

COVR B.V.B.A.

Release Notes

cmOffice – V2.73a

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Content

- Introduction..... 4
- General Functionalities..... 4
 - New full installer cmOffice – Customer independent..... 4
 - New variable in “*-Default values” to add additional info in the “Invoice for*”-field for **member** registrations..... 6
- Style sheet 7
 - New: New style sheet variable “Abstr. subject (no HTML)” 7
- Payments..... 7
 - New Variable “InsertConflnPayment” 7
 - transferring online payment detail records..... 8
 - Import payments 9
- Invoices New..... 10
 - Modification: Total credited for exhibition records..... 10
 - new: Export invoices 10
- Membership 11
 - NEW member registration status 11
 - new Multi membership Management 11
- Relations 12
 - New extra fields in the mail-merge” 12
- cmOffice – cmServer bug fixes 13
 - Bug fix cmOffice: transfer payment detail records to another payment..... 13
 - Bug fix cmOffice: html code in mail merge 13
 - Bug fix cmOffice: update country in payment detail 13
 - Bug fix cmOffice: creating a pro forma invoice or credit note memo 13
 - Bug fix cmOffice: manual transfer of payments 13
 - Bug fix cmOffice: Overview style sheet variable..... 13
 - Bug fix cmOffice: exhibition module..... 13

Bug fix cmserver: online member invoices were not merged automatically 13

cmDocument 4.27 14

 New cmDocument 4.27: Deleting Memos and Style sheets..... 14

 New cmDocument 4.27: Mailing with authentication..... 14

 New cmDocument 4.27: CmDocument version check 14

Introduction

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

At the end of the document you will find the updates and bug fixes released in version 2.72f

General Functionalities

NEW FULL INSTALLER CMOFFICE – CUSTOMER INDEPENDENT.

CMOFFICE

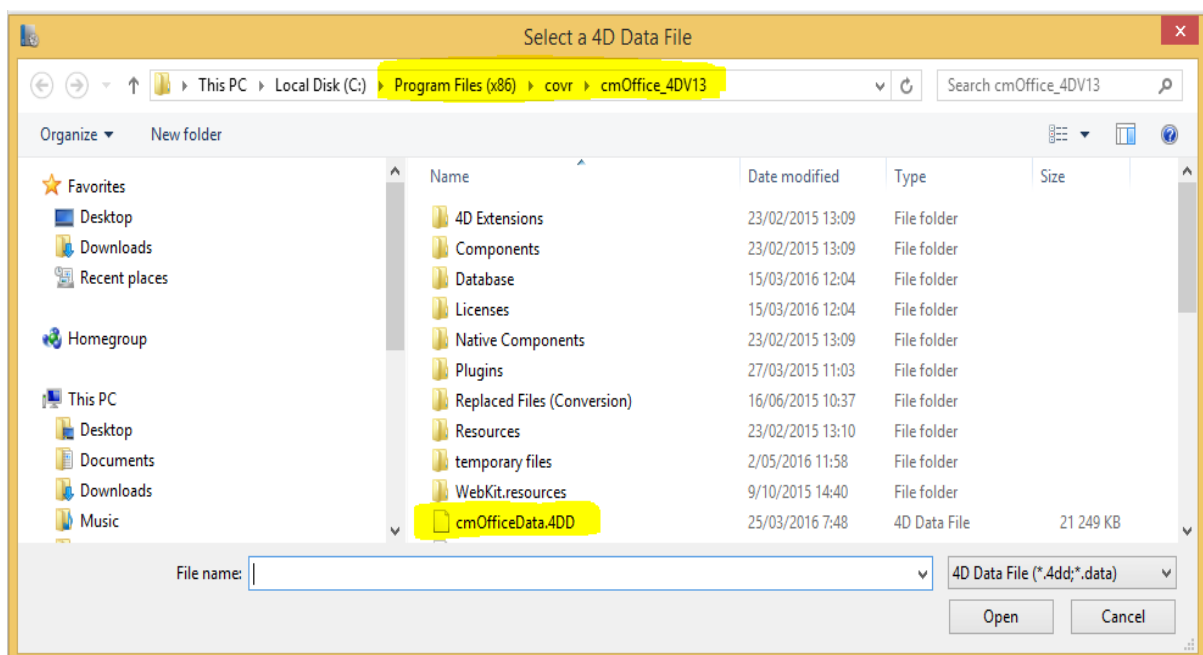
The full installer application has been made customer independent.

