The Score

Why Upgrade Plans Are Key

There are a number of great reasons to keep your Adagio software upgrade plan up to date. Of course, always having the latest feature set at your disposal is an important benefit of "being a member", but there are other privileges that will truly give you the most bang for your buck.

Free Access to Softrak's Online Technical Support Forum

Softrak's online technical support forum is a great resource for answers to your technical queries. The site is constantly monitored by Softrak's technical support staff, as anyone who has ever scrolled through the site has witnessed. There are also many top-notch Adagio consultants who visit the site, looking for ways to show off their expertise by helping you for free. Be sure to check it out at www.softrak.com under the Support heading. You don't need to be on an upgrade plan to peek in, or to post a question in "general inquiries", but if you want to post a question in the meatier "Technical Support section", you must be an upgrade plan member to get authorized.

Keeping up with Windows

Newer versions of Adagio will support newer versions of Microsoft Windows, which is usually upgraded about once a year. New capabilities in Windows can only be exploited by newer versions of Adagio. Softrak is a great company, but they aren't psychic.

Upgrade Plan Members Stay "In The Know"

Unforeseen software glitches happen, even to robust technical support stars like Softrak. You will be automatically notified when bugs are fixed and a Service Pack is up on the web.

Get Softrak's Ear

Upgrade Plan members get to provide direct input into new features planned for the next release. You will have Softrak's ear if you like to make suggestions for future releases. Softrak really considers their upgrade plan members as partners in future development.

Easier Budget Approvals

A regular annual fee is easier to budget for than an exceptional expense (if you need to upgrade from several versions ago). Regular expenses, planned well in advance, generally are much easier to sell to the powers that be than larger lumps.

Regular, Worthwhile Upgrades

Of course, the biggest reason to be on an upgrade plan is to stay current with the latest and greatest versions of Adagio, and Softrak does put out new releases regularly.

What You Won't Get On Softrak's Upgrade Plan

While we definitely believe the Softrak upgrade plans are an important aspect to maintaining your "Adagio ecosystem", there are some things you can only get from us, your Adagio consultant.

Softrak provides good basic technical support. However this doesn't include online support — they will never login to your system to resolve your issues, nor will they make changes to your files (unless you are paying for their database repair service). Softrak also will not provide advice on how to use and/or configure Adagio to meet your business needs. They won't help you install upgrades, they won't test your system, they won't write report specifications, nor will they administer security rights. These are just some examples of the more in depth aspects of technical support that are always referred to their consultant network — consultants like us.

If you are not on an upgrade plan, give us a call and we can let you know what is involved for your specific installation. Similarly, if you have technical support needs beyond what Softrak provides, or simply prefer coming to us, please give us a call. We are here to help.

More 9.3 Versions

The following Adagio modules are all now at version 9.3:
- BOM
- DocStore
- EFT
- GridView/GridView RW
- LanPak
- Ledger
- OrderEntry
- Payables
- PurchaseOrders
- RMA
- Receivables
- Payments
- Invoices
- CatchWeights

Brought to you by...

BAMPH Information Technology Services *with a personal touch*

BAMPH Consulting Services
29 Microsoft Drive, Elizabeth Park
Christ Church BB15092 Barbados
Cell: (246) 230-5277
Tel: (246) 271-0682
Fax: (246) 271-0681
Email: PeterB@BAMPH.biz
Web: www.BAMPH.biz

Adagio Technical Tips

Financial Reporter Watermark

Question: I'm trying to insert a 'DRAFT' watermark on some of my reports in Financial Reporter. How do I do this?

Answer: Choose the AdagioPDF or AdagioV2PDF (preferred) printer to print the reports. Enter the watermark as part of the printer properties. You can save the profile so it's easily available after you've got the watermark looking the way you want.

Restore Deleted Invoice Batches

Question: Is there a way to restore cancelled or deleted batches in the Invoice module? From the Batch Audit List I can see that the batches were deleted and I am also able to see the contents in the Deleted Invoice Audit List.

Answer: No, sorry, there is no restore function in Invoices 9.3A. The data structure does not allow it. However, there is a new option in the Security Group: Delete Batch, that can be set to prevent the accidental deletion of batches.

Combining Financial Statements

Question: I'd like to produce combined financial statements from five companies. Most do not have the same chart of accounts, although this is something I'd like to change. How can I do this?

Answer: The module for producing combined financial statements is Adagio FX Pro. To simplify the process of creating the new reports, we recommend using the Toolkit for Adagio to normalize the chart of accounts in the various companies.

Then, moving forward, the entire process of retrieving the general ledger information and producing the statements can be automated.

Adagio FX looks and works just like Adagio Ledger, except you can't post to it, only report from it. A nice thing about FX is that you don't have to re-create the Ledger financial statement specs - they can be ported over to FX.

Also, another nice thing is that when someone uses FX, they are in a COPY of the data, so they can't do any harm and they also can't conflict with other users, particularly if someone needs to run a Data Integrity Check.

GridView Most Recent Record

Question: Is there a way in GridView to summarize a view and get as a result the most recent record for certain columns? For example, from the OE Sales history table, I want to be able to do a Summary Filter and get the most recent Unit Price sold by customer, by item.

Answer: Create one View that lists all the details, sorted by a composite field called CustItem and a secondary sort DESCENDING on date.

Then create a second View with the same fields except for Unit Price and an identical composite field. This one is sorted and summarized by CustItem. Create a calculated field that pulls the Unit Price from the first View. Because it is sorted Descending, it will pick the most recent Unit Price.

Sort By Batch Number

Question: My GL batches (under Edit Batches) are being sorted alphabetically by description instead of numerical by batch number. How do I get it to sort by batch number?

Answer: The two sorting options should show at the top of the Edit Batches window. Select the radio button for Sort By Batch number.

Print Multiple Batches In Ledger

Question: I used to be able to select multiple batches and do a "Listing" to print them all in one shot. Now when I select more than one batch, "Listing" becomes greyed out. Is there a setting somewhere to change it so that I can print multiple batches in Ledger again?

Answer: It sounds like your batch list is being sorted by Description rather than by Batch number. If it is sorted by Description, then you will see the Listing button disabled when multi-selected batches because there is no guarantee that the batch numbers will be consecutive. Try resetting your batch list to sort by Batch number and the option should be available.

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