

Adagio® SalesAnalysis 9.1A (2013.10.09) Release Notes

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



Upgrade Complexity

From prior version: ● Easy

Adagio

Crystal Reports® 8.5-B for Adagio
DataCare 8.1A, 9.0A
ePrint 9.0A
GridView 8.1A – 9.1A
Inventory 8.1C - 8.1D
Invoices 8.1A – 9.0B
Lanpak 9.0E
MultiCurrency 8.1B
ODBC 9.0A

OrderEntry 8.1D - 8.1F (Note 1)
Receivables 8.1A – 9.1A

Other

MS Office 2003, 2007, 2010
MS Windows XP, Vista, 7, 8

Enhancements and revisions in Adagio SalesAnalysis 9.1A (2013.10.09)

New Features

- ◆ Supports Automation when Adagio Console is installed. Automation allows you to automate many functions including retrieving, importing, printing reports, backup and integrity check, etc. across modules, and view, print or email the results from an automation log.
- ◆ Adagio ePrint users can view PDFs of invoices and credit notes from Adagio Invoices and OrderEntry for transactions in the View Customer function.
- ◆ Adagio ePrint users can view PDFs of invoices and credit notes from Adagio Invoices and OrderEntry for shipment and return transactions in IC history in the View Items function.
- ◆ Added smart finder by Customer Name to the Find function in the View Customer function.
- ◆ Added new expansion codes for Report Favorite filenames for Adagio ePrint users: %CMP (company name), %CNO (company number), and %EXT (data extension).
- ◆ Default Import/Export Templates can now be deleted. This avoids selecting them accidentally at sites using custom designed templates.
- ◆ The Data Integrity Check results now include the version/date of the program, for example: "Adagio SalesAnalysis 9.1A (131009)".
- ◆ New splash screen with an updated look.
- ◆ A 'Report set' button has been added to the toolbar.
- ◆ Added SalesAnalysis specific Styles for use in filters. The default Filters (used when a new database is created) have also been updated. The sample data includes new Filters that make use of the new Styles. You can recreate any of the new sample filters you find useful in your own live databases.
- ◆ The Help | About function now has a Consultant tab showing the contact information for your Adagio consultant if they have enabled this option at your site.
- ◆ When Adagio SalesAnalysis is opened after installing an upgrade, a dialog is displayed with a link to a short video highlighting the new features. The dialog is displayed for each user until they tick 'Don't show this message again'. The video also be viewed anytime by visiting the Softrak website. Note: the dialog also appears when Adagio is installed at a new site.

Problems Fixed

- ◆ Sales Analysis no longer sets the Paid indicator for unapplied credit notes.
- ◆ If system performance was slow, in some cases toolbar buttons set to disabled by security were momentarily enabled when the program opened the database.
- ◆ The range on the Item field for Adagio Invoices items in the Archive/Purge/Restore function was not working correctly.

- ◆ Installing the 9.0B (2013.01.26) Service Pack caused the customer smart finder not to work if SalesCQ was used, unless Receivables 9.1A was also installed.
- ◆ When converting SalesAnalysis from a version prior to 9.0A, depending on the version of OrderEntry you were using, if you did not retrieve from OE prior to upgrading SA then invoices in the retrieve file were duplicated in some cases.

Enhancements and revisions in earlier versions of Adagio SalesAnalysis

- ◆ Refer to the Readme help file for details of enhancements and revisions in earlier versions or [Historical Enhancements](#) under Resources, Support on Softrak's web site.

Installing

To install Adagio SalesAnalysis 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 upgrade download instruction email. 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 a previous version.

Read the sections below before installing an upgrade from an earlier 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 9.1A must be installed before the Service Pack can be installed.

To install Adagio SalesAnalysis (or an upgrade) 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, 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.

Adagio SalesAnalysis 9.1A requires Adagio Lanpak (if used) to be version 9.0E or higher.

Adagio SalesAnalysis 9.1A requires Adagio MultiCurrency (f used) to version 8.1B or higher.

Upgrading to 9.1A from 9.0A or 9.0B

Upgrade Complexity: **Easy** ●

There are no other special considerations when upgrading to Adagio SalesAnalysis 9.1A from version 9.0A or 9.0B and no database conversion is required. The information below can be skipped.

Upgrading to 9.1A from versions earlier than 9.0A

Upgrade Complexity: **Difficult** ◆

Adagio SalesAnalysis 9.0A was a major upgrade, containing many changes and new features. **If you are upgrading to 9.1A from a version earlier than 9.0A it is very important to review the information below regarding 9.0A before installing the upgrade.**

Upgrading to this Version – considerations before installing an upgrade

Adagio SalesAnalysis 9.0A is a major upgrade with significant changes to the data structure, containing many changes and new features. It is very important to review the information below before installing an upgrade.

