Adagio® OrderEntry 8.1F (2014.05.02) Release Notes

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

Adagio

BankRec 8.1B - 8.1E
BoM 8.1E – 8.1F
Console 9.1A
Crystal Reports® 8.5-B for Adagio
DataCare 8.1A - 9.1A
ePrint 9.0A
GridView 8.1A – 9.1A
Inventory 8.1A – 8.1E
Lanpak 9.0E
Ledger 8.1A – 9.1A
MultiCurrency 8.1B

ODBC 9.0A, 9.1A
Purchase Orders for Adagio 8.1A-8.1B
PurchaseOrders 8.1C, 8.1D
Receivables 8.1A – 9.1A (required)
SalesAnalysis 8.1A – 9.1A
SalesCQ 8.1A - 8.1C

Other Products
MS Office 2003, 2007, 2010, 2013
MS Windows Vista, 7, 8, 8.1

Upgrade Complexity
From prior version: Easy ●

Enhancements and revisions in Adagio OrderEntry 8.1F (2014.05.02)

New Features Done

♦ Supports Transport Layer Security (TLS) / Secure Socket Layer (SSL) for secure email servers when emailing documents. Added option 'Use TLS/SSL' added to Email Setup function. Note: This new feature does not require a workstation install as it did in recent upgrade versions of PurchaseOrders and DataCare. If either of those versions were installed, the From field in received email showed the Return Address rather than the Display Name when emailing from any module, and there was an error when emailing from any module on an XP station. Installing OE will correct these problems in all modules. Secure email servers are not supported on Windows XP.

♦ Added new codes to the specification designer for use on picking slips and other documents:
    F44, total quantity originally ordered
    F45, total quantity ordered
    F46, total quantity backordered

♦ Added option 'Allow create credit note' to the Entry Template in Security Groups to prevent certain users from entering credit notes.

♦ The BOM Item and BOM fields previously added to the Inventory Transaction History record can now be shown in item grids in OrderEntry.

Problems fixed

♦ Corrected problems in document entry, import orders and day end, where some fields were incorrectly defaulted from the customer / Shipto in some cases when a customer had a contact that was not a Shipto address and the Contact Code was blank (allowed for legacy reasons).

♦ Changes have been made to improve the performance when Document Filters are used at sites with a large number of documents, many users and a large volume of document entry and printing.

♦ When the 'Allow editing of invoice/credits' option was on in the Company Profile, the Manual Style Code could not be edited on invoices or credit notes by user SYS.

♦ You can no longer change any detail type to a Text Block when editing an existing detail. Doing so caused a problem in some cases.

♦ In OrderEntry 8.1F, disabling the option 'Allow editing of invoices/credits' did not work.

♦ In OrderEntry 8.1F, if user SYS had a blank Security Group, the Company Profile option 'Allow editing of Invoice/Credits' was not respected. You had to make SYS belong to a Group that enabled the option.

♦ In OrderEntry 8.1F, if when creating a Security Group you clicked on the Entry Template button before entering the new Group code, then canceled from adding the Group, the setting in the main Entry Template in the Maintenance menu were lost.

♦ In OrderEntry 8.1D and higher, the Price List reports were missing from the menu tree in Security Groups for standalone OE (no IC). Note: these reports/functions show in the menu tree when IC is used and are not functional.

♦ The Edit Item function from within OrderEntry did not respect the 'Allow invalid vendors' option in Adagio Inventory.

- The spec code 'D41, Unit price per stocking unit' was actually printing the price per selling unit. The code has been renamed to 'D41, Unit price per selling unit' and new code 'D79, Unit price per stocking unit' has been added.

- The Order Action Default template for the Order Action report could be overwritten and duplicates appear in some cases if you typed in an non-existing template name.

- When printing the Tax Tracking report from an Automation FIle, if there were no records to print, the Automation file halted.

- If the 'Allow editing of invoice/credits' option was on in the Company Profile and you edited a document that had already been copied to history, when Day End was run by an Automation File, the question asking whether to overwrite the History was not suppressed. A Noun with choices 'ReplaceHistory' and 'KeepHistory' has been added to the DayEnd command to handle this situation. Note: Existing Automation Files using the DayEnd command must be edited and resaved, otherwise the automation will be halted when the command is encountered.

- OrderEntry 8.1F could not convert Plus OE databases to Adagio OrderEntry and an error was displayed.

- The number of Previously Opened databases (saved by user) was increased from 25 to 100.

- An error was displayed when installing to a 2 Terabyte drive or larger, although the install completed without problems. The error has been changed to a warning.

Problems Fixed in previously released 8.1F Hot Fixes

- In the column editor for the Edit Items function the Qty on SO and Qty on PO fields were reversed.

- The Fax Queue Listing report could not be printed in OrderEntry 8.1F.

- Invoices and credit notes containing a dash in the manually assigned document number were not visible in OrderEntry or from Edit/View Customer and could not be attached to statements in Receivables by Adagio ePrint users because the dash was stripped from the PDF file name.

- The splash screen for the specification designer indicated OE 8.1F was not registered and licensed when in fact it was.

- In 8.1F (2013.07.08) on large databases and depending on network performance and usage, the Price List and time fields intermittently changed to values from an different order.

- Enables special functionality for web order import for North49's Webtelligence product.

- When orders were imported for customers on hold, although the orders are (correctly) placed on hold, the DIC error "Quantity on Sales Order is not being updated." occurred because the 'Inventory Updated?' flag in the header was being set.

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.

To install the Adagio OrderEntry Service Pack, run the Service Pack program and follow the instructions on the screen.

After installing OrderEntry, an upgrade or a Service Pack, a workstation install may be required at each station running Adagio OrderEntry on a network. 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 an 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 OrderEntry 8.1F requires Adagio BoM (if used) to be version 8.1E or higher. Do not install this upgrade if you do not also have your BoM upgrade available to install.

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

Note for Adagio Console users installing a Service Pack

A Noun with choices 'ReplaceHistory' and 'KeepHistory' has been added to the DayEnd command in Automation Files. Any and all Automation Files using the DayEnd command must be edited and resaved, otherwise the automation will be halted when the command is encountered.

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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