, amounts and average unit price are displayed. Information can be sent to Excel using the ExcelDirect button. When entering an order, the Pricing button will optionally display the historical purchases of an item and its price to a customer.
- ◆ Text Blocks can be defined and added to orders as multiple comment or instruction lines. Note that Edit Text Blocks defaults to disabled in any existing Groups if you are using security.
- ◆ You can now create a Credit Note from an Invoice in history either from the History Invoices grid or when viewing a specific invoice. There is now little need to keep completed invoices in the Current file. Purging completed invoices from the Current file will improve the speed of Dayend Processing.
- ◆ An Item Entry template has been added to the Order Template and is also available in Groups. Use this template to control fields visited to improve entry speed or prevent users from changing certain fields such as Unit and Extended Prices.
- ◆ Adagio OrderEntry will now warn about a previously entered order with the same reference number in either the current or history file to catch duplicate data entry of a previously entered PO. (Note: the reference number and check is Case sensitive – "BILL0307" will not match "BILL0307".) Set the option 'Check for duplicate reference' in the Company Profile, System Options to enable this feature.
- ◆ Payments can now be entered on orders. This allows you to enter credit card and other payment information when the order is entered. In previous versions you could only enter payments on invoices. When you invoice an order with a payment recorded, the payment will now default to the invoice amount. The payment amount on the order will reset to \$0.00 in the case of partial shipments. If you leave the check number blank the payment is not saved (it is the entry of a document number that triggers saving of the payment information.)
- ◆ On creation of a Credit Note against an invoice, OrderEntry will display the total dollar value of all credit notes issued against that invoice. This will aid in preventing duplicate Credit Notes being posted against an invoice. Set the option 'Check for duplicate credit notes' in the Company Profile, System Options.
- ◆ The User entered in the Credit Approval field on the credit check dialog is now authenticated against Adagio's list of users. The authenticated user must belong to a group allowed to override the credit limit (set the option 'Allow credit limit override' in the in the Order Options section on the Order Template tab in the Edit Group function). Note: if Groups are not used, all authenticated users can be entered in the Credit Approval field. User SYS cannot be entered in the Credit Approval field unless SYS belongs to a Group that allows credit override.
- ◆ User initials of those who create, modify and print documents are saved with the document. The User who created the document and the last User to edit the document are now saved, along with the Date and Time of the action. These fields are available to be shown in grids and finders, and can be printed on documents. They are also accessible in GridView and in Crystal Reports for Adagio.
- ◆ If you change the Location on the header for an order the program will now ask if you want to change the Location on all existing lines on the order. This is useful if the Location is not known when the order is originally entered or if you accidentally chose the wrong Location.

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- ◆ There is now an option to be warned if the quantity shipped will cause inventory to go negative, even if the IC option 'Allow inventory levels to be below zero' is turned on. There are warnings on exit of the Quantity Shipped field, save item line and edit item. Set the option 'Warn if IC quantity below zero' in the Company Profile, System Options.
- ◆ An option has been added to allow you to sort the lines in a document while it is being edited. You can optionally save the document with the lines in the new sequence. If this is done, the line numbers will not match the line numbers on previously printed documents.
- ◆ The Expected Ship Date can now be entered on each item line on an order and printed on order confirmations.
- ◆ Adagio OrderEntry will now optionally remember the last line type entered when auto-add items on documents is enabled and the new option 'Remember line type' is set in File | Options.
- ◆ Entry now warns you if there are no details (lines or miscellaneous charges) on an order or credit note.
- ◆ Lines having zero for Quantity Ordered are no longer considered complete when the order is posted -- unless all of quantity, shipped and backordered are zero and you have responded that you are aware of this and wish to continue at the warning prompt. Often it was a mistake that the line had zero quantity. If this is the case, you should modify the detail containing zero for quantity, shipped and backordered before posting.
- ◆ If Enter Orders/Invoices and Credit Notes is disabled in the user's Group, the user can no longer restore documents from History.
- ◆ If Purge History is disabled in the user's Group, the user can no longer delete individual documents from History.
- ◆ You may now edit some fields on posted invoices and credit notes in current or history. Set the option 'Allow editing of invoice/credits' in the Company Profile, System Options. If security Groups are used, then set the option in the Order Options section on the Order Template tab in Edit Group. There is explicit control over which fields may be edited. No fields that have the potential of affecting ANY calculated amounts may be changed.
- ◆ A company profile option now allows an order confirmation to be printed when the order is on hold. Set the option 'Allow printing of On Hold orders' in the Company Profile, System Options. Previously, order confirmations could not be printed for "On Hold" orders. You may want to include the "On hold" status in your order confirmation specification.
- ◆ A Print Count number is maintained, which may be useful to prevent duplicate picking of documents inadvertently printed multiple times.
- ◆ The following Specification codes have been added to the specification designer. The specification document OE\$ALL.SAM has all the available specification codes.