PROCEDURE

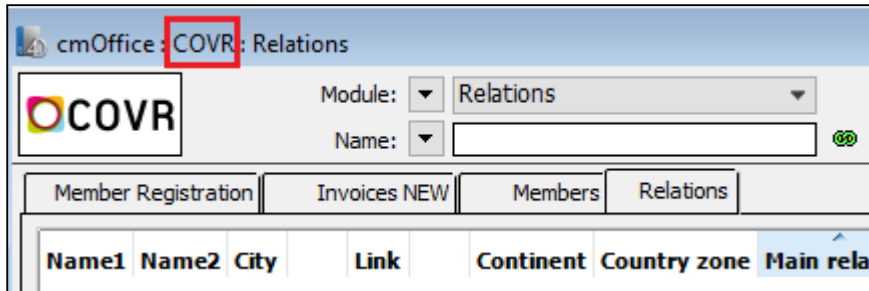
Note: You only should use the full installer if no cmOffice is installed yet on your PC (if no covr folder is available yet in C:\Program Files (x86)\covr)!

The full installer for cmOffice is located on <http://www.covr.be/downloads/cmInstallers>. It installs in Program Files (x86) a folder covr containing folders named cmDocument and cmOffice_4Dv 13 and the TeamViewer TeamViewerQS_nl-idcywz3jhu.exe.

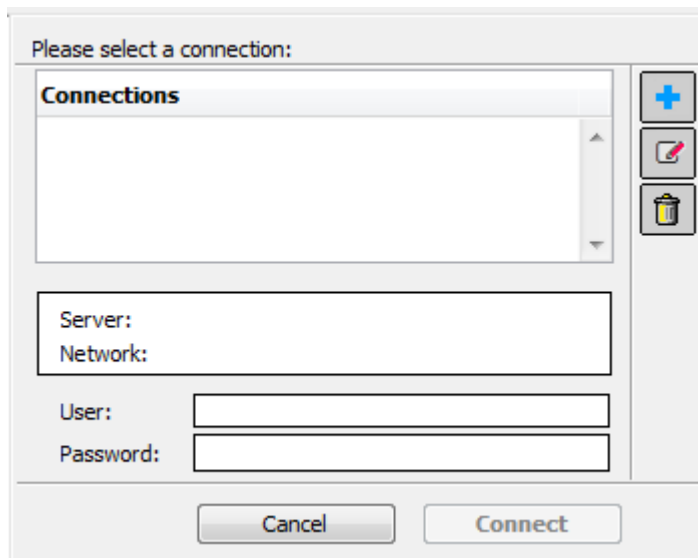
The first time you login into cmOffice, you will get a dialogue in which you are asked to select the datafile. Select in the folder C:\Program Files (x86)\covr\cmOffice_4Dv 13 the file cmOfficeData.4DD (4D Data File).



Next, a dialogue appears in which you are asked to give in a customer name cmOffice will use. The customer name will become the name that appears in the top title bar in between the name “cmOffice: “ and the module name. If cmOffice is already running on another PC then please use the same customer name. One can find the customer name on that PC by starting up cmOffice. The customer name appears in the title bar in between the text “cmOffice” and the name of the module. In the example below the customer name is “COVR”.



If the customer name corresponds with the customer name known in the cmServer, another dialogue box appears with empty fields.



Select the + Button.

Give a name for the (cm)Server.

