Adagio® OrderEntry 8.1F (2013.07.08) Release Notes

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

Adagio

BankRec 8.1B - 8.1D	ODBC 9.0A
BoM 8.1E	Purchase Orders for Adagio 8.1A-8.1B
Crystal Reports® 8.5-B for Adagio	PurchaseOrders 8.1C
DataCare 8.1A, 9.0A	Receivables 8.0A – 9.1A (required)
ePrint 9.0A	SalesAnalysis 8.0A – 9.0B
GridView 8.0A – 9.1A	SalesCQ 8.1A - 8.1C
Inventory 8.0A – 8.1D	
Lanpak 9.0E	**Other Products**
Ledger 8.0A – 9.0D 9.1A	MS Office 2003, 2007, 2010
MultiCurrency 8.1B	MS Windows XP, Vista, 7, 8

Upgrade Complexity
From prior version: Easy ●

Enhancements and revisions in Adagio OrderEntry 8.1F (2013.07.08)

New Features

♦ Adagio ePrint users can view a PDF of invoices and credit notes from the document entry, inquiry and history functions. They can also view PDFs of invoices and credit notes from the Item Inquiry in the View Items function and on the Load History grid on the Pricing grid. Also from the transactions grid in the Edit/View Customer function if Receivables is 9.1A or higher. The documents open in the new Adagio PDF viewer. PDF documents can also be viewed from the email queue.

♦ You can attach a PDF document (such as shipping / customs instructions or product literature) when emailing, faxing or printing Order Confirmations, Invoices, Credit Notes or Picking Slips. For documents in the email queue, you can attach other types of documents as well, such as Word or Excel. Attachments are shown in a tree view on the Edit Email Entry dialog. Right-click on the tree to add a document. Default folders for attachments can be specified on the Optional/Specs tab in the Company Profile. These folders are relative to the ePrint relative folder path (or to the data folder if ePrint is not installed).

♦ Supports Automation when Adagio Console is installed. Automation allows you to automate many functions in Adagio modules, including retrieving, posting, importing, printing reports and forms, day end, backup and integrity check, etc. across modules, and view, print or email the results from an automation log. Note: OE 8.1E (2013.03.22) included support for Automation. However changes have been made and that version should not be used with Automation. Adagio Console had not been released at the time of this release.

♦ You can double click on the Qty On Hand grid on the Edit Detail screen to select a Location to ship from for the item when entering an order. Previously, to change the Location you had to enter or select it in the Location field.

♦ Added an option to automatically print a picking slip and/or an order conformation when an order is posted. Set the Direct Order Printing option to None, Picking Slip, Order Conf. or Both. This new option is found on the System Options tab in the Company Profile.

♦ Supports the Preferred Send Method on the Invoicing tab in the customer if Receivables 9.1A is installed. When printing invoices, credit notes or order confirmations, documents will only be selected for customers having the same Preferred Send Method set in their record as the send method you use on the print dialog. The option is ignored when printing a single document of any type from the Enter Orders/Invoices/Credit Notes grid.

♦ Added BOM Item and BOM fields to the Transaction History record. These fields are updated by the automatic assembly of master items from Bills of Material during Day End if Adagio BoM is installed. This will also be supported in the next release of Adagio Inventory. The BOM Item field allows you to track which master item the component items were used to assemble. The BOM field allows you to track which BOM created the transactions for both the master item and component items for an assembly in the case of master items with multiple BOMs.

♦ The email queue grid can now show the total number of attachment files. The fax queue grid can now show total the number of pages in the fax.

♦ Payments can now be imported with orders have Quantity Shipped on the order.

♦ New splash screen with an updated look.

- A 'Report set' button has been added to the toolbar.

- Supports the new Specific Due Date terms added in Adagio Receivables 9.1A. Allows you set the due date to any date in the future.

- Supports the Auto-fill GL account and department options in Ledger 9.1A.

- A Listing button was added on the Group Setup window and prints all options or enabled options only for a range of groups. An Entry Templates button in the Group is now used to set up templates rather than having tabs on the Group.

- The 'On invoice as' option in Tax Groups can now be changed without first printing and clearing the Tax Tracking and Tax Summary reports (providing Day End has been run).

