



## Compatibility

### Adagio

BankRec 8.1B – 9.2A  
BoM 9.2A  
Console 9.1A, 9.2A  
DataCare 8.1A - 9.2A  
ePrint 9.0A, 9.2A  
GridView 8.1A - 9.2B  
Inventory 8.1A – 9.2A  
Lanpak 9.2A, 9.2B  
Ledger 9.0A – 9.2B  
MultiCurrency 9.2A  
ODBC 9.1A, 9.2A  
PurchaseOrders 8.1C – 9.2B  
Receivables 9.0A – 9.2A  
RMA 9.2A  
SalesAnalysis 9.0A – 9.2A  
SalesCQ 8.1B - 8.1C

### Other

MS Office 2007/10/13/16, 365  
MS Windows 7 (SP1), 8, 8.1, 10  
MS Server 2008R2 SP1 or higher  
Crystal Reports® 2011 and 2013  
(requires Adagio ODBC 9.2A)  
Crystal Reports 8.5 for Adagio  
(see note)

### Note

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

## Enhancements in OrderEntry

- Supports retrieval of the Price Level (Customer Discount Level A-E or blank) from the invoice header for SalesAnalysis 9.2A (2016.06.08) and higher.
- In OrderEntry 9.2A (2016.01.11) and (2016.01.25) for multi-currency databases, after printing a document the Rate was zero for the next document entered for a source currency customer.
- When the Enter Orders/Invoices/Credit Notes grid is opened, the first order/invoice is highlighted for Filtered grids. Improved behavior remembering and selecting what document is highlighted when switching between document type tabs.
- Fields and objects on specifications can now have custom colors, with full control of hue, saturation and luminosity. Colors in the sample data specifications and templates in the designer have been updated accordingly.
- Added specification code 'E70 RMA Expiry date' in the designer. It prints the RMA date + 'RMA Expiries after days' set in the Company Profile
- Added specification code 'E71 RMA Flagged Expiry' in the designer. It prints True/False from the RMA. Note: it will print False until it has been updated to True in the RMA by editing the RMA document, even though the date may be past the expiry date.
- Specification code 'E39, optional units 2 header' printed the value for optional unit 1.

- Additional comments on the Notes tab in View Customer did not refresh properly in when using Next/Previous.
- The Tax Group for a new ShipTo Address defaulted to blank rather than from the Customer or the Company Profile when added in the Ship To Address function in OrderEntry rather than the Edit Customer function.
- In OrderEntry 9.2A (2016.01.11) and (2016.01.25), the PDF button was not being shown on the Items tab grid in View History.
- The Order Action report now excludes RMAs. The RMA Listing report or the Orders/Invoices/Credit Notes report should be used to list RMA documents.
- For MultiCurrency databases, the Sales report when printed in Source format, with both Salesperson and Customer subtotals, repeated the subtotals for every Salesperson.
- In OrderEntry 9.2A, if Adagio Ledger data was not present, the GL transactions were not cleared after printing the report and responding 'Yes' to the prompt to clear transactions.

- When importing orders using automation, if the 'Validate before importing?' option was off and the import file contained a Customer Number that did not exist, the details for the order were added to the next valid order in the import file. If importing manually there was an error message stating there were corrupt records.
- When adding user-attached documents to entries in the email queue, after adding the first document, adding further documents attached a copy of the first document instead.
- Installs an updated ReportConvertor utility that is compatible with the SAP Crystal Reports runtime engine for .NET Framework version 13.0.16 (SP 16), which may have been installed by another (non-Adagio) application at your site. The ReportConvertor is used to convert custom Crystal reports to be compatible with Adagio 9.2A and higher.

## Enhancements and revisions in earlier versions

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 instruction email sent to you by Softrak Systems.

If you are installing an upgrade, you need the upgrade serial number and install code from the download instruction 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 a previous version.

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

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 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.

**Installing OrderEntry 9.2A may cause a workstation install to be required for other Adagio 9.2A modules on other stations.** When the first such module (or OrderEntry) is run, it will trigger the workstation install. One and only one workstation install, for the first module run, will be required on each station.