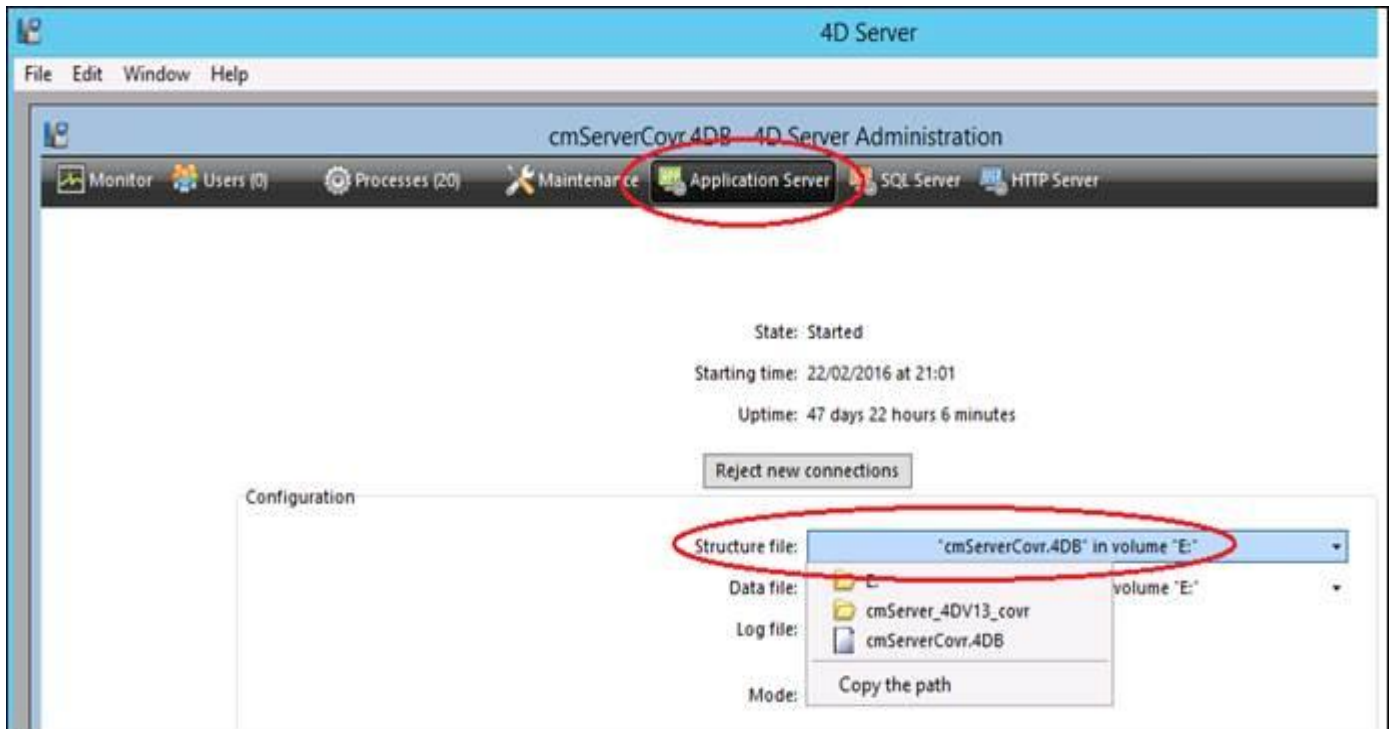
Select TCP/IP in the Network popup menu.

Select the IP-address of the cmServer if it is displayed in the dialog or select the “Enter IP” button and give in the IP-address of the 4D server (cmServer).

In case the default 4D port is used, the IP-address only is sufficient. However in case the cmServer folder contains a document named usePort, then the cmServer uses another port. Fill out the port number mentioned in the document after the IP-address of the cmServer. An example: 192.168.xxx.yyy:19994

In order to find the folder in which the cmServer info is saved, you have to logon on the 4D server and select the 4D window.

Select the “Application Server” tab and in there the “Structure file” drop down box.



Select the “Create” button.

Login with an existing user and password.

cmOffice will synchronize all the local parameters and ask you at the end to restart cmOffice.

It is a good practice to update cmOffice towards the most recent version after the full installation. You can find the most recent version on the COVR installer page <http://www.covr.be/downloads/cmInstaller>.

