The Accountants Partner for Windows
Program Release Log

TAPS V1.5 RELEASED 6/1/96

- ♦ Released program with Professional Bill, Accounts Receivable, Practice Manager and Scheduler & Messages

TAPS V1.5a RELEASED 6/29/96

- ♦ PB - Fixed Time Bill - not printing additional description
- ♦ Staff time reports control break label changed from clients to

TAPS V2.0 RELEASED 8/27/96

- ♦ MS_CTRL layout changed
- ♦ SM - Added import/export of engagements for Time It Link
- ♦ TM - Added import/export of engagements and scheduler
- ♦ TM - Added selective hide/unhide fields depending on "ONQ" password
- ♦ PB - Added selective hide/unhide fields and reports depending on "ONQ" password done for AR/PM/SM staff billable services cost fields

TAPS V2.1 RELEASED 9/16/96

- ♦ Added renewal program ONQPA
- ♦ Customer file - layout changed
- ♦ Staff file - layout changed (added address, etc)
- ♦ Bill time file key changed for time invoices to sort by invoice transactions by date
- ♦ Invoice transactions sort changed to standard bill invoices to sort transactions by date
- ♦ AR - Added finance charges
- ♦ TM - Fixed view client insert to work properly
- ♦ PB - Fixed extended cost in time edit to display when "ONQ" password is used
- ♦ Fixed standard bill, quick bill and time bill invoice to print properly (was dropping lines) and to print by client and transaction date
- ♦ IE - Added import/export utilities for the following files:
  - Customer
  - Staff
  - Billserve
  - Artrnhdr (artrans)

Service rendered (customer)

TAPS V2.2 RELEASED 9/17/96

- I/E - Created menu application to call individual file utilities
- Changed import/export program names from convxxxx to imexxxxx
- Added engagements (jobs) to import/export utility
- Added help files to import/export programs

TAPS V3.0 RELEASE 5/1/97

- I/E - Added import/export utility for recurring transactions
- AR - changed AR inquiry transaction browse fields to amount to amt/rate, extended amount to be billed
- Added payments/adjustments input sheet
- Added type field (i,p,a,f) to AR history report
- P/B - divided into sub dll's PB_A, PB_B and PB_C
- Added write up/down routines to time bill
- Added net amount field to all time reports to reflect write up/down adjustments
- Added several new time bill report by different sort including realization by staff & client as well as job reports
- Some new sorts were added to time bill browse tables
- Changed invoice history transaction browse table to reflect write up/down changes as follows: amt/rate (field), extamt (field) changed to billed
- Changed quick bill selections and added quick bill recurring client browse with tag and bill selection, printing is now from within
- Added detail invoice transaction history report
- T/B - added header billing and individual selection of client tagging and billing
- Time transactions file changed.
- New time header file and temporary file added
- P/M - added query options to client labels
- B/N - added business module inter relating with client master
- Scheduler - added calendar date drag and drop to all input date fields
- T/N - added recurring tax notices module
- C/E - added continuing education credits module

TAPS 3.1 PB, SCD, MENU FIX 5/21/97, 6/9/97

- P/B - fixed error on recurring billing update (process delete error, error record not available - 33)
- Scheduler - fixed help misspelling on scheduler by single date added click on calendar date

and update displayed dates
- ♦ Main menu - fixed tax notice menu call

TAPS 3.2 RELEASE DATE 7/17/97

- ♦ Added version number for all modules
- ♦ Fixed dial out error on all modules
- ♦ PB - added retainer bill to SB, QB, TB
- ♦ PB - added user defined retainer message text field to print with
- ♦ PB - added 5th invoice type which displays rate field
- ♦ PB - added "print additional description field to invoice transaction and selected billtrans. Both files layout changed. Deleted these temporary files before running program.
- ♦ AR - added retainer fields to screens and reports.
- ♦ Two new retainer reports were added.
- ♦ CE - Continuing education forms screen fixed to fit on screen
- ♦ PM - added client name to all federal due date and engagements reports
- ♦ PM - added client master query report

TAPS 3.3 UPDATE FIX 7/31/97

- ♦ P/B - fixed client retainer balance not updating when invoicing time transactions decreased