**When installing Adagio at a new site, Adagio OrderEntry 9.2A should be installed last** (any Adagio 9.2A module with a release date later than December 15, 2015 that prints reports can be installed last instead), or you must run the All Workstation install on all stations. Otherwise you may not be able to print any reports from Adagio 9.2A modules on other workstations and will receive the error "Logon failed. Details: [Database Vendor Code: 160]". If this occurs, run the All Workstation install and update the module that had the

error. At the same time you may want to update any other modules that will be used on the station. Refer to "Installing on a Network" in the Readme for instructions to run the All Workstation install.

Adagio OrderEntry 9.2A **requires Adagio Lanpak (if used) to be version 9.2A** or higher.

Adagio OrderEntry 9.2A **requires Adagio MultiCurrency (if used) to be version 9.2A** or higher.

Adagio OrderEntry 9.2A **requires Adagio BoM (if used) to be version 9.2A**.

Adagio OrderEntry 9.2A **requires Adagio RMA (if used) to be version 9.2A. If Adagio RMA is used, Adagio DataCare (if used) must be version 9.2A or higher.**

Adagio OrderEntry 9.2A **requires Adagio Receivables 9.0A or higher.** It is not compatible with Adagio Receivables 8.1A or earlier versions.

Adagio OrderEntry 9.2A **requires Microsoft Server 2008 R2 SP1** or higher if running under Remote Desktop Services (Terminal Services). OrderEntry 9.2A may be installed to Server 2008 R1 when used as a file server from a station on a LAN. Note: Mainstream Support from Microsoft for Server 2008 R1 ended January 13, 2015.

Adagio OrderEntry 9.2A requires a minor database conversion from earlier versions. You should perform a Data Integrity Check in your current version of OrderEntry before installing the new version and converting your database. Any errors should be rebuilt or dealt with in your current version to ensure a successful conversion.

If you have custom reports and/or views for OrderEntry created in Crystal Reports 8.5 for Adagio / Adagio GridView, they will require conversion and adjustment for use with 9.2A. You should not install the upgrade or convert OrderEntry data until you have a plan in place to update any custom reports and views critical to your operation. See the sections below on converting reports and views for details.

## Upgrading

### Upgrading from 9.2A SP1

### Upgrade Complexity:

Easy ●

Adagio OrderEntry 9.2A (2016.07.07) SP3 requires a minor database conversion from 9.2A (2015.07.29) SP1.

You can convert your OrderEntry database at any time. However, **if you retrieve batches from OE into Adagio Receivables, you must do so before converting your data.** If a batch exists that has not been retrieved in AR, the conversion process will warn you and the conversion will not proceed until you have done so.

To start the conversion, open your current database for the first time with OrderEntry 9.2A (2016.07.07). A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup before proceeding with the conversion if you have not already done so. The conversion should only take a few moments. **After converting a database, it must not be used with earlier versions or with version 9.2A (2015.07.29).**

The fields in the Company Profile have been rearranged and tab names changed to a more logical and intuitive arrangement. At Tech-Tip has been posted on our website at

<http://www.softrak.com/resources/technicaltips/technicaltips.php> which itemizes these changes. You must scroll to the Tech-Tips.

The layout of the Find dialog for document entry, view documents and view history has changed slightly for this release to support Adagio RMA.

A minor change has been made to the Open document function in the Specification Designer. It is now the same for mapped drives as it is for UNC drives. Simply click the folder button to open the browse.

**Upgrading from 8.1F** **Upgrade Complexity:** **Intermediate** ■

Adagio OrderEntry 9.2A requires a minor database conversion from earlier versions.

You can convert your OrderEntry database at any time. **However, if you retrieve batches from OE into Adagio Receivables, you must do so before converting your data.** If a batch exists that has not been retrieved in AR, the conversion process will warn you and the conversion will not proceed until you have done so.

To start the conversion, open your current database for the first time in OrderEntry 9.2A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup before proceeding with the conversion if you have not already done so. The conversion should only take a few moments. After converting a database to 9.2A, it must not be used with earlier versions.

OrderEntry 9.2A is compatible with Receivables 9.2A. However, OrderEntry limits Customer name and address fields to 30 characters although these fields are 40 characters in Receivables.

