



### Compatibility

#### Adagio

Console 9.2A – 9.3A  
DataCare 9.3A  
DocStore 9.3A  
ePrint 9.2A  
GridView 9.2A - 9.3B  
Inventory 9.2A - 9.3A  
JobCost 9.2A  
Lanpak 9.3B  
Ledger 9.2A – 9.3B  
MultiCurrency 9.2B  
ODBC 9.2A  
OrderEntry 9.2A – 9.3B  
Payables \* 9.2A – 9.3C  
\* = module required

#### Other

MS Office 2010/13/16/19/21,  
365  
MS Windows 8, 8.1, 10, 11  
MS Server 2012R2 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.softrak.com](http://www.softrak.com).

## Enhancements & Problems Fixed

- In Multicurrency datasets, editing a Document and using Propagate Changes to change the vendor from a Source Currency Vendor to a Home Currency Vendor was not updating the document details for the Currency and the Home Equivalent amounts. Data Integrity Check has also been updated to detect this error.
- In document entry, if the selling unit of measure did not match the costing unit of measure, the detail Item cost was not properly recalculated, in some cases.
- The Purchase Order Reports, Outstanding Purchase Orders report has been updated. Setting a filter by the Expected Receipt Date was not working. Selecting an Inventory or Sundry Item from the Finder or SmartFinder was not updating the Starting and Ending ranges properly.

Note: The Outstanding Purchase Orders report was not including all of the records.

- There is a new Company Profile option on the Integration tab for JobCost 9.3A: Sent to JC description 2 field.
- PurchaseOrders has been updated to send additional information to JobCost 9.3A including Doc Link and Entry Description Line 2.
- New specification codes have been added:  
D101-Job name 1  
D102-Job name 2
- For JobCost 9.3A, a Default Job-Phase-Category has been added to Edit, Import/Export and Print Sundry Items.
- If a Sundry Item has been created with a blank 'G/L Expense Acct', Document Line Details will default the 'DB GL Account' from the Company Profile, Ledger Interface tab, 'Default Sundry Item Expense Account'. For Job related entries, this account will not be used but it can't be left blank.

- JobCost 9.3A Job Alerts now appear in Document entry.
- Import Purchase Orders, Quick Receipts, Receipts and Requisitions now have Job, Phase & Category fields in the Available fields list for Inventory and Sundry Items.
- If the Company Profile is set to use "North American Address?", Import Sundry Vendors, Pickup Addresses, Ship/Bill To Addresses, Purchase Orders, Receipts, Quick Receipts or Requisitions will validate State/Province. If Country is imported, it will also be validated.

- A new option has been added to the Company Profile, System Options tab to work with 'North American Address?': 'Normalize Country To'. The options are: Full name, 2 character ISO, 3 character ISO and Never. For Import or Edit for Sundry Vendors, Pickup Addresses, Ship/Bill To Addresses, Purchase Orders, Receipts, Quick Receipts or Requisition and for editing Payables Vendors through PurchaseOrders, if the Country is recognized, variations on Country codes are standardized based on this setting.  
Eg. For the Default setting: Full name, CA or CAN become Canada.
- Adagio PurchaseOrders now respects the Group Security settings for Item Notes within Adagio Inventory. If a PurchaseOrders user does not have access to edit Items, but the same Inventory user does have access to Edit Item Notes, the PurchaseOrders user will also be able to edit Item Notes while viewing Item records.

## 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 PurchaseOrders 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 PurchaseOrders 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 PurchaseOrders 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 PurchaseOrders is installed on a network, you may also need to do a workstation install at each station running Adagio PurchaseOrders.

To determine if a workstation install is required, start Adagio PurchaseOrders 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 PurchaseOrders 9.3B (2024.03.20) installs a new version of the SAP Crystal Reports™ runtime engine for .NET Framework (SP25) used to print/preview reports. **This will require a workstation install on all stations that run Adagio**, regardless of whether Adagio PurchaseOrders is run from a given station, unless another module that installs SP25 has already caused a workstation install for this reason. If a station does not run PurchaseOrders then untick the shortcuts and Start Menu options when running the workstation install. Other modules with a release date after October 23, 2019 may or may not install SP25. Eventually, all modules will do so.

**After installing PurchaseOrders** (or any other module that installs Crystal SP25 in the future) **you must do a workstation install for any current version Adagio module on each workstation**, even if the station never runs PurchaseOrders. When any Adagio module is run on a workstation for the first time after PurchaseOrders 9.3B has been installed, a workstation install will be launched automatically if required. Only this one workstation install has to be done. No other modules will require a workstation install. However, if running an older module **that did not install Crystal SP25 runtime** and you receive a workstation requires updating message, its regular workstation install will be intercepted by the newer Workstation Common Setup. After, a message will be displayed stating the regular workstation install has already been run and indicating that you should NOT continue to the regular install as it is obsolete. You should select to exit at this point.

**When installing Adagio at a new site or to a new server, Adagio PurchaseOrders 9.3B should be installed last** (any module that installs the new version of the Crystal Reports runtime engine (SP25) can be installed last instead). If after installing PurchaseOrders, you install other modules with a release date older than the date of this PurchaseOrders release, or any module that does not install Crystal SP25, the error "Failure to initialize the Adagio Reporting environment." will be displayed when you start the module. To correct this, run the System Status function from the Help menu of any module or run \Softrak\System\chksys.exe. You need to have local administrator rights on the station to do this. If User Account Control is enabled you will be prompted to allow the program CHKSYS.EXE to run and must do so. The following message will be displayed and you should proceed to update the files.

