

COVR B.V.B.A.

Release Notes

cmOffice – V2.74a2

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Introduction

This Release Notes document provides the latest information about new features, enhancements and defects fixed in any of the builds of cmOffice version 2.74.

cmOffice – VAT settings

NEW: USER INTERFACE TO DEFINE THE VAT SETTINGS

A description and a short explanation on the working of the new use interface for VAT settings and VAT rules can be found in [“M160040 Quick Manual Defining VAT Settings and Rules”](#)

NEW: OVERRULE GENERAL ACCOUNT

CMOFFICE – VAT SETTINGS

It is now possible to overrule the “general” account defined for the congress by another “general” account for a specific VAT rule(s) of a specific transaction.

PROCEDURE

For each VAT rule defined in the VAT settings one can select a general account. This general account overrules the possible definition of an account defined in the Conference Settings (Admin table S-Conference).



Previously a general account could only be defined for the transactions “(member) registration” and “exhibition” (in the Admin table S-Conference). From now on one can define a general account for each defined transaction (see Admin table V-Types) in the Admin table V-Settings.

Any General account is defined in the Admin table F-General Accounts.

PS: Also in the Admin table “EX-Products” a general account code can be set used in the transaction “exhibition”. However the settings in the Admin table V-Settings overrules also the settings in the Admin table EX-Products.

NEW: OVERRULE VAT ACCOUNT

CMOFFICE – VAT SETTINGS

It is now possible to overrule the “VAT” account defined for the congress by another “VAT” account for a specific VAT rule(s) of a specific transaction.

PROCEDURE

For each VAT rule defined in the VAT settings one can select a VAT account. This VAT account overrules the possible definition of an account defined in the Conference Settings (Admin table S-Conference).



Previously one could define only 1 VAT account (in the Admin tabme S-Conference). From now on one can define a VAT account for each defined transaction (see Admin table V-Types) in the Admin table V-Settings.

The VAT account defined in the V-Settings table overrules the definition in S-Conference. The VAT account is exported in the accounting file on the line containing the VAT.

Do know that only one VAT account can be used per invoice. If not, a message pops up during the creation of an invoice stating that there is general account conflict.

Any account (General account or VAT account) is defined in the Admin table F-General Accounts.

An example of a definition of an extra VAT account for all rules defined for the transaction named “Donation”.

Add record for V-Settings

VAT settings

Company: Country:
 Conference: Default VAT%:

VAT Rules for transaction:

Transaction	B2B/B2C	Cust.Location	Description	VAT_type	VAT percentage	VAT Text	General account	VAT account
TDON	B2B	PT		FREE1	10,0	Gift – outside the scope of VAT		452001
TDON	B2B	EU		FREE1	10,0	Gift – outside the scope of VAT		452001
TDON	B2B	WORLD		FREE1	10,0	Gift – outside the scope of VAT		452001
TDON	B2C	PT		FREE1	10,0	Gift – outside the scope of VAT		452001
TDON	B2C	EU		FREE1	10,0	Gift – outside the scope of VAT		452001
TDON	B2C	WORLD		FREE1	10,0	Gift – outside the scope of VAT		452001

Member conferences

NEW: MEMBER CONFERENCE SETTING

CMOFFICE – CONFERENCE SETTINGS

The user has now the possibility to indicate that a newly created conference is used as a member conference.

PROCEDURE

In cmOffice, a virtual conference can be defined per company, which is used as member conference (See release notes “160523 Release Notes 2 73a” paragraph “NEW MULTI MEMBERSHIP MANAGEMENT”). 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).

The management of this List record occurs now automatically by cmOffice. If one tick marks “Used as Member conference” in the definition form of the conference (Admin table S-Conference).

Add record for S-Conference

General info | **Printing and Sync** | **Online functions**

Conference: Used as Member conference Sort:
 Description:
 Full conference name:

Member Module

NEW: UNDELETE A MEMBER RECORD

CMOFFICE

The user has now the possibility to undelete a member record.

