

Adagio® OrderEntry 8.1D (2011.03.16)

Release Notes

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



Upgrade Complexity

From 8.1D: **Easy** ●
(Service Pack: **Easy** ●)

Adagio

BankRec 8.1B
BoM 8.1D
Crystal Reports® 8.5-B for Adagio
DataCare 8.1A, 9.0A
GridView 6.8A – 9.0C
Inventory 6.8A – 8.1C
Lanpak 9.0C
Ledger 6.8A – 9.0C
MultiCurrency 8.0B - 8.1B
ODBC 9.0A

OLEDDB 6.8A – 8.0A
Purchase Orders for Adagio 8.1A-8.1B
Receivables 8.0A – 9.0B (required)
SalesAnalysis 6.8B – 9.0A
SalesCQ 8.1A, 8.1B

Other Products

MS Office 2003, 2007
MS Windows XP, Vista, 7

Enhancements and revisions in Adagio OrderEntry 8.1D (2011.03.16)

- ◆ Compatible with Adagio SalesAnalysis 9.0A. The batch file for retrieval SA contains information for the new fields in SA 9.0A, including Item and Customer Report Group, Optional Fields from the document header and the IC Item Description (from the order, where it may have been edited and thus different from the item description in inventory).
- ◆ In 8.1D (2010.11.05), the calculation of the value of invoices (and optionally orders) to be included in the credit check was being performed regardless of the settings for the customer's default terms. This slowed down opening and saving orders for very high volume customers. The scan of the invoices is now only performed if credit limit checking is required for the order.
- ◆ When issuing a credit note against a previous invoice and returning a different quantity of items to inventory than were on the original invoice, an incorrect extended cost for the items was calculated. This has been fixed for credit notes going forward. Items returned on Credit Notes created in OrderEntry 8.1D (2010.11.05) or the 8.1D (2010.12.22) Hot Fix should be inspected and necessary adjustments made in Adagio Inventory.
- ◆ When using the Find function to find a document in current or history in version 8.1D the wrong row was highlighted in some cases if the type of document you were searching for was different than the type of tab you were on in the grid.
- ◆ When documents are restored from history, if items on the document no longer exist in inventory or are inactive a warning message is displayed.
- ◆ In 8.1D (2010.11.05), if you had 'Sort active documents' set to 'Customer' in the Company Profile, you received an "Access Violation" error in the Display Orders/Invoices/Credit Notes function. Note: 'Sort historical documents' did not have a problem.
- ◆ When Adagio Inventory versions prior to 8.1C were used with OE 8.1D, if you set 'Show active records only' in the Column Editor for items, all items were hidden and the grid was empty.
- ◆ On a stand-alone database (no IC), you received an "Access Violation" error when adding or editing a Price List Item.
- ◆ Edit Items function now respects the Payables 8.1C options to uppercase and auto-fill vendor codes.
- ◆ In 8.1D (2010.11.05), to import Special Prices to update existing records, you had to enable 'Add new records'.
- ◆ You could not save a template in the Import Special Prices function without including the Customer Number field in the imported fields, even with if you included it in the defaulted fields.

Install Changes

- ◆ This version moves toward our goal of a more Windows 7 friendly environment for installation. If you are installing to a mapped network drive that is normally accessible, but you cannot see it during the install when attempting to select a drive or folder, you can now install by browsing to the correct folder using the Universal Naming Convention (UNC), for example \\myserver\accounting. This avoids having to adjust the User Account Control settings, which requires you to restart your computer and temporarily grant Administrative privileges to the user if they are not an administrator.
- ◆ This version simplifies installation by removing any consideration of the location of the Report Tables Drive (RTD) by the install and program in virtually all cases. Therefore the install no longer prompts for the RTD.

- ◆ The install writes to the master install log file "AdagioMasterInstall.log" in the \sofrak\system folder. An entry is written to this log when any full, upgrade or SP for any Adagio module (with a release date of March 2011 or later) is installed. It shows the version installed and the version being replaced, the name of the Windows user who did the install and the rights for that user. An entry is also written to the log when an updated version of the Adagio Data Source (ADS) is installed, showing the version installed and the version being replaced. This log can be used to quickly determine the install history for all Adagio programs.
- ◆ When you select the 'Backup Files' option during an install, the replaced files are now saved in a subfolder named YYYYMMDD in the BACKUP folder, under the programs destination folder (rather than the BACKUP folder itself, where extensions need to be changed to .001, .002, etc. when there are multiple versions of the same file).
- ◆ The install includes an option allowing you to skip creating entries under Windows Start for cases where you will be manually creating an icon for the user to start Adagio and do not want them starting from Windows Start. During the install, uncheck the option 'Start Menu programs'. This avoids having to delete or change the Windows Start entry that would have been created.
- ◆ The install no longer checks the Opportunistic Locking setting (Oplocks) on the workstation.
- ◆ The Opportunistic Locking setting (Oplocks) on the workstation is no longer checked when the program is started.
- ◆ The System Status function in the Help menu (chksys.exe) no longer prompts you to disable Oplocks. It displays the current Oplocks setting and allows you to change it. The 'Check R/W Status', 'Check Specific Folder' function now supports UNC browse, whereas before you would have had to turn UAC off to use it.
- ◆ SetServerForAdagio and SetReportsTablesDrive utilities have been updated. The latter should virtually never be needed at an Adagio site once any Adagio module dated March 2011 or later has been installed.

