

Rentals for Adagio - Release Notes

Version 9.3.1.58 (9.3A), April 26th, 2021

- o Removed validation when archiving quotes

Version 9.3.1.56 (9.3A), February 14th, 2021

- o Added support for Adagio Ledger 9.3B (210115)
- o Updated dictionaries

Version 9.3.1.55 (9.3A), November 3rd, 2020

- o Added support for Adagio BankRec 9.3A (200929)

Version 9.3.1.52 (9.3A), July 21st, 2020

- o Added options to bill for complete start/return days
- o Added ability to hide time field
- o Fixed issues with billing allocated items on contracts

Version 9.3.1.48 (9.3A), May 5th, 2020

- o Fixed the generation of pre-bill worksheet
- o Added ability to change the worksheet line category

Version 9.3.1.46 (9.3A), April 14th, 2020

- o Added an option to rent all rentals and expendables
- o Added the ability to return allocated expendables.

Version 9.3.1.45 (9.3A), March 8th, 2020

- o Added an option to include the minimum amount beyond the minimum period.

Version 9.3.1.44 (9.3A), January 27th, 2019

- o Fixed an issue with negative qty on a contract non-stock item.
- o Fixed an issue rental item validation where it reported it in use for the same contract/line.

Version 9.3.1.43 (9.3A), January 8th, 2019

- o Added minimum amount/rate per rental item

Version 9.3.1.42 (9.3A), December 18th, 2019

- o Enhancements and fixes to pre-billing worksheets

Version 9.3.1.24 (9.3A), March 19th, 2019

- o Enhancements and fixes to pre-billing worksheets
- o Added price list to suggested expendable items

Version 9.3.1.22 (9.3A), February 4th, 2019

- o Enhancements to pre-billing worksheets
- o Fixed the credits to expendables

Version 9.3.1.21 (9.3A), December 5th, 2018

- o Fixed an issue with data integrity issues after printing from a new contract.
- o Fixed an issue with contract locks after printing from a new contract.
- o Added support for pre-billing worksheets.

Version 9.3.1.20 (9.3A), November 18th, 2018

- o Fixed conversion issues from RN92A and RN92B.
- o Fixed an issue with disabling customer and shipto alerts.
- o Fixed an issue with customer inquiry and a 1212 error.
- o Fixed an issue with positioning the contract grid after an edit or filter change.
- o Fixed an issue with the unnecessary disabling of the detail type for new contracts.
- o Added a new contract option to default to a particular line type. A similar option has also been created for pre-billing worksheets.

Version 9.3.1.19 (9.3A), October 31st, 2018

- o Fixed issues with the display of contract notes when adding new notes.

Version 9.3.1.17 (9.3A), October 27th, 2018

- o Fixed issues with conversions from prior versions
- o Fixed an issue with rental item validation

Version 9.3.1.16 (9.3A), October 24th, 2018

- o Fixed an issue with the menu security.

Version 9.3.1.14 (9.3A), October 17th, 2018

- o Fixed an issue with the rental item validation.

Version 9.3.1.12 (9.3A), October 17th, 2018

- o Fixed an issue the suggested menu item enable/disable.
- o Fixed an issue with the rental item validation.

Version 9.3.1.11 (9.3A), October 16th, 2018

- o Fixed an issue where the rental start/end dates were blank when entering multiple lines.
- o Improved Rental validation when validation is disabled. If the unit field is blank, it will load the first non-blank unit record and use that information. You'll still receive a warning about an invalid rental item.