TAPS 4.0 RELEASED 5/01/98

Professional Bill

- ♦ Default option for setting tax rate, recurring billing, finance charge
- ♦ Added chargeable/non chargeable time transactions
- ♦ Expense tracking added to time bill
- ♦ Batch time entry stays in input (insert) mode
- ♦ Repeat common fields added for faster data input
- ♦ Quick find added for service code look up during input
- ♦ Added batch time input by staff
- ♦ Added time transactions by service code and date report
- ♦ Added remaining to bill time transactions by service code
- ♦ Added billable hours by staff and date report
- ♦ Optional suppress printing prior balance on invoices

Business Notes

- Added letters and mail merge with client master

Accounts Receivable

- ♦ Modified finance charge to 2 step process (1-calculate and 2-post)
- ♦ Added common services list description table for after the fact invoices, payments and adjustments

Practice Manager

- ♦ Added separate monthly, quarterly and year end services file with functions that create work control records
- ♦ Added additional extension date fields to engagements
- ♦ Added "add a year" by client tag browse
- ♦ Added beeper/pager field to customer master
- ♦ Added year end work control report
- ♦ Added printing of rolodex

Scheduler & Messages

- ♦ Message center added for incoming calls

Time It

- ♦ You may now bypass clicking timer on/off and just enter timed worked

TAPS VER 4.1 RELEASED 5/21/98

Professional Bill

- ♦ Added batch print to time transactions
- ♦ Added quick find to service code browse
- ♦ Added quick find to post P/B invoices to A/R browse

Accounts Receivable

- ♦ Added quick find to post P/B invoices to A/R browse

TAPS VER 4.2 RELEASED 6/10/98

Includes 4.1 release plus)

- PB - added copying of recurring transactions
- PM - quarterly, monthly and user defined services - added function to add a year to the record. Changed “clear months” in maintenance to a separate “clear month/add a year” routine
- AR - fixed journal not printing last transaction on page
- AR - added print zero balance prompt to AR balance, retainer balance and combined AR/retainer balance reports

TAPS V4.3 RELEASED 6/29/98

(Included 4.1 & 4.2 releases)

- AR - shortened all report lengths

TAPS VERSION 5.0 RELEASED 5/31/99

Global

- Y2K ready.
- New 32 bit architecture.
- New and improved import/export procedures.
- New scan fix and upgrade file utilities.
- Data back up procedures have been added.
- E-mail and faxing capabilities have been added.
- Tool bar icons are now active upon entering each module.
- New and enhanced tag routines/buttons have been incorporated to include tag, untag, flip, tag all, untag all, and flip all.
- Client and staff lookup windows are now available when printing reports.
- We have modified the customer’s master file to reflect a “Managing Staff” instead of “Staff”.
- Staff notes have been added to the staff’s master file.
- The System Defaults file now has a field for “Calculate Federal Return? Y/N”.
- A procedure has been added by which all the services for a chosen staff can be modified simultaneously to reflect a pre-set billable rate.
- Capability of changing a billable rate for a particular service code for all staff members at has been added.
- New User’s Manual.

Practice Manager

- ♦ The User Defined Services file now contains a description field, which will be automatically filled in when ever the service is used.
- ♦ A new report for all Federal Due Dates has been added which combines return due dates and extension due dates.
- ♦ Due date reports now have the capability of printing the engagement's additional description.
- ♦ A "Birthday List" report has been added.
- ♦ User defined labels and rolodex cards have been added.
- ♦ New and improved query features have been added.

Professional Bill

- ♦ A new invoice format (type 6) has been added, which prints columns for date, description and units, with the total fee appearing in the balance due field.
- ♦ The capability of changing the invoice type at the time of printing the bill has been added.
- ♦ The Invoice Text screen now contains a field to specify the "Invoice Description for A/R Statements", to be used in place of "Quick Bill", "Standard Bill" or "Time Bill".
- ♦ Grand Totals have been added to Time Bill reports, reflecting total units, extended amount, write up/down, and net amount to bill.
- ♦ The following new reports have been added to Time Bill:
    - Remaining to Bill by Service Code/Date
    - Time Transactions by Staff/Date
    - Time Transactions by Staff/Client/Date
    - Pre Bill Time by Managing Staff/Client/Staff/Date
    - Pre Bill Time by Managing Staff/Staff/Client/Date
    - Remaining to Bill by Managing Staff/Client/Staff/Date
    - Remaining to Bill by Managing Staff/Staff/Client/Date
    - Time Transactions by Managing Staff/Client/Staff/Date
    - Time Transactions by Managing Staff/Staff/Client/Date
- ♦ The "Batch Time Transactions for Posting Report" now prints the client's name and chargeable status (time or expense) of each transaction.
- ♦ A "Recurring Totals by Managing Staff" report has been added.
- ♦ The following new reports have been added to the History reports:
    - Client Invoices by Managing Staff
    - Invoice Transaction Detail by Managing Staff
    - Invoice Summary by Managing Staff

