

Release Notes

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



Upgrade Complexity

From prior version: **Easy** ●

Adagio

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

ODBC 9.0A
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 (2011.09.29) SP2

New Features

- ◆ Installs the AdagioPDF printer driver. All reports and printouts from Adagio can be printed to the AdagioPDF printer to create a PDF document in the data folder.
- ◆ Supports the features in Adagio ePrint. When ePrint is installed you can print reports to PDF files in configurable folders determined by the Report Type (General, Transaction or Audit). Order Confirmations, Invoices and Credit Notes print to a separate, configurable Forms folder. Fields can be embedded to establish the file and folder names (User, Session Date, System Date, Time). Click the ePrint button (red "EP" icon) on any report dialog to print the report to PDF. The Paperless Reports option forces all reports to be printed to PDF. Reports can be printed to PDF and attached to an email (MAPI) with a single button click.
- ◆ You can now have OrderEntry print an accounting copy of Invoices and Credit Notes to a PDF document to save you from printing and filing paper copies of the documents you send to customers. The Company Profile, Reports tab, has 3 fields called: 'Keep PDF Accounting copy?', 'Invoice accounting spec' and 'Credit note accounting spec'. If Keep PDF Accounting copy is turned on, when printing invoices or credit notes (except when printing from history), OE will create accounting copies of the documents printed in a folder called Documents underneath the PDF Audit Reports Folder. It will do this regardless of whether you print to printer, file, PDF, fax, email, or screen (if the option 'Mark printed to screen as printed' is set). It will use the Invoice accounting spec and Credit note accounting spec specified in the company profile for this purpose (not the spec selected on the print screen). The PDF files are named IXXXXXXXX or CXXXXXXXX depending on the document type. The conflict strategy for the accounting copy is to append _01, _02 etc. to the PDF document filename if you reprint it.
- ◆ You can now have OrderEntry create a PDF archive of the customer copy of Invoices and Credit Notes you send to customers. The Order Entry Company profile, Optional / Specs tab, has the new option 'Archive PDF customer copy?'. If this option is turned on, when printing invoices or credit notes, OE will create archive copies of the documents printed in the a folder called SOFTPDF under the data directory (not the Relative base folder, if it is set in Adagio ePrint). The PDF files are created regardless of whether you print to printer, file, PDF, fax, email, or screen (if the option 'Mark printed to screen as printed' is set). It will use the spec specified on the screen. The PDF files are named <customer number right justified and padded with trailing "_" characters to fill to 6 characters> followed by '_OE_' and IXXXXXXXX or CXXXXXXXX depending on the document type. The conflict strategy for the archive document is overwrite.
- ◆ On the Open database dialog you can now use Alt-B to open the browse and Alt-F (for Favorites) to open the previously opened list. In previous versions you had to use the mouse to select the folder buttons.
- ◆ Alt-X now selects the Excel Direct button on grids where it is available. In previous versions you had to use the mouse to select Excel Direct.
- ◆ The vitalEsafe upload progress dialog has been improved and the progress bar now accurately shows the percentage. It is no longer necessary to install the vitalEsafe patch.
- ◆ Account Styles were added in Ledger 9.0D. They are now supported in GL account finder grids in OrderEntry.
- ◆ Added 'Page break on change of salesperson' option to the Salesperson Commission report.

Problems Fixed

- ◆ When printing a Picking slip (and only a picking slip) directly from the grid, the "Reprint already printed" option now always defaults to "off" so that duplicate picking slips are not inadvertently printed.
- ◆ Editing a Security Group changed the value of 'Locked Status' field in some cases even though you did not change that field.
- ◆ When tabbing through fields on the Header tab of the Enter Orders/Invoices/Credit Notes function the Order Type you had selected changed by itself in some cases.
- ◆ If a filter is based on a range for any field that is right-justified (such as customer number, single segment item number, vendor number, etc.) then additional records will be selected by the search that should not have been. For example, if the range is from 1 to 2, then not only would records 1 and 2 be selected, but also 10, 11, 100, 101 etc. You will need to edit and save any existing filters to correct them.
- ◆ The inquiry function on the Items tab in Display History did not find transactions it should have in some cases.
- ◆ The Unit and Extended cost were calculated (incorrectly) for the alternate unit when a credit note was entered and the quantity entered was not in the pricing unit.
- ◆ After printing or previewing a multi-currency report that prints in landscape, reports that print in portrait printed in landscape instead.
- ◆ The Find did not work correctly for selecting a customer with a leading zero in the Name field, such as for a numbered company. As result an order could not be created for the customer.
- ◆ If your Ledger data was created with version 9.0x and you never used Ledger 8.1A or earlier versions, after printing the G/L Transactions report in OrderEntry, the Consolidate G/L Transactions dialog did not show the 2 options to consolidate by Fiscal Period.
- ◆ When copying an Invoice to create new Order, regardless of the setting of the 'Set quantity shipped to quantity ordered' option, the new order created always set quantity shipped to quantity ordered. As result, when the new order was posted the default was to post an invoice, which was not the desired default for sites only wanting an order to be created.
- ◆ OrderEntry suppressed "Canada" in the Bill-to and Ship-to addresses if the Home Country in the Receivables Company Profile was "USA" and the 'Suppress home country on forms' option was selected. It also suppressed "USA" if the Home Country was "Canada". The fields from the Customer
- ◆ Order styles (fonts and colors) did not appear on finder grids, although they did appear on other grids.
- ◆ OrderEntry 8.1D did not send tax on Miscellaneous Charge lines to SalesAnalysis 9.0A.

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 Product Label 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.

Note: The Edit Customer and Edit Item functions now use a Lanpak license. If another user is already in AR or IC this would require Adagio Lanpak to be installed. The View Customer and View Item functions do not use a license, nor does adding a customer or item "on the fly", nor editing customers or items from within OE documents.

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 set up?" 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".

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