Version 9.3.1.9 (9.3A), October 15th, 2018

- o Added the option to print private/public notes, if the user has that security setting enabled.
- o Fixed an issue with copying quotes to contracts. grdDetails grid definition

Version 9.3.1.8 (9.3A), October 14th, 2018

- o Added ability to make contract notes private and to restrict access through user groups within Rentals.
- o Fixed an issue with the validation of item/unit number
- o Fixed an issue with the app where note all job statuses could be selected. Previously, only 10 statuses could be selected and saved

Version 9.3.1.7 (9.3A), October 11th, 2018

- o Added ability to make contract notes private and to restrict access through user groups.
- o Fixed an issue with the validation of item/unit number

- o Fixed an issue with overriding unit price and item/unit number
- o Added ability to restrict the ability to return or credit through user groups.
- o Added an audit trail for user entry, starting with rental items that are overbooked.
- o Added a company profile option to prevent the selection of inventory items instead of rental items
- o Added support for Receivables 9.3A and OrderEntry 9.3A.
- o Fixed an issue with deleting quote or contracts on reservation. It was creating app integrity issues
- o Fixed an issue when an app user adds a note and the contract changes status when transferred. A last edit date has been added to separate header changes vs notes.
- o Fixed an issue with the app where note all job statuses could be selected. Previously, only 10 statuses could be selected and saved
- o Added the ability to view/select/add private vs public notes on the app. The user needs to have these rights.
- o Fixed an issue with auto editing items on contracts. Completed lines will be included.

Version 9.3.1.6 (9.3A), August 9th, 2018

- o Fixed an issue with an incorrect status description after a transfer
- o Fixed an issue with quotes and qty on reserve when deleting contract lines
- o Added a contract status data integrity check

Version 9.3.1.5 (9.3A), July 14th, 2018

- o Fixed an issue with downloading contacts with unprintable characters

Version 9.3.1.2 (9.3A), July 10th, 2018

- o Fixed an issue with the status changing when a contract is copied
- o Added protection against uploading contract notes with unprintable characters

Version 9.3.1.1 (9.3A), July 1st, 2018

- o Added support for the following new release:

Adagio OrderEntry 9.3A (2017.12.04)

- o Added CE Oil enhancements for Call Center app including new fields.
- o Added protection against installation into SOFTRAK vs SOFTRAK\RENTAL
- o Added Toolkit and Exporter support for this new version
- o Fixed an issue with cycling suggested items
- o Expanded contract statuses to '999'

Version 9.2.1.152 (9.2B), April 12th, 2018

- o Fixed the Auto Advance On Edit/New for contracts and invoices
- o Fixed an issue with retaining the contact form size and position
- o Fixed an issue with the display of customer alerts
- o Fixed an issue with cycling suggested items
- o Added a counter to the suggested item dialog
- o Added ability to copy a quote
- o Added ability to delete the quote when copied to history
- o Added file compaction after purging history

Version 9.2.1.150 (9.2B), October 4th, 2017

- o Fixed an issue with qtys doubled up when copying from history to quote
- o Fixed an issue with notes with DIC errors after a transfer

Version 9.2.96.149 (9.2B), October 3th, 2017

- o Fixed issues with the copying and archiving of contracts

Version 9.2.95.148 (9.2B), September 5th, 2017

- o Fixed more issues with the transfer of contract notes

Version 9.2.94.147 (9.2B), July 27th, 2017

- o Fixed an issue with the transfer of contract notes

Version 9.2.93.146 (9.2B), July 23rd, 2017

- o Fixed an issue with default contract columns with active filters
- o Fixed an issue with spec print margins

Version 9.2.92.144 (9.2B), July 18th, 2017

- o Added ExcelDirect support for contract details
- o Added item unit and serial number to the PreBill Register
- o Filters are updated when the contract is saved
- o Added DIC checks for notes
- o Added contract info to the notes report

Version 9.2.91.143 (9.2B), May 30th, 2017

- o Various bug fixes

Version 9.2.85.134 (9.2B), April 30th, 2017

- o Added a contract notes report
- o Added support for reverse sorts of quotes and history grids

Version 9.2.84.133 (9.2B), April 6th, 2017

- o Added the following new features:

- Contract statuses
- Single series for contracts and quotes
- Contracts can be canceled instead of deleted
- Quotes can be moved to create contracts
- New contracts can start as a reservation
- Rental item unit added to availability grid
- Availability grid can be automatically refreshed
- Notes can be automatically added due to select changes
- Data integrity checker can be configured to only check select items
- Added a DIC check to search for orphaned notes
- Quotes and archived contracts can be filtered and sorted
- Text blocks can be used during note entry
- Quotes added to customer/item inquiries
- Option to copy contract notes
- Access to external contract documents
- Note time is formatted as hh:mm:ss
- Add contract/invoice specs for new fields
- Added an editable unit cost for user defined costing methods
- Added creation and last edit fields to notes
- Updated supporting DLLs and dictionaries

- o Added the following new custom features:

- iPhone app to view contracts and edit notes

- Transfer to/from app
- Pre/Post job check lists
- Next actions
- Salespersons
- Call center contract fields
- Option to copy call center info and checklists
- Security added for just editing contract notes
- Popup menu sorts are disabled if filters are active

o Fixed the following issues:

- Unable to load ADS32.DLL with multiple users
- Removed unapplicable fields/buttons from quotes
- Activity is cleared with you copy contracts to quotes
- Fixed a problem accessing contracts from customer inquiry
- Changed the History Purged based upon completion date
- Fixed DIC issues with contracts, units and qty on reserve
- Fixed a problem copying contract notes between contracts
- Contracts with activity cannot be put on reserve
- An override item rate will be displayed correctly on the billing method dropdown
- Message dialogs are centered to the main form instead of the screen center
- Fixed customer alerts
- Contracts now require a customer
- Fixed an issue with the salesperson code when a contract is copied
- Fixed a problem deleting items from quotes or contracts on reserve

Version 9.2.81.122 (9.2A), December 12th, 2015

o Added support for the following new releases:

- Adagio DataCare 9.2A (2015.09.16)
- Adagio JobCost 9.2A (2015.12.03)

- o Updated supporting DLLs and dictionaries
- o This version requires 9.x versions of Adagio
- o Fixed an issue with the DIC falsely reporting misc charge errors

Version 9.2.80.119 (9.2A), August 13th, 2015

- o Removed the 'on hold' and 'reservation' fields for quotes
- o Fixed the quote contract number where auto incrementing is turned off
- o Fixed the rental item inquiry to drill down to a contract
- o Fixed an issue with drilldown to the rental item from the availability dialog

Version 9.2.79.118 (9.2A), May 27th, 2015

- o Added a DIC check for a rental item allowed at the rented location

Version 9.2.78.117 (9.2A), May 26th, 2015

- o Internal version changed to 9201
- o Active dictionary is now RN92A instead of RN90A

Version 9.2.76.115 (9.2A), May 9th, 2015

- o Fixed an issue with closing the report dialog after print

- o Fixed an issue with saving user preferences

Version 9.2.75.114 (9.2A), May 1st, 2015

- o Added support for the following new releases:

- Adagio Payables 9.2A (2015.03.10)
- Adagio Receivables 9.2A (2015.04.10)
- Adagio Invoices 9.2A (2015.04.28)
- Adagio Inventory 9.2A (2015.05.15)

- o Support for Adagio Receivables 8.1A has been discontinued.

- o Updated supporting DLLs and dictionaries

- o The Active Users List has been enhanced to show the user ID, computer name, selected data information and Lanpak usage.

- o Fixed an issue with displaying orphaned batches during the data integrity check.

- o Fixed an issue contract quotes and the data integrity checker.

- o Added support for the Adagio menu.

- o Adagio Styles, Colors and LanPak licensing will be made available to National Accounts on startup.

- o The open dialog can be sized horizontally to see the full data path

- o The number of previously opened databases (saved by user) was increased from 25 to 100

Cash Batch Entry and Posting

- o The document number generated for cash batch entries now includes the year. The format is year, batch and entry number (YY-B-E). This avoids potential duplicate numbers with transactions entered in previous years.