Accounts Receivable

- ♦ Statements will now have the option of printing a user defined invoice description (set in the Invoice Text screen of Professional Bill) or the customary description (Time Bill, Quick Bill, Standard Bill).
- ♦ User defined aging periods are now available.
- ♦ The transactions journals (invoice, payments, adjustments, finance charges) now provide a choice of sorting by invoice number or date order.

Scheduler

- New improved calendar displays 5 months at a time.
- We have eliminated the need to click and drag to fill in the date field. The new calendar allows you to simply double click on the desired date to fill in the field.
- Messages browse tables now display related message information.
- Engagement browse tables now display related engagement information.

Business Notes

- Staff notes have been added to the staff's master file.
- Staff notes browse tables and corresponding reports may be sorted by initial or follow up date.

Continuing Education

- The staff master file now allows you to track CPE information for two organizations.

Time It

- You may now manually enter the number of units worked, without having to start/stop the clock.
- New improved calendar displays 5 months at a time.
- We have eliminated the need to click and drag to fill in the date field. The new calendar allows you to simply double click on the desired date to fill in the field.
- Engagement browse tables now display related engagement information.

TAPS VERSION 5.1 RELEASED 6/8/99

- AR - inquiry detailed report and aged detail report - removed dots
- AR - expanded aging text help for statements
- Scheduler - added more text to maintenance/setup for import/export or add 1 to year
- PB - shrunk invoice text screen to fit on screen
- Main menu - updated to reflect version 5.1
- Time It - fixed misspelling on export screen warning and shrunk setup screen to fit on screen

TAPS VERSION 5.2 RELEASED 08/25/99

- Dictionary changes made - generate new convert upg52.tps
- Ms_ctrl - added fields for individual sales of TAP, FA, TI, TI LINK. Also added system maximum users and inactivity timeout, locked timeout fields added and used with super multiuser limiter. Last 3 fields permits us to control the number of users that log in at the same time. Works with the new mainmenu.exe program.
- Tapusers file changed(for our use, reflects multiuser and utility passwords and individual program sales.

- Main menu - added separate dictionary, with ms_ctrl and limiter file & super multiuser limiter to control number of users allowed to log in.
- Security - Added super security with useredit.exe to all modules
- PB - fixed QB & TB which were incorrectly assigning invoice numbers
- Time Bill - added 3 new tabs (unbilled transactions, selected to bill and billed transactions). Also changed printer icon to print all tagged transactions, not just billed transactions.
- Quick Bill - corrected pop up window displays. Also enable/disable icons if records are found (or not found) in billtran file
- File Utilities - Changed convert program for v52 data files
- Backup utility added missing RUNBK.PIF, would generate error without this file.
- Main menu - multiuser limiter not ready in this release

<u>TAPS V5.3 RELEASED 9/28/99</u>

- PB - Fixed Quick Bill not transferring selected to bill or additional trans to history.
- Billtran.tps changed
- NT - Fixed not printing in all functions
- SM - Fixed not printing, enlarged display phone field on all browse
- All other modules fixed print additional description issues
- Compiled all programs using **CPE 5B**

<u>Taps v5.3a Released xx/xx/xx</u>

- Taps userid program added more info to user file
- PM - Fixed SB invoice not printing/calculating tax

<u>TAPS v6.0 Released Started 7/06/00</u>

- Fixed Delete Client not properly working

- PB - Fixed QB & TB-Batch invoice numbering
- TB Batch rpt fixed (not to print additional description unless chosen)
- Added undo pending TB Invoices
- Added Change TB time trans to bill/unbilled
- Added Billed by date TB trans reports
- Added Billed by staff/transaction date
- Added Billed by staff/client/TDate
- Added staff ytd monthly hours analysis report

