

# The Score

Volume 18 Issue 4

## Adagio Inventory 9.3A Ships

**At the end of 2019 Softrak released a major upgrade to their Inventory module. This upgrade includes a number of improvements in transaction entry, history, and 9.3 feature inclusions.**

### Improved Transaction Processing

Multi-user entry is available for all transaction types, allowing for more efficient data entry, and user date/time stamps are now recorded on all transactions. Transactions can now be reviewed, edited and printed prior to posting, and multi-select is available when choosing transactions to post, delete or print. Posting Journals are now not purged until year end. And because Inventory 9.3A is DocStore compatible, PDF attachments to items and transactions are now supported, in addition to image attachments.

### 9.3 Standard Features

This update also adds 9.3A features like enhanced backup options, improved Column Editor field selection, the launch of 64-bit GridView and automatic refresh of Sample Data. Also, all Adagio 9.3 modules are compatible with Adagio DocStore, so documents can be attached to transactions and flow to other modules for review. Documents attached in Inventory are filed by Transaction Type (Receipt, Shipment, Transfer, Assembly or Adjustment).

### Barcode Support

With full barcode support, item entry can be sped up dramatically, and Physical Inventory entry is much easier. Barcode entry is available wherever an item code is requested. Barcodes can include a different Unit of Measure or Item Description if desired. Multiple

barcodes may point to a single item. Barcodes can be imported and exported.

### More Great New Features

- Editing Alternate Price List items has been improved by allowing display of only a single price list.
- Reason Codes have been added to all transaction entry dialogs and are stored in the transaction history file for further analysis.
- Transaction level Optional Fields have been added to record additional site specific information at the transaction level.
- ExcelDirectPrint is available for the Stock Card Report, so Item movement can be easily sent to Excel for analysis.
- Item Assemblies can now be imported, allowing BoM lists to be maintained externally.

There are too many new features to list in their entirety here, but you can watch new feature videos and find out more here: [www.softrak.com/products/adagio-inventory](http://www.softrak.com/products/adagio-inventory).

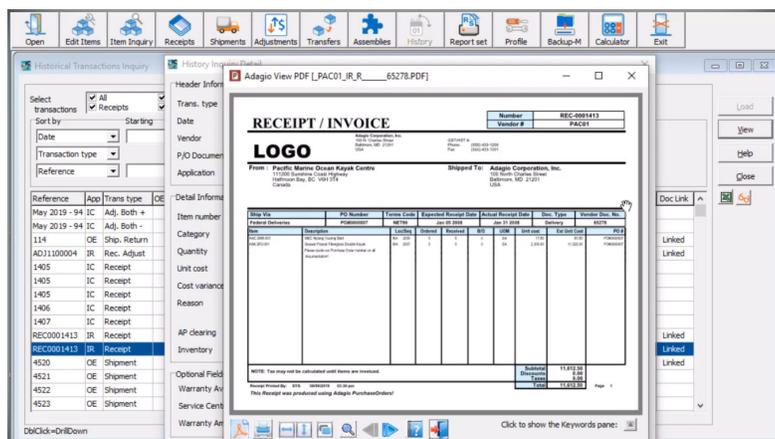
Users on maintenance plans with Softrak are eligible to download this upgrade for free. However, because it has an intermediate upgrade complexity score, we recommend you consider enlisting our help with its installation. Book an appointment for your upgrade today!

### AOC 2020

Softrak recently announced that the AOC is heading back to Las Vegas!

The 20th Annual Adagio Opportunity Conference is headed to the JW Marriot in Summerlin, Nevada in 2020. Mark your calendars now for May 25-28.

Find out more at [www.softrak.com/aoc-2020/](http://www.softrak.com/aoc-2020/). This is an event you don't want to miss!



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## Attach PDFs to Inventory Items

**Question:** Is there a way to attach PDF files to inventory items like you can attach images?

**Answer:** Yes. The latest version of Inventory, 9.3A, supports DocStore, and DocStore lets you attach PDF files to items and transactions, including Inventory items. This will allow users to link spec sheets, manuals, diagrams and many other PDF documents to inventory items, and is one of many great reasons to install Adagio DocStore, if you haven't already.

## Deleting Filters

**Question:** I'm learning to use filters in Accounts Payable, and I set one up just to test it out. I had my filter highlight a bunch of things yellow. Then I deleted the filter, but the style still shows in the View Vendor List, so quite a lot of my vendors are now highlighted yellow. How do I get rid of a style from a filter that no longer exists?

**Answer:** From the Maintenance menu, look for Apply Styles at the top. This brings up a screen similar to Edit Filters, where you can select filters to apply the colour. Here, there is an additional checkbox to 'clear unselected filter styles', so that records that don't match any of the filters selected here will be reset.

Also, data integrity check redetermines the filters and would clear the style colour from the rows that don't match any filters.

There is the short video describing filters in Adagio on Softrak's YouTube channel. You can see it and other General Feature videos here:

<https://www.youtube.com/watch?v=QfOfQM-B2Pk>

## Deleting Sundry Items

**Question:** When Adagio was originally set up, our purchasing manager did not do a good job organizing the sundry item list. We are trying to recategorize everything and were wondering what would happen if we just

deleted all of the current sundry items and then created new ones with new categories. Would this mess up any open POs or would they still show up on the PO, but just not link anywhere?

**Answer:** The problem with deleting sundry items is the fact that this will mess up all of the current and historical PO's.

You would be much better advised to purchase a Utility called Toolkit for Adagio, which will allow you to change Sundry Item Code X to Y. The utility would then go through all the current and historical PO's to make the corresponding change.

## MAPI email and Adagio

**Question:** After running EFT in Payables, we are getting the following message: "A program is trying to send an e-mail message on your behalf". While the emails themselves get sent successfully, the issue is that we have to keep clicking on the OK button after each EFT advice is emailed. Can this be avoided somehow?

**Answer:** That is a security message from Windows 7 when the MAPI email option is being used in the Adagio email setup. It's there to prevent malicious software from automatically sending emails.

Since Windows 7 is near end of life, you should just upgrade to Windows 10 and use the "Outlook" option in the Adagio email setup. Then you shouldn't get that prompt anymore.

The other alternatives are to buy and download a program called "Click Yes" that will override that setting or to set up Direct settings using your SMTP server.

Also, it is worth noting that in some circumstances Adagio will still use MAPI to send email out of Adagio even in Windows 10. So if you are using Windows 10 and seeing this message, then "Click Yes" or Direct Settings are currently the only ways around that security message.

You can find more tips like this in the Softrak Technical Support Forum at [www.softrak.com](http://www.softrak.com) through the Client Portal.