

COVR B.V.B.A.

# Release Notes

cmOffice – V2.75

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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 2.75.

## Release 2.75 b

### NEW: ADDITIONAL FEATURE EXPORT A PAYMENT FOR PROACC

It's possible now to export a payment for ProAcc even if the payment is allocated to an invoice without invoice number or if that invoice isn't exported yet for the accountancy. Until this version of cmOffice the linked invoice needed to have an invoice number and had to be exported.

A new default value "Payment\_Export\_Acc" has been defined so you can activate these restrictions again. If the value\_for\_text field contains the text "Invoice number mandatory" then it remains necessary that the linked invoice has an invoice number.

If the value\_for\_text field contains the text "Invoice exported" then it remains necessary that the linked invoice has been exported for the accountancy.

### NEW: ALLOCATE PAYMENT TO AN INVOICE THAT ALREADY HAS A PAYMENT

It's possible now to allocate a payment to an invoice that already has a payment that's booked on a payment with a virtual account like Ogone or Cash etc. These invoices are shown in red in the payment. Until now it was necessary first to transfer this payment to a payment with a real account and only then you could allocate a new payment to it.

### NEW: IMPORTING ATOS-FILES IN THE PAYMENT MODULE

Importing ATOS-files in the Payment module.

Until now we imported the "Paym.Date" or "Payment Date" of the ATOS-file as payment date in cmOffice. From now on we import the "Purch.Date" or "Purchase Date" as payment date because this date is the real date the credit card payment is executed. This is also the date when the online payment is saved in cmOffice on a virtual account like Ogone etc.

### BUG FIX: CREATE PRO FORMA INVOICE IN EXHIBITION MODULE

Bug fix. If you created a pro forma invoice from within the print dialog of the Exhibition module, the pro forma invoice wasn't created. This is solved now.

### BUG FIX: EXPORTED LIST CONTAINING THE CONTACT E-MAILS

Relations module: exported list contains the contact e-mails for the accounts.

## BUG FIX: LABEL EDITOR

Label printer now also prints the institutes/company name on the label “badge” (registration / participant module: label editor function in the printer icon)

## Release 2.75 a


## cmOffice – registration, member registration and exhibition module

### NEW: FINANCIAL RESET OF A REGISTRATION, MEMBER REGISTRATION OR EXHIBITION

Registrations, member registrations or exhibitions can only be financially reset by cmOffice users with an authorization level of at least 3 for the module in which the financial reset will be executed.

If the registrations, member registrations or exhibitions already have at least one final invoice or credit note it can only be financially reset by cmOffice users with an authorization level of 9. A final invoice is an invoice that already has an invoice number.

They also need to enter the financial reset password.

To financially reset a registration, member registration or exhibition, you have to select the “Financial Reset”-button  in the input window.

After a financial reset of a selected registration, member registration or exhibition the following will be done:

1. All invoices and credit notes without a number will be deleted.
2. All invoices and credit notes with a number will have the financial status 0-Balanced. Their invoice subtype will be “Reset”.
3. An extra invoice or credit note will be created if necessary. It will have the financial status 0-Balanced and invoice subtype “Reset”.
4. All existing payments will be deallocated from the invoices and become ‘Open’ payments linked to the registration. This means that as soon as a new invoice will be created for the registration, member registration or exhibition, this ‘open’ payment will automatically be allocated to this new invoice. These payments remain saved to the original Payment reference. Open payments are shown as gray invoice allocation lines in the Payment detail window in the Payment module.
5. Because the previous invoices and credit notes and the optional ‘reset’ invoice or credit note need to have the financial status 0-Balanced a ‘Reset’ Payment will be created if necessary. cmOffice will create maximum one ‘Reset’ payment per month. This payment will have the virtual account “RESET”