TAPS V6.0A Released 7/10/00

- Client/staff master & BN & TD changed notes to display on corresponding browse tables
- CM - Fixed clnotes to print single note
- Added print all cm notes

TAPS V6.1 Released 10/23/00

(Includes 6.0a Update)

- Added view and install demo to cd install program
- A/R - Fixed statement aging printing over trans
- T/I - On inserting a new clock trans date is same as login report date
- C/E - On new ce record date is same as login report date
- P/M - Fixed managing staff prompt not displaying on client query
- P/B - Fixed trans by client/job/scode/tdate rpt
- L/R - Fixed labels not printing all field letters

TAPS VERSION 7.0 RELEASED 6/15/01

- Client look up tables may now be displayed by client ID or by client name.
- Look up buttons displaying clients, staff, jobs, service code and/or dates have been added to all input screens.
- Where ever the user is prompted to enter a date, a calendar button has been added to optionally view and select a date.
- The Quick Bill feature has been redesigned for greater ease of use. When billing services for quarterly, semi-annual, yearly or other frequencies, the system optionally prompts you for the corresponding months in which to generate the bills.
- All additional description screens and all note fields have been enlarged.
- Telephone fields have been enlarged.

- ♦ Client, staff, service code and date look up buttons are now available when selecting to print reports.

- ♦ You may now display a yearly calendar from within any module's main screen.

- ♦ The Accounts Receivable Open Items, Detailed Aging, and Summary Aging reports now allow you to enter a cut off date, thus allowing you to print the reports any time during the month.

- ♦ The Accounts Receivable Consolidating procedure has been redesigned allowing you to optionally backup A/R files during the process.

- ♦ In Practice Manager, you may now mark engagements for desired clients during a particular year as completed. This will allow you to easily purge/remove unwanted client engagements.

- ♦ A new Client Control Worksheet report has been added in Practice Manager.

- ♦ In Business Notes, you now have the option to tag multiple notes and change their follow up date.

- ♦ The mail merge routine in Business Notes now provides the flexibility of selecting clients by tag or by query.

- ♦ Six new Engagements display tables have been added in Scheduler and Messages:

    - Engagements by Client ID
    - Engagements by Client ID and Date Range
    - Engagements by Date Range
    - Engagements by Month and Year
    - Engagements by Staff Range and Date Range
    - Messages by Staff Range and Date Range

- ♦ Engagements and messages now incorporate a "taken by" field.

- ♦ Engagements and messages tables now display records in date descending order, allowing you to focus your attention on the most recent engagements.

- ♦ You now have the flexibility of viewing your incoming messages on screen or printing these to a report.

- ♦ Scheduled engagements may now be copied to Business Notes.

- ♦ You now have the option of tagging desired engagements and copying these to other staff members. This will prove particularly useful when setting up meetings involving more than one staff member.

- ♦ In Scheduler, you may now insert new clients from within the client pop up screen, when adding appointments or messages.

- ♦ The Back Up/Restore utility has been redesigned allowing for greater flexibility and security.
- ♦ Colors have been incorporated to aid the viewing of data.

- ♦ New User's Manual.

Taps V7.1 Released 6/21/01

- ♦ PB - Fixed time bill, header bill - service code description and addtl Description not being copy in v7.0. QB, TB, SB changed units, amount & ext amount & cost fields to automatically display correct data upon any change made.

Taps v7.2 Released 7/11/01

- ♦ AR - Fixed Journal reports was not printing all clients
- ♦ PM - Fixed work control by clients worksheet to select by clients

Taps V7.3 Released 7/26/01

- ♦ PB - Fixed SB, not calculating taxes on transactions. Also not bringing proper A/R balances and not updating Retainer properly. Checked QB and TB, both ok.

- ♦ Added Uninstall icon to start menu

Taps V8.0 Released 7/7/02

- ♦ New background/icons
- ♦ Now Windows 95/98/2000/XP compliant.
- ♦ All client master browse tables have been redesigned to incorporate phone dialing capabilities.
- ♦ You may now assign a category from a user defined look up table in the customer master file.
- ♦ You may now tag desired billable services to copy from one staff to another.
- ♦ You may now tag desired budgeted hours to copy from one staff to another.
- ♦ All non critical select range procedures and date entry have been speeded up by pre-filling the "To date" field (when applicable) and setting the continue/proceed button to "yes".
- ♦ The client's ID, name and phone now display in all transaction entry screens.
- ♦ Finding reports has been simplified since reports are now printed from within each procedure. For example, customer master reports and input sheets now print from the customer master

browse table; recurring bill reports now print from the recurring bill clients browse table.

