



Compatibility

Adagio

BankRec 9.2A (2017.07.20)
BoM 9.3A
Console 9.1A, 9.2B
DataCare 9.2A
DocStore 9.3A
ePrint 9.2A
GridView 9.1A - 9.3A
Inventory 9.2A (2017.06.08)
Lanpak 9.3A
Ledger 9.1A - 9.3A
MultiCurrency 9.2B
ODBC 9.2A
PurchaseOrders 9.3A
Receivables 9.2A (2017.07.11)
RMA 9.3A
SalesAnalysis 9.2A (2017.09.04)
SalesCQ 9.2B

Other

MS Office 2010/13/16, 365
MS Windows 7 (SP1), 8, 8.1, 10
MS Server 2008R2 SP1 or higher
Crystal Reports® 2013 - 2016
(requires Adagio ODBC 9.2A)

Note

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

Enhancements in OrderEntry

New Features

- Compatible with future release of Adagio Receivables 9.3A.
- Adagio DocStore links from documents attached in OrderEntry are sent to batches in Adagio Receivables 9.3A for Direct and Retrieval methods.
- Added new option 'Send to A/R P/O Reference' to the System Options tab in the Company Profile for Adagio Receivables 9.3A. Typically this option would be set to "%rfl%rfr" to receive the full 24 character PO Number. This option is only available when the Receivables Batch Type is 'Direct'. The Retrieval method will be supported in a future version.
- If Adagio Receivables is 9.3A, the Find button on the Customer grid in the Edit/View Customer functions is now enabled when a filter is applied. You use the Finder and Smart Finder to search within the filtered grid.
- It is easier to choose the correct field from tables with large numbers of fields in the Column Editor. You can now sort the list, restrict the list using the data type you are searching for (Text, Date, Amount and Value), and type in some text likely to identify the field. On the Select the Type option on the Select Fields dialog to show fields of that type.

- Added keyboard shortcut Alt-M to set focus to the Send Method on all forms print dialogs. Once on the Send Method the arrow and spacebar keys can be used to select or deselect Printer, PDF and/or Email. Also added Alt-P, Alt-D and Alt-E to select or deselect directly. Note: previously Alt-P was use for the Send/Print button. Alt-S is now used for this button. The Send/Print button has the focus on the dialog. You can simply press Enter to print.

Problems Fixed

- Adagio OrderEntry 9.3A did not allow the Expected Ship Date to be blank. A blank date would cause problems for the Auto-Invoice function and printing picking slips by date range. The Expected Ship Date can now be blank. Auto-Invoice will skip any order with a blank Expected Ship Date when selected by Expected Ship Date – the order will not be invoiced. Use the option to select orders by Order Date instead. Orders multi-selected from the grid will be invoiced in all cases. If printing picking slips are selected by Expected Ship Date, orders with a blank Expected Ship Date will not print a picking slip, even when you select 'All'. To print picking slips for orders with a blank Expected Ship Date, select orders by Order Date instead.
- In OrderEntry 9.3A, if the 'Auto add items on documents' option was not on in User Preferences, detail lines added had the Item Number and Description blanked out on the grid. Adding additional details resulted in an Access Violation error.

