

Adagio® SalesAnalysis 8.1B (2010.05.05)

Release Notes

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



Adagio

Crystal Reports® 8.5 for Adagio
DataCare 8.1A
GridView 6.8A – 9.0B
Inventory 6.8A – 8.1B
Invoices 6.8A – 8.1A, 9.0A
Lanpak 9.0B
MultiCurrency 8.0A – 8.1A
ODBC 9.0A
OLEDB 6.8A – 8.0A

OrderEntry 6.8A – 8.1C
Receivables 6.8A – 9.0A

Other

MS Office 2003, 2007
MS Windows XP, Vista, 7

Enhancements and revisions in Adagio SalesAnalysis 8.1B (2010.05.05)

- ◆ Compatible with Adagio Invoices 9.0A. Compatibility with earlier versions of Adagio Invoices is maintained.
- ◆ Compatible with Windows 7.
- ◆ Added an Excel Direct button to various grids, including View Customer and the customer transactions tab for Receivables, OrderEntry, Invoices and Time&Billing transactions. Also the View Item grid. Use the 'Enable SF Export' option in Edit User to enable or disable the Excel Direct button.
- ◆ Excel Direct from grids now has a progress bar and cancel for grids with a very large number of rows.
- ◆ The Help | About dialog now has a 'System Info' tab showing the version and path to various DLLs used by the program.
- ◆ Supports the 'Implied decimal' option added in Ledger 9.0C (in the User Preferences function). The setting is by Adagio user, for all companies, and when set in any Adagio module it is set for all Adagio module versions that support it. Turn the option on if you want a decimal automatically entered before the last two digits. For example, typing 400 in an amount field and tabbing to the next field will result in the number being changed to 4.00; typing 400.00 and tabbing to the next field will leave the number as 400.00. With the option off, typing in 400 will result in the number being changed to 400.00 (the behavior in previous versions). Percent fields and exchange rate fields are not affected by this setting.
- ◆ If there are errors during any import function, the error message dialog displaying the error (e.g. "Errors have been written to the log file C:\softtrak\data\xx\IMPERR.ddd.") now allows you to view or print the log file.
- ◆ Added 'Report Preview Options' in the File | Options function to allow you to set the default preview zoom factor (percentage) and preview window state (full screen or partial screen) for previewing reports to screen. These settings are saved by workstation. Note: this applies to previewing reports only (but not previewing statements/letters).
- ◆ Typing the Adagio user password on the Open dialog displayed the characters very slowly when on a network in rare cases.
- ◆ When you selected Historical transactions for Receivables on the Transactions tab in view customer, loading the grid was noticeably slow when across a network. In addition, if the Transactions tab was the last tab you visited in the customer, the next time you opened a customer it was noticeably slow.
- ◆ The 'Last access' date was not updated if the program was started from the Adagio menu of another application or from an icon with parameters that bypassed the login screen. Therefore the field was not up to date on the login screen the next time you started the program.
- ◆ Old formats such as Lotus, Dbase and Clipper that are almost never used any more have been removed from import / export templates, leaving Excel, ASCII CSV (Delimited), ASCII Fixed Length and PSV Delimited. The old formats may be manually turned back on for sites that need them. See the Upgrading section below for details.
- ◆ Excel Direct (from finders, smart finders and from grids in some modules) can be configured to export an ASCII CSV file (instead of sending data direct to Excel) and start an application that automatically opens the file. This allows export when Excel is not installed and provides support for other spreadsheets such as OpenOffice.org. Note that unlike Excel Direct there is no formatting with CSV. To enable this functionality, entries must be made manually in the file \softtrak\system\ssi2xl.ini. Refer to the Configuring Excel Direct to Export to CSV section for details.
- ◆ Some of the Standard Reports could not be printed if another program installed a different version of the Crystal print engine

(CRPE32.DLL) in the \windows\system32 folder (\windows\SysWOW64 on a 64-bit OS). SalesAnalysis now loads the print engine from the \softtrak\system\win32 folder to avoid this problem.

- ◆ The print engine is only installed to the \softtrak\system\win32 folder, and not to the \windows\system32 folder, so that it does not affect other applications that may not load it from their own folder.
- ◆ Some of the Standard Reports could not be printed if you placed the 8.5 version of the Crystal print engine (CRPE32.DLL) in the \softtrak\system\crpe folder for use by Adagio PrintTool, in order for it to print custom reports designed in Crystal Reports for Adagio that use features requiring the 8.5 print engine. SalesAnalysis no longer loads the print engine from this folder.
- ◆ The Cost and Base Price fields were not being imported for transactions.
- ◆ For single-segment item numbers, the import set the item number to "IC" rather than the item number from the import file.
- ◆ If the Adagio Receivables 9.0A data dictionary (@R90A) was installed by installing Receivables 9.0A or OrderEntry 8.1C, and your SalesAnalysis database was interfaced to Receivables 8.1A or older, some of the summary reports in the Standard Reports could not be printed in some cases.
- ◆ After printing any Standard Report, printing another Standard Report gave the error message "Critical Error: [1011] insufficient rights to create file in data directory." and the report did not print. Note: This problem was also fixed by installing the System Updater (2009.11.09) or (2009.12.07).

