

## Release Notes

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



### Upgrade Complexity

From prior version: **Easy** ●

### 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 – 9.2A  
Inventory 8.1A – 8.1E  
Lanpak 9.0E, 9.2A  
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 2007, 2010, 2013  
MS Windows Vista, 7, 8, 8.1

## Enhancements and revisions in Adagio OrderEntry 8.1F (2014.09.30) SP2

### New Features

- ◆ Compatible with future release of Adagio Payables 9.2A. Earlier versions of OrderEntry will not open if Payables 9.2A data is present.
- ◆ Supports new feature added in future 9.2A version of Receivables to require you to enter a purchase order number in the Reference field on the Header tab when entering an order. Added option 'Require PO?' to the Invoicing tab in the Edit Customers function in Receivables 9.2A.
- ◆ You can now have more than one automatic surcharge for items as details on invoices. Added new option 'Inc Tax Jur' on the Jurisdiction tab in Tax Group. When enabled, the taxable jurisdiction using it would include the taxable jurisdictions(s) on tabs to its left. It is enabled by default for existing Tax Groups and new Tax Groups, and should remain so except when a second jurisdiction is used for a second recycling fee, such as for Multi Material British Columbia (MMBC). For example, when disabled, the taxable jurisdiction MMBC would not be included in the calculation of taxable EcoFee:

EcoFee (existing), taxable by PST and GST but not MMBC,  
MMBC (new), taxable by PST and GST, **disable 'Inc Tax Jur'**  
PST  
GST

### Problems fixed

- ◆ When an order was created by copying another order (or by restoring from history), if the Picking Sequence for item details was for a Location, it reverted to the Picking Sequence for the item.
- ◆ The Load History grid on the Pricing screen for an item detail in an order no longer shows comment or instruction lines associated with items on historical orders as they have no price and are not of interest.
- ◆ If you entered an item number when adding a detail to an order and pressed ENTER by mistake (rather than tab or entering a quantity) and the warning 'This quantity ordered has zero value. Do you wish to continue?' appeared, after answering 'Yes', if the line used a Price List the Unit Price changed from the Base Price for the Price List to the Base Price for the item.
- ◆ If you are using Adagio ePrint, when you close the PDF viewer after viewing the PDF of a invoice or credit note from the Display History function, the focus now returns to the grid in that function.
- ◆ When processing a credit note for items using Standard Costing where there is a variance, the Day End function adjusted the item's actual cost valuation by the cost of sale amount and not by the amount posted to the IC control account by the original invoice. This resulted in the inventory control account not agreeing with the actual cost in the Item Valuation report.
- ◆ The Aged Orders report did not print if you used a range of Order Numbers (rather than blanks to zzzzzzzz) for the first sort.
- ◆ Orders were excluded from the Order Action report if the Telephone or Fax Number fields began with lowercase characters rather than phone numbers.
- ◆ The Rebuild function in the Data Integrity Check now removes orphan header extension records. This type of error could have

required a database repair or restore of data.

## 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, an upgrade or Service Pack, run the program file you downloaded. Once the install program is running, you can click the View button for detailed installation instructions in the Readme help. If Adagio OrderEntry is installed on a network, you may also need to do a workstation install 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.

Adagio OrderEntry 8.1F requires Adagio BoM (if used) to be version 8.1E or higher.

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

This applies to you if you have OrderEntry 8.1F (2013.07.08). 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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