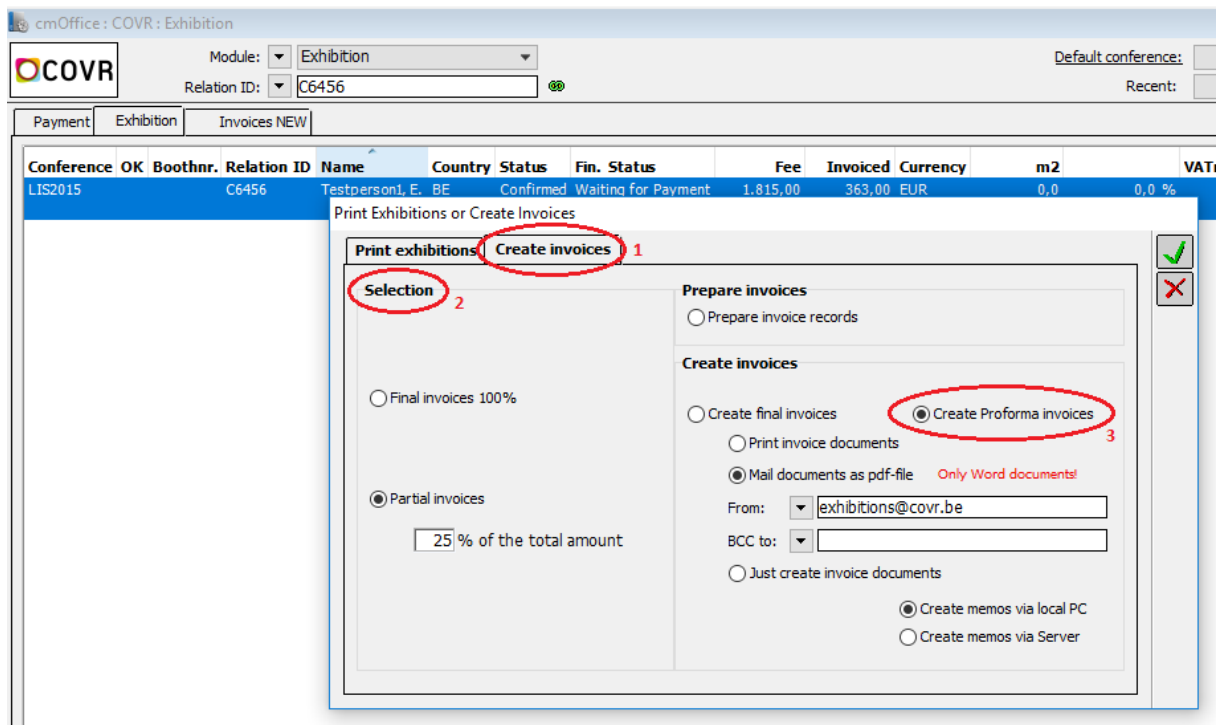
and will only contain payment detail records with a credit amount of zero.

6. The total amount invoiced of the registration, member registration or exhibition will be zero.
7. All participant, member subscription or exhibition detail records in the sub table will be colored black indicating that they aren't invoiced yet. The percentage already invoiced of the exhibition detail records will be reset to 0%.

The data of the invoices and credit notes that are reset won't have any influence anymore on the new invoices created for the relevant registration, member registration or exhibition.

## NEW: EXHIBITION PROFORMA INVOICES

You can create a proforma invoice for an exhibition by using the Print dialog in the Exhibition module. Unlike the name suggests, no invoice record will be saved in cmOffice but only the Memo record and accompanying Word or 4D Write document will be saved.



