

The Score

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Simplify in 2019 with Adagio Console

Simplify your administration of complex Adagio sites with Adagio Console. Console helps you manage a large user community, streamline complex day-end processes, or juggle remote office locations.

Adagio Console allows you to:

- clone users, to quickly set up new users
- force users out of Adagio to perform module updates or data integrity checks, even when the user has left for the day
- copy user settings to multiple data sets, quickly propagating Grid and Email settings, Report Favorites and Sets and other Preferences
- automate repetitive tasks such as Day End or Batch Posting.

Console is also great for User Management, Administration, and Automation functions.

User Management

Use Console to quickly normalize a user's settings across multiple companies, or to set up a new user with known security settings and preferences in seconds. Delete all references to a user from within Adagio with a single function.

Simplified Administration

Send messages to users in Adagio, and force users to log out of their applications so you can easily perform system maintenance. Users who are not at their station will be gracefully exited from the Adagio modules they have left open, minimizing the risk of data damage.

Automation

Adagio Console enables task Automation in all Adagio core applications. You can easily create a sequential list of tasks to perform. All applications support common tasks such as set session date, backup module, related, and all files, perform data integrity check, import data, and print a report set.

Features

- Clone a user to make sure that security settings and other options are set up properly.
- Use Console to copy settings from one company to another.
- Schedule system shutdowns to make sure that everyone is out of Adagio for backups and data integrity checks.
- Specific commands are available to retrieve and post batches, perform day-end processing, charge interest, and print statements.
- Adagio Console will create Batch files that automate an entire sequence of processes across multiple modules, allowing you to:
 - Perform Day-End Processing in PurchaseOrders.
 - Retrieve Invoices in Payables.
 - Post the Invoice batch.
 - Print a Cashflow Report.
 - And much more.

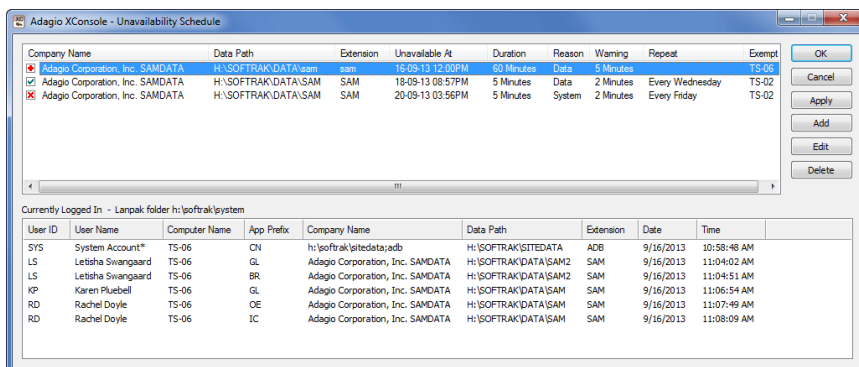
Let 2019 be the year you discover Adagio Console! Contact us today for more information.

Adagio Payments

If you take credit card payments on a one-time or recurring basis for rent, membership dues or customer invoice settlement, Adagio Payments will save you hours of manual processing each month.

This new module provides integrated PCI-DSS compliant credit card storage and processing using North American Payment Solutions. Store multiple credit cards for a customer in a safe and secure way. Automatically pre-authorize and capture credit card payments and flow them through to Adagio BankRec. Process payments and credits without leaving Adagio.

Find out more at <https://www.softrak.com/products/financials/payments>.



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Payment Terms

Question: In Adagio Receivables, when the payment terms for a customer have been entered, will the system automatically apply the terms if the payment is within the terms specified? For example, terms entered as 2% 10 Net 90 is a 2% discount if the payment is made within 10 days. When I receive the payment and enter it into Adagio within that 10 days, will Adagio automatically discount the invoice being paid by the 2%?

Answer: When a customer has payment Terms that allow for an early payment discount, new invoices for this customer will use that Terms code, unless you choose to change this on the invoice. Posting this invoice will save all the terms information, including the discount date and the percentage.

When a payment is entered for this invoice, if the document date is not later than the discount date, the discount percentage will automatically be calculated for you, and the payment amount applied to the invoice will be reduced by the discount amount.

Here is a link to a short video on how Payment Terms work in Adagio Receivables: <https://www.youtube.com/watch?v=Gmh6bIVxHjU>

Email attachment from OE

Question: I email our customer invoices from Adagio Order Entry's "email queue". However, I only see an option to attach a .PDF file. I need to attach an Excel file. How can I change this option?

Answer: If you open the Email Queue in Adagio, for forms written to the Queue but not yet sent, and select one or more records from the grid, you can right-click and choose Attach File to include other files of any type, including Excel sheets.

There are no options to attach file types other than PDF directly from the Print/Email Invoice screen in Adagio. You have to do this sort of attaching from the Email Queue. This would mean that you have to send the emailed 'To the Queue' rather than 'Now', to give you the chance to include those extra attachments.

Post imported batch to next year

Question: We regularly retrieve a batch from our payroll provider and post it to the GL. We need to retrieve and post the journal entries for the Jan 4, 2019 payroll into Fiscal Period 1, 2019. We have created Next Year but not closed the Current Year.

The batch is retrieved and assigned a batch number from the Current Year. It can be posted there, but there does not seem to be an option to post to Next Year. The radio buttons appear for 2018 and 2019 but when 2019 is checked, the batch number disappears and there are no batches to post. Any directions or suggestions?

Answer: "Move" the batch to the "Next Year" batches.

Update SA from invoice history

Question: We have been running Invoices & AR (as well as other modules) for a number of years. We are now considering installing Sales Analysis. Is it possible to build the Sales Analysis records from the Invoices history from the last many years?

Answer: Yes, this feature is available through "Maintenance > Scan".

GridView filter

Question: I want to run a GridView search that pulls all invoices for a certain date range and for transaction "IN" or "CN". How do I add OR to the Trx Type to include "IN" or "CN"?

Answer:

```
AND({Trx Date} >= DATE(2018,01,01),
{Trx Date} <= DATE(2018,10,31),
OR({Trx Type} = "IN",
{Trx Type} = "CN"))
```

You could also use the QUERYDATE function so you don't have to hard code the date range into the filter.

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