Note 1: Adagio SalesAnalysis 9.0A requires compatibility upgrades and Service Packs to several other Adagio modules. **Do not install SalesAnalysis 9.0A or newer** you are certain all the compatibility upgrades required at your site have been released by Softrak and you have them available to install.

Adagio SalesAnalysis 9.0A requires Adagio OrderEntry to be version 8.1D (2011.03.16) or higher. The installation of OE and SA, and the conversion of data, can be done in any order. However, you should open SA 9.0A at least once after converting OE data, before running Day End in OE. If this is not done, you will receive a series of messages when you open SA, prompting you to retrieve transactions from OE before the database can be opened. If you are also converting OE from earlier versions than 8.1D you may also get these messages. No data will be lost in any case.

An Item Description field was added to transactions. The conversion to 9.0A sets it to item description saved in the SA Item Description File the last time the item was on a document retrieved into SA. If the is no description in that file the converted data will have a blank item description. This may be the case for transactions that were retrieved by older versions of SA. To avoid this possibility you should

run the Update Item Description File function prior to installing the 9.0A upgrade.

SalesAnalysis 9.0A requires Adagio Inventory to be version 8.1C or higher.

SalesAnalysis 9.0A requires Adagio SalesCQ to be version 8.1B (2011.03.18) or higher.

SalesAnalysis 9.0A requires Adagio Invoices to be version 9.0A (2010.03.17) or higher if you use Invoices 9.0A. SA 9.0A is compatible with 8.1B and earlier versions of Invoices when Receivables 8.1A or earlier is used.

SalesAnalysis 9.0A requires a database conversion. You should perform a Data Integrity Check in your current version of SA 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.

Adagio SalesAnalysis is one of the top modules for which custom reports and views are likely to have been created in Crystal Reports for Adagio and Adagio GridView. These reports and views will require conversion and adjustment for use with 9.0A. You should not install or convert SA until you have a plan in place to update any custom reports and views critical to your operation. See the 'Converting custom reports and views' section below for details.

Upgrading to this Version – installing the upgrade

Adagio SalesAnalysis 9.0A will be installed to the \sofrak\salesanalysis folder. Previous versions were installed in \sofrak\srwin. The previous version will be uninstalled. Uninstalling the previous version removes everything from the program folder that got installed but leaves everything else that you may have created manually, including the CustomRP, ModRP and Views folders.

The install checks that you have the required versions (as listed in the section above) and displays a warning if the version you have is not compatible. You may proceed as long as you have the required compatibility upgrades to the other modules and are prepared to install them after completing the installation of SalesAnalysis 9.0A.

The upgrade install cannot change any custom icons you may have created to launch SalesAnalysis and they will continue to run your previous version if it was not uninstalled or will display a “missing shortcut” error if it was uninstalled. You must change these icons manually to run SalesAnalysis from \sofrak\salesanalysis\salesanalysis.exe.

Upgrading to this Version – converting your database

You can convert your SA database at any time. You do not need to retrieve from OrderEntry or Invoices first. You do not have to run Day End in OrderEntry or print and clear the audit lists before converting your data.

To start the conversion, open your current database that used your previous version of SA. A warning is displayed indicating the database will be converted and a backup must be made. The program allows you to make a back up at this time, before proceeding with the conversion.

The conversion to 9.0A could take a significant period of time on databases with a large number of transactions 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 will be much faster. We strongly recommend you contact your Adagio dealer or consultant for assistance with this procedure.

Note: If the conversion is aborted or does not complete for any reason you must restore your backup. Before restoring your backup you **MUST** first delete the SA data files (SR*.ddd, where ddd is your company data file extension). Failure to delete the SA data files before restoring your backup will result in future problems and database corruption. In general you must always delete the existing database before restoring a backup and be certain your backup is viable before deleting the database.

Upgrading to this Version – after conversion

The program folder moves to \sofrak\salesanalysis for version 9.0A. Previous versions were installed to \sofrak\srwin. Likewise, the program filename changes to SalesAnalysis.exe for version 9.0A. Previous program versions were named srwin.exe.

The Windows Start list entry for version 9.0A will default to 'SalesAnalysis 9'. The Windows Start list entry for earlier versions defaulted to 'SalesAnalysis', and will be removed. When installing an upgrade you should change any icons on your desktop or in desktop folders to run SalesAnalysis using the new program name and folder (see above paragraph).

Settings made in the Column Editor to grids, finders and smart finders for previous versions may to be adjusted.