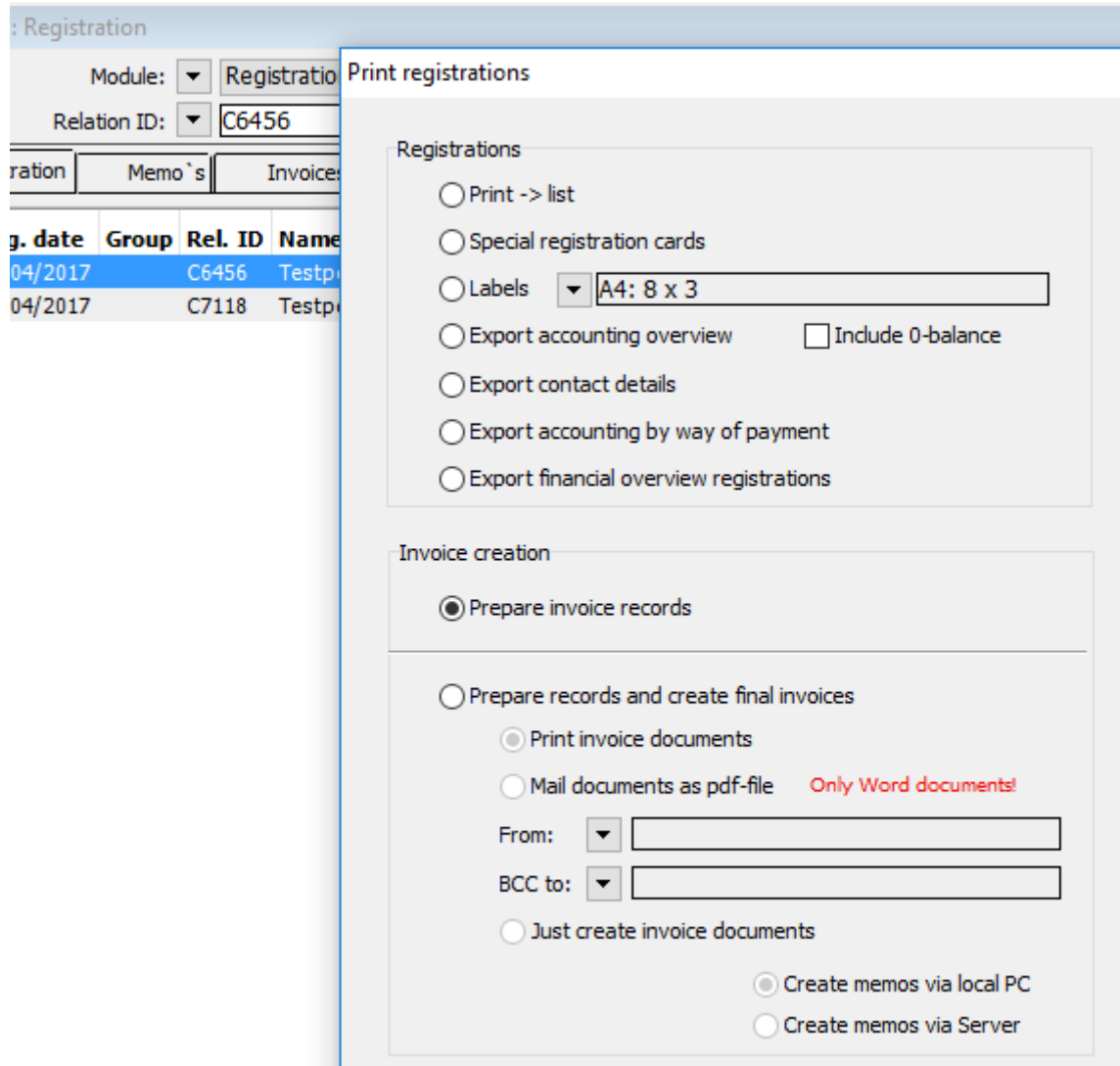
1. First select the exhibitions for which you want to create a proforma 'invoice' in the Exhibition module.
2. Open the Print dialog and select the "Create invoices" tab (1).
3. In the Selection (2) part select the percentage of the total amount for which you want to create a proforma invoice.
  - If you select "Final invoices 100%" a proforma invoice will be created for the full part of the exhibition that isn't invoiced yet.
  - If you select "Partial invoices", you have to enter the percentage of the total amount of the exhibition for which you want to create a proforma invoice.

In both cases cmOffice will only create a proforma invoice for maximal the amount of the exhibition that isn't invoiced yet!