- You now have the option to set up a default invoice type on a per client basis.
- Clients may now be added on the fly as invoices and time transactions are entered.

- Billable services may now be added on the fly as invoices are created.
- All invoice formats have been modified to better reflect retainer balances and improve their appearance.
- The client time transaction browse table now displays totals for hours billed, amount billed, hours unbilled and amount unbilled.
- A new detailed WIP report has been added.
- Recurring transactions on hold now have "Hold Until" (month and year) field.
- A new PB Recurring Transactions report has been added.
- A prepayments procedure has been added within Accounts Receivable.
- Payment transaction entry has been modified to include a check number in addition to a description. A new Deposit report has been added that subtotals payment transactions by check number.
- Client statements and aging reports are now available from within a client's inquiry screen.
- Posting of payments, after the fact invoices, and prepayments has been made more intuitive since now you perform the posting procedure right from within the transaction entry browse table.
- Six new AR statement formats have been added, several with remittance slips.
- In addition to having the option to back up key A/R files during the Accounts Receivable Consolidation procedure, we have added a procedure to restore these files.
- You may now initialize (delete) temporary files from within A/R's maintenance submenu.

- The client master query report within Practice Manager may now be printed either by client name or by client ID.
- A mileage tracker has been incorporated into The Accountant's Partner. Each trip transaction will allow you to enter beginning and ending odometer readings, tolls, parking, meals and miscellaneous expenses, as well as make annotations. Related reports may be printed as well.
- Recurring tax deposit transactions on hold (Tax Notices) now have "Hold Until" (month and year) field.
- A PDA Interface utility has been added. Thru this utility you will be able to export data to an intermediate software, which in turn you can hot sync into your PDA. This utility also allows you to import data from your PDA.
- Rotary cards have been modified to include more information.
- A new label format has been added that prints telephone numbers.
- New User's Manual.

<u>Taps V8.0a Released 7/20/02</u>

- Added new protection scheme to allow downloads to use current and expiration date with out us having to update ms_ctrl on web sites. No fields where added to ms_ctrl.

<u>Taps V8.1 Released 8/22/02</u>

PB - Added Unregister Software message to all modules

- PB - Client/Staff Batch Time entry disable buttons if no records in browse table
- Fix batch time rpt headings display and Hash total text
- PM - Client master query list fixed length to print all records

Taps v8.2 Released 9/06/02

AR - Fixed file error generated at Calculate Finance Charge

Taps v8.2a Released 10/25/02

Change installation menu and Tap main menu and manual to reflect change
From Think DB to SmartList To Go from DataViz.

Taps v8.3 Released 01/08/03

PM - Changed Review engagements by staff and date browse to include all Due Date and Extension due trans not only Federal returns only.
AR - Fixed aging on Detail/Summary/Open report to use user defined variable aging.

1/18/03 - Added ATF_AR.EXE install file to Installation CD. This EXE is not shown in installation menu. It allows ATF invoices with user defined Invoice numbers.

Added new CWP 2.2 DEMO to installation CD. Still same 8.3 version CD.

Taps V9.0 Released 06/06/03

- We have added email capabilities for use with Outlook 2000 and Outlook Express Email Clients.

- You can now email the following:

  - Invoices
  - Accounts receivable statements
  - Letters from within Business Notes module. Emerge is also available.
  - Tax Notices

- You may now specify whether you wish to use plain paper or preprinted letterhead when requesting:

- ♦ Invoices
- ♦ Statements
- ♦ Letters (Business Notes)
- ♦ Tax Notices

♦ We have added the capability of printing the above reports with your company's heading centered or left justified. When choosing to left justify your company's heading, you will be able to use double window envelopes.

♦ We have incorporated VCR buttons to the following files, allowing you to view and browse their contents in a more efficient manner:

- ♦ Client Master File
- ♦ Staff Master File
- ♦ Work Control
- ♦ Federal Returns and Extensions
- ♦ Job Engagements by Client ID
- ♦ Client Federal ID Numbers
- ♦ Client Monthly/Quarterly/Year End/User Defined Services

♦ We have expanded the capabilities addressed in the System Defaults window.

