

COVR B.V.B.A.

# Release Notes

cmOffice – V2.72e

<b>Author</b>	Covr bvba
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## Introduction

This Release Notes document provides the latest information about new features, enhancements to existing features, and defects fixed.

## General Functionalities

### DEFAULT CONFERENCE (BUG FIX)

#### CMOFFICE

Default Conference

#### PROCEDURE

The selected “default conference” is no longer lost when the user switches between different modules

## Style sheet

### NEW: EXTRA STYLE SHEET VARIABLES TO SUPPORT FIVE DIFFERENT VAT PERCENTAGES ON THE INVOICE DOCUMENTS

Six new style sheet variables are added to the list of variables:

<<Inv. VAT proc 4>> and <<Inv. VAT proc 6>> can contain the 4<sup>th</sup> and 5<sup>th</sup> different VAT percentage.

<<Inv. Base4>> and <<Inv. Base5>> can contain the total amount excl. VAT corresponding with the 4<sup>th</sup> and 5<sup>th</sup> different VAT percentage.

<<Inv. VAT 4>> and <<Inv. VAT 5>> can contain the total VAT amount corresponding with the 4<sup>th</sup> and 5<sup>th</sup> different VAT percentage.

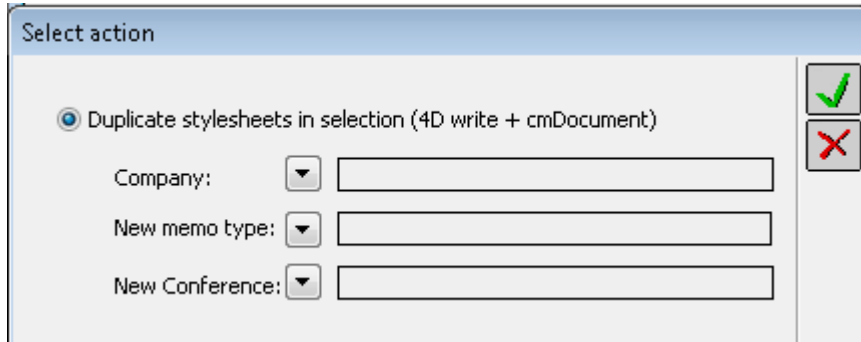
These variables can be used on style sheets for creating an invoice or credit note document, for doing a mail merge from within the Invoices new or Exhibitions modules.

Total Excl.	0,0 %	14,0 %	21,0 %	23,0 %	24,0 %	Total Incl.	p. 1/2
1 479,90	10,00	342,10	300,00	747,15	80,65	1 782,00 EUR	
VAT:	0,00	47,90	63,00	171,85	19,35		

**BUG FIX CMOFFICE: DUPLICATING STYLE SHEETS**

If style sheets were duplicated by using the extra function in the Style sheets module, the company info could be lost if multiple companies were available.

This is solved.



**BUG FIX CMOFFICE: DUPLICATING STYLE SHEETS**

If a Word style sheet was duplicated by using the extra function in the Style sheets module, both the original style sheet and the copy referred to the same Word document. This is solved.

relation

**NEW: DESCRIPTION PREVIOUS INVOICES OR CREDIT NOTES IN THE INVOICE DETAIL LINES**

If an invoice or credit note is created for a registration or exhibition that already contained some previous invoices or credit notes, the invoice lines contained some lines like

Already invoiced 20160001 01/02/16  
 Already credited 20160002 02/02/16

These two descriptions can now be defined in the Administrator’s table \*Default values with the codes InvAlreadyInvoiced and InvAlreadyCredited. The description needs to be saved in the value\_for\_text field. The description can contain two fields ##nr## and ##date## that will be replaced by respectively the invoice number and date.

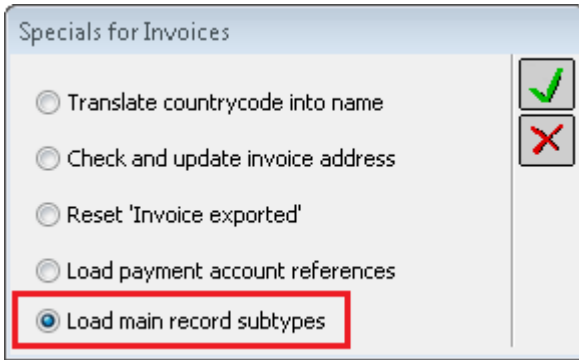
**Invoices**

**NEW: IN THE MAIN TABLE OF THE INVOICES NEW MODULE AN EXTRA COLUMN “MAIN RECORD SUBTYPE” IS ADDED**

**Main record subtype**

- Test Group
- Individual
- Individual
- Individual
- individuals

This column is empty by default. You need to load these subtypes by using the extra function “Load main record subtypes”



