Release Notes

Compatibility

Adagio

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

Other

MS Office 2010/13/16, 365
MS Windows 8, 8.1, 10
MS Server 2012R2 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.softrak.com.

Enhancements & Revisions

- SalesCQ quotes are now shown on the Transactions tab in Edit and View Customer if SalesCQ data is present. Notes: Drilldown to SalesCQ transactions screens is only available in Edit Customer in SalesCQ. Item numbers show quantities with 2 decimals. The Quotes tab is only available in Edit Customer in SalesCQ.

- New automation command nouns have been added to allow attaching report set PDF/Excel files to the email with the automation log results. Allows reports from multiple applications to be attached on a single email. The EmailPDFAutoLog has Overwrite/Attach and Append/Attach nouns to include PDF/Excel files from report sets. The 9.3A release of Adagio Console is required to use this feature.

- Finder / Smartfinder was showing a Character string instead of 'Linked' for the Doc Link field in some cases.

- During conversion, the progress bar does not show the progress of the conversion. However, upon successful conversion, a message box "Conversion Completed Successfully" is displayed. The fix now shows the progress of the conversion followed by the success message box.

- When the customer Zip/Postal code was used as a summary field in an online inquiry, the last portion of the customer name was used instead. This has been fixed.

- When Adagio DocStore is integrated, report sets can now be emailed with PDF or Excel file attachments for each report to selected recipients.

- If a user has access to the Maintain Automation Log feature, they also have the ability to view all of the automation logs for any user.

- If the data path folder name contained a period, browsing to the folder and double clicking on the global file caused the application to try to create a new dataset with the extension set to the part of the folder name following the period character.

- If reports were printed to PDF using AdagioV3PDF and either the Append or Insert Before file conflict strategies, existing PDFs were not appended to and instead a new PDF was created with a numeric file name suffix. This has been fixed.

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 9.2A or higher.

SalesAnalysis 9.3A requires Adagio DataCare (if used) 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.