OrderEntry 9.2A now installs to the \Softtrak\OrderEntry folder and the program name is OrderEntry.exe. Previous versions were installed in \Softtrak\OEWIn and had a program name of OEWIn.exe. When an Adagio OrderEntry 9.2A upgrade is installed, it automatically uninstalls any prior version of Adagio OrderEntry.

The upgrade install cannot change any custom icons you may have created to launch OrderEntry and will display a "Problem with Shortcut" error if they are launched. You must change these icons manually to run OrderEntry from \Softtrak\OrderEntry\OrderEntry.exe or create new ones.

Adagio 9.2A uses the current version of the Crystal Reports runtime engine with Adagio ODBC drivers to view and print reports, replacing the Crystal Reports 8.5 Print Engine (CRPE32.dll). Adagio 9.2A installs Crystal Reports runtime and if not already installed on your machine, the Microsoft® .NET Framework. The Adagio install will automatically download these install packages from the internet as required. If other 9.2A modules have already been installed, these packages will not need to be downloaded. Adagio ODBC drivers are installed by version 9.2A applications – Adagio ODBC does not need to be installed to print reports.

While users are printing / previewing reports, the Active Users List function in Adagio shows the User Name in application "Adagio Reporting". The Active Users List in Adagio Console and the Currently Logged In List in Adagio xConsole show a grid row with App Prefix of "OD" (ODBC) for users printing / previewing reports. A Lanpak license is not used to print or preview reports.

Reports in Adagio OrderEntry have been converted for Crystal Reports 2013 and can be modified with Crystal Reports 2011 or 2013. Custom reports created with Crystal Reports 2011 or 2013 can be added to the Reports menu by placing them in \Softrak\OrderEntry\CustomReports. The Report Tables Drive settings and Crystal tables in the \QRASP folder are not used.

The report viewer remembers the window size, position and zoom level. Therefore, the Print/Preview options, including Preview Zoom Factor and Preview Window State (Full screen / Partial screen) were removed from Workstation Options.

Adagio module buttons have been added to the toolbar for 9.2A. They will be enabled by default. The 'Adagio Toolbar' option in User Preferences on the General tab is used to configure the toolbar.

### **Converting GridView Views**

A data dictionary change from 'Adagio OrderEntry 8.0A-8.1F' (@O80A) to 'Adagio OrderEntry 9.2A' (@O92A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio OrderEntry should be recreated using tables from 'Adagio OrderEntry 9.2A'. GridView has the ability to convert existing views to a new table.

Note: The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by its reports. The table Descriptions for the module start with "O/E or OE" and ones for use by its reports do not. When creating new views you must use the tables starting with "O/E or OE". A future release of GridView will hide tables used by the reports so they cannot be used inadvertently. Tables starting with "OE" (no slash) are composite tables and can be used to create views.

GridView views created with the previous dictionary will continue to work without any change. However, it is recommended you convert all your views to use the new 'Adagio OrderEntry 9.2A' dictionary.

Views from your prior version located in \Softrak\OEWIn\Views will be copied to the folder \Softrak\OrderEntry\Views.priorversion. Recreated views must be placed in \Softrak\OrderEntry\Views. When you are certain the original views are no longer needed, you can delete the \Softrak\OrderEntry\Views.priorversion folder.

See the Tech-Tip and Show Me How video on converting GridView views on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>. You must scroll to the Tech-Tips.

You may find the Adagio Data Dictionary Exporter Tool useful for comparing tables in the Adagio OrderEntry 9.2A dictionary to previous versions using Excel. The exporter can be found under on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>.

### **Converting Modified and Custom Reports**

If you have modified any of the standard reports installed by Adagio OrderEntry, you will have to redo those modifications for OrderEntry 9.2A. Modified reports are files with a .rpt extension that you copied from \Softrak\OEWIn\StandardRP to \Softrak\OEWIn\ModRP and modified using Crystal Reports 8.5 for Adagio. Your modified reports from your prior version

will be copied to the folder \Softrak\OrderEntry\ModifiedReports.priorversion. These same reports must be recopied from \Softrak\OrderEntry\StandardReports to \Softrak\OrderEntry\ModifiedReports and remodified using Crystal Reports 2011 or 2013. Adagio ODBC 9.1A or higher module must be installed to be able to do this. Or, your Adagio dealer or consultant can modify reports for you and deploy them at your site.