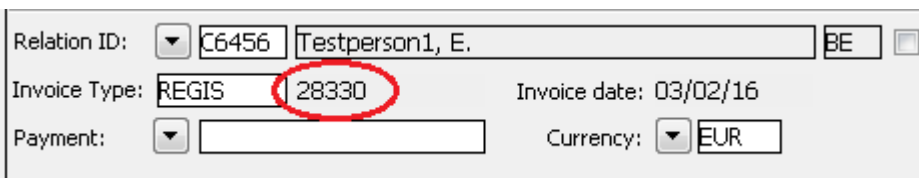
The content of this column depends on the kind of main record the invoice was created for:

<u>Main record</u>	<u>Subtype</u>
Registration	Registration type
Exhibition	“EXHIB” + exhibition status
Member registration	Membership type

## Relation Manager

### BUG FIX CMOFFICE: MERGING RELATIONS

If a relation is merged that’s used in an Invoice new record, also the accounting customer ID is updated.



If a relation is merged also the Group ID and Group name are updated in a registration, member registration or exhibition. Also the relation in a session proposal is updated.

**BUG FIX CMOFFICE: DELETING A RELATION DETAIL**

Before a relation is deleted, cmOffice checks if this relation detail isn't used in cmOffice. If the relation is used you get a message that tells you in which modules this relation is used. The memo relation, registration Group relation, exhibition relations and session proposal relations are added to this check.

**BUG FIX CMOFFICE: DOUBLE CARRIAGE RETURN IN RELATION LINK ADDRESS CARD**

When updating an address via the manage account web module, a double carriage return appeared in the address. This bug has been fixed.

**Payments**

**BUG FIX CMOFFICE: TRANSFERRING PAYMENTS DURING THE IMPORT OF PAYMENTS OF AN ATOS FILE**

If during the import of payments of an ATOS file some payment detail records on a payment with a virtual account like Ogone, Cash, Creditcard... needed to be transferred to a payment with a real account, the transferred payment detail records all got the sequence number 10. This is solved.

**NEW FINANCIAL STATUS IN REGISTRATIONS**

The financial status field is no longer editable. What does this status represent? Find here a short description:

Status	Description
O-balance	amount paid = amount to pay is not equal to zero Euro
Non-registration	No participant (record) in registration
To process cc	Payment method = credit card and amount to pay is not zero
Processing cc	Payment method = credit card and the amount to pay is authorised by Ingenico (Ogone) [note: coupled to a specific setting in * default values "authorizedStatus"]
Waiting for cheque/Cash	Manual Payment in cmOffice (Cash )
Waiting for transfer	Manual Payment in cmOffice (Cash ) or payment via an online registration (bank transfer)
Free	amount to pay = 0
Overpayment	amount paid > amount to pay
Underpayment	amount paid < amount to pay and amount to pay >0
Query	CC payment method but not yet authorised
Waiting for payment	CC payment method

## BUG FIX CMOFFICE: THE GENERAL SEARCH IS ACTIVATED IN THE PAYMENT DETAILS MODULE



The general search is activated in the Payment details module, so multi query searches are possible.

## Registrations

### BUG FIX IN HOTEL REGISTRATIONS

The number of nights calculated out of a hotel registration was wrong in those cases where multiple day rates were involved over the booking period. This led to a wrong calculation of the rates to pay in the registration and as a result in the invoice.

This is solved.

### BUG FIX CMOFFICE: EXTRA FUNCTION “CREATE REGISTRATIONS FOR SELECTED AUTHORS” IN THE ABSTRACT MODULE

With this function a registration can be created for a selection of abstracts in the Abstract-Functions module. This function gave an error after one of the previous updates.

This is solved.

### BUG FIX CMOFFICE: EXTRA FUNCTION “CREATE REGISTRATIONS FOR SELECTED RELATIONS” IN THE RELATIONS MODULE

With this function a registration can be created for a selection of relations in the Relations module. This function gave an error after one of the previous updates.

This is solved.

## Membership

### FORMAT MEMBERSHIP DATES IN INVOICES

Whenever an invoice is created for the membership payment, information of the membership is stored in the “Invoices for” field of the invoice (Tab 2)

This information contains the start and end date of the membership. The format has always been the dutch date format (for instance Fri 1, 2015). It is now displayed in the format DDMMYY.

