

## Compatibility

### Adagio

Console 9.2A – 9.2B  
DataCare 9.2A, 9.3A  
DocStore 9.3A  
ePrint 9.2A  
GridView 9.1A – 9.3B  
Inventory 8.1E – 9.2A  
Invoices 9.1A – 9.3A  
Lanpak 9.3A  
MultiCurrency 9.2B  
ODBC 9.2A  
OrderEntry 8.1F – 9.3A  
Receivables 9.1A – 9.3A

### 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)

### Note

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

## Enhancements & Revisions

- Enhanced compatibility with future release of Adagio Inventory 9.3A.
  - Compatible with Adagio DocStore. The Retrieve Sales Data function retrieves DocStore document links from Adagio OrderEntry and Adagio Invoices. The Scan Sales Data from Other Systems function also retrieves document links from those modules. The Edit Data and Online Inquiry functions allow you to view DocStore attachments. Documents can be attached in the Edit Data function. The Import Transactions function allows you to attach PDF documents. The Process SoftPDF to DocStore function adds links to SalesAnalysis transactions retrieved from OrderEntry and/or Adagio Invoices prior to upgrading to SalesAnalysis 9.3A.
  - Requires Adagio OrderEntry 9.3A (2019.04.08) for compatibility with Adagio DocStore.
  - Requires Adagio Invoices 9.3A (2019.03.18) for compatibility with Adagio DocStore.
  - The Find button in the Edit Data function is now enabled when a filter is applied. You can use the Finder and Smart Finder to search within the filtered grid. Note: To use this feature, you must use the Smart Finder – entering a document number in the Finder is not supported.
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- The Find button on the Customer grid in the View Customer function is now enabled when a filter is applied. You can use the Finder and Smart Finder to search within the filtered grid.
  - The 64-bit version of Adagio GridView (if available) is launched from the Adagio menu and for Custom Views added to the Inquiries menu. The 64-bit version makes use of more memory (if available), allowing for views on larger databases and it can be faster. Note: This is not yet supported on Adagio Cloud.
  - The Reference field increased to 24 characters for support of OE 9.3A.
  - In Standard Reports Print Options, the value entered as the Starting value is defaulted to the Ending Value.
  - The Edit Online Inquiry Template screen is now sizable.
  - Standard reports have been updated to increase the Customer Name length from 30 to 40 characters.
  - In View/Print statistics, the Calendar type is now remembered for the User. Calendar or Fiscal years.
  - In SalesAnalysis 9.2A (2018.05.19), an error was displayed by the Find on the customer grid with a filter applied when you entered a customer code less than 6 characters in length and pressed ENTER rather selecting the customer from the finder.

## General New Features

- The Adagio Login dialog permits browsing to a UNC. The Create database button is hidden unless "/C" is included on the command line. New databases are created with the extension "ADB" or the extension used by existing modules in the selected Folder.
- A "Backup" button has been added to the Adagio Toolbar. Backup Options select whether the button saves the module data, related data or the entire database and whether exclusive access is required for the backup to proceed. The backup now includes the Automation Batch Folder.
- Backup options enable automatic or prompted backups prior to performing critical functions Retrieve Sales Data and Scan Sales Data. You can choose the number of these backups that will be saved.
- Retrieve Sales Data from CounterSales™ respects the Backup options settings for Prompt and Always.
- Refresh Sample Data function has been added to the Help menu. It allows you to refresh single and multi-currency sample data to its original state at install time.
- 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. Use the Select the Type option on the Select Fields dialog to show fields of that type.

## Enhancements and revisions in earlier versions

Refer to the Readme help file for details of enhancements and revisions in earlier versions or the [Change Log](#) under Product Documentation 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 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 section 'Upgrading' sections below before installing an upgrade.**

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 installation instructions in the Readme help. If Adagio SalesAnalysis is installed on a network, you may also need to do a workstation install 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.

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

SalesAnalysis 9.3A requires Adagio Lanpak (if used) to be version 9.3A or higher.

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

SalesAnalysis 9.3A requires Adagio Receivables 9.1A or higher.