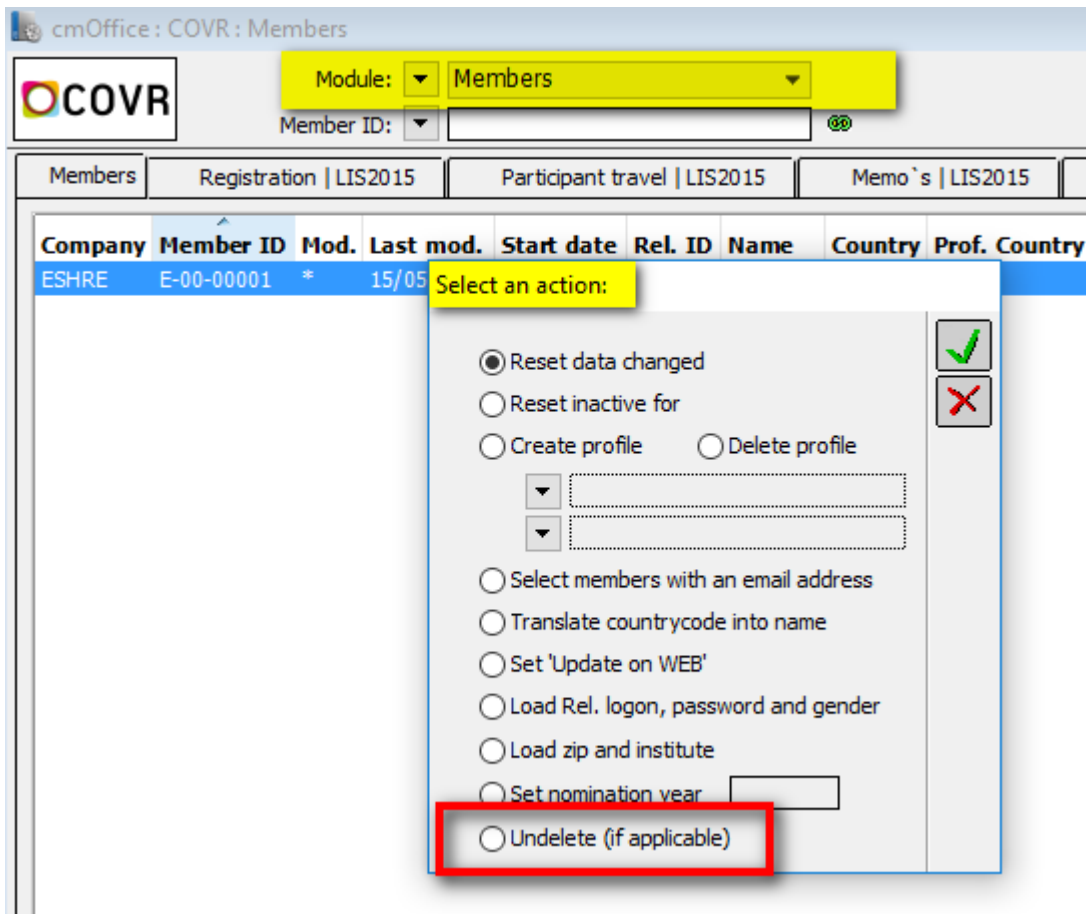
PROCEDURE

You've always had the possibility to delete "old" member records. Member records as such were not really removed out of the database but got a label which indicated 'Deleted'. Member records having this label were no longer shown in member lists. Such a delete of a member record could only be undone by contacting the Quality & Support department of COVR. With this new function, you can now "undelete" a record marked as "Deleted".

How to get a list of the deleted member records?

The screenshot shows the 'Search Members' dialog box in the cmOffice COVR Members module. The 'Company' dropdown is set to 'TESTPS'. The 'Show deleted records' checkbox is checked and highlighted with a red box. The 'Operation on current selection' dropdown is set to 'None = new selection'. The dialog box contains various search criteria such as Member ID, Relation ID, Country, Startdate, End date, Date last mod., Active member, Inactive for, Data changed, Publisher ref., Mail allowed, Nomination year, Continent, Country zone, Share contact details, and Not for commercial use.

HOW TO UNDELETE ONE OR MORE MEMBER RECORDS?



cmOffice – Invoice creation


NEW: AUTOMATIC GENERATE INVOICES PER REGISTRATION TYPE


CMOFFICE

The user now has the possibility to automatically create invoices for online registrations for (a) specific registration type(s).

PROCEDURE

In the Online functions tab of the Conference definition in the Administrator (Admin table S-Conference) you can define if and whether an invoice needs to be created and for which types.

This can be when the online registration is created 

or when the online credit card payment is received. 

