

# ComVida ART 5.1.14

## What's New

September 2021

This update, 5.1.14, focused on performance enhancements and requests from our users.

### **\*New\*** Client Search

A client search has been added to certain pages to allow for a quick client lookup when using a filter. When working with filters and entering data, a client code may not be listed but it isn't always clear whether the client already exists and isn't included in the filter, whether the code is in use by another client, or whether it's a new client who hasn't been set up yet. This search allows users to work with a filter and do a search of all clients to determine whether a specific code is already in use by another client, or a client who may be inactive.

The search can be accessed with the world button (🌐) and can be run by Code and/or Name. If matches are listed, some changes can be made in the grid, or clicking on the GoTo button (🔍) in the results grid will bring up the Client Master (based on operator access). Note: any updates will not be reflected until the page has been refreshed. (#3755)

### AR Reports

**\*New\*** A Tax Receipt has been added to display the total value of Payment transactions within the selected date range. By default, all transaction codes marked as PaymentOnly will be included, though specific Payment codes can be selected to limit those included. (#3830)

The Statement Summary page will show the correct From and To dates. (#3490)

When using the Export to Excel option for the Client Ledger report, the OpenBal field will be exported as a numeric value. (#3795)

### AR Tools

The Transaction Import tool has an option to Post right away when accepting the import rather than saving the batch as Open and posting later from the Batch page. When the 'Post Batch(es) Immediately' option is checked, the batch will be posted when saved. (#2992)

### Trust Batch Entry

The grid will properly refresh after adding Bulk Transactions. (#3791)

The Override column will show, as needed, after any save. (#3838)

## Trust Reports

The Trust Summary report will display 'not defined' when printing for ARTrxType codes without a description. The report speed has been improved as well. (#3806)

## Trust Tools

Closing the Export Pre-authorized Payment tool without downloading the file will display a confirmation message. (#3798)