COVR B.V.B.A.

Release Notes

cmOffice – V2.72b

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Content

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Introduction

Please find in this document the release Notes from release 2.72b.

General Functionalities

EXTRA PARAMETER (NEW)

ADMIN

S-Conference table

PROCEDURE

Extra parameter "Only if no online credit card payment" in congress's online functions

If the "Mail proforma" checkbox is marked, a proforma invoice document will be created and mailed by cmOffice when an online registration is created.

With the new checkbox "Only if no online card payment" you can link a condition to the mailing of proforma invoices. If this checkbox is marked the pro forma invoice document will only be created and mailed if the online registration is NOT paid online by credit card.

Invoices New

PROFORMA INVOICE (NEW)

IMPACTED MODULE/MANAGER?

Invoices New, Memos

PROCEDURE

Mailing pro forma invoice documents for Member registrations and Abstract submission.

Until this version of cmServer the pro forma invoice documents could only be created and mailed for regular online registrations. Now with cmServer 2.72b this function is also available for online Member registrations and Abstract submissions. An update of the cmServer is necessary.

MAIL MERGE FROM WITHIN THE PARTICIPANTS MODULE (BUG FIX)

IMPACTED MODULE/MANAGER?

Participants, Memos

PROCEDURE

If the participant has a link to the relation manager (.i.e RelId is filled in) then the person's info from the releation manager is used to create and mail a memo and document.

If the participant has NO link to the relation manager (.i.e RelId is NOT filled in), the person's info entered in the participant's part of the registration like name, company and mail address will be used to create and mail the memo and document. You can select these types of memos by searching on "Name" in the Memos module.
Until now the memo and document sometimes contained some person info of the previous participant that was saved in the Relation manager. This is solved now.

Payments

OVERBOOKING PAYMENTS (NEW)

IMPACTED MODULE/MANAGER?

Payments

"PROCEDURE

There are two buttons (**1** & **2**) in the Payment window that can be used to allocate an amount (**3**) to an invoice or credit note.

Allocate (**1**)

The credit amount (**3**) of the payment will be allocated to the selected invoice(s). The amount allocated to a specific invoice will never exceed the amount that still needs to be paid for that invoice.

If the credit amount is positive and the selection contains one or more credit notes, these credit notes are balanced first and the amount allocated is added to the credit amount of the payment. After that this new credit amount is allocated to the invoices in the selection.

> e.g. A payment with a credit amount of 200€ and an invoice of 800€ and a credit note of 600€.
>
> a) If you select only the invoice before you select the Allocate-button, only 200€ will be allocated.
>
> b) If you select both the invoice and credit note before you select the Allocate-button, the credit note will be balanced and 200+600=800€ will be allocated to the invoice.

If the credit amount is negative and the selection contains one or more invoices, these invoices will be balanced first and the amount allocated is subtracted from the credit amount of the payment. After that this new credit amount is allocated to the credit notes in the selection.

Allocate all (**2**)

By selecting this button, the full credit amount of the payment will be allocated to the selected invoice or credit note. Only **one** invoice or credit note can be selected. This function is only enabled for users with an authorization level of 6 or more.

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Membership

GROUP MEMBER REGISTRATIONS WITH EXCEL (BUG FIX)

IMPACTED MODULE/MANAGER?

Registrations

PROCEDURE

The import of memberships from an Excel file has been changed so you can enter persons that aren't saved yet in the Relation manager. To do this you just have to enter the person's data in the Excel file without a Relation ID. This part of the code that copies this data in cmOffice contained a bug resulting in an invalid behavior. This is solved now.

Style sheets

PARSING THE VARIBLES USED IN THE DESCRIPTION OF THE INVOICE STYLE SHEETS (BUG FIX)

IMPACTED MODULE/MANAGER?

Style sheets

PROCEDURE

The description of a style sheet can contain the variables nr1, nr2, date and type. These variables are parsed when the invoice documents are created.

These style sheets can also be used in a mail merge executed from within the Invoice new module. This function contained a bug that's solved now.

Others

THE SYNCHRONIZATION OF LOCAL PARAMETERS (NEW)

Whenever a newly installed cmOffice client is started for the first time, a synchronization of the local parameters is automatically executed.

HOTEL (NEW)

If a hotel booking has been cancelled (ps: a cancellation of a hotel booking can only be performed manually in cmOffice by the backoffice) then the participant can redo the hotel booking in the online registration pages (ps: in case one is allowed to edit/manage an existing registration).