Enhancements and revisions in earlier versions of Adagio OrderEntry

- ◆ Refer to the Readme help file for details of enhancements and revisions in earlier versions or [Historical Enhancements](#) under Products on Softrak's web site.

Installing

To install Adagio OrderEntry from the Adagio Product CD, you need the serial number and install code from the ProductLabel that came with the CD or in the email from Softrak Systems.

If you are installing an upgrade, you need the serial number and install code from with your upgrade. 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.

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

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 8.1D 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. Or, if Adagio OrderEntry was downloaded, run the program file you downloaded. 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

Upgrade Complexity: From 8.1C

Easy ●

Adagio OrderEntry 8.1D requires Adagio Lanpak to be version 9.0C or higher. **Do not install this upgrade before you have installed Lanpak 9.0C or have it available to install, if you require multiple users in Adagio OrderEntry.** If you have any prior version Lanpaks installed but no 9.0C Lanpaks the Adagio OrderEntry install will warn you.

Adagio OrderEntry 8.1D is not compatible with earlier versions of Adagio OrderEntry. Posting in previous versions can cause data integrity errors. Do not attempt to open an 8.1D database with earlier versions. Earlier versions may open the database without any warning but use of those versions can result in errors.

Before installing the new version you should perform a Data Integrity Check of your database(s) at your current version to ensure there are no integrity errors.

After converting, you may need to adjust your Security Groups (if you use them). This release adds Special Prices to the File | Import and File | Export menus. These new menu choices will be disabled for all existing Security Groups. You will need to edit each Security Group to enable access to new functions as required.

Upgrading from versions prior to 8.1C (2010.05.07) Upgrade Complexity: From 8.1C ● Easy

If you have items where the Pricing Unit does not match the Costing Unit, you must complete DayEnd before installing this upgrade. After this version is installed: 1) when a credit note is created for an existing invoice, the Unit Cost will default from the original invoice. If the original Costing Unit was different than the Pricing Unit, the unit cost will need to be adjusted before the credit note is posted; 2) unshipped orders for items or alternate price list items that use User specified costing will need to be modified to ensure that the unit cost matches the new unit on the detail (i.e. the Pricing Unit). Note: If your Pricing and Costing Units are always the same, this does not apply to you.

Upgrading from 8.1B or earlier Upgrade Complexity: ■ Intermediate

Note 1: If Adagio Receivables is 9.0A or higher, the following modules (if used) must be at the version indicated, or higher, to be compatible with Adagio OrderEntry 8.1D.

BankRec	8.1B
DataCare	8.1A
Inventory	8.1A (2009.02.17) or higher
Ledger	9.0A (Note 2)
SalesAnalysis	8.1B
SalesCQ	8.1B

Note 2: If Adagio Ledger is in use, you must have Ledger 9.0A (2008.04.02) or higher installed.

Do not install this upgrade until you are certain you have the above upgrades available to install. The upgrades to the other modules may be installed before or after installing the OrderEntry upgrade.

If Receivables 9.0A is used it must be version 9.0A (2009.05.11) or higher. If you have Receivables 9.0A (2009.03.31), you must install the Receivables Service Pack.

Adagio OrderEntry data must be converted for use with 8.1D. It remains downward compatible with earlier versions of Adagio Receivables. A conversion will take place even if OrderEntry is used with versions of Receivables previous to 9.0A.

The conversion could take a significant period of time on databases with a large number of documents in current across a network. For large databases, we recommend copying your database to a local machine, converting the data, and then copying it back. We strongly recommend you contact your dealer or consultant for assistance with this procedure and take a backup before proceeding.