- In Order Entry 9.3A, if 'Uppercase customer codes' is disabled in Receivables and you have customer numbers that are not uppercase, printing from the Print Invoices function for a range other than blank to zzzzzzzzzzzz caused the program to hang.
- In OrderEntry 9.3A, posting orders having a single item only or all items that have Quantity but no Value (i.e. Unit Price and Extension = 0.00) automatically Completed the order.
- The Order Notes tab was not visible in History if no Header Optional Fields are defined in OrderEntry.
- In OrderEntry 9.3A, adding a Comment or Instruction line when 'Hide completed lines' was selected displayed an error.
- In OrderEntry 9.3A, changes made to address lines on posted invoices with Formatted Addresses were not saved.
- In OrderEntry 9.3A for multi-currency databases, the Order Amount field on the Details screen moved left on the form after editing the order.
- The 'No. of copies' field added to document print dialogs in OrderEntry 9.3A did not work.
- On the print dialog for documents, when multiple Send Methods are used they are remembered for next time. The Send Method was also remembered if a single Send Method was used. This has been changed to default to the preferred Send Method for the customer next time rather than what was selected last time.
- In the print documents functions, if you selected one or more Send Methods that were not the preferred send method in the customer, and selected 'Use preferred send method', the question "Was everything printed/sent OK?" was asked even though nothing was printed.
- For customers where Print is not enabled in the Send Method, if you printed multiple forms for the customer (either from the Print Invoices menu or multi-selected from the invoices grid), clicking Preview displayed the message "Nothing in range to preview." You had to allow Print for the customer in order to be able to preview multi-selected documents. Preview works even for customers that don't allow printing.
- In OrderEntry 9.3A if you used the Complete button to complete an already completed order, after displaying the message that the order is already complete, a message saying there are still items on backorder was incorrectly displayed.
- If a customer has a blank Ship To code on the Invoicing tab for OrderEntry and no Ship To code is specified in the Entry Template, the Ship To code will default to blank when entering an order. This was the behavior prior to version OrderEntry 9.3A and some sites used a blank Ship To as the default ship to location for customers.
- The Auto-Invoice function did not recalculate the Due Date and Discount Date for invoices created when using an Invoice Date that is different than the Order Date.
- In OrderEntry 9.3A when auto-invoicing orders, lines could be missing on invoices created in some cases if other users were posting in OrderEntry or transferring quotes from SalesCQ to orders in OrderEntry.
- Auto-invoice orders did not calculate the invoice discount specified on the Totals tab.
- The Order/Invoice/Credit Note List report had overlapped fields when none of the Additional Information options were selected.

- Printing a Report Set to PDF used the older AdagioPDF printer driver rather than the newer AdagioV2PDF printer driver. This caused a problem if an older version of some Adagio module that installed older AdagioPDF had not been installed at a site.
- Searching History by Item in OrderEntry 9.3A was extremely slow if the Customer Number range was not blank to ZZZZZZ (i.e. when searching for specific customers).
- If there were more than four Optional Fields, they were not displayed correctly in the Edit/View Customer functions.
- When running an Automation File, error messages relating to DocStore in Day End displayed on screen and required operator input. These errors are now recorded in the automation log and are no longer displayed on screen.
- If an alternate item was chosen from the Item Inquiry for a detail line and that item was on sale, the sale price was not used. Similarly, if the Price List was removed (blanked out) in the Item Inquiry, the sale price was not used, nor was it used if the Price List was re-entered.
- In OrderEntry 9.3A, in the View History function on the Items tab, if you selected blank as a Sort By field the Starting / Ending fields disappeared.
- An Access Violation error occurred in Import functions had when importing a CSV file where the last record is missing a CR/LF. Previous versions of OrderEntry were able to import such files.
- Conversion to OrderEntry 9.3A was halted when there were missing header records (i.e. a corrupt database). The conversion now completes and displays a message. Note: databases should be checked for errors prior to conversion.

Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or Change Log under [Documentation](#) for this module 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.

Adagio OrderEntry 9.3A **requires these versions** or higher of the following modules (if used). **Earlier versions of these modules will not open or may open but will not work if OrderEntry 9.3A data is present, with errors resulting.** OrderEntry 9.3A also requires certain versions of other modules (if used) that are not listed here. See the compatibility information at the top of this release note.

- Lanpak 9.3A
- MultiCurrency 9.2B
- BankRec 9.2A (2017.07.20)
- Adagio BoM 9.3A
- Inventory 9.2A (2017.06.08)
- Invoices 9.2A (2017.08.30)
- JobCost 9.2A (2017.10.20)
- Payables 9.2A
- PurchaseOrders 9.3A
- Receivables 9.2A (2017.07.11)
- Adagio RMA 9.3A
- SalesAnalysis 9.2A (2017.09.04)
- SalesCQ 9.2B
- Time&Billing 9.2A (2017.10.24)

Upgrading

Upgrading from 9.2A

Upgrade Complexity: **Intermediate** ■

Note: if you have complex custom reports in Crystal Reports and/or views in Adagio GridView the Upgrade Complexity may be **Difficult** ♦.