- ♦ You may now preset report ranges commonly used by pre-selecting client, staff, service code, category and name ranges, thus speeding up report viewing/printing.
- ♦ Report date ranges can also be preset, selecting from the report date, system date, user defined or leaving it blank.

♦ The following reports have been added:

- ♦ Chargeable/Non-Chargeable by Client/Staff/Transaction Date (Expense Transactions)
- ♦ Chargeable/Non-Chargeable by Staff/Client/Transaction Date (Expense Transactions)
- ♦ Chargeable/Non-Chargeable by Client/Staff/Transaction Date (All Transactions)
- ♦ Chargeable/Non-Chargeable by Staff/Client/Transaction Date (All Transactions)
- ♦ WIP and Investment Limit

♦ We have added an "Update client exposure WIP totals" button to the client master browse table within Accounts Receivable. When selected, the system recalculates the client exposure figures.

♦ The printing of the Client Exposure report has been modified to include a re-calculation of the client exposure figures, thus producing accurate, up to the minute results.

♦ We have added Retainer Balance Totals to the Accounts Receivable Inquiry Summary Screen.

- You can now select to print or email individual customer's statement from within the A/R Inquiry or Summary Screens.

- New User's Manual.
- Changed service code amount, detailed history, invoice transactions related browses and key files. Added Invoice Date field and Keys. PB Invoice History client detail invoice history and managing staff reports know print by filtered by invoice date not transaction date. Now the A/R invoice journal matches the service code billed and detailed history reports in PB.
- Fixed Copy of billable service code, additional description.

Taps V9.1 Released 06/12/03

PB- Fixed QB & SB Company Heading not printing correctly
Changed Installation Notes

Taps V10.0 Released 06/04/04

- The Accountant's Partner now gives you the flexibility of using either the Enter Key, Tab Key or Mouse to move between fields.

- The client master files now allow you to store a client's email address as well as their web page.

- Corresponding icons next to a client's email and web site address fields activate Outlook/Outlook Express or Explorer allowing you to email your clients or visit their web sites with just a click of the mouse.

- We have added a Scheduler tab to the client master screen allowing you have access to scheduled appointments.

- The staff master file now contains an email address field with a corresponding icon, allowing you to email your staff from within The Accountant's Partner with just a click of the mouse.

- We have similarly incorporated icon calls to the professional organizations' email and web site addresses.

- You may now print a fax transmittal cover sheet from within a business note. Simply create a business note and click on the Print Fax icon.

- Business notes can now be copied over to the Scheduler. Upon selecting to copy a business note to the scheduler, you are prompted to enter the date and time of the appointment.

- We have added a new "Open Items" payment entry method giving you the choice of entering payments in a new, more intuitive way or thru the method you have come accustomed to.

- ♦ We have added a “Period Sales Tax” report to assist in the preparation of your sales tax, if applicable.

- ♦ We have added email and web site fields to the Smart List To Go applications used when transferring data to your PDA.

- ♦ Behind the scenes programming changes have been done to improve the overall performance of the program.

- ♦ New User’s Manual on disk.

<u>Taps V 11.0 Released 6/22/05</u>

- ♦ The program has been compiled with Clarion 6 for greater speed, efficiency and stability.

- ♦ Professional Bill, Accounts Receivable, Time It, Practice manager, Continuing Education Credits, Tax Deposit Notices, Business Notes Tracker, Labels and Financial Analyzer have been consolidated into a single module.

<u>Taps V 11.1 Released 7/15/05</u>

- ♦ Fixed receivable batch payment update screen locking out occasionally on exit from non invoice client.

- ♦ Fixed automatic adding of next invoice number on After the Fact and Prepayment update screens occasionally erroneously adding 1 to next invoice number when procedure aborted.

<u>Taps V 11.2 Released 7/21/05</u>

- ♦ Fixed Recurring Bill hanging up after returning from invoicing. Removed timer.

- ♦ Time Bill, Recurring Bill and Standard Bill transaction update screens where changed to make SCODE strictly a lookup function. Done to prevent hangup on blank service code look up screens.

<u>Taps V 11.3 Released 9/01/05</u>

- ♦ Fixed client master, invoice reprint, erroneously printing address on left side when center address printing selected..

- ♦ Allowed Standard Bill, Recurring Bill and Time Bill update screens SCODE field lookup.