The File | Options, Field Verification option has been removed. Fields are always verified during entry.

Statistics Field Selection is now on a new tab in User Preferences. In previous versions the selection was done in security Groups.

The Original Invoice field from credit notes was added to the transaction file. The conversion sets this new field to blank for existing transactions. It is possible to use the Scan Sales Data function to populate this field for existing transactions. However, this function does not update existing records but only adds new records. Therefore you would have to delete or archive all transactions and then scan to get them back. You must be certain your OrderEntry and/or Invoices history contain ALL the transactions you require in SA.

Therefore this procedure is not recommended unless the Original Invoice field is very important to you.

Upgrading to this Version – converting custom reports and views

Reports

If you have modified any of the standard reports installed by Adagio SalesAnalysis, you will have to redo those modifications for SalesAnalysis 9.0A. Modified reports are files with an .rpt extension that you copied from \sofrak\srwin\StandardRP to \sofrak\srwin\ModRP and modified using Crystal Reports for Adagio. The standard report filenames for 9.0A are similar to those in earlier versions. Your modified reports from your prior version will be copied to the folder \sofrak\salesanalysis\ModRP.priorversion. Re-modified reports must be placed in \sofrak\salesanalysis\ModRP for SalesAnalysis 9.0A.

Installing a SalesAnalysis 9.0A upgrade does not delete your original modified reports in \sofrak\srwin\ModRP. When you are certain these reports are no longer needed, you can delete that folder.

Custom reports created in Crystal Reports for Adagio for earlier versions of SalesAnalysis will have to be modified or recreated for use with SalesAnalysis 9.0A databases. Your custom reports from your prior version will be copied to the folder \sofrak\salesanalysis\CustomRP.priorversion. Recreated custom reports must be placed in \sofrak\salesanalysis\CustomRP for SalesAnalysis 9.0A. Installing a SalesAnalysis 9.0A upgrade does not delete your original custom reports in \sofrak\srwin\CustomRP. When you are certain these reports are no longer needed, you can delete that folder.

See the Tech Note entitled “Converting Crystal Reports for Adagio SalesAnalysis 9.0A” and a on Softrak’s website under Support | Technical Tips <http://www.softrak.com/partners/resources/technicaltips/technicaltips.php>. In addition to this document there is short video entitled “ConvertingReportsforSR90A” showing how to convert a report.

The ‘Installed only’ method of selecting tables for Adagio when defining reports in Crystal Reports for Adagio using ADAGIO.SSI to find your database is not supported for SalesAnalysis 9.0A. Find your database by the alternate method of searching for the SalesAnalysis company profile (global) file ‘SRGLOB’ instead. Existing reports are not affected by this change.

Views

GridView views created for earlier versions of Adagio SalesAnalysis must be modified or recreated or using tables from ‘Adagio SalesAnalysis 9.0A’. GridView 9.0A and higher has the ability to convert existing views to a new table.

Views from your prior version will be copied to the folder \sofrak\salesanalysis\views.priorversion. Recreated views must be placed in \sofrak\salesanalysis\views for SalesAnalysis 9.0A. Installing a SalesAnalysis 9.0A upgrade does not delete your original views in \sofrak\srwin\views. When you are certain these views are no longer needed, you can delete that folder.

See the Tech Note entitled “Converting GridView views for Adagio SalesAnalysis 9.0A” on Softrak’s website under Support | Technical Tips <http://www.softrak.com/partners/resources/technicaltips/technicaltips.php>. In addition to this document there is short video entitled “ConvertingViewsforSR90A” showing how to convert a view.

You may find the Adagio Data Dictionary Export Tool useful for comparing tables in the Adagio SalesAnalysis 9.0A dictionary to previous versions using Excel. The exporter can be found under on Softrak’s website Support | Technical Tips www.softrak.com/resources/technicaltips/technicaltips.php.

A new Composite dictionary “Adagio {Composite Tables 9.0B}” that links to SalesAnalysis 9.0A tables is installed for use with GridView. It replaces “Adagio {Composite Tables 9.0A}” for use with SalesAnalysis 9.0A. Views using the 9.0A composite dictionary can be converted to use the new 9.0B dictionary. However, if you have GridView 9.0C or higher, instead, we recommend you redefine your views using the new call GetExternalData(S, S, list), and the composite dictionary will not be needed. See the GV 9.0C documentation for details. Note: the composite dictionary will not be updated for future upgrades of Adagio modules because GV 9.0C allows you to create your own composite views using any related tables.

Upgrading to from a version older than 8.1B

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 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 and must be re-selected the first time these functions are used after the conversion.

-- end --