SalesAnalysis 9.3A requires Adagio DataCare 9.2A or higher.

SalesAnalysis 9.3A requires Adagio OrderEntry 9.3A (2019.04.08) for compatibility with Adagio DocStore.

SalesAnalysis 9.3A requires Adagio Invoices 9.3A (2019.03.18) for compatibility with Adagio DocStore.

Adagio SalesAnalysis 9.3A requires a minor database conversion from earlier versions. You should perform a Data Integrity Check in your current version of SalesAnalysis 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.

## Note: GridView views / custom reports for OrderEntry 9.3A

SalesAnalysis 9.2A (2017.09.04) and higher is compatible with OrderEntry 9.3A. Custom Crystal reports and GridView views for OE 9.2A users will not be affected by installing SA 9.3A. **However, custom reports and views may need to be adjusted for OE 9.3A if you did not already make any required adjustments.**

In OrderEntry 9.3A, the Miscellaneous Charge Code changes to allow more than 10 codes per Price List. The format changes from "Mis0" to Mis9" to "Mis00000" to "Mis99999". When SalesAnalysis is used with OE 9.3A, the code is retrieved in the new format. The code in existing SA Transactions retrieved from earlier versions of OE is not converted to the new format. **Online Inquires, custom Crystal reports and GridView views may need to be adjusted.** Note: The Miscellaneous Charge Code is retrieved and stored in the Item Number field in SalesAnalysis.

In OrderEntry 9.3A, the Reference field on the order header changes from 12 to 24 characters. The new field 'Reference OE93A' was added to the SA Transaction record to accommodate this. It can be shown on grids and included on GridView views or custom Crystal reports.

Adjustment of existing custom Crystal reports or GridView views using the Reference field may be required when OE 9.3A is used. Custom reports and views for OE 9.2A users will not be affected.

The new Reference OE93A field will be blank in transactions already retrieved from pre-OE 9.3A.

If you will be entering more than 12 characters in the Reference in OE 9.3A, your custom reports and views may need adjusting. You may need a formula to select Reference if Reference OE93A is blank.

If you continue to enter 12 characters or less in the Reference in OE 9.3A, then your reports and views would not need to change because the (old) Reference field (12 characters) in the Transaction is populated with 12 characters from the 24 character Reference field in OE.

The field OE93A Order Key was added to the SA Transaction Master record. It is 13 characters: the Prefix (or Type, C, I, O) of length 1, plus the Order # of length 12. Use this field in custom Crystal reports to link to order header files in OrderEntry 9.3A when the standard tables are used.

For existing reports using the old tables ("crview" tables), the link to OE 9.2A order headers used the field 'OE 8 prefixed doc' to link to the OE header. This link will no longer work if Document Numbers longer than 8 characters are used. Reports must be recreated to use the standard tables. See below for more information.

## Upgrading

### Upgrading from 9.2A

### Upgrade Complexity:

Easy ●

Adagio SalesAnalysis 9.3A requires a minor database conversion from earlier versions.

You can convert your SalesAnalysis database at any time. To start the conversion, open your current database for the first time in SalesAnalysis 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 before proceeding with the conversion if you have not already done so. The conversion should only take a few moments unless you have large Archive files that will require conversion. After converting a database to 9.3A, it must not be used with earlier versions.

Adagio DocStore users should run the 'Process SoftPDF to DocStore' function from the Maintenance menu in DocStore. This will add document links to SalesAnalysis transactions retrieved from OrderEntry and/or Adagio Invoices prior to upgrading to SalesAnalysis 9.3A. This may take a significant amount of time for large databases.

When Invoices 9.3A detects that SalesAnalysis is at version 9.3A, it will write to a new file called 'Q/I Softrak S/A 93A Extended' with filename QISSISW.<dat> for retrieval into SalesAnalysis. The new file contains the document link for Adagio DocStore.

## Upgrading

### Upgrading from versions prior to 9.2A

This Release Notes does not cover upgrading from version prior to 9.2A. 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 SalesAnalysis Readme help.