When you are certain the original modified reports are no longer needed, you can delete the \Softrak\OrderEntry\ModifiedReports.priorversion folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of OrderEntry will have to be converted or recreated. Your custom reports from your prior version will be copied to the folder \Softrak\OrderEntry\CustomReports.priorversion. Converted or recreated custom reports must be placed in \Softrak\OrderEntry\CustomReports.

A Report Convertor Utility is available from Softrak Systems for the purpose of converting Crystal Reports 7 and 8.5 reports that use the old Crystal Reports Print Engine (CRPE32.dll) to Crystal Reports 2011/2013 format, using the Adagio ODBC driver. Converted reports can be edited and new reports can be created using Crystal Reports 2011 or 2013. Adagio ODBC must be installed to be able to do this. **Only reports built using the most recent QRT\*.QRW tables can be converted.**

Note: Custom reports created with Crystal Reports 8.5 for Adagio for prior versions of OrderEntry will continue to work in most cases when printed from the Crystal 8.5 designer, Adagio PrintTool 8.5 and the Custom Reports menu of Adagio modules at versions prior to 9.2A. This is because the data structure for OrderEntry 9.2A did not change significantly. Existing custom reports cannot be printed from the Custom Reports menu of OrderEntry 9.2A and may not function for future versions of OrderEntry.

The Report Convertor Utility and related files are installed to \Softrak\System\ReportConvertor. It converts reports created with Crystal Reports 8.5 but will also convert reports from 9.2A to future versions of Adagio. See Tech-Tips on the ReportConvertor and Speed Improvement Tips for Custom Reports.

See the Tech-Tip and Show Me How video on converting reports on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>.

Softrak provides only limited support on the Report Convertor. We do not support new versions of Crystal Reports itself, except as support is related to assisting you to locate data in the Adagio tables. Softrak no longer provides support for Crystal Reports 8.5 for Adagio.

As Adagio 9.2A reports use the same data dictionaries as the application, the Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio OrderEntry 9.2A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.2A data dictionaries contain 2 tables for each physical file - one for use by the Adagio module and one for use by reports in 9.2A modules. Standard reports in the modules and custom reports created with Crystal Reports 8.5 for Adagio use tables where the description ends with "(View)" in the DDE. The standard tables used by the module (and by GridView) do not. In Crystal Reports, the View table names end with "crview" (eg. ao192ahedcrview for sales order header). Standard tables do not (eg. ao92ahed). Use the "crview" tables for modified reports or when converting existing custom reports. When creating new reports,

use the standard tables without "crview". Future versions of Adagio will begin to use the standard tables for reporting. You must create a shortcut and add the parameter /ODBC to include the "crview" tables in the export to Excel in the DDE. Note: the "crview" field names are not prefixed with the application code (e.g. "OE").

When you are certain the original reports are no longer needed, you can delete the \Softrak\OrderEntry\CustomReports.priorversion folder.

An updated version of Adagio PrintTool (PT) is installed in \Softrak\PrintTool. PT 9.2A prints custom reports created with Crystal Reports 2011 or 2013. It uses the Crystal Reports runtime engine. Adagio ODBC must be installed to create custom reports but is not required to print custom reports. Your Adagio dealer or consultant can create custom reports for you and deploy them at your site. Note: PT does not print reports created with Crystal Reports 8.5 for Adagio. Existing version 8.5 custom reports must be converted before they can be printed by 9.2A.

**Upgrading from 8.1E** **Upgrade Complexity:** **Intermediate** ■

Adagio OrderEntry data will be converted for use with 9.2A.

OrderEntry 9.2A is not compatible with earlier versions of Adagio OrderEntry. Posting in previous versions can cause data integrity errors. Do not attempt to open a 9.2A 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:** **Intermediate** ■

The options 'Ask Print OK after forms print?' and 'Close forms dialog after print?' were added to User Preferences. Both options are enabled 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:** **Intermediate** ■

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 Day End 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**

This Release Notes does not cover upgrading from 8.1B or earlier versions. If you are upgrading to 9.2A from these versions, **before installing the upgrade**, it is important to review this information in the 8.1F Release Notes on Softrak's website or the OrderEntry Readme help.

