



ComVida Corporation
SOFTWARE SOLUTIONS THAT FIT

ComVida Application Suite 5.1 AR/Trust

What's New!

May 2019

This document in its entirety and any extract thereof is confidential and contains proprietary information of ComVida Corporation and/or its affiliates or subsidiaries and may contain information that is privileged and protected from disclosure by law. It is intended only for the use of the individual or organization to which it was expressly provided by ComVida Corporation. Do not copy, reproduce or publish, in whole or in part, without the express written consent of ComVida Corporation.

Contents

1	Overview	3
2	Security	3
	Security Groups	3
	Operators	3
	Password	3
	Reports	3
3	Setup	3
	Menu Groups	3
	Pages	4
	Report Definitions	4
	Tool Definitions	4
	Type Block Labels	4
	Reports	4
4	AR	4
	Batch Entry	4
	Bulk Entry By Transaction	4
	Copy Batch	4
	Client AR Pages	5
	Statements	5
	Reporting Client Filters	5
	Report Sort Order	5
	Report Date Range	5
5	Trust	5
	Batch Entry	5
	Trust Bulk Entry by Transaction	5
	Copy Batch	5
	Client Trust Pages	6
	Reporting Client Filters	6
	Report Sort Order	6
	Report Date Range	6

1 Overview

ComVida AR/Trust 5.1 (ART51) integrates the Accounts Receivable and Trust functionality into the ComVida Application Suite 5.1 products.

- As part of the 5.1 suite of products, new Setup and Security options are available.
- The DevExpress components have been upgraded to the latest version, incorporating improved functionality and performance in areas such as the batch edit grids and reporting.
- Performance has been enhanced in several areas of the application.
- Security and Setup Reports have been added to those areas.

2 Security

Security Groups

Individual Reports and Tools have now been added to Security Groups to control access. Similar to pages, if a user does not have access to a report or tool, it will not show up in their menus.

Operators

A “Copy” feature has been added to assist in creating new operators using an existing operator’s settings.

Password

Security enhancements now require a strong password with a minimum of eight (8) characters including at least one special character, one upper case character and one number. New users will be assigned a temporary password (set by the Administrator) that must be changed on their first login.

Reports

A new Reports menu provides quick access to new Operator and Application Access lists.

3 Setup

Menu Groups

All Pages, Reports, and Tools can now be organized and grouped in menus based on individual site requirements. The sequence of items within these groups is also user-defined.

Pages

All application pages are now shown in the Pages setup. Along with grouping and sequence setup, the titles and descriptions may be customized by each site.

Report Definitions

All reports are now shown in the Report Definitions setup, including custom report information. Along with grouping and sequence setup, the descriptions may be customized by each site.

Tool Definitions

All tools are now shown in the Tool Definitions setup. Along with grouping and sequence setup, the descriptions may be customized by each site.

Type Block Labels

Type Block functionality has been expanded in 5.1. In addition to the Lookup Code dropdowns being used for the six reserved type block fields, they may also be used for the other six type block characters.

Reports

A new Reports menu provides quick access to new Lookup and Page lists.

4 AR

Batch Entry

Upgrades to the Dev Express controls, and improvements for handling large client lists, make the page more responsive. In addition, tabbing between columns is now cleaner.

Bulk Entry By Transaction

The Batch Bulk Entry tool has been rewritten to better handle batches with very large numbers of transactions. When "Generate Transactions" is chosen, the new transactions are automatically saved to the database. Only transactions that are flagged for warnings or errors will appear as "new" in the grid. If there are more than 100 problem transactions detected, the operation is aborted so the user can be informed in a timelier manner.

Copy Batch

The Copy Batch process has been updated with functionality similar to the Bulk Entry so that when a batch is copied, the new transactions are automatically saved to the database. Only transactions that are flagged for warnings or errors will appear as "new" in the grid. If there are more than 100 problem transactions detected, the operation is aborted so the user can be informed in a timelier manner.

Client AR Pages

Client AR pages with multiple grids have been updated to ensure the client in the upper grid matches the client details in the lower grid(s).

Statements

AR Statements, both the standard statement and custom statement functionality, have been rewritten to greatly improve their response time.

Reporting Client Filters

Standard reports that makes use of a Client Range or Client Filter will now find the Filter in the top right of the header, similar to where it is located in the application pages. When this filter is set, it will be applied to any Client dropdowns used for the report criteria.

Report Sort Order

Standard reports will now automatically sort by Client Code.

Report Date Range

The user's report date range settings will be stored in memory for the duration of the user's session.

5 Trust

Batch Entry

Upgrades to the Dev Express controls, and improvements with handling large client lists, make the page more responsive. In addition, tabbing between columns is now cleaner.

Trust Bulk Entry by Transaction

The Batch Bulk Entry tool has been rewritten to better handle batches with very large numbers of transactions. When "Generate Transactions" is chosen, the new transactions are automatically saved to the database. Only transactions that are flagged for warnings or errors will appear as "new" in the grid. If there are more than 100 problem transactions detected, the operation is aborted so the user can be informed in a timelier manner.

Copy Batch

The Copy Batch process has been updated with functionality similar to the Bulk Entry so that when a batch is copied, the new transactions are automatically saved to the database. Only transactions that are flagged for warnings or errors will appear as "new" in the grid. If there are more than 100 problem transactions detected, the operation is aborted so the user can be informed in a timelier manner.

Client Trust Pages

Client Trust pages with multiple grids have been updated to ensure the client in the upper grid matches the client details in the lower grid(s).

Reporting Client Filters

Standard reports that makes use of a Client Range or Client Filter will now find the Filter in the top right of the header, similar to where it is located in the application pages. When this filter is set, it will be applied to any Client dropdowns used for the report criteria.

Report Sort Order

Standard reports will now automatically sort by Client Code.

Report Date Range

The user's report date range settings will be stored in memory for the duration of the user's session.