NEW VARIABLE IN “*-DEFAULT VALUES” TO ADD ADDITIONAL INFO IN THE “INVOICE FOR*”-FIELD FOR MEMBER REGISTRATIONS

CMOFFICE

A new variable to be defined in the “* default values” admin table is [InvMemberSumFormat](#)

PROCEDURE

An example: |SU| |NA| |ID| |CR| |CR|From |FD| to |TD|

Where

- NA is the Full Name
- SU is the Description of the member subscription
- ID is the Member Identification
- FD is the member From Date

- TD is the member To Date
- CR is a Carriage return

Each time an invoice is created for a member registration, the setting of **InvMemberSumFormat** is looked up and the corresponding values are stored in the "Invoice from" field.

The content of the "Invoice from" field is used in the style sheet variable <<Reg_overview>>.

If the variable **InvMemberSumFormat** is not defined in the Admin table, the default is used. The default setting is: |ID| |NA| |SU| i.e. the identification of the member followed by the members' name followed by the description of the member subscription.

The invoice record has a field "Invoice for" that you can see on the "Extra info" tab.

You can show the content of this field in the invoice documents by using the style sheet variable "Reg. overview".

Style sheet

NEW: NEW STYLE SHEET VARIABLE "ABSTR. SUBJECT (NO HTML)"

CMOFFICE

The new style sheet variable "Abstr. Subject (no HTML)" is available in the Abstract Functions module.

PROCEDURE

The subject of an Abstract can contain html code. When the style sheet variable "Abstr. Subject" is used in a style sheet for a mail merge from within the Abstract Function module, this html code will be interpreted or will be visible. (For instance an extra empty line in the output)

We've created a new variable "Abstr. Subject (No html)" in which this html code is removed and converted into formatted data.

Payments

NEW VARIABLE "INSERTCONFINPAYMENT"

CMOFFICE

New default value (admin table "* default values"), "InsertConflnPayment" for online credit card payments.

PROCEDURE

If the default value "InsertConflnPayment" is set to False, no conference code will be filled in in the Payment record which is created to save the online credit card payments. (see also Modification: Transferring online Payment detail records).

If the default value doesn't exist or is set to True, the conference code will be filled in in the Payment. This is the default behavior.

TRANSFERRING ONLINE PAYMENT DETAIL RECORDS

CMOFFICE

Transferring online payment detail records.

PROCEDURE

When an online registration is paid by credit card, cmOffice creates a Payment detail record on a virtual account which is a combination of the payment provider and credit card company (e.g. OGONE-VISA, OGONE-Mastercard, VIVEUM-VISA...). A new Payment will be created for each new day, company, conference and virtual account combination. Records shown on this virtual account are authorized credit card transactions. This does not mean that the money is on your account yet, you should transfer these payments to your actual bank account once the money has arrived on that account. At the end the stop value of all Payments with a virtual account should be 0.



The payments can be imported in cmOffice , transferred from the virtual to the actual account, or entered manually.

Importing payments

When importing the payments (e.g. from an ATOS file), cmOffice checks if the payments in the import file are already saved in cmOffice on a such a virtual account. If so, that payment detail record will be transferred automatically to a new or existing payment with a real bank account.

Manually transferring payments

If you don't import payments, you can transfer these payment detail records manually.

- 1) Open the payment with the virtual account
- 2) Select the payment detail records to transfer and select the Copy-button 
- 3) You can copy payment details from multiple payments
- 4) Create a new payment and select a company and account or open an existing payment
- 5) Select the Paste-button 
- 6) The copied payment detail records will be removed from the source payment and saved in the current payment.

When copying payment details from multiple payments, please keep in mind that you cannot mix payments from multiple companies, conference or real bank accounts.

Manually entering payments

If you enter a payment detail manually and enter a reference or Relation ID, cmOffice checks if there's a payment detail record, saved in cmOffice on a virtual account which matches the reference or relation. If so, this payment detail record will be shown in red and you will be asked if you wish to transfer this payment from the virtual account to the actual account. After accepting, the payment detail record will be transferred automatically to the active payment record.

