

# The Score

Volume 22 Issue 2

## Softrak's Tech Support Policies

**Are you familiar with Softrak's technical support policies? Knowing these may help you get assistance faster when you need urgent support.**

Technical support is available for all Adagio Accounting customers. There are three options for obtaining technical support. Below is a summary of each to help you choose the one that is most appropriate, depending on the seriousness and urgency of your support issue.

### Your Adagio Consultant: First Line of Defence

#### Support Via: Phone, email, online

Softrak sells Adagio exclusively through authorized Adagio Consultants. These professionals like us keep abreast of updates and changes in the software. Many Adagio Consultants have a professional accounting designation. Support questions are often as much about accounting or business processes as they are about the software.

We have many years of experience in assisting businesses with accounting automation and can provide a spectrum of services, including support.

While we typically bill for our time and expertise when providing assistance, our in-depth knowledge of Adagio and your business processes will often enable us to provide the fastest, least expensive and most direct method of getting your issues resolved.

### Softrak Technical Support Forum

#### Support Via: Online

Softrak's Technical Support Forum is free to use. Post a question and you will have one or more responses from Adagio Consultants and Softrak technical personnel to help you understand and resolve your support issue.

The forum is constantly monitored between 8:00am and 5:00pm Pacific Time on business days and answers are often posted in under an hour during that time. However, there is no guaranteed response time for forum postings. Off-hours monitoring of these forums is also done, but there is no certainty of a response outside of Softrak's normal business hours.

Softrak requires that your Adagio software be registered in order to login to the Support Forum or to call Softrak Technical Support.

Our Technical Tips on p.2 of every issue of The Score are extracted from the Softrak Technical Support Forum. If you haven't visited, it is definitely worth checking out.

### Softrak Technical Support

#### Support Via: Phone, email

On very rare occasions, we, your Adagio Consultant, may be unavailable to assist you in the timeframe you require. Generally we can and will arrange for backup coverage to be provided by a fellow Adagio Consultant. However, under the rare circumstance that this support network is unable to help, Softrak provides technical support by phone for end users on a Per Incident basis. Please contact their Customer Service for pricing.

Also, Adagio Accounting software can be purchased with an optional annual SupportPlus Plan. This option entitles you to free priority technical support from Softrak, in addition to all software Upgrades and Updates. Ask us if you are interested in learning more about this SupportPlus option.

### Service Packs

**Softrak released the following service packs in Q2:**

#### **MultiCurrency 9.25**

Release Date: April 5th, 2023

Upgrade Complexity: Easy

#### **JobCost 9.2A**

Release Date: April 18th, 2023

Upgrade Complexity: Intermediate

#### **DataCare 9.3A**

Release Date: April 19th, 2023

Upgrade Complexity: Easy

#### **Time&Billing 9.2A**

Release Date: May 2nd, 2023

Upgrade Complexity: Intermediate

#### **Ledger 9.3B**

Release Date: May 18th, 2023

Upgrade Complexity: Easy

#### **OrderEntry 9.3B**

Release Date: June 7th, 2023

Upgrade Complexity: Intermediate

#### **SalesAnalysis 9.3B (Upgrade)**

Release Date: June 16th, 2023

Upgrade Complexity: Easy

**Please contact us if you have not yet downloaded these service packs and need help with their implementation.**

Brought to you by...



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## Add T&C To The Back Of A Quote

**Question: We would like to have the ability to add Terms & Conditions to the back of quotes in our Adagio SalesCQ so that when we print a quote it comes out as two sheets: the quote, and then our Terms & Conditions. How can we do this?**

Answer: This is a common request, and it can't be done straight out of Adagio, but here are some workarounds.

If you are actually printing and mailing quotes, you can print the Terms & Conditions on blank paper and then use that paper (turned over) when printing the Adagio quotes.

If you are emailing quotes, you can build them into the cover letter, or attach them as a PDF.

And then there's PrintBoss, a very handy add-on by Wellspring Software which can do almost anything like this. However, this costs money and also introduces another program to install and maintain.

## Edit Cost In SalesCQ

**Question: We just updated to the latest version of Adagio (9.3A). Before the update, we were able to edit the cost on the miscellaneous "M" Part Number. Now we are unable to do it in SalesCQ, but can only edit the cost once the quote has been transferred to OrderEntry.**

**Is there a setting we can use so that we can edit the cost again in SalesCQ before the order is transferred?**

Answer: Yes there is. If you've defined Security Groups, check the Options tab under Entry Template. There you'll find cost options.

Note: you may need to log in as SYS.

## Refund Payment to a Customer

**Question: We sent a wire payment back to a customer. We need to enter this transaction, so that the customer transactions and customer account are accurate AND the bank in BankRec is updated with the payment.**

**We are running AR, AP and BR along with other modules. How to best enter this in Adagio?**

Answer: If the customer has a credit on their account, you can use Create Write Off Batch to transfer the credit amount to a Manual Check batch entry in Payables.

If the customer doesn't currently have a credit balance, you will want to create a credit note or an adjustment to a clearing account so that the Bank isn't credited twice.

## AP Year End Not Period End

**Question: I think I may have run Year End instead of Period End in Payables. How can I tell, and how can I fix it if I have?**

Answer: To determine whether you ran Year End by accident, locate a very active Vendor, click on Edit (or View) then look at the "Statistics" tab. Look for the YTD figures. Check another Vendor. Are the YTD amounts zero? If so, you likely ran Year End in error.

Another way to check is to click on the "Batch Inquiry" button on the main screen. If there are no batches listed, that also indicates that the Year End was run.

The solution will be the same in Receivables.

Restore your backup to reverse the error, but you should consider speaking with your Adagio consultant first.

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.