### NEW MEMBER REGISTRATION STATUS

In the member registration, the field “Registration status” has been added.

The status values are the same as those of a “normal” registration. You can define the values in the Administrator’s tabel RG-Status.



cmOffice: COVR: Member Registration

Member registration | Extra info | Invoices/Credit notes | Edit member registration 120726


Company: ESHRE  Renewed  Ready to Invoice Member reg. No.: M2016-00044

Relation: C6456 Testperson1, E. BE    
 Invoice ID: C6456 Testperson1, E. BE    
 Memb. type: Individual Currency: EUR   
 Payment:  VAT no.:

Regis. date: 15/02/2016 Status: Confirmed Payment Date: 00/00/00

Total records: 1 Total fee: 75,00 EUR Financial Status: Waiting for Payment Financial Status Date: 15/02/2016

Sort	Member ID	Rel. ID	Name	Year	Subscription	Fee (incl.)	VAT%	Currency	Period from	Period to	Deleted	Nom. Year	End date
10	E-14-02062	C6456	Testperson1, E.	BE 2016	International Trainee Member	75,00	21,0	EUR	1/02/2016	31/01/2017			30/11/2018

In the “Member registrations” and “Member by year” modules, an extra column is added. You can use this field in the search  as well.

Search Member registration

Member | Yearly subscription | Member registration | Profile

Company: ESHRE

Rel. ID (regis.):

Regis. type:

Payment:

Registration status: Confirmed


Financial status:

Financial Status date:  12

Financial Status date:  12

Date regis.:  12

Renewed:

In the “Member registrations” and “Member by year” modules, you can do an update / change of the status value for all selected records via the “Extra” function .

Select an action:

- Renew membership (not for multiyear!!!)
- Check ready to Invoice (selection only)
- Translate countrycode into name
- Load ZIPcodes
- Ommit doubles (sort by relation Id)

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Create profile     Delete profile

▼

▼

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Set registration status to:

▼

In the inputform of "Member", an extra column has been added in the sub-table.


YEAR	Subscription	FEE	Currency	Chapter	Financial status	Reg. status	Period from	Period to
2016	International Trainee Member	75,00	EUR		Waiting for Payment	Confirmed	1/02/2016	31/01/2017

## Exhibition


### NEW MODULE NAMED "EXHIBITION DETAILS"

In an exhibition record one can attach several products. Each product is represented in the exhibition record. A double click on such a product (line) opens the "Exhibition Details" tab in which all product related information is shown. In the new module "Exhibition Details", you will get an overview of all products. No need any more to open first an exhibition record before you can see the product info (Exhibition Details).

### EXPORT EXHIBITION / EXHIBITION DETAILS

Via the print button  you will have the opportunity to select "Export via XLSX template". This function is available under the Print button in both the exhibition module as well as in the "exhibition Details" module. It allows you to export the data of the exhibition records or exhibition details records visible in the window into an Excel sheet with the aid of an Excel template.

How does it work?


- Select “Export via XLSX template”
- Click the green button 
- Browse to your Excel template
- Open the Excel template
- The export will transfer the date of the selected records into the Excel
- Save the result in a new excel file name (otherwise your template will be overwritten!)

An export via an Excel template can be seen as a personated, a dedicated export. The Excel template contains the fields and their corresponding formatting you do want display in the final Excel.

Do know that you can also use the “normal” Excel export function . No Excel template needed in this case.

## Scientific Program (SCPR)

### BUG FIX DUPLICATE SCIENTIFIC PROGRAM


The “Duplicate” function of a scientific program in the “Extra”  contained a bug. As a result some sessions had no content. This is solved.

Remember that the duplication of a scientific program has some preconditions:

- Make sur you created the (new) conference that will receive the duplicated abstract function records
- Make sur that the tables related to the abstract submission are empty. I.e. the tables in which the topics are defined, the session types, the presentation types, the timeslots, the functions, ... all should be empty. If the “Duplicate” function is finished, these tables will have the same definition as the conference of which the scientific program is copied from.

## cmOffice

### BUG FIX CMOFFICE: THE GENERAL SEARCH IS ACTIVATED IN THE PAYMENT DETAILS MODULE

The general search  is activated in the Payment details module, so multi query searches are possible.

### BUG FIX CMOFFICE: DUPLICATING PARTICIPANT RECORDS

The registration is automatically saved if a participant record is duplicated.