The Score

There's No Better Time For DocStore

The COVID-19 crisis around the globe is highlighting the benefits of digital documentation. While the workforce is shifting dramatically to the virtual world, the ability to send, share and collaborate via the internet has rapidly become a business survival tactic for many. For Adagio users, DocStore is a cornerstone to that transition, allowing for rapid electronic retrieval of stored documents.

With Adagio DocStore, all accounting-related document images can now be stored and indexed for immediate retrieval, even remotely.

Adagio DocStore allows you to keep all of your accounting documents electronically stored as PDFs, and linked to their specific transactions. This applies not only to documents generated by Adagio, but also to other "paper trail" items that your business generates or receives. You can scan paper documents received from vendors or customers, for example, or even drag email attachments directly into Adagio. Save documents particular to vendors, customers or banks, and attach them to transactions for easy recovery.

DocStore Lets You:

- Organize not only your documents you have generated, but also attach paper and PDF documents sent to you. Scan received vendor packing slips, invoices, customer checks or quotes, for example.

- Attach PDFs to transactions on the fly, or drag emailed PDFs, or attach those already saved or scanned directly to their related transactions.

- See not only the accounting information, but also the document itself, including checks, payment advices and previous supporting documents.

- Attach and view service agreements, voided checks, or contracts, directly to vendors, customers or banks.

- Look up documents while drilling down to transaction details from financial statements.

- Customize the save location of PDFs. Your documents and reports can be saved in a folder relative to the company data, or on a separate drive. This allows PDFs to be relocated without breaking any links.

Adagio DocStore Compatibility and Pricing

Adagio Version 9.3 modules are all compatible with Adagio DocStore. DocStore costs $4,200, including a year of Softrak's Upgrade Plan.

Adagio DocStore provides a simple interface to scan, search and print reports and documents saved in the accounting department, whether or not they were generated by Adagio. Docstore is the ideal electronic document storage system for your Adagio Accounting!

Mobile Orders

Keep those salespeople out of the office! Are you looking for a remote solution for your salespeople to submit orders?

Dakota Software's Mobile Orders for Adagio pairs with ePortal to allow salespeople to collect and send orders from the field using their iPads or iPhones.

It offers simple, intuitive order entry functionality which mirrors Adagio OrderEntry in a mobile iOS application. Item, customer and order inquiries are fast and simple.

Completed orders are sent to a secure hosted database, and are then retrieved by the host (office) via ePortal for Adagio, where they are reviewed and subsequently sent through to Adagio OrderEntry for processing.

DocStore lets you attach or scan PDFs in many flexible ways, including dragging and dropping attachments from email.

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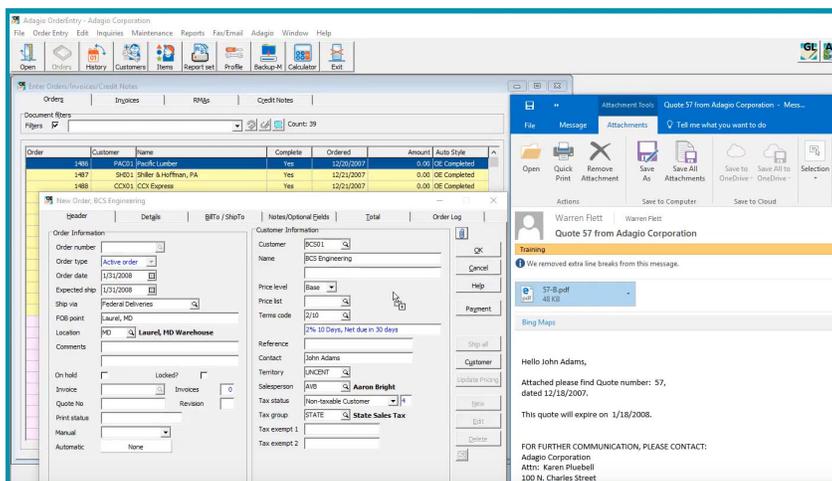
BAMPH Consulting Services
29A Microsoft Drive, Elizabeth Park
Christ Church BB15092 Barbados
Cell: (246) 230-5277
Tel: (246) 271-0681 / 2
Email: PeterB@BAMPH.biz
Web: www.BAMPH.biz

Adagio Technical Tips

No Adagio On OneDrive

Question: Can the Adagio database be stored on OneDrive instead of our network, with multiple people accessing it as the live database?

Answer: NO! You will corrupt your database. OneDrive and Dropbox and other Cloud storage methods are used to store non-volatile (unchanging) files. The updates in the Cloud occur in the background, as your workstation is idle. Adagio relies on file changes being applied immediately they are made (so they are available to other workstations). And by "immediately", we mean before ANYTHING else happens.

You could put backups on OneDrive / Dropbox / Google Drive, but definitely not live data. If you have people who are only looking at the data (not doing any data entry), then you can have a copy of yesterday's data copied to your OneDrive Folder and let them report or View information from that.

The OneDrive data must be static and used for reporting only.

GridView Font

Question: How does one control the font and the row height within a View - at the View level and/or at the row level - so that it sticks the next time you open up the View?

Answer: Change the attributes of the "Standard" Style under Format | Styles.

Customer List Grid Filters

Question: I'm trying to create a new filter for our Customer List in GridView, but every time I create a new filter (or copy and rename an old one), it always shows a "Count" of 0. I don't understand how I can copy another one exactly and it has customers showing on it, but the new one doesn't. Can you help?

Answer: After you create your new Customer filter, you need to Apply it to Customers.

There are three ways to do this:

1. From the Grid Filters List, choose the 'Apply Styles' button.

2. From the Customer View or Customer Edit, choose your new Filter and then the 'Refresh Scan' button next to the Filter Description.

3. From the Maintenance menu, choose the 'Apply Styles' function.

Inventory Field For Active Alerts

Question: I am trying to find the field containing active alerts for items in Inventory Control. I need to export data to Excel to create a list. I have not been able to find the correct field in GridView, or a data export in inventory.

Answer: The text of the Alerts is available in GridView with table = "I/C Item Alerts". The "Active alert" flag is in table = "I/C Item (3) Extension".

Receivables Report Option

Question: I want to print an AR report "Customer Aged Trail Balance". One of the sort/pull down options used to be "customer balance". That option is no longer listed for this type of report. How to I get this option back?

Answer: Change the Print Options for 'Calculate as of' to 'Age as of'. Then 'Customer Balance' will be available again.

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