The Score

Adagio RMA Module Released

Hot off of Softrak's development press, Adagio's new RMA module prints and tracks Return Merchandise Authorizations for users of Adagio OrderEntry.

Efficient processing of returns is a hallmark of good customer service, and an important aspect of a well-tuned inventory control system. Adagio RMA is a welcome addition to Adagio that will surely enhance many aspects of the business performance of its users.

Adagio RMA lets you create an RMA exactly as you would create an Order. RMA's can be automatically generated by referencing a previous invoice. Track expected receipt dates. When the goods are returned and inspected, create a credit note to apply to the customer account and automatically apply it to a specific invoice if desired. Quantities on RMA are tracked in Adagio Inventory by location. RMA's can be analyzed by "Return Code Reason". Expired RMA's are automatically removed from pending returns in Adagio Inventory.

You can design your own RMA form for your customer to include with their return, and to assist your receiving department in processing the goods on the receiving dock.

Here's a quick recap of the main features:

- Adagio RMA allows you to enter, print/email and track Return Merchandise Authorizations in Adagio OrderEntry, then create a credit note when returned goods are received.

- Adds RMA Return Codes to OrderEntry.

- Adds an RMA Listing report and the Orders/Invoices/Credit Notes report includes an RMA's option.

- Quantities on RMA are tracked in Adagio Inventory by Location. The field 'Qty. on RMA' has been added to Quantities tab in the item.

- Adds option in Security Groups to allow creating RMA's.

- Adds 'Default posting to RMA' option to the Company Profile. Controls whether posting an RMA defaults to posting as an RMA or a credit note.

- Adds 'RMA Expires after n days' option to the Company Profile. Provides a default for RMA creation. When the number of days has been exceeded and the goods have not been returned, the RMA will be flagged as expired and the 'Qty. on RMA' decremented in the item.

- Adds 'RMA Location defaults' option to the Company Profile. Specifies the default Location for returned goods.

Note: Adagio RMA is an Add-on product for Adagio OrderEntry. Adagio RMA requires OrderEntry 9.2A (2016.01.11) or higher. If you have OE 9.2 (2015.07.29) you must install the OE Service Pack 9.2A (2016.01.11). Adagio RMA is compatible with Adagio Inventory 8.1A and higher. However, Adagio Inventory 9.2A is recommended.

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Adagio Technical Tips

Missing Security Groups

Question: In all modules EXCEPT Order Entry I am able to see our groups and update settings as normal. When I go into OE, all of our groups seem to be missing, even though all users are assigned to these missing groups. What is causing this issue?

Answer: Security Groups are set up individually in each module. For instance, Payables could have 5 Groups and Order Entry could have 2 Groups. You just need to add OE Groups that correspond to your users. If there are no Groups set up in a module (as in OE in your case), all users have open access to all functions in that module.

Adagio 8.1 and Windows

Question: Are Adagio 8.1A versions compatible with Windows 10?

Answer: There is a compatibility page on Softrak's website to identify which versions of Adagio applications are known to be compatible with Windows versions. You can find it here:

http://softrak.com/products/compatibility/compatibility.php

If the Adagio version you are inquiring about is not specifically listed as compatible, then Softrak would not support that combination of Adagio and Windows.

According to this page, "All current Adagio versions and versions as of January 1, 2013 are compatible with Windows 10." Therefore, version 8.1 would not be compatible.

Item Assembly in PO and IC

Question: In our Inventory Control I have set up the BOM (bill of material) for each product that we assemble from inventory parts. Our assembly of our finished goods is done by a third party.

Is it possible to use Purchase Orders to send a Production Order for the assembly of the goods to the third party, and then have the receipt update the assembly of the BOM in Inventory Control?

When I tried it, it updated the finished goods units, but didn't reduce the part units in Inventory, so no assembly took place.

Answer: At the current time, Adagio Purchase Orders does not have any integration with Inventory item Bill of Materials.

The choices for BOM processing are to do it manually within Adagio Inventory, or in conjunction with the Adagio Bill of Materials add-on, you can auto-assemble BOMs from Adagio OrderEntry day end processing or Adagio Inventory import shipments. The latter allows auto assembly when master BOM items are sold and shipped.

Adagio's Column Editor

Question: I am running inventory 9.2A and using the column editor to edit the item inquiry/edit items windows. When I make changes to the column width, they do not appear to get "saved". I can add and remove columns, but I cannot get the column width to save. How can I make it "stick", and is there a way to make these changes global, rather than user based, as well?

Answer: How are you changing the Column Width? Are you doing this from the grid itself similar to how you would do it in Excel? That won't stick. You need to change the Column Widths within the Column Editor itself. Also, be sure to save your screen size within your File | User Preferences.

If you use the column editor as the SYS user, there is an additional option to 'set view for all users', which pushes the saved settings to all the other users. This only affects the specific grid edited, and if other users are allowed to edit their grids via security, then they could still choose to change the layout from the global setting.

Here's a link to a brief video on how to use the Column Editor in Adagio:

https://youtu.be/d41OYCc_WAw

You can find more tips like this in the Softrak Technical Support Forum at www.softrak.com through the Client Portal.