- o The Total Applied is now displayed at the bottom of the cash batch entry screen. In previous versions, only the Total Unapplied was displayed.

- o Cash batch entry now checks for a negative unapplied amount and displays the message: "Applied payment amount exceeds the check amount. Do you wish to continue and save the entry?" when the entry is saved. This also prevents accidentally leaving the Payment amount field at zero after applying cash to invoices.

- o The customer name can now be edited for miscellaneous cash receipts. In previous versions, it was set to 'Miscellaneous Cash Receipts'. The edited name is retrieved in BankRec. It is also retrieved in Ledger when any of the G/L Reference, Description 1 or Description 2 Send To fields are set to Customer Name.

- o Added support for the A/R option 'Allow posting to control account'. It is disabled by default to prevent you from (accidentally) entering GL accounts used in Control Account Sets for the Receivables Control account during batch entry and posting.

- o The Job Description and Estimate Description can be shown in the Job/Phase/Category finder in batch entry.

- o Batches may be selected as 'Ready for Posting' using the spacebar.

Customer Maintenance and Inquiry

- o Fixed an issue with customer inquiry where an error appeared when opened.
- o Added an option to the Transactions tab to sort customer transactions by Date or by Type/Doc No. In previous versions, transactions were always sorted by Date when 'Current' or 'Historical' were selected and always by Type/Doc No. when 'Both' was selected. Also added an option to the screen to sort customer transactions 'Ascending' or 'Descending'. In previous versions this selection had to be made by right-clicking on the grid. And when 'Both' was selected, transactions were always sorted ascending.
- o Added 'Require PO?' option on the Invoicing tab in Edit Customer. Enable to require a purchase order number to be entered in the Reference field on the Header tab in Adagio OrderEntry when entering a new order, and in the PO Number field in Adagio Invoices on the Header tab when entering an invoice. Requires OrderEntry 8.1F (2014. 09.30) or higher and Invoices 9.1A (2014.10.16) or higher. A default for new customers can be set on the Customer tab in the Company Profile.
- o Added 'Print BR Receipts' option to Invoicing tab in customer. Enable if you want to print a receipt in BankRec when payments for the customer are deposited. This enables the 'Print Receipt' option in the BankRec batch for receipts retrieved from Receivables, transactions entered in BankRec or generated in reconciliation. Requires BankRec 9.2A (2014.12.18) or higher.
- o Added 'Batch by entry' option in Payment Methods. Enable to create a separate deposit batch when receipts are retrieved in Adagio BankRec (including payments originated in Adagio OrderEntry and Invoices). This is very useful if you want all deposit entries using this Payment Method to appear in the Bank Reconciliation in BankRec as separate deposit entries, such as for payments received by EFT.
- o Added support for the A/R option 'Allow edit of posted desc or reference?'. Enable the option to allow the Description 1 and 2 fields and the Reference field for posted transactions to be edited on the Transaction Details screen, accessed from the Transactions tab in Edit Customer. Use this option to allow correction or updates to these fields after posting.
- o The Terms Description is displayed next to the Terms field in Edit and View Customer. This allows you to see the description in View Customer and to see it in Edit Customer without opening finder on the Terms field.

Version 9.0.74.111, March 1st, 2014

Fixed the rental item alerts
 Added ability to exclude the check for invalid items during the DIC

Version 9.0.73.110, January 23rd, 2014

Fixed an issue with selling items. The item's resource was not released when the contract was saved

Updated supporting DLLs and dictionaries

Expanded report amount columns for the contract listing, delinquency report and pre-register report

Version 9.0.72.109, October 31st, 2013

Added the spec code, E11 (Invoice date less a day)

Version 9.0.71.108, September 26th, 2013

Fixed an invalid pointer error when opening the smart finder.