Enhancements and revisions in earlier versions of Adagio SalesAnalysis

- ◆ Refer to the Readme help file for details of enhancements and revisions in earlier versions.

Installing

To install Adagio SalesAnalysis from the Adagio Product CD you need the serial number and install code from the Product Label that came with your CD.

If you are installing an upgrade, you need the serial number and install code that came with your upgrade. A previous version of Adagio SalesAnalysis 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.

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 SalesAnalysis 8.1B must be installed before the Service Pack can be installed.

To install Adagio SalesAnalysis (or an upgrade), insert the CD in the drive. If the install program does not start automatically, run ADAGIO.EXE from the root of the CD. Or, if Adagio SalesAnalysis was downloaded, run the program file you downloaded. Once the install program is running you can click the View button for detailed instructions. If Adagio SalesAnalysis is installed on a network, you must also do a workstation install for each workstation running Adagio SalesAnalysis. Refer to the manual or "Installing on a network" in the Readme help for instructions.

To install the Adagio SalesAnalysis Service Pack, run the Service Pack program and follow the instructions on the screen. After installing the Service Pack, a workstation install may be required at each station running Adagio SalesAnalysis. To determine if a workstation install is required, start Adagio SalesAnalysis 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.

Upgrading to 8.1B

Note 1 If Adagio Receivables is 9.0A then these modules (if used) must be at the version indicated, or higher, to be compatible with Adagio SalesAnalysis 8.1B.

DataCare	8.1A
Inventory	8.1A (2009.02.17) – Note: if OrderEntry 8.1C is used, Inventory must be 8.1B or higher
Invoices	8.1B
OrderEntry	8.1C

Adagio SalesAnalysis 8.1B remains compatible with earlier versions of all Adagio modules when Adagio Receivables is version 8.1A or earlier.

Adagio SalesAnalysis 8.1B requires Adagio Lanpak to be version 9.0B or higher.

Adagio SalesAnalysis 8.1B is not compatible with DataCare 8.0A. It is only compatible with DataCare 8.1A or higher.

A database conversion is required for compatibility with Adagio Receivables 9.0A but SA remains downward compatible with earlier versions of Adagio Receivables. A conversion will take place even if SalesAnalysis is used with versions of Receivables previous to 9.0A.

The conversion to 8.1B could take a significant period of time on databases with a large number of transactions 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.

Adagio SalesAnalysis 8.1B is not compatible with earlier versions of SA or with Softrak Sales Analysis for DOS. These programs will open an SA 8.1B database without a warning but must not be used.

Adagio SalesAnalysis 8.1B remains compatible with ACCPAC® Plus™ Accounts Receivable and ACCPAC Plus Order Entry (unless Adagio Receivables is 9.0A). However, using ACCPAC Plus is not recommended, compatibility is not guaranteed and this configuration is not supported.

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 SalesAnalysis 8.1B they will be asked "Would you like your historical company access list set up?" Answer yes to have Adagio SalesAnalysis add all entries from the Previously Opened list from your prior version of Adagio SalesAnalysis. It is no longer possible for all users to share the same Previously Opened list.

Settings remembered from the last use of the Set Paid Invoices and Statistics Inquiry functions are lost when you convert to V8.1B and must be re-selected the first time these functions are used after the conversion.

The Territory field increased in size from 2 to 6 characters in Adagio Receivables V9.0A and has also been changed in Adagio SalesAnalysis V8.1B even if Adagio Receivables V9.0A is not used. GridView views created for earlier versions of Adagio SalesAnalysis will continue to work although they must be adjusted for the new Territory field. The Territory field will change to 'Territory Old (pre-81B)' in existing views and must be deleted and replaced with the 'Territory' field, which is the new field. Reports created in Crystal Reports for Adagio for earlier versions of Adagio SalesAnalysis will continue to work and do not need to be adjusted for the new Territory field. The SRW68 table continues to be used for Adagio SalesAnalysis 8.1B.

A new Composite dictionary "Adagio {Composite Tables 9.0A}" that links to Receivables 9.0A tables is installed by A/R for use with GridView. See the AR 9.0A Release Notes or Readme help for further details if you have views linking S/A tables to A/R tables.

Old formats such as Lotus, Dbase and Clipper that are almost never used any more have been removed from import / export templates, leaving Excel, ASCII CSV (Delimited), ASCII Fixed Length and PSV Delimited. The old formats may be manually turned back on for sites that need them by editing \softrak\srwin\srwin.ini and adding section format lines as required:

```
[Import/Export Formats]
Lotus 123 ( Version 1.0 - 2.x)=1
Lotus 123 ( Version 3.0 - 5.0)=1
dBase III & IV=1
FoxPro (all versions)=1
Clipper (all versions)=1
Symphony (Version 1.0,1.1)=1
Quattro Pro (Version 1.0 - 6.0)=1
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