Adagio® SalesAnalysis 9.3B (2025.02.25)

Release Notes

Upgrade Complexity from 9.3A · **Easy** ●

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 – 9.3B
Lanpak 9.3B
MultiCurrency 9.2B
ODBC 9.2A
OrderEntry 9.2A – 9.3B
Receivables 9.2A – 9.3B

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)

Note

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

Enhancements & Revisions in SalesAnalysis

• Having February 29 as a Fiscal Period Ending Date caused an error: Invalid argument to date encode, when printing some reports, in some cases.

• User Preferences now includes 'Open Reportset List' in the 'On start-up' options.

• For Print Destination: File, the File Format list has been updated to remove outdated formats. The only Format is Excel.

• In cases of a multi-tabbed dialog where the DocStore functionality is only available on one of the tabs, the glasses graphic is displayed on the tab to highlight it. In Invoices, Open batches, the document shows it on the Header tab.

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.

Adagio SalesAnalysis 9.3B (2025.02.25) 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 SalesAnalysis 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 SalesAnalysis 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 SalesAnalysis (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 SalesAnalysis. When any Adagio module is run on a workstation for the first time after SalesAnalysis 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 SalesAnalysis 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 SalesAnalysis, you install other modules with a release date older than the date of this SalesAnalysis 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 SalesAnalysis 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 BankRec 9.3A that do not install the new driver will set the driver used back to AdagioODBCv2.dll. Reports from BankRec will continue to work.

Adagio SalesAnalysis 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.

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

SalesAnalysis 9.3B requires Adagio Lanpak (if used) to be version 9.3B.

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

SalesAnalysis 9.3B requires Adagio Receivables 9.3A or higher.

SalesAnalysis 9.3B requires Adagio DataCare 9.2A or higher.

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

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

Upgrading

Upgrading from 9.3A   **Upgrade Complexity:**   **Easy ●**

Adagio SalesAnalysis 9.3B 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 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 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.