Version 9.0.70.107, September 4th, 2013

Fixed the invoice audit report. For credits there was a credit and debit amount displayed.
 Fixed the problem of generating zero amount invoices related to final invoices.

Version 9.0.69.106, August 26th, 2013

Fixed a problem with the print spec D80, Rate Description

Version 9.0.68.105, August 20th, 2013

Fixed a problem with display of the billing end date on the pre-bill register
Added the ability to sort the lines on the pre-bill register

Version 9.0.67.104, July 22nd, 2013

Fixed a problem with printing and marking contract lines

Version 9.0.66.103, June 19th, 2013

Fixed the spec code F1, grand total on the printed invoice
Fixed a problem with unit price when the contract is edited and the billing method's special first invoice is the full rental period and amount. The item might not be billed.

Version 9.0.64.101, June 7th, 2013

Added the ability to invoice and print the invoice from the contract list dialog
The return date label will change depending the return state.
Either 'return date' or 'exp return date'
Fixed the sizing of the rental contract and invoice dialogs
Fixed the printed tax and misc charges on contract forms
Fixed the visibility and position of select rental contract detail fields.

Version 9.0.63.100, April 22nd, 2013

Added quantity by location for rental item maintenance and inquiry
Fixed a tax calculation problem where the tax rates changed between billings

Version 9.0.62.99, April 5th, 2013

Added tax related spec codes
Fixed the Consolidate G/L Transactions dialog labels

Version 9.0.61.98, March 24th, 2013

Fixed the G/L summary on the invoice audit report
Fixed the setup of Rentals appearing on alternate Adagio products
Fixed the printing of invoice spec E79 (total sale) and E80 (total misc)
Fixed the menu level security with respect to the invoice inquiry
Fixed an error when viewing customer info from a contract or invoice
Fixed an error with printing multiple copies of a contract/invoice.

Version 9.0.60.97, March 18th, 2013

Fixed the printing of spec code F33 (total before tax)

Version 9.0.59.96, March 15th, 2013

Fixed suggested rental items on contracts. The start/end/exp ship dates were not initialized properly.
Added a check for a rental item on another contract, if there is insufficient quantity on hand.

Version 9.0.58.95, February 28th, 2013

Added the ability to only print unprinted contract lines
Fixed the display of the service record from rental item maintenance/inquiry
Fixed the display of quantity for returned items

Version 9.0.57.94, February 20th, 2013

Fixed the printing of serial numbers
Fixed an error when viewing rental item info from the contract detail

Version 9.0.56.93, February 18th, 2013

Add the serialized unit field to the contract/invoice detail index
Fixed the maximum length of the billto/shipto contact field to 30
Fixed the transfer of comments to invoices
Fixed credit of expendables and misc charges
Fixed the Gross/Net amount on the contract listing

Version 9.0.55.92, February 14th, 2013

Fixed data integrity errors with rental items.
Fixed an 'index out of bounds' error when printing to a printer
Fixed the invoice grid to match the contract grid sort direction
Fixed date encoding error during invoicing

Version 9.0.53.89, February 5th, 2013

Fixed the display of location on the contract detail
Fixed partial returns and credits when lines were inserted above
the rental line during the same edit session.

Version 9.0.52.88, February 4th, 2013

Added support for suggested items. Suggested items will automatically
appear when a specific item is added to a contract.
Changed the contract detail dialog to expand to show all item locations.
The limit on the displayed locations can be set in the company profile.

Version 9.0.51.87, January 30th, 2013

Added validation of rented and sold items on contracts, including
categories, locations, qty on hand, price lists.

Version 9.0.50.86, January 30th, 2013

Fixed the initialization of a networked printer
Fixed some menu enabling/disabling for select maintenance functions
Added a company profile option to print rental amounts if the invoice
is under the minimum amount.
Changed the printing of invoices to support the above option.
Fixed the printing of tax jurisdictions on invoices.

