

The Score

How To Email Forms From Adagio

The fastest and most efficient way to send forms to your customers and vendors is by email. It is simple to generate these emails, to send the forms, and to include any associated attachments.

To email a form, open your form from either a document grid or a menu. An Email button is available to direct the forms to emails rather than to a printer. Select the desired email cover code from the email cover field to assign text to each email. If you are emailing forms for many customers at once, all customers in the range that allow receiving emails will have one generated. Or, click the “match preferred send method” check box to send emails only to customers having an email preference. If you are emailing a single document for a customer, emailing will always happen, regardless of whether the customer allows or prefers receiving forms that way.

Also, you can choose to attach a single additional PDF file within each email from a particular folder under the company data directory, as defined in the Company Profile. When you are ready, click the Email button and choose to either Send now, or Save them to an email queue to send later.

Some Adagio programs allow the selection of an email address to send to, such as the Billing

or Ship-to email address from the document, or from the Customer master record. Whichever you choose, all emails are saved in the queue. Any customers without email addresses correctly set up will still have an email generated in the queue, but it will have a status of “on hold” and must be edited before it can be sent. To edit or send queued emails, from the Email menu choose Email Queue. From here, emails can be edited to change the address, email cover or sending status. Also, the form can be previewed from the View button.

Additional files of any type may also be attached from the queue. One way is to multi-select all desired emails, right-click, and choose “attach file” to browse for a single file, to attach from any folder to all emails. Or edit a single email, and in the attachments area, right-click and choose “attach file” to select multiple files of varying types. Either way, these files will be listed in the user attached section.

For any email not yet completed, or on hold, send highlighted emails by clicking the Send button, or all emails by clicking the Send All button.

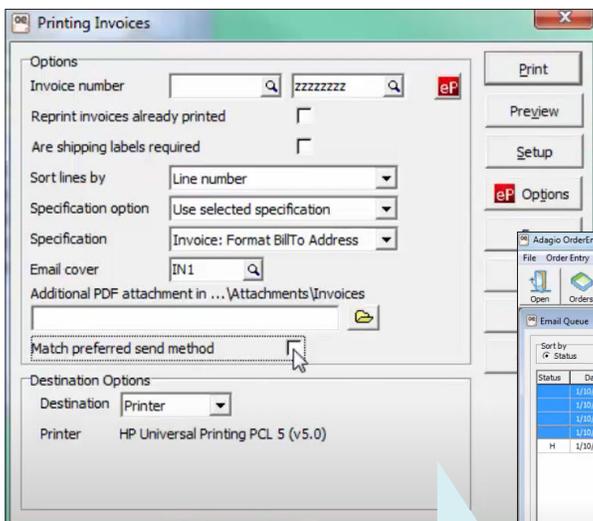
For more information about how to configure Adagio for emailing, [follow this link to watch the video](#) for Email Forms Setup, or contact us for help.

Adagio Payments

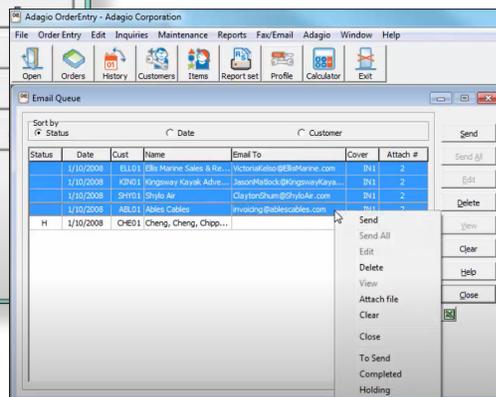
If you take credit card payments on a one-time or recurring basis for rent, membership dues or customer invoice settlement, Adagio Payments will save you hours of manual processing each month.

This 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>.



Click the “match preferred send method” check box to send emails only to customers having an email preference.



To edit or send queued emails, from the Email menu choose Email Queue.

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Create a PO from an Order in OE

Question: Is there a way to create a Purchase Order from an Order, or visa versa, where you have created a Purchase order and would like to Create the order in OrderEntry from that PO?

Answer: Yes, there are two ways to create Purchase Orders from OrderEntry Orders:

1. One by one, from within a new Purchase Order, you can enter an 'OE Reference' and 'Import OE Lines'.
2. For a range of OrderEntry Orders, you can use 'Auto Generate POs From' from the Maintenance menu for OrderEntry.

However, you can't go the other way and create OrderEntry Orders from Purchase Orders.

Commission on Misc Charges

Question: In OrderEntry, is there a way to ensure that commission is earned on miscellaneous charges?

Answer: No, the Commission Report, or even a Sales Report out of OrderEntry only shows revenue with SKUs. We find the standard Commission Report out of OrderEntry too simplistic. Instead, we recommend creating a custom report using Adagio GridView, and it can be customized to meet your exact needs — for example, if the commission is earned on collections rather than on billings.

Stop Posting Into Another Year

Question: Is there a setting in AR and AP to stop a user from posting into a fiscal year that is not open? Or a warning if a user attempts to post into a fiscal year that is not the current fiscal year?

Answer: Yes. In the Company Profile, on the Integration tab, set "Validate closed periods" to: Disallow or Warn Only - depending what you want.

Also, in the Ledger, go to Edit > Fiscal Calendar, where you will want to Open/Close the appropriate Periods.

Dealing With Non-stock Charges

Question: How should we best handle a sale which includes additional charges such as Documentation Charges? This is processed as a non-stock part number with a selling price but zero cost. Can we use a single static part number with a selling price but no cost to record this?

Answer: Documentation Charges are almost certainly better handled as a miscellaneous charge rather than as a non-stock part number. Miscellaneous charges don't ask for a quantity, and don't have a cost.

Page Break in Financial Reporter

Question: I am wondering how to set a hard page break in Financial Reporter. I have searched the help, but cannot seem to find this option.

Answer: With the Financial Reporter and the desired statement open, highlight the row where you want to insert a page break. Then from the Edit menu, select Insert Row Page Break. Or you can use the Control-B keyboard shortcut. When inserted, you will see a red line above the row number to visually indicate where the page break is.

There is also a setting to add a Column Page Break, if your statement has enough columns that would force it to print on more than one page wide. Typically, however, you would want the entire statement to print on a single page width.

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