M16 Current User Initials	M17 Current Time
E48 Last print user order confirmation	E49 Last print user picking slip
E50 Last print user invoice	E51 Last print user credit note
E52 Order confirmation print count	E53 Picking slip print count
E54 Invoice print count	E55 Credit note print count
E56 Created by user	E57 Created date
E58 Created time	E59 Last modified by user
E60 Last modified date	E61 Last modified time
D71 Item expected ship date	D72 Item number (unformatted)

- ◆ The orientation and paper size of custom (\CustomRP) and modified (ModRP) reports is maintained.
- ◆ A Printer Setup button has been added to the print preview window. This allows you to select a different printer after previewing a report.
- ◆ The Number of Labels field is now available on the Print Labels screen when the function is selected from the menu, as long as the range selects only 1 document. Previously the Number of Labels field was only available when printing from the Enter Orders/Invoices/Credit Notes grid. Now you can prevent a user from entering or editing document but still allow them to change the number of labels.

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- ◆ When printing specification documents, you can now specify a default document to use for that print run. The default document will be overridden if a customer has a specific form to use recorded on their file. When printing documents, the Specification Option can now also be set to 'Use document specification'. This choice forces the document to print using the specification saved with the document. This is useful if you want to reprint a document with the same specification with which it was originally printed, rather than the currently selected (customer) specification. When printing documents with the Specification Option set to 'Use customer specification' or 'Use document specification' and the specification is blank in the customer or document, you can now select a specification to use on the print dialog screen. If you don't then the default specification in the Company Profile is also blank. In previous versions the Company Profile was the only fallback for a blank specification on the customer or document.
- ◆ The confirmation message "Everything printed OK?" has been removed when printing documents with the 'Use document specification' and 'Use current customer specification' options. The confirmation message only appears with the 'Use selected specification' option. Users most often do not wait to be sure the document printed before clicking OK on a laser printer, and if the printer is out of paper or toner it will print the missing sheets as soon as the print problem is fixed.
- ◆ A Payment Totals Summary by payment type (from Payment Method in AR) has been added to the Invoice Audit List and the Credit Note Audit List reports.
- ◆ The specification templates have been updated to show the Invoice Salesperson instead of the Customer Salesperson.
- ◆ The Miscellaneous Charge Description and Tax Status can now be imported on orders, over-riding the default value.
- ◆ Smart Finder speed improved by a factor of 2 to 10 times when the database is on a network drive.
- ◆ The "Customers" button now launches Display Customer if user doesn't have access to Edit Customer.
- ◆ The "Items" button now launches Display Items if user doesn't have access to Edit Item.
- ◆ Email fields are checked for correct format of email addresses.
- ◆ Edit/View Items now remembers the tab you were last on and uses that when first opening another record.
- ◆ View History now remembers the tab you were last on and uses that when first opening another record.
- ◆ OrderEntry now respects the "Edit Notes Only" option based on the user's setting in Adagio Receivables.
- ◆ The Day End processing speed has been improved by a factor of up to 4 times over a network if you have a large number of documents in the "Current" file. Purging a large number of documents from current (after they are transferred to history) during Day End is up to 10 times faster over a network. This second change is less significant as purging a large number of documents from current is done less frequently.
- ◆ Copying or restoring an order or creating a credit note for a customer with an Alert now pops the Alert.
- ◆ A Tax Group with only one tax jurisdiction can now be copied or deleted.
- ◆ The values of the Print Status field in "Current" and "History" are now available in GridView when the 'Translate coded fields' option is on.
- ◆ Deleting orders on hold updated (reduced) the 'Quantity On Sales Order' of Items when it should not have.
- ◆ Viewing orders now correctly displays the miscellaneous charge amount on the Totals screen if the Company Profile option 'Discount misc charges' is not selected.
- ◆ If the option 'Warn if below cost' was enabled and the default price of the item was lower than the cost, the warning did not appear. The warning only appeared when you entered new price lower than the cost. This has been fixed.
- ◆ If the order number is defined in the import file, and that order number exists in either Current or History, a warning will now appear stating that the order number already exists and the order is not imported. Previously if 'Automatic numbering' was on the order was imported and assigned the next order number.
- ◆ If the Security Group is set to not allow Picking Lists to be printed, the Confirmation and Print Labels buttons were disabled in Enter Orders/Invoices/Credit Notes.
- ◆ The Comments field printed twice on forms in some cases if the 'Miscellaneous charges last' option was used.
- ◆ In OrderEntry 81A, even if the Company Profile option 'Miscellaneous charges last' was enabled, comment and instruction detail lines immediately following miscellaneous charges always printed after the miscellaneous charges. Now if you print the document sorted specifically by Line Number, miscellaneous charges will print last. Sorting by Item or Pick Sequence will continue to print miscellaneous charges followed by any comments or instructions entered immediately below the miscellaneous charge.

