

CareMaster Revision History

5.44 A - 11/1/23

There was a fault whereby a user used to post sales invoices to separate datasets but no longer does. Their charge templates would have Sage dataset codes on them and CM would post invoices to these datasets in the belief that they were still used. They should be using the datasets associated with the homes instead.

5.44 - 5/1/23

There is a new field in the Header table enabling the e-mail address to be printed on sales invoices

5.43 - 24/11/22

Sales invoice lines which are a retrospective adjustment are now highlighted in red

5.42 - 24/11/22

There is a facility to specify ad-hoc sales invoice addresses on a charge template. The addresses are setup within Settings, Invoicing and Ad-Hoc Sales Addresses and can be copied to a charge template by clicking the envelope button on the charge template

5.41 C - 23/11/22

There is a new facility within Utilities and Check Data called "Delete Orphaned Data Records"

5.41 B - 22/11/22

There is a new Sage 200 sales invoice export format ('4') which shows the analysis description from the appropriate charge template line

5.40

The Xero interface is now complete

5.39 A - 13/09/22

When creating a Tradeshift CSV export file, there is now an option to do so by Sage dataset. There is a new report "Sales Analysis by Funding Source"

5.38 D - 25/08/22

The sales invoice e-mail preview report now gives an option to show only those invoices yet to be e-mailed.

5.38 C - 18/08/22

All Sage 200 export routines now show all amounts as positive numbers in order to deal with credit notes. Users had previously been editing output CSV files.

5.38 B

There is now a grid on the Invoicing tab of the Residents screen showing all active charge templates. The grid can be double-clicked to go straight to the template

5.38

There is now a "Preferred Name" field on the Residents screen.
The document names which can be attached to a Resident record can now be 350 characters long.
The sales invoice history screen accessed from the Residents record can now be searched and also shows the funding source
The charge template charges screen can now be click-sorted
The "Income by Charge Type" spreadsheet now shows the resident reference

5.37 A

The code for e-mailing sales invoices via SMTP has been re-written using the EASendMail component.

5.34G – 10/06/22

The report "Income by Charge Type" now shows all money to 2 decimal places

5.34F – 01/06/22

There is a new report within the Residents section of the reports menu called "Birthday List".

5.34E – 25/05/22

The "Summary of current charge template rates" on the Residents rate history tab now shows the relevant nominal code. There is a new report "Sales Analysis by Charge Type".

5.34C - 13/04/2022

The Allowances module is now available to all users whereas access to Tradeshift functionality is an optional extra.

5.34B - 12/04/2022

When creating a Tradeshift file, invoice numbers can now be prefixed with the home's sales invoice prefix set in Defaults.

5.34A - 06/04/2022

There is now a facility within Settings and Sundry to allow manual entry of e-mail addresses for users who are not linking to any accounting software. The Allowances Transaction history report now has an option to exclude opening balances. The residents table on the main screen now shows the resident's default invoice period.

5.33B - 09/03/2022

The DD CSV file now includes any invoices which don't have a corresponding Sage sales record. This can happen if a user generates an invoice and then deletes the account from the Sage sales ledger. From now on a line will appear in the CSV file which has blank bank account details – this is an indication that something is wrong whereas previously the whole line would be blank and the end user would be unaware of the problem.

5.32 - 17/02/2022

Various modifications made towards implementing Tradeshift functionality. There is a new facility to enter an analysis description on a charge template line.

5.28A - 17/1/22

There is a new facility within Invoicing and Update Respite Care enabling the recording of hourly respite care.

5.27 - 17/12/21

There is a new report within Invoicing & Financial, Sales Invoice Day Book List called "List by Charge Code". Within the Residents screen and Documents tab, the filename has been extended. The Charge Template List now has an option to show only those templates with a status of 'Ignore'.

5.25E – 29/11/21

There is now a third export format for Sage 200 sales invoices.

5.25D - 22/11/21

The Sales Invoice Day Book report now has an option to output to a CSV file

5.25C - 17/11/21

The Charge Template layout has been changed to resolve problems whereby it did not fit on computer displays with a low screen resolution set.

There is a new option within Settings and System Defaults on the Other tab called "Allow £ 0.00 value ad hoc invoices to be created?"

5.25 - 13/10/21

There is now a facility on the Charge Template screen to enter up to three e-mail addresses. Any sales invoices generated from a template will be sent to these three e-mail addresses.

5.24B - 30/09/21

New report – Reports, Invoicing & Financial – Charge Template Rate History by Funding Source

5.24A - 28/09/21

There is a new line in the CareMaster_Settings.ini file titled "Allow_Multiple_CM_Instances_YN=". If this is set to either "N" or left blank then it will not be possible to load CareMaster more than once on a single computer. If set to "Y" then a user can load CareMaster multiple times.

5.24 - 16/09/21

A warning will display when posting sales invoices to Sage if the option to post them over multiple accounting periods has been selected

The sales invoice batch reference has been expanded to 20 characters

The sales invoice DD output file can now be run for all homes simultaneously.

The Sales Invoice Day Book report now shows the resident category code

Within Reports, Invoicing & Financial there is a new report "Charge Template Rate Discrepancy List". This lists any residents with a discrepancy between the fees listed on charge templates and the rate history on the residents screen.

5.23B - 15/09/2021

CareMaster can no longer be loaded twice.