



The Score

A Quarterly Update on Adagio Accounting



Volume 7 Issue 1

Adagio SalesCQ offers two in one

SalesCQ is actually two programs rolled into one – a Contact Management program and a Quote Management program. It's a great tool for anyone who deals with customers or prospects — Customer Service, Tech Support, Credit, or Sales.

If you use Adagio Receivables and do not have a Customer Relationship Management (CRM) system in place, SalesCQ is great for you. It's easy to keep track of each instance where anyone in your company has a contact with a prospect or a client. Here's why:

- It's easy for all your staff to track and add each contact made with every prospect or customer
- All the information you need for follow up is available in one place
- The information is available electronically to all authorized personnel
- Your prospects are kept separate from your customers, so you don't add information to your AR file until they become a customer. Then you can move a prospect to a customer at the touch of a button.
- It's easy to make scan lists for different projects. They can be used to print lists for phoning or visits and/or mailmerge letters, faxes, or emails

- It's easy to create call back codes and/or call back dates so that nothing falls through the cracks, even for holidays/vacations or changes in responsibility.

SalesCQ lets you:

- Create and manage quotes, sending them to OrderEntry when the quotation is accepted. Management reports remind you of quotes about to expire. Confidence levels and quote statuses assist in inventory planning. Analyze lost sales by reason. Keep quotation templates on file to speed quote creation. Retrieve any order or invoice to generate a new quote for repeat business.
- Enter quotes while orders are being finalized with your customer. Quotes do not commit inventory, and there is no risk of accidentally shipping an incorrect or partial order. Quotes contain complete, customer specific pricing, and include all tax calculations for pricing confirmation. They can also hold standing orders or templates for repetitive order creation.
- Track quote revisions, and record notes and comments on a quote while the sales cycle is progressing. Purge expired quotes. Import quotations from other systems.

Call for a demonstration today and start fine-tuning your sales cycle! 🎵

Online Webinars

Did you know you can attend online Adagio Webinars at www.softrak.com?

Webinars concentrate on modules and upgrades recently released, and tips and tricks that demonstrate quick ways to get your daily work accomplished. Your specific questions about features and functionality are welcomed and always answered as part of the presentation.

Find out more at www.softrak.com, under the events tab.

Scan your customer and prospect database for marketing and customer relations purposes, using numerous selection criteria.

Type	Code	Name	Address	Phone	Fax
C	ABL01	Ables Cables	1400 E		
C	BCS01	BCS Engineering	PO Bc		
C	BOH01	Bohr Drilling, Inc.	1234 V		
C	BOL01	Bolts Hardware	PO Bc		
C	BRA01	Braxton Consulting Gro...	470 F		
C	CAP01	Cape May Inn	1450 I		
C	CCX01	CCX Express	1460-9		
C	CHE01	Cheng, Cheng, Chipper...	895 H		
C	CIR01	CIRS, Inc.	1500-4		
C	CLA01	Clayton Publishing	1500 I		
C	CON01	Conner Air	PO Bc		
C	DAW01	Dawson Marine Advent...	643 K		
C	DOU01	Double D Rentals Ltd	1066 I		
C	ELL01	Ellis Marine Sales & Re...	365 G		
C	FIR01	First Fidelity Savings Ba...	1652 V		
C	GRE01	Greenleaf Park Services	10455		

Callback Date	Initials	Code	Reason
6/1/2001	KP	OVER60	Over 60 days overdue 118.84
7/31/2001	AVB	EXPIRE	Service Plans Expire

Brought to you by...



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Changing Date Formats

Question: How can I change the date format from dd/mm/yy to mm/dd/yy in all Adagio data entry screens? I recently upgraded my Windows and it changed the date formats that I was used to.

Answer: For data entry screens, this change would be done in Windows Regional Settings (not in Adagio). In your Control Panel, select the Regional and Language Options. From there, select Customize > Date and select the format you prefer.

For date formats in reports, make this change in Adagio in the Reports menu. See File > Report Options.

Statement Groups

Question: I'm creating new statement groups and would like to add departments outside my original departmental ranges.

I don't seem to be able to add the department outside the original range into the consolidated totals. Is this even an option? My old department range is from 3000 to 3009. I want to add department 2003 to that range. Note that there are also other departments in the 2000-2009 series.

Answer: To create new ranges (spanning departments), shift-click to select the range of departments and right mouse button and select Create Department Range from the pop-up menu. To create a wildcard mask, right mouse button on a single department.

Account ranges can only be contiguous or be selectable by a mask to be included in the department drop-down.

If you want to sum a noncontiguous range of accounts, you need to use the =RNGMERGE(s1,s2) function to build your account ranges. s1 will point to a cell containing your account numbers separated by commas. s2 will point to a cell containing your ranges of departments separated by commas. The result of the =RNGMERGE() function should be the second argument to the ADGET() function to get the account balance or net change you're looking for.

To see how these are formed, drag and drop an income statement and tick departmental comparative on the format dialog and choose several noncontiguous departments. Ask for a sum of the departments chosen on the statement.

The departmental comparative statement in the sample data also uses this function.

Trial Balance in Excel

Question: Can I transfer or copy my year-end Trial Balance into Excel? I know I can copy a financial report, but don't see where to do the Trial Balance.

Answer: You can preview the Trial Balance and use the export feature to export the report to Excel. The column widths in the exported file will probably need adjusting. However, if formatting is an issue, you'll get a better formatted report by opening up the simple Trial Balance Financial Statement from the sample data and changing its accounts to match your chart. Then use the Excel-Direct button in the Financial Reporter to send the report to Excel.

A further note: If the Trial Balance numbers are being used for further reporting in Excel, you should consider creating those spreadsheets in the Financial Reporter and having them generated every month.

GridView Report

Question: I am trying to produce a report in GridView that will give me a list of all my invoices for a specified period of time. I need help to get GridView to add together all the items in one invoice so all the report shows is the invoice total.

I am using the S/R table, with the fields: Cust #, Prefixed Doc #, Date, Qty, Amt and Cost. This gives me the information I need. However, I just want to have one line for each invoice instead of one line for each item on each invoice. I have a Filter which allows me to specify the dates I require.

Answer: Select the invoice number column, right click and "Set Sort Order", then double click the column for your desired order. Now select View | Summarize. You should have a button for 'Summarize'. If not, you will need to reset your toolbar.

Technical Support Forums

Did you know that each of these technical tips comes from either the Softrak Technical Support Forum (at www.softrak.com, under the Support Menu), or from PlusCommunity.com? Both of these forums are free, and although registration is required to post questions, it is not needed to view postings. However, we can't think of a good reason not to register, both forums have very good privacy policies. Check them out!