1

General Online mailing parameters

Mail from:

Mail BCC:

2

Prepare invoice

Select specific registration types

Mail proforma

Only if no online credit card payment

Create invoice

Mail invoice

Invoice type	Subtype
REGIS	CREATE ALL INVOICES
REGIS	CREATE NO INVOICES
REGIS	Faculty/Invited
REGIS	Faculty/Invited
REGIS	Group
REGIS	Individual
INVOI	CREATE ALL INVOICES
INVOI	CREATE NO INVOICES

Select per invoice type
 "CREATE ALL INVOICES"
 or
 "CREATE NO INVOICES"
 or
 some specific registration types

Online registration invoice mail attachment pathnames:

Separate multiple pathnames with a carriage return

The invoice is always **prepared** when the online registration is created. This means that the invoice record is created but no invoice number is assigned yet and no memo is created yet.

Now you can specify in more detail whether the invoices need to be created and mailed.

- You can choose to send a proforma invoice and the final invoice when the online payment is received.
- You can choose to create an invoice and send it to the participant for each online registration
- You can choose to only create and invoice.
- **NEW** You can choose to create an invoice for certain types (select the checkbox "Create invoice"). If you then also select the checkbox "Select specific registration types", you can choose the invoice types (defined in the Admin table F-Invoice journals) and registration types (defined in the Admin table RG-Types) for which the invoices need to be created.

Per invoice type you can select: CREATE ALL INVOICES, CREATE NO INVOICES or one or more specific registration types.

An example: If you would like that the invoices are created and send for each individual registration only then you would have to tickmark ...

- ✓ Create Invoice
- ✓ Mail Invoice
- ✓ Select specific registration types and within the selection window
- ✓ REGIS Individual

PS: the invoice type "REGIS" is used for online registrations. The invoice type "INVOI" is used for manual invoices. Both are predefined invoice types within cmOffice.

CmOffice Update Installer

MANAGEMENT OF THE VIRTUAL STORE IN THE CMOFFICE UPDATE INSTALLER

CMOFFICE -UPDATE INSTALLER

The cmOffice update installer has been changed in order to manage the handling of the (Microsoft) virtual store folders.

PROCEDURE (EXECUTED BY THE INSTALLER)

The steps in the cmOffice update installer have been adapted to ...

- assure that the correct rights are set on the “COVR” folder (precondition: run the installer being admin user) preventing the creation of the virtual store folder.
- remove the virtual store folder created by Microsoft during a previous installation. These folders were created if the installer was run with not the correct administrator rights (not as admin user).

CmOffice Abstract functions

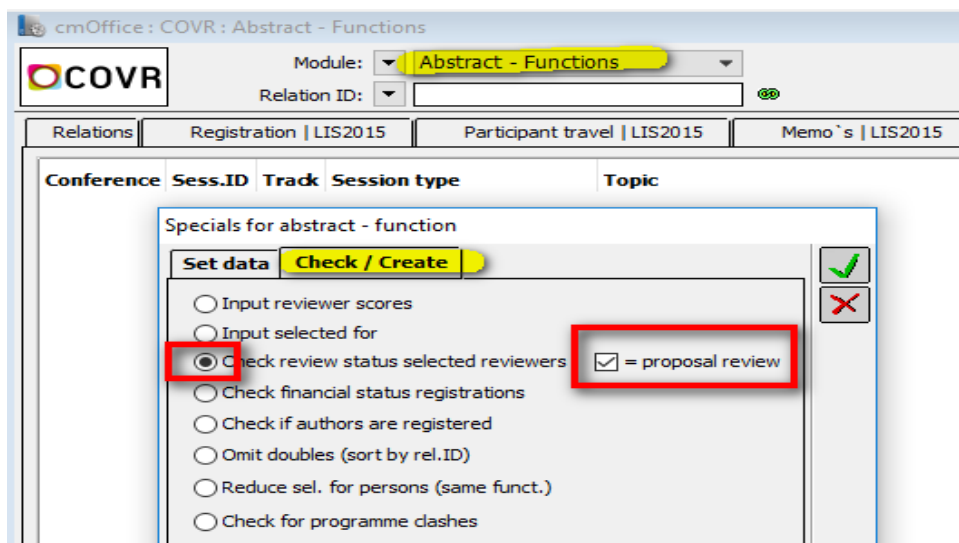
PROPOSALS

CMOFFICE -PROPOSALS

The specials function in the abstract module has been extended with a function to check the review status of the selected reviewers for the proposal module.