Field selections you have made in the Column Editor for grids may be altered when you upgrade due to the significant data structure changes in 9.3A. Filter definitions may also be altered. You should make note of these settings in 9.2A before installing and upgrading to 9.3A to assist you with adjusting these settings as needed after upgrading.

Installing the upgrade:

Adagio OrderEntry 9.3A is a major upgrade, containing many changes and new features. It is very important to review the information below before installing the upgrade.

OrderEntry 9.3A requires some Adagio modules (if used) be at a certain version or higher. See the list above and check the compatibility chart. Do not install OrderEntry 9.3A until you are certain you have all the compatibility releases required at your site available to be installed.

The data structure was changed and expanded significantly for the OrderEntry 9.3A release. The internal database version changed for 9.3A. **Programs from Adagio Developer Partners (ADPs) that read or write the OrderEntry data will require a compatibility upgrade.** Check with the developer or your Adagio dealer to ensure an upgrade is available before installing or upgrading to OrderEntry 9.3A.

Adagio OrderEntry 9.3A requires a significant 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 for OrderEntry 9.2A created in Crystal Reports 2011/2013/2016 or in Crystal Reports 8.5 for Adagio, they will require conversion and adjustment for use with 9.3A. If you have GridView views for OrderEntry 9.2A, they will require conversion and adjustment for use with 9.3A. 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.

Converting your database:

Adagio OrderEntry 9.3A requires a significant database conversion from 9.2A.

You can convert your OrderEntry 9.3A database at any time. To start the conversion, open your current database for the first time in OrderEntry 9.3A. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a backup at this time, before proceeding with the conversion. You should do so if you have not already made a backup.

If you are converting databases for other modules at the same time, the order in which you convert is not significant, with the following exceptions:

- If you are also converting Adagio SalesCQ you must convert OrderEntry first. OrderEntry 9.3A is not compatible with version of Adagio SalesCQ earlier than 9.2B.
- If you are converting from OrderEntry 9.2A (2015.07.29), **and if you retrieve batches from OE into Adagio Receivables (i.e. you use 'Retrieval' rather than 'Direct'), you must retrieve your batches in AR before converting your OE 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.

The conversion should only take a few minutes. However, it could take a significant period of time on databases with a large number of documents in current and/or history over a network. For large databases, you may want to copy your database to a local machine, convert the data, and then copy it back. The conversion on a local drive could be 10 times faster or more. We strongly recommend you contact your Adagio consultant for assistance with this procedure.

Adagio OrderEntry 9.3A supports "formatted addresses" - it maintains separate fields for City, Province/State and Country; whereas in previous versions, this information was contained in free-formatted address lines. It will convert the information in address lines from previous versions to populate the City, Province/State and Country fields, at the same time removing this information from the address lines. Generally you should only use formatted addresses if you are located in Canada or the USA, and if you format vendor addresses in Receivables.

The conversion will ask you if you want to attempt to format your addresses according to conventions used. The conversion only formats addresses for vendors in North America. It will populate the Country field for international customers if it can, although the address will be left unformatted.

After converting your database:

After converting, you should immediately run a Data Integrity Check.

Existing specifications (order, invoice, credit note, etc.) from versions prior to 9.3A will continue to work without requiring changes, regardless of whether you elected to format addresses. However, you may want to adjust your specifications to use new features in 9.3A, including: larger Document Number field (12), larger Reference field (24), formatted Bill To and Ship To addresses, larger customer name and address fields (40), and Optional Fields on details.

OrderEntry 9.3A has unlimited Miscellaneous Charges. New Footer specification code 'F53 total by misc charge description' was added to support unlimited Miscellaneous Charges. Versions prior to 9.3A were limited to 10. Totals for each of those 10 print using codes F07 to F12, and F17 to F20. These existing codes continue to work so that existing specifications continue to work without change. However, if you use more than 10 you will need to use F53.