- Added 3 new expansion codes for Report Favorite filenames for Adagio ePrint users: %CMP (company name), %CNO (company number), and %EXT (data extension).

- Added several new OE specific Styles for use in OE filters. The OE default Filters (used when a new database is created) have also been updated. The sample data includes many new Filters that make use of the new Styles. You can recreate any of the new sample filters you find useful in your own live databases.

- The performance of Filters has been improved.

- The Help | About function now has a Consultant tab showing the contact information for your Adagio consultant if they have enabled this option at your site.

- Excel Direct can now use Windows "automation" (inter-process communication) to send data to other spreadsheet applications, the same way it interfaces to Excel, allowing all formatting to be retained in the resulting sheet. OpenOffice 3.3 or later and LibreOffice® 3.3 or later are supported. This interface must be manually enabled. The file SSI2XL.INI must exist in \softrak\system and must contain the section [Initialization] with an entry <computer name>-UseOpenOffice=1, where <computer name> is the name of the machine that this entry references. Refer to the Readme Help for further details.

Problems Fixed

- The warning displayed when an item is entered on a order with a price less than the cost has been changed to not show the cost if the security prevents the user from seeing costs.

- The Customer Name field width defaulted to 30 characters instead of 40 in the specification designer.

- The results of the inquiry on the Item tab in the View History function were incorrect in some cases when ranges other the full range of customers or items were used.

- When an order was copied the 'Ordered in PO' field was not reset for the new order, causing the Auto Generate POs function in PurchaseOrders not to generate a PO for the new sales order.

- When an item detail is imported for an order the Default Picking Sequence was used instead of the Picking Sequence for the Location specified in the import file.

- The "Everything printed OK?" message is no longer asked when printing documents from History.

- Certain codes embedded in Report Favorites were not being saved in some cases.

- The 'Bypass History on DIC' option did not work in 8.1E (2013.03.22).

- If you installed a full or upgrade to a network drive via a UNC path, from a station that had never run Adagio from a station and User Account Control was enabled, you received an error such as "The file //YourServer//Softrak/OEWIN/Common_Print.chm could not be opened."

- OrderEntry 8.1E (2013.03.22) attempted to fix a problem with the specification code 'F24 Total Item Weight' for orders that were transferred from quotes in SalesCQ. However, the fix did not work correctly and the total weight printed was the weight of the last line on the order. This has been corrected.

- In OrderEntry 8.1E (2013.03.22) when a standing orders was converted to an active order the error "Due Date cannot be prior to the document date." was displayed due to additional date checking on orders. This has been corrected. The Due Date and Discount Date are re-calculated when a standing order is made into an active order.

- If a line was deleted on an order, any comment or instruction lines before the first item on the order were lost when the order was invoiced.

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 you need the serial number and install code from the download instructions email sent to you by Softrak Systems.

If you are installing an upgrade, you need the serial number and install code from the upgrade download instructions email. 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 '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 8.1F must be installed before the Service Pack can be installed.

To install Adagio OrderEntry (or an upgrade), 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.

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

Adagio BoM 8.1E (if used) is required for use with OrderEntry 8.1F. Earlier versions of BoM (Bills of Material) are not compatible. Do not install this upgrade if you do not also have your BoM 8.1E upgrade available to install.

Adagio OrderEntry 8.1F **requires Adagio MultiCurrency (if used) to be version 8.1B** or higher.

Upgrading from 8.1E   Upgrade Complexity: Easy ●

Adagio OrderEntry data will be converted for use with 8.1F.

OrderEntry 8.1F is not compatible with earlier versions of Adagio OrderEntry. Posting in previous versions can cause data integrity errors. Do not attempt to open an 8.1F 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.

Note: The Purge Options have been moved from the Optional/Specs tab to the Number/Tax tab in the Company Profile.

Upgrading from 8.1D   Upgrade Complexity: Easy ●

The options 'Ask Print OK after forms print?' and 'Close forms dialog after print?' were added to User Preferences for this release. Both options are selected by default. **You should review the changed behavior related to these new options and any effect they may have on your procedures.**

Upgrading from 8.1C or earlier   Upgrade Complexity: From 8.1C   Easy ●

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.

If you are upgrading from versions prior to 8.1C (2010.05.07), and 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 8.1F.

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 8.1E. 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 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.

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