- ♦ Staff and client look up fields in scheduler, messages and notes update screens changed to reflect proper results.

♦ Added access code screen to maintenance.

♦ Fixed Backup Utility (Other select not working)

Taps V 11.3a Released 9/07/05

♦ Fixed Job Engagements submenu selections closing program upon selecting any option.

Taps V 11.4 Released 10/24/05

♦ Added Set Date screen under Maintenance
♦ Fixed erroneous report/system date retained occurring after selecting to mark time transactions as billed in Time Bill.
♦ Changed schedule and messages update to allow assigned client to be changed.

Taps V 12.0 Released 05/19/06

♦ Ms Office spell checking function has been added to all notes, letters and memo's through out the program (MS Office required).

♦ Screen fonts, size and color can now be user selected .

♦ Multiple application graphical themes are now available for you to choose from.

♦ Fixed known issues/bugs.

Taps V 12.1 Released 07/14/06

♦ Fixed Standard Bill (invoice) error. Invoice update screen missing "Print Additional Description" prompt, hence invoice not printing any additional description specified.

Taps V 12.2 Released 08/30/06

♦ Fixed labels screen not displaying properly after selecting to print labels.

Taps V 13.0 Released 06/06/07

♦ The program has been compiled with Clarion 6.x for greater speed, efficiency and stability.

♦ Additional telephone fields (telephone1, telephone2, home phone, cell phone1, cell phone2, pager, fax) have been added to the scheduler engagements edit/input screen, messages edit/input screen, as well as the client master file.

- ♦ Ascending, descending and completed sort tabs have been added to schedulers engagements and messages browse tables. Now you can view your engagements and appointments in ascending or descending order.

- ♦ Recurring engagement functions have been added to schedulers engagements.

- ♦ Start and end time fields have been added to schedulers engagements.

- ♦ Added completed field to schedulers engagements.

- ♦ Added to system default the capability to display or not the staff time bill amount and cost fields

- ♦ Now you can print scheduler engagement reports in ascending or descending order.

- ♦ Print message reports in ascending or descending order.

- ♦ 13 time transaction with cost reports added to time bill.

Taps V 14.0 Release Date 06/06/08

- ♦ Added portable data format(pdf) printing to all reports.
- ♦ Added remaining to bill time report by date/staff/client order.
- ♦ Added remaining to bill time report by date/client/staff order.

Taps V 15.0 Release Date 04/30/09

- ♦ Added portable data format(pdf), word(doc) and text(txt) printing to all reports.
- ♦ Added ability to print multiple copies of any report, invoice or statement at print time.
- ♦ Added saving of user tabs throughout TAPS.
- ♦ Added client only invoice history screen.
- ♦ Added new client master summary reports.
- ♦ Added new Federal/State ID fields and reports.
- ♦ Added new sort fields to Standard Invoice, and Invoice History screens.

Taps V 16.0 Release Date 04/30/10

The check number field has been added to the A/R History tab of the Client Master file, as well as to the A/R Transaction History file.

- ♦ We have added a check number field to the following Accounts Receivable reports:

A/R Prepayments for Posting (Prepayments function)

A/R Selected to Pay Invoices (Payoff Client Open Invoices function)
A/R Unpaid Invoices (Payoff Client Open Invoices function)
A/R Selected to Pay Invoices (Payoff Client Open Invoices function)
A/R Payments/Adjustments for Posting (Batch Payments/Adjustments function)
Payment Journal (Journals function)

- The Spell Checker for all Notes has been improved.

Taps V 17.0 Release Date 04/31/11

- Added to client master file cell phone1 and cell phone2 contact fields
- Added to client master file a second e-mail address
- Updated client master reports to reflect new added fields
- Added to Scheduler file and corresponding screens all client master contact phones and contact fields. Updated corresponding scheduler reports with new fields.
- Added to business Notes file and corresponding screens all client master contact phones and contact fields. Updated corresponding business notes reports with new fields.
- Added to Messages file and corresponding screens all client master contact phones and fields. Updated corresponding message reports with new fields.
- Added priority field to client business notes, scheduler, messages and staff notes screens
- Added priority key field display tabs to corresponding notes, messages, scheduler, staff screens.
- Added priority field based reports to client notes, scheduler, messages and staff notes
- Added Event Type reports to client notes, messages, staff notes