PROCEDURE

The user has now the possibility to not only check the review status of the selected reviewers for the abstract module but also for the proposal module



CmOffice Proposal

PROPOSALS - PRINT

CMOFFICE -PROPOSALS PRINT FUNCTION

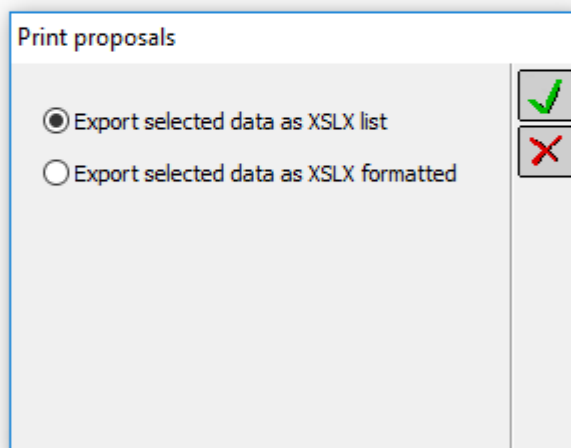
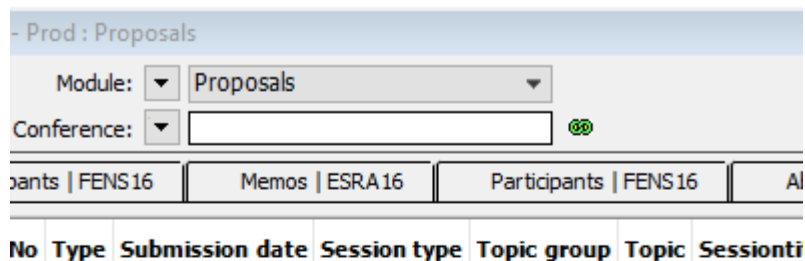
An extra print function has been added in the “Proposal” module

PROCEDURE



The user can now select whether he/she wants to export the proposal data in a formatted or a listed Excel file via the print function in the proposal module.

The difference between both print functions is the formatting and the amount of exported data (all fields versus the main fields).



CmOffice Relation manager

RELATION MANAGER - “DO NOT USE THIS LINK”

RELATION MANAGER -DISPLAY THE “DO NOT USE THIS LINK ANYMORE”

An extra print function has been added in the “Proposal” module

PROCEDURE

On top of the relation manager[Block 1] you will find the search window of the relations. By entering a [zoekterm-search term](#) (name or part of it, or the userID) in the Name/userID field, you can [review observe](#) the list of found relations in the relation column.

By means of the drag and drop method you can drag [to](#) a relation to the [selection field selectveld](#) [Block 2]. This activates the selection and provides you with a lot more information:

The new feature makes it possible to display the “Do no use this :link anymore” links in the ‘existing links’ column (block 3) by pressing the CTRL key during the “drag and drop” operation.

The screenshot shows the cmOffice application window with a search bar and a table of relations. The search bar contains 'stans' and is highlighted with a red circle '1'. Below it is a table with columns: Rel. ID, Name, Zip, City, Country. The second row is selected. Below the table is a 'Select' field containing 'Stans Rudi (BE Lommel)' and a 'Link' field containing 'COVR bvba (Affiliation-Person)', both highlighted with red circles '2'. Below that is an 'Existing links' section with a table containing two rows, both highlighted with red circles '3'.

Rel. ID	Name	Zip	City	Country
36924	Stans melisa			Belgium
30652	Stans Rudi	3920	Lommel	Belgium
26095	Stansfield Damien			Australia

C	M	Name	Dep.	Linktype	Position
				None	
c		COVR bvba		Affiliation-Person	
		COVR bvba		Affiliation-Person	

CmOffice

ABSTRACT FUNCTIONS -EXPORT”

EXPORT EMAIL ADDRESSES”

Also the email address(es) of the co-author(s) are being exported.

PROCEDURE

If you use the ‚Export co-authors info‘ from Abstract-Functions, the email addresses are included for both the presenting author as well the co-authors.

cmOffice

BUG FIX CMOFFICE: ABSTRACT NUMBERS

ABSTRACT NUMBERS: EXTRA CHECK ON DUPLICATE NUMBERS

An extra check has been implemented to avoid the creation of double abstract numbers.