Version 9.0.49.84, January 28th, 2013

Added a unit field to the rental item finder dialog
Added ability to change the category on a previously entered contract detail
Added ability to change the extended weight on a previously entered contract detail,
provided the option to edit extension is active
When a rental item's comments are added to a contract, you can now indicate whether
those comments will be marked as instructions and if they will be transferred to the invoice

Added a default service code to the company profile
Added a company profile option to default serialized item quantity to 1 on a contract
Fixed a problem where the G/L transaction file is open during contract entry
Removed unnecessary access to O/E data files
Disabled the description field on the rental item inquiry dialog
Fixed the serialized item on a contract when the unit number was keyed in

Version 9.0.48.83, January 23rd, 2013

Fixed an issue with the reading/writing/conversion of the invoice unit field

Version 9.0.47.82, January 22nd, 2013

Fixed editing specs and tax groups under customer maintenance
Fixed the registration report

Version 9.0.47.81, January 21st, 2013

Added import/export rental item
Fixed the item/unit finder with service records

Version 9.0.46.79, January 14th, 2013

Added protection against converting bad data
Fixed a billing rounding error
Fixed a conversion from Rentrak issue regarding line types
Added protection against long printer names
Fixed footer spec codes
Fixed QRW item table

Version 9.0.45.77, January 10th, 2013

Added support for GridView and custom reports attached to the menu
 Custom reports should be placed in \Softrak\Rentals\CustomRP
 Custom views should be placed in \Softrak\Rentals\Views
Added an option to prepare a contract work file for views and custom reports
Added sorts and columns to the rental item activity report
Added serial number field to the contract/invoice detail record
Fixed the item + unit finder
Fixed the qty remaining out on an invoice detail

Version 9.0.44.76, December 18th, 2012

Fixed a special case of billing expendables on a final invoice
Fixed an issue with discounts on conversion and the invoice audit

Version 9.0.43.75, December 18th, 2012

Fixed the contract start date on the contract listing
Fixed the error when the Revenue report was printed twice
Fixed the item restriction on the Commission report
Fixed the contract end date update when the date was originally cleared
Fixed the excel button status adjacent to the rental history grid under item inquiry
Added a date range to the Commission report printed ranges
Added trickle down updates to the contract header dates.

Version 9.0.42.74, December 10th, 2012

Added rental item optional fields. Both rental item and inventory

item optional field data will be applied to contract details.
Added remaining qty out to date for invoicing.

Version 9.0.41.73, November 14th, 2012

Prevented the closing of contracts with rented items that are still out
Fixed the update of contract detail fields, that impacted billing
and invoice printing
Fixed the invoice finder

Version 9.0.40.72, October 31st, 2012

Added a User's Guide and HTML Help
Added manual and automatic styles to the rental edit dialog
Fixed a line tax recalculation problem for completed lines
Fixed an issue with the printed status of newly created invoices
Fixed dialog caption for filter maintenance
Fixed an issue with price lists on the detail dialog

Version 9.0.39.71, September 27th, 2012

Fixed the credit of sale items and misc charges

Version 9.0.38.70, September 25th, 2012

Fixed the line count on invoices, when comments are transferred
Fixed the rebuilding of invoices, when the line count is incorrect

Version 9.0.37.69, September 21st, 2012

Fixed the transfer of comments to invoices
Added an option to skip the unit field on the contract detail dialog
Fixed the new contract dialog
Fixed the customer tax type while editing a customer

Version 9.0.36.68, September 4th, 2012

Added an option to view the IC item from a rental item on a contract.
Added an option to default to an open ended contract (no end date).
Added an option to open an existing contract to the detail grid.
Improved the handling of an open ended contract.
While printing invoices, a user can have a restricted invoice range, when a
single contract is specified.
Added an excel button for the rental grid under item inquiry.
When a contract is closed and saved, the end date will be assigned the close date.
Fixed the resizing of the contract form.

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