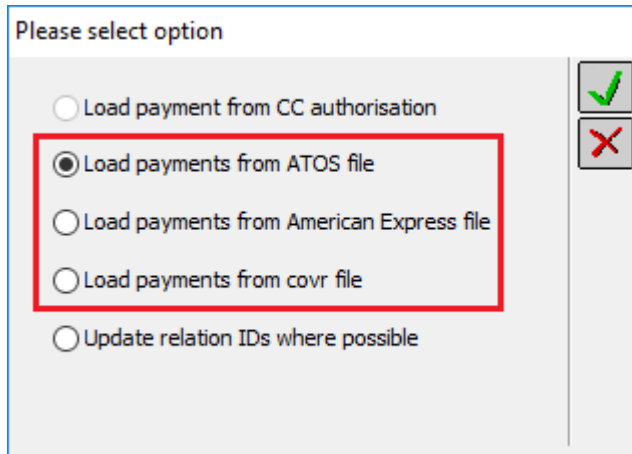
IMPORT PAYMENTS

CMOFFICE

Import payments from an Excel file.

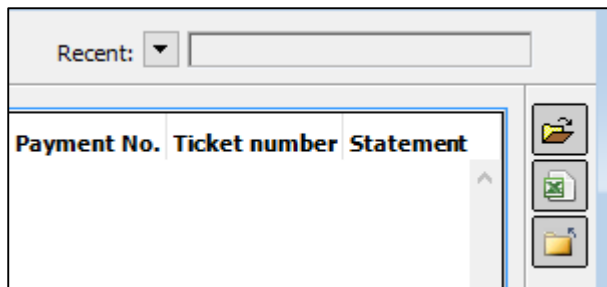
PROCEDURE

In the Payment module the payments can be imported from an ATOS, American Express or covr file.



Until now this always needed to be text files.

With this version of cmOffice you can import Excel files.



We also support the import of the American Express file with the following Dutch column titles

Referentie transactie

Transactiedatum

Bedrag transactie

Kaartnummer

Betalingsnummer

This column needs to be added manually in the import file

Kosten

This column needs to be added manually in the import file

Invoices New

MODIFICATION: TOTAL CREDITED FOR EXHIBITION RECORDS

CMOFFICE

The “total credited” field is not used anymore in the exhibition records.

PROCEDURE

In the past the exhibition had a field “Total credited” that contained the total amount credited for that exhibition. This field isn’t used anymore. All amounts invoiced and credited are all summarized in the “Total_Invoiced” field.