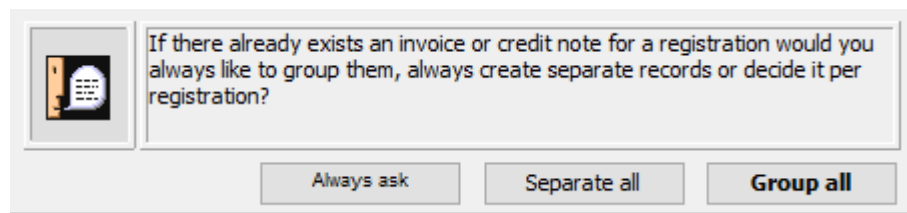
4. At last select the option "Create Proforma invoices" (3) in the Prepare invoices part of the dialog. The proforma invoice can be printed, mailed or just created.

**NEW: PREPARE INVOICE RECORDS**

The process of merging invoices has been slightly adapted. If one prepares an invoice via the “Print” dialog in a (member) registration ....



... a dialog was displayed for each selected (member) registration asking whether one wants to create a new invoice or merge it with an already existing invoice. The adaption made is such that you can make your choice to be applied on all selected (member) registrations. The adapted pop-up window looks like this:



## NEW: OPEN PAYMENTS, OPEN REFUNDS

The processing of open payments and open refunds has been changed in this version.

An open payment or refund is een payment or refund that is coupled to a registration but not to an invoice or a credit note. An open payment can only occur if one makes a payment via “Kassa” AND one chooses not to create an invoice by selecting the value “Dialog” for th field “Drawermode”. Open payments and/or open refunds can also occur if one performs a financial reset een registration with an existing payment and/or refund.

If one creates an invoice for a payment coupled to a registration but not yet to an invoice, cmOffice will ask whether the open payment can be linked to this new to be created invoice. If the amount to pay of the open payment is higher then the amount to pay, cmOffice will ask whether the total open amount should be assigned or just the amount to pay. In case one chooses to assign the amount to pay then the open payment is split in two.

This same functionality is now used in the open refunds too. If an amount is to be refunded, cmOffice will display a pop-up window in which one can choose to assign the open refund to this credit note.

## NEW: INVOICES AND COLORS

If one has a globa invoices (member) registration with several participants/members the all the participants/member records are colored blue. If one next deleted a participant/member then the registrations records were still kept in blue. This is misleading as one could think that these records would be financially correct.

The introduced change is that if one deletes a participant out of a registration record for which an invoice has been created, that the remaining participant records now gets a grey color.

## cmDocument

### BUG FIX CMDOCUMENT – OFFICE 365

The support of Office 365 into our cmDocument application resulted in a conflict in the synchronization between cmDocument and any mail server tool. As a result cmDocument got stuck. No single document was send out anymore.

In order to resolve this issue Covr had to implement an new synchronization mechanism.

## cmOffice

### BUG FIX MEMBERSHIP



## **MEMBERSHIP SUBMISSIONS (MEMBERSHIP FEE) PROPAGATED**

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The membership submission (fee) is propagated into all related member modules (Member registration -, member by year - and member module) if it is changed manually in the cmoffice backoffice.

## cmHost Applications

### NEW: CMPORTAL

The cmPortal is a kind of personalized dashboard application that gives the user an overview of his/her involvement in the congress functions (registration, abstract submission, reviews etcetera).

Just an example:

The screenshot displays the cmPortal user interface. At the top, there is a navigation bar with 'HOME' and 'HOME PORTAL' on the left, and 'Welcome, [redacted]' and 'LOG OFF' on the right. Below the navigation bar, the main content area is divided into several sections:

- Personal details:** A section with a blue header. It contains a list of fields: Name, Company, Country, and Email. A red box highlights the Name field. To the right of these fields, there is a link: "You are a FENS member. To change your profile you can click here".
- Registration details:** A section with a blue header. It contains a sub-section 'Reg info' with fields: Name (redacted), Main (Student Member - Early rate), description, Fee (120), and Registration number (F18-0002-001). Below this is a 'Delegate extras' section with the text "I want to submit an abstract" and "W04 Introduction to the Human Brain...". At the bottom, there is a button labeled "Registration".
- Hotel:** A section with a blue header. It contains the text "Hotel link: coming soon" and a button labeled "Click here".
- My Abstract:** A section with a blue header. It contains the text "My Abstract is now open" and "Jus a title" followed by "F18-0002". Below this is a button labeled "Abstract submission".
- Travel Grant:** A section with a blue header. It contains the text "Update your profile" and a button labeled "Click here".

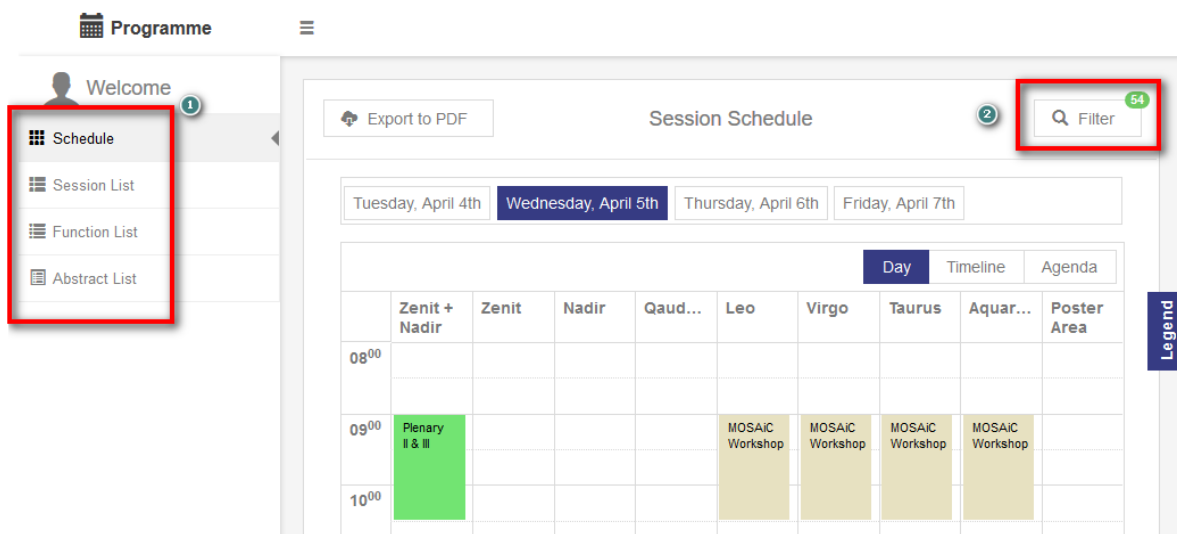
Do you want to know more of the cmPortal? Contact Covr, please.

**NEW: CMSEARCHABLEPROGRAMME**

The idea was to create a new searchable programme that has a grid option based on Telerik Scheduler. Basically this is a back to the old webui grid page but then in a modern, more flexible AND - very important for our customers – a configurable version. All data and text appearing in the searchable programme pages are highly configurable. Access to the searchable programme is open for everyone or linked to a login.

Several views are preprogrammed (see (1)) and an extended filter functionality allows the user to browse into the searchable programme.

Explore the benefits of this new searchable program.



Do you want to know more? Contact Covr.

**UPDATE: CMMEMBERSHIP – MULTIMEMBER REGISTRATIONS**

The membership application (cmMembership) gives the user the possibility to register multiple members within one session. By default the membership application registers one person in one session (individual registration). The new settings allow a user to tune the membership application such that more persons (individuals) can be registered in one go.

New members can be added as long as the multimember registration is open i.e. the payment is not yet done.

In the booklet “How to setup a multimember registrations” we explain the needed configuration settings in the cmHost application cmMembership to tune an individual membership into a multimembership registration.

On demand, Covr will send you this booklet.