Specifications in the sample data and in document templates in the designer have been updated to use formatted addresses fields. The ALL Codes specification (OE\$ALL) has been updated to show all new specification codes. Specifications are not downward compatible with earlier versions.

You may want to turn on the 'Suppress home country on forms' option on the System Options tab. This suppresses the Country from printing in the address on documents for customers in your own country.

The Reference field in the Transaction History file in Adagio Inventory (10 characters) does not yet fully support the increased Document Number size in OrderEntry (now 12 characters, was 8 in prior versions). The Document Number will be truncated in the Reference field if you use more than 10 characters in OE. In addition, for Adagio ePrint users, if you use more than 10 characters you will not be able to link from transactions in the Inventory History grid to the OE Invoice or Credit Note PDF document.

The 12-character field 'OE93A Document Number' has been added to the I/C Transaction History file as a temporary solution to store the extended 12-character OE Document number. This field is available for use in custom Crystal reports and GridView views. Adagio Inventory itself will not use this field until new version is released, although it is available in grids. The field is only populated going forward after OrderEntry 9.3A is used.

The Archived Transactions file in Adagio SalesAnalysis does not yet support the increased Document Number size (now 12 characters, was 8 in prior versions) in the 'Order no.' field. It also does not yet support the increased 'Reference' field (now 24 characters, was 12). There will be a loss of information in these fields if you use the increased size, archive and later restore the archived file in SA. The Invoice number was increased to 12 characters from 8. The Archived Transaction file does support the increased size and there is no loss of information for the Invoice number when restoring.

Other changes have been made to the data structure that may affect custom reports and view. Fields in the O/E Options file have been moved to an expanded Company Profile file (OEGLOB) and the Option file is no longer used. The O/E Order Status Log (OEOLG), O/E Commission Report (OECOMM), and O/E Sales Summary (OESALES) files have been

expanded and are now indexed for speed. The Invoice and Credit Note Audit List files have been expanded. The Tax Tracking file has been expanded.

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 9.3A. Any modified reports will be located in \Softrak\OrderEntry\ModifiedReports. These same reports must be recopied from \Softrak\OrderEntry\StandardReports and re-modified using Crystal Reports 2013 or 2016. Adagio ODBC 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.

If you have custom reports, they will have to be converted or recreated. Any custom reports will be located in \Softrak\OrderEntry\CustomReports or its subfolders.

A Report Converter Utility is available from Softrak Systems for the purpose of converting custom reports created with Crystal Reports 2011, 2013 or 2016 for OrderEntry 9.2A to work with 9.3A. See the Tech-Tip "ConvertingCustomCrystalReportsToHigherAdagioVersion.pdf". The Report Converter Utility and related files are installed to \Softrak\System\ReportConverter.

Also see Tech-Tips and Show Me How videos on creating and converting reports on Softrak's website at <http://www.softrak.com/resources/technicaltips/technicaltips.php>. You must scroll to the Tech-Tips.

Note: If you are upgrading from OrderEntry 9.2A but you did not update your custom reports created in Crystal Reports for Adagio 8.5 when you upgraded to 9.2A, you WILL have to update them for 9.3A. To do this using the Report Converter you must get the Mapping Table file (TableInfo.txt) that has been changed to update to 9.3A rather than 9.2A. First, make a backup of the existing TableInfo.txt in \Softrak\System\ReportConverter. Then copy TableInfo.txt in \Softrak\System\ReportConverter\ForOE93A to \Softrak\System\ReportConverter. If your custom 8.5 reports were already converted for 9.2A the mapping table is not required to convert your reports and you can ignore this step.

Softrak provides only limited support on the Report Converter. We do not provide support for Crystal Reports, except as support is related to assisting you to locate data in the Adagio tables. The Adagio Data Dictionary Exporter tool (DDE) is useful for locating the tables and fields in the Adagio OrderEntry 9.3A dictionary. The DDE program, help and manual can be run from the Windows Start menu.

The 9.3A data dictionary contains 2 tables for each physical file - one for use by the Adagio OrderEntry program module and one for use by its reports. Standard reports 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" (e.g. ao93ahedcrview). Standard tables do not end with "crview" (e.g. ao93ahed). 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").