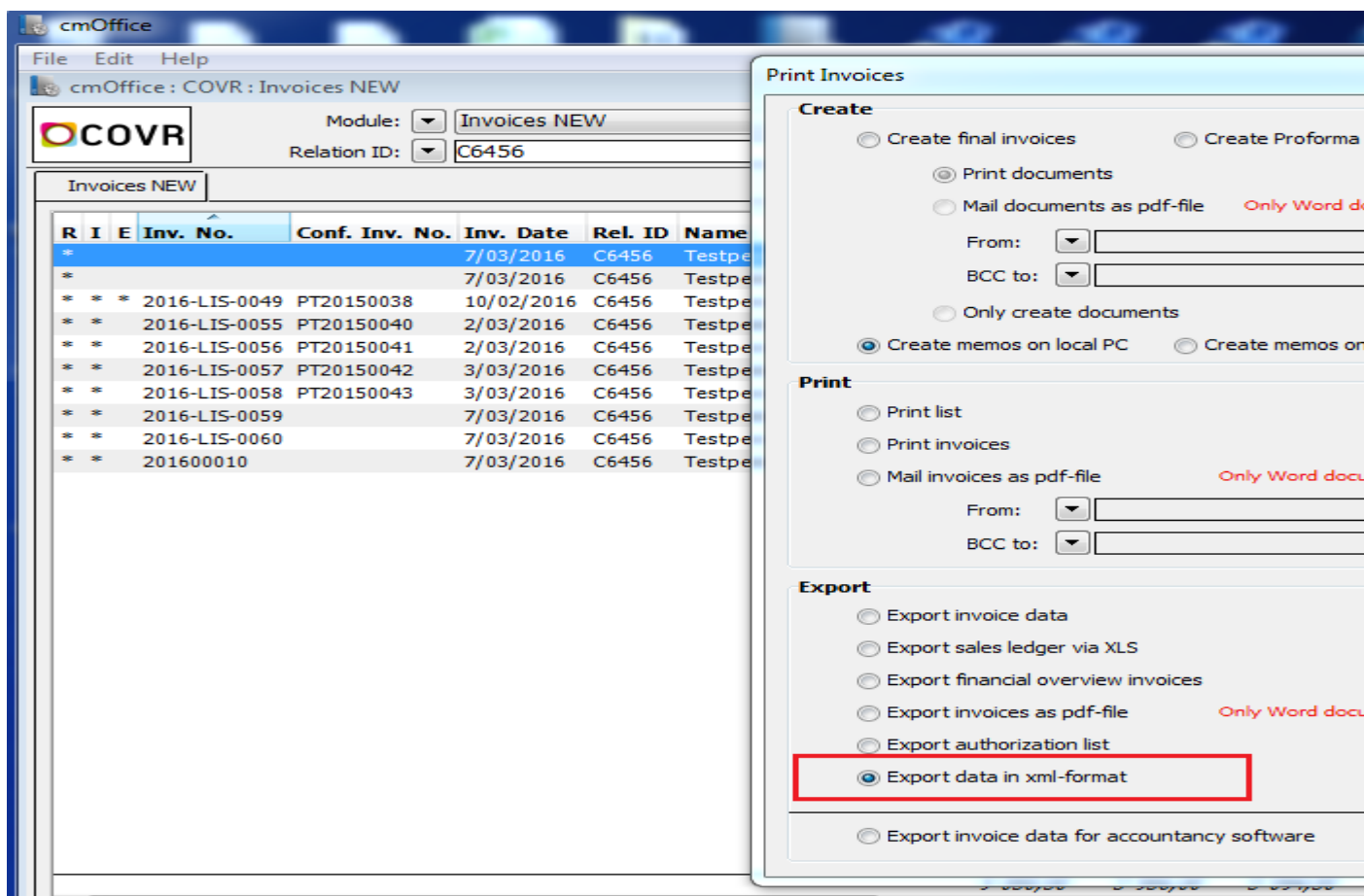
NEW: EXPORT INVOICES

CMOFFICE

A new export of invoices in XML-format has been created.

PROCEDURE

export invoices



Membership

NEW MEMBER REGISTRATION STATUS

CMOFFICE

The registration status is now also available in the Member registrations.

PROCEDURE

The registration status is now also available in the Input form, the main table and the extended search dialog box in the Member registrations and Members by Year modules.

The screenshot displays the 'Edit member registration' interface. At the top right, it says 'Edit member registration 120772'. Below that, the 'Member reg. No.' is 'M2016-00070'. The main area shows two columns of member details for 'Ms. Eva Testperson1' at 'Testcompany BE', 'Administration', 'Nieuwstraat 1', '1000 Brussel', 'Belgium'. At the bottom, there are two dropdown menus: 'Status:' is set to 'Confirmed' (highlighted with a red box) and 'Financial Status:' is set to 'Waiting for Payment'. To the right of these are 'Payment Date: 00/00/00' and 'Financial Status Date: 15/04/2016'. A vertical toolbar on the right contains icons for save, delete, print, and other actions.

The registration status can be defined in the Admin table "RG-Status".

NEW MULTI MEMBERSHIP MANAGEMENT

CMOFFICE

Membership management for multiple companies.

PROCEDURE

cmOffice supports the registration management of multiple companies.

Until now it was only possible to manage the membership of one company. For this conference the VAT-Settings, member subscriptions etc. were defined.

With this version of cmOffice we can manage the member registrations of multiple companies. For each company one virtual 'member' conference can be defined. The conference code and name can be chosen freely.

For each 'member' conference one record needs to be defined in the Administrator's table * Lists: Listnr = 190,

Code = company and listValue = conference code (defined in S-Conference).
Per company the Member nrs., Member subscriptions and Member types need to be defined.

Relations

NEW EXTRA FIELDS IN THE MAIL-MERGE”

CMOFFICE

Extra fields added to the mail merge functionality in the Relations module.

PROCEDURE

The registration overview style sheet variables can be used in the style sheets for a mail merge from the Relations module.