**Reporting File Needs Updating!** This utility has detected that the Softrak Reporting DLL [SoftrakSystems.Adagio.Reporting.dll] needs to be updated in one or more Adagio folders. Unless you have specific circumstances to delay this action, you should update the needed files now. Do you want to update the needed files?

Adagio PurchaseOrders 9.3B installs a new version of the Adagio ODBC driver used to print reports. The new driver is AdagioODBCv3.dll. It is installed in the \Softrak\ODBCV2 folder. Reports printed by all Adagio modules, including all versions, will use this new driver. The prior version of the driver (AdagioODBCv2.dll) remains installed and will continue to be used by existing ODBC connections (for any DSN created with the module Adagio ODBC) without change. Installing Adagio module versions released prior to PurchaseOrders 9.3B that do not install the new driver will set the driver used back to AdagioODBCv2.dll. Reports from PurchaseOrders will continue to work.

Adagio PurchaseOrders 9.3B installs a new version of the printer driver used to print documents and reports to PDF for DocStore users. The new driver name is AdagioV3PDF. This driver uses novaPDF version 10.

NOTE: Modules that have not been updated to use AdagioV3PDF printer driver cannot print to that driver from the printer list. However, DocStore users will have no problem ePrinting reports to PDF or printing forms to PDF.

**Adagio PurchaseOrders requires Adagio Payables** and a Payables database must exist for PurchaseOrders to run.

**PurchaseOrders 9.3B requires some Adagio modules to be at a certain version or higher.** See compatibility information below or the Adagio Compatibility Chart.

PurchaseOrders 9.3B requires Adagio Lanpak (if used) to be version 9.3B or higher.

PurchaseOrders 9.3B requires these modules (if used) be at the specified version or higher. If an earlier version of Ledger data is detected, an error message is displayed and PurchaseOrders will not open the database.

- Inventory 9.2A or higher
- JobCost 9.2A or higher
- Ledger 9.3A or higher
- OrderEntry 9.2A (2016.01.11) or higher preferred
- Payables 9.2A or higher

Display of transactions for PurchaseOrders 9.3A or higher in the Edit / View Vendor functions requires Payables 9.3B or higher, and BankRec 9.2A (2016.06.06) or higher. For earlier versions, these transactions can be viewed in the Edit / View Vendor functions in PurchaseOrders.

The Item Inquiry with Sales and Cost function requires Inventory 9.2A (2016.04.25), Invoices 9.2A (2016.05.07), and SalesAnalysis 9.2A (2016.06.08), or higher versions, to display the purchase order details correctly on the current or archived documents grids. This display issue will be addressed in the next Service Pack for SalesCQ. For SalesCQ and earlier versions of these modules, use the item display in Adagio PurchaseOrders.

The Auto Generate POs from OrderEntry function did not work if you have OrderEntry 9.2A (2015.07.29). Orders entered with this version of OE 9.2A did not generate PO's. Orders entered with a previous version of OE and orders created by transfer from SalesCQ did not have a problem. This was corrected in OrderEntry 9.2A (2016.01.11). If you entered orders in the 9.2A (2015.07.29) version, you must open the data with PurchaseOrders first and then do a Data Integrity Check in OE. Errors will be reported for each detail line entered in OE 9.2A (2015.07.29). You must do a rebuild and all errors will be corrected without loss of data. The Auto Generate will then work correctly.

PurchaseOrders 9.3B requires Adagio MultiCurrency (if used) to be version 9.2B or higher.

**The data structure for PurchaseOrders 9.2B and 9.3A, 9.3B was changed and expanded significantly.** Programs from Adagio Developer Partners (ADPs) that read or write the PurchaseOrders 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 PurchaseOrders 9.3B.

PurchaseOrders does not have a Manual in PDF form. Use the online help instead. The help fully documents all aspects of the product.

## Upgrading to 9.3B

**Upgrading from 9.3A**

**Upgrade Complexity:**

**Easy ●**

Adagio PurchaseOrders 9.3B does a minor database conversion from 9.3A. It converts the PO sundry item file. You will be prompted to back up your database before conversion, you can convert your P/O database at any time.

**Upgrading from 9.2B**

**Upgrade Complexity:**

**Easy ●**

Adagio PurchaseOrders 9.3B does a minor database conversion from 9.2B. It converts the PO item history file and the PO Sundry Item file. You can convert your P/O database at any time.

The release of OrderEntry 9.3A Order Number is expanded to length 12 and therefore is also in these PO 9.3A tables:

- P/O Header
- P/O Header History
- P/O Header Requisitions
- P/O item history file
- P/O Details
- P/O Details History
- P/O Details Requisitions

In addition, the OE93A Order Key field has been added to the detail record.

The ExcelDirect Print function has been added for some reports. During conversion you will be asked if you want to enable the option for in the Company profile and for all User Preferences.

If you are using Adagio DocStore, it is imperative the DocStore database be included with all backups of your PurchaseOrders database. All backup zip files created by the File | Backup functions in PurchaseOrders include the DocStore database. In Adagio DataCare, the DocStore database is backed up by Jobs checking 'Adagio Common Files' with the 'Include in backup' option enabled. For a manual backup, include all data files beginning with "SD".

## Upgrading

**Upgrading from versions prior to 9.2B**

**Upgrade Complexity:**

**Intermediate**



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

