

The Score

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Adagio's Optional Fields

When you want to save information on records and the specific field isn't available, some places in Adagio support creating your own customized optional fields.

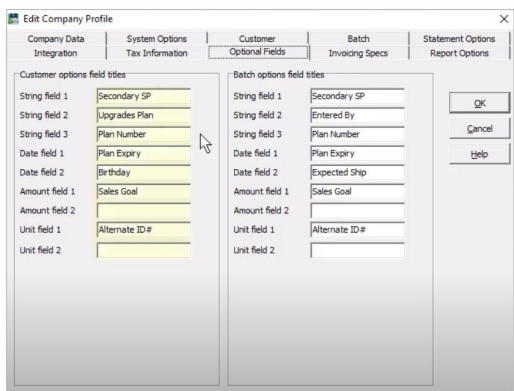
Creating Optional Fields

To see what types of optional fields may be available to define, edit the Company Profile and look for an Optional Fields tab. Some programs allow creating a block of optional fields for master records such as customers, vendors or other items, and other programs allow defining optional fields for transactions or batch entries. Some allow both.

Each block of optional fields allows up to nine fields of various data types — three text strings, two date fields, two amount fields and two unit fields. You define the labels for the desired field types, as many as needed, but you cannot create more fields of any given type.

Viewing Optional Fields

When optional field labels are saved in the Company Profile, and you view or edit a record type belonging to the optional field, they will be revealed on one of the tabs, which may or may not have Optional Fields in the tab title. Data values for date, amount, and unit optional fields can be entered just like any other field.



Editing Optional Fields

Text optional fields can have additional features implemented, which are configured from the

File menu and the Optional Fields function. A list of all text optional fields defined in all Adagio programs for this company will be listed there. If you have used the same label in multiple programs they will be grouped together, and settings will be used in all places.

Edit an optional field and you can specify the maximum number of characters, up to 30, and if characters will be forced to all uppercase. Make it a simple text field for editing, or turn it into either a combo box, or a finder field, to allow defining a selection list. Values can be added or deleted here up to the maximum width, or you can opt to allow new values to be added on the fly from any or all places that use this field. You may also allow or disallow blank values to be entered, and also require whatever value you enter to match one from the list, including any you added on the fly.

Autopopulated Optional Fields

It is possible for optional field values to be populated automatically or sent to transactions in other applications. In some places, such as for customers and related transactions like orders or invoices, you can create identical titles in both places for the same optional field. When optional field values are entered for a customer, then creating a transaction will read the values from the customer and populate the transaction. Text fields with selection lists allow choosing the desired value.

Syncing Optional Fields

In other places, such as Order Entry, it is possible to sync optional field values without requiring them to have the same title or location. In these cases, the Company Profile has settings to select optional fields from another specific program such as Sales Analysis. When posting transactions and creating batch entries for Adagio Ledger to retrieve, you can setup user-defined codes for either of the Send To GL description fields, in order to save optional field values within.

Do you have a business use case that you think can benefit from Adagio's Optional Fields? Contact us and we would be happy to help you set them up.

Q3 Upgrades

Softrak released the following upgrades in Q3:

Invoices 9.3
Release Date: August 7th, 2023
Upgrade Complexity: Intermediate

OrderEntry 9.3B
Release Date: August 9th 2023
Upgrade Complexity: Intermediate

Please contact us if you have need help implementing these upgrades.

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Base Price/Sale Price Updating

Question: When we have a price increase we enter the new sales price on 2 lines in inventory, in the Base price section and in the Sale Price section. We have noticed that when the item is either invoiced or received into inventory from a PO created in our system with different pricing on the invoice or PO, it changes the sale price (only) on the item itself in inventory.

Is there a setting we need to check to make sure it doesn't do this each time? Or is there another solution for this issue?

Answer: Yes, there is a setting in PO Company Profile, under the Integration tab - "Update base price on entry". Probably it is set to Auto and it **should not be**. There is no reason whatsoever to maintain the price in both the Base Price section and the Sale Price section. The Base Price section is all you need.

It's probably a good idea to work with your consultant on this, because it's very probable that there are other issues with your Adagio setup that should be addressed.

Disable OE Default Styles

Question: How do I disable the default styles in Order Entry? I created document filters and applied them to override any default styling. However, every time there is a new order or document, Order Entry uses the default styling.

Answer: Check the Style Priority on your new Document Filters. The Filters that you want to be applied must have a lower Style Priority number than the others.

Insert Rows in Financial Reporter

Question: How do I insert rows/columns in the Financial Reporter without affecting the "QUERYSHEET" formula references in the rows below the inserted line? If I insert a row on a referenced sheet then I have to go back to the QUERYSHEET formulas and update the referenced cell(s).

Answer: If you name the cells or cell ranges, and use the names in the QUERYSHEET() formulas rather than the cell coordinates, then the formulas will be updated properly as the named ranges are updated when rows/columns are inserted.

Setting up Recurring Invoices

Question: How do I setup recurring invoices for customers? I have some customers that get invoiced with the same amount each month, thus it would be ideal if this can be automated. I would also need the invoice description updated automatically.

Answer: Simple Recurring Charges can be set up in Receivables.

For more elaborate setups, Recurring Charges can be set up in Adagio Invoices as an Archive Batch. "Restoring Open Archive Batches" is described in the Adagio Invoices Help.

You can use Text Maintenance to set up the Descriptions that will appear on the Header Text tab in the Archive Batch. Use the 'Update Archive Batches' Maintenance function to update these descriptions each month in your Archive batch.

If you look at the Sample data for Adagio Invoices, you will see that it has been set up with this example.

Hide Inactive Inventory Items

Question: Is it possible to "Hide" an inactive item in Adagio Inventory?

Answer: Yes, you can hide it from the grid and from the finders by double clicking in the grid column row.

There is a box to Include Active Records Only. If you are using SYS, you need to disable the option to set the view for all users, to set the filter and then, edit the grid columns to enable the box to set to all users.

This needs to be done both on the grid and the finder.

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