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- ◆ Disabling Edit Items in a security Group did not disable the Items button on the toolbar.
- ◆ When an item with a leading space was selected from the smart finder search results you received an error message saying the item did not exist and asking if you wanted to create a new item.
- ◆ If included on the Enter Orders/Invoices/Credit Notes grid, the Print Status field is now refreshed without having to click on the grid after printing a document.
- ◆ The order import function did not allow Filler fields on the Miscellaneous Charge (M) line.
- ◆ The Company Name field in the Company Profile is now enabled when OE is used with Adagio Inventory. Address fields continue to be editable only if OE is used stand alone, without Adagio Inventory.
- ◆ The fax server now properly handles fax numbers entered with dashes (for example: 1-555-123-4567).
- ◆ On a multi-currency database, if you had a currency code with 2 characters rather than 3 (example US vs. USD) and field verification was on, you could not tab out of the Tax Group field when entering an order.
- ◆ The settings on the Print Shipping Labels dialog were not remembered when 'Remember form settings' was on.
- ◆ For a customer with information in the 'Contact name' on the Customer tab only and blank in the 'Contact' on the Invoicing tab, the BillTo / ShipTo showed blank when it should have shown the 'Contact name' from the Customer tab.
- ◆ When a security Group prevented the user from editing customers they could still add customers on the fly while entering orders.
- ◆ Import Orders now checks for blank in the order number field if auto-numbering is not selected in the Company Profile.
- ◆ Tax amounts were not recalculated when a Ship-To code was changed to a Ship-To Address with a different Tax Group.

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 OrderEntry 8.1B **requires Adagio Lanpak to be version 9.0A** or higher. New versions of products require Lanpak to be at the currently shipping version. **Do not install this upgrade before you have installed Lanpak 9.0A if you require multiple users in Adagio OrderEntry.** If you have any prior version Lanpaks installed but no 9.0A Lanpaks the Adagio OrderEntry install will warn you.

Adagio Receivables 8.0A or higher is required. Adagio OrderEntry 8.1B 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 8.1B.**

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

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