The variables are:

"Reg. overview all"	"Reg. overview all fee"
"M_regAllExtras"	"M_regAllExtrasFee"
"Accomp. persons"	
"Reg. arrival date"	"Reg. departure date"
"Reg. overview"	"Reg. overview 2"
"Reg. overview 3"	"Reg. overview 4"
"Reg. overview No hotel"	"Reg. overview No hotel 2"
"Reg. overview No hotel 3"	"Reg. overview No hotel 4"

cmOffice – cmServer bug fixes

BUG FIX CMOFFICE: TRANSFER PAYMENT DETAIL RECORDS TO ANOTHER PAYMENT

The Stop value wasn't updated in the Payment from which the transferred Payment detail records were removed.

BUG FIX CMOFFICE: HTML CODE IN MAIL MERGE

If a mail merge was executed from within the Abstract Functions module, cmDocument added some html code to some abstract style sheet variables. This could lead to popping up a decode dialog box in Word and the html code was interpreted. This html code isn't added anymore.

BUG FIX CMOFFICE: UPDATE COUNTRY IN PAYMENT DETAIL

If two relations that were used in a Payment detail record were merged, only the Relation's ID and name were updated in the Payment detail. Now also the country will be updated.

BUG FIX CMOFFICE: CREATING A PRO FORMA INVOICE OR CREDIT NOTE MEMO

If you defined a specific style sheet for a pro forma invoice with the memo type "INVOICEPRO" and you created a pro forma invoice memo, that memo got the memo type "INVOICE" instead of "INVOICEPRO". The same happened for the pro forma credit notes and the memo types "CREDITNOTE" and "CREDITNOTEPRO". This is solved now.

BUG FIX CMOFFICE: MANUAL TRANSFER OF PAYMENTS

When you manually transfer payments by using the clipboard functionality, the total amount of the original payment is now recalculated correctly.

BUG FIX CMOFFICE: OVERVIEW STYLE SHEET VARIABLE

The "overview" style sheet variable is now also made available for mail merges from within the Registrations module.

BUG FIX CMOFFICE: EXHIBITION MODULE

The "total invoiced" amount in the exhibition module now takes the credit notes into account as well.

BUG FIX CMSERVER: ONLINE MEMBER INVOICES WERE NOT MERGED AUTOMATICALLY

If an existing member registration record with a prepared invoice was changed online, a new invoice was created instead of merging with the existing one.

cmDocument 4.27

NEW CMDOCUMENT 4.27: DELETING MEMOS AND STYLE SHEETS

Until now when a memo or style sheet was deleted only the record in cmOffice was deleted. The corresponding Word and pdf file remained on the relevant (web)server.
With this version of cmDocument also the corresponding Word and pdf file will be deleted on the (web)server.

NEW CMDOCUMENT 4.27: MAILING WITH AUTHENTICATION

With this version of cmDocument a user and password can be defined to logon to the mail host. This user and password can be defined in the new default value "MailServerLogon". The value contains the user and the value_for_text contains the password.

This authentication is also used for the HTML Mass mailing.

NEW CMDOCUMENT 4.27: CMDOCUMENT VERSION CHECK

cmOffice now checks the compatibility of the installed cmDocument application.

The version number of the installed cmDocument is taken from the xml file C:\Program Files (x86)\covr\cmDocument\types.xml.

The required cmDocument version is defined in cmOffice. Both cmDocument versions are displayed in the "About" and in the "Preferences" windows.

The screenshot displays the 'About' window of cmOffice. On the left, a red-bordered box contains the following text:

cmOffice	v2.72e	26
cmDocument installed:	4.27	
cmDocument required:	4.26	

Below this box is the COVR logo with the tagline 'covering IT needs for professional societies' and the ID 'F0011360'. The main area features a circular diagram with 'cmOffice' in the center, surrounded by segments for 'Membership', 'Contact Management', 'Communication', 'Programme', 'Registration', 'Exhibition', and 'Finance'. In the bottom right corner, contact information for COVR b.v.b.a. is provided: 'Oude tramstraat 5, B- 2490 - Balen, Belgium, tel: +32-14- 21 22 23, support@covr.be'.