The Previously Opened database list is now saved by Adagio User rather than for all users. The first time an existing user or a new user logs into Adagio OrderEntry 8.1C they will be asked "Would you like your historical company access list setup?" Answer yes to have OrderEntry add all entries from the Previously Opened list from your prior version. It is no longer possible for all users to share the same Previously Opened list.

Salespersons are now entered in Receivables rather than OrderEntry (or Adagio Invoices) if Receivables 9.0A is used. The Salespersons are shared by OrderEntry and Invoices rather than being in separate modules. Existing Salespersons in those modules are converted for use by Receivables 9.0A. There were 2 commission rates in OE Salespersons and there are 5 in AR Salespersons. Each of the 5 commission rates also has a 'Minimum sales' amount. When converted from OE, the 'Base commission rate' becomes the first commission rate with a minimum sales amount of 0.00. The 'Special commission rate' becomes the second commission rate.

Ship-to Address are now maintained in Receivables and are entered in the Customer in Receivables rather than in OrderEntry (or Adagio Invoices) if Receivables 9.0A is used. Existing Ship-to Addresses in those modules are converted for use by Receivables 9.0A. A separate Edit Ship-to Address function remains available in OrderEntry to allow users access without allowing them to edit customers.

Note: If you use OrderEntry as well as Adagio Invoices on the same company database read this paragraph. Conversion of Ship-to Addresses when both OrderEntry (OE) and Invoices (IN) database are present converts both sets of addresses. OE Ship-to Addresses are converted first, then IN Shipping Addresses. If there are duplicate Ship-to codes then the address from IN will overwrite the one from OE. This can only happen if OE codes used are 3 characters or less because the codes in IN are 3 characters. It is assumed that at most sites the Ship-to addresses in OE and IN will be duplicates because the customers from AR are shared by both modules. Therefore, unless you used the same Ship-to code in OE and IN, and it was 3 characters or less, you will end up with duplicate Ship-to addresses with different codes. This will have to be corrected manually as required. Also note that the conversion does not verify the Ship-to address for a given Ship-to code is the same in OE and IN. Finally, if you switched from OE to IN or IN to OE, and are no longer using the other module, the database from the unused module should be deleted or moved before converting Receivables to 9.0A to ensure the correct and most up-to-date Ship-to addresses will be converted.

The Territory field increases from 2 to 6 characters in OE. The Territory is 6 characters regardless of the version of Receivables used.

If you have custom Crystal Reports for Adagio report or GridView views that use the Salesperson, Ship-to Addresses, or Territory tables they will require adjustment.

If you have custom reports (CustomRP folder) or modified reports (ModRP folder) for Adagio OrderEntry that reference tables in Adagio Receivables and you are upgrading to AR 9.0A you will have to adjust or recreate these reports. See the Adagio Receivables Release Note or Readme help for details. GridView views for OE tables that reference AR tables will also require adjustment.

Adagio OrderEntry 8.1D remains compatible with ACCPAC® Plus™ OrderEntry, Accounts Receivable and ACCPAC Plus Inventory Control unless Adagio Receivables is 9.0A or higher and as mentioned in the next paragraph. However, using ACCPAC Plus with Adagio OrderEntry is not recommended, compatibility is not guaranteed and this configuration is not supported.

An additional index to the order details file by item number has been added to speed up GridView views used for inquiries into the open orders/invoices/credit note details by item. This means Adagio OrderEntry is no longer compatible with third-party products that add new documents or lines to existing documents in the OE database but do not use the Adagio Data Source (ADS) to do so as those products do not update the additional index. This includes ACCPAC® Plus™ Order Entry. There is no issue if a product only updates existing OE detail records.

If these products must be used the additional index can be turned off. The index is used to speed up GridView views only and not absolutely required by Adagio OE, but the default is to have the index on. To turn off the additional index, edit the OEWININI.ddd file (where ddd is your company data file extension) found in the Adagio data folder. This is a text file but with your database extension rather than .TXT. Change the line "@O80ALIN2=1" to "@O80ALIN2=0".

Old formats such as Lotus, Dbase and Clipper that are almost never used any more have been removed from import/export templates, leaving Excel, ASCII CSV (Delimited), ASCII Fixed Length and PSV Delimited. The old formats may be manually turned back on for sites that need them by editing \sofrak\oewin\oewin.ini and adding section format lines as required:

```
[Import/Export Formats]
Lotus 123 ( Version 1.0 - 2.x)=1
Lotus 123 ( Version 3.0 - 5.0)=1
dBase III & IV=1
FoxPro (all versions)=1
Clipper (all versions)=1
Symphony (Version 1.0,1.1)=1
Quattro Pro (Version 1.0 - 6.0)=1
```

-- end --