For OrderEntry 9.3A the Extension files for document header and detail tables present in prior versions have been combined into the main table. The Master and Extension tables are no longer needed and do not exist. **Therefore custom reports using the Master or Extension tables for Sales Order (current) or History documents cannot be converted by the Report Converter utility. They must be converted manually in Crystal Reports.** This is the case whether the custom report was written using Crystal Reports for Adagio 8.5 or written for or converted to the "crview" table in Crystal Reports 2011-2016, or written for the standard tables in Crystal 2011 - 2016.

Composite tables using Extension tables are no longer required and have been removed for the OrderEntry 9.3A dictionary. The Composite tables 'OE Ord Detail /w Head' and 'OE Hst Detail /w Head' are available for use in GridView views.

See the Tech-Tip "ManuallyConvertingCustomCrystalReports.pdf". The Report Converter Utility and related files are installed to \Softrak\System\ReportConverter.

The single bit-mapped Print Status field in documents has been removed and replaced with individual fields: Order printed, Invoices printed, Credit note printed, Label printed, and Picking slip printed. These fields are Boolean (Yes / No) rather than a bit-mapped variable, making selection by print status much simpler in custom reports. Custom reports using the Print Status field in previous versions will require adjustment of fields and selection formulas.

For OrderEntry 9.3A, many fields commonly reported on in custom Crystal reports have been added to the header and detail tables to reduce the necessity of linking to other tables. You may want to modify your existing custom report do take advantage of this. Using these fields instead of linking to other tables simplifies reports and may speed up such reports noticeably.

In the header these include:
Salesperson name
Customer report group.

In the detail these include:
Category description
Category commission rate
Category commission paid?

Converting GridView Views

A data dictionary change from 'Adagio OrderEntry 9.2A' (@O92A) to ' Adagio OrderEntry 9.3A ' (@O93A) was required in order to support new features added for this version. GridView views created for earlier versions of Adagio OrderEntry must be recreated using tables from 'Adagio OrderEntry 9.3A'. GridView has the ability to convert existing views to a new table.

Note: The 9.3A 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". GridView 9.2B and higher hides 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.

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 Export Tool useful for comparing tables in the Adagio OrderEntry 9.3A 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>.

Current and History tables were harmonized for 9.3A. Converting GridView views based on the History Header Master will encounter errors if certain fields are used in the view. The errors will be similar to 'The data set '@O92AHHM' does not exist! Missing secondary files for the set and '@O92AHHD' followed by 'Encountered an improper argument'. The conversion will fail and the view should not be saved. A future release of GridView will enhance the conversion of fields using partial matching and prevent these errors.

If any of these fields are used in a History Header Master view there will be errors during conversion. Do not save the view if this occurs. Remove these fields from the view and formulas within the view. The view can then be converted and saved.

- Posting Seq
- G/L Posting Seq
- A/R Posting Seq
- Home Currency
- Source Currency
- Rate Override
- Foreign Rate Override

Composite tables using Extension tables are no longer required and have been removed for the OrderEntry 9.3A dictionary. The Composite tables 'OE Ord Detail /w Head' and 'OE Hst Detail /w Head' are available for use in GridView views.

The single bit-mapped Print Status field in documents has been removed and replaced with individual fields: Order printed, Invoices printed, Credit note printed, Label printed, and Picking slip printed. These fields are Boolean (Yes / No) rather than a bit-mapped variable, making selection by print status much simpler. GridView views using the Print Status field in previous versions will require adjustment of fields and selection formulas.

Upgrading from 8.1C - 8.1F

Upgrade Complexity:

Difficult ♦

This Release Notes does not cover upgrading from 8.1C - 8.1F. If you are upgrading to 9.3A from these versions, **before installing the upgrade**, it is important to review this information in the 9.2A Release Notes on Softrak's website or the OrderEntry Readme help.

Upgrading from 8.1B or earlier

Upgrade Complexity:

Difficult ♦

This Release Notes does not cover upgrading from 8.1B or earlier versions. If you are upgrading to 9.3A 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.

