



CMI

ENHANCEMENTS LIST

Creative Microsystems, Inc. (CMI)

**Municipal Income Tax (TAX) Client/Server
Version 19.0.2**

October 2009

The following changes and modifications have been made to the TAX Client/Server, Version 19.0.0. This list covers all changes since the last general release. This update involves new menu selections; make sure to check each User's ID Access level settings for the respective items.

New Menu Items:

Maintenance

The user now has the ability to print a single label from the Maintenance screen of a single account. Also, a Label tab has been added to the Client/Server Printer options and it will only work on the individual label print.

Transaction Entry

The user was unable to enter a declaration for next year, unless he/she did it as part of the final for the current year. The user is now able to use a type 0 transaction for next year.

New Field

On the field which shows that a final has been filed on the TB screen a letter B will indicate that the tax year is in Bankruptcy or a C will indicate that it is in collection. Those with a B will be excluded from Statements, delinquent reports, and Auto PI. Those with a C can be excluded. These flags will be set in the Master Menu/Collections Module Menu.

New Menu Option

There is a new menu option to delete all transactions in a deposit or all cash and transactions in that deposit. This is located in the TRANSACTION PROCESSING MENU/DEPOSIT MAINTENANCE/CLEAR UNPOSTED DEPOSIT. Please note if you have manually posted any of the transactions in the deposit this will not work.

Text Hard Copy Option

An option has been added to the Hardcopy function that will allow inclusion of Text.

Cash Entry and Quick Cash Screen

The order of the columns on the Cash Entry and Quick Cash screen has been switched so that the Check Number/Credit Number comes before the Payment Type. This is so the user does not have to enter through the type field every time that he/she enters a check.

Update Modification List (continued)

Label Setup

A new column has been added to Label Setup. This will allow the code that is entered as a number to now be a unique code for label entry.

Standard Transactions Entry Screen

After entering a transaction the user was still able to see the whole amount that was available to post after updating. It has been changed so that the amount will blank out upon update.

W-2 Entry Screen

A count has been added to the W-2 Entry screen for the number of rows in the table.

Print Letters in Log

When doing the Print Letters in Log, the User-Generated List radio button is now hidden because this is not where that function is used.

Account Master

1099's will have a choice of whether to issue them to businesses or not. 1099 participation (non-individual type only) is now automated with an override feature. This is located in the 1099 Menu.

Last Accounts Accessed

As accounts were called up in Transaction Processing, the check boxes were not moving with the data in the last accounts accessed window. This has been corrected.

Tax Master File Maintenance/Extended Master Screen

A text field for Landlord data has been added to the Extended Master screen for B accounts.

Zip Code Maintenance Master File

The Zip Code Maintenance Master file is now populated with data from the Postal Service. Upon entering the zip code, the city and state will auto-fill.

New Accounts Report

When new accounts were deleted or renumbered, the New Accounts report was showing "errors" for the missing numbers. This has been corrected.

Maintenance Screen

An Alt shortcut has been added to set an audit flag and to toggle the Transactions screen, as well as many other options available on the Tax Master screen.

Letter Log Update

If the flag set to 'Y', the program will save in a hold status an item in Letter Log Update that has the HOLD status clicked.

Lookup Type B

Lookup Type "B" for Browsing Windows files for imports has been added.

Update Modification List (continued)

Final Return Distribution Screen

There was an issue with the Final Return Distribution screen not carrying the amount of the final return or the tax due to the final screen forward. This has been corrected.

Prorate Screen

Users suggested the Prorate screen in Client/Server to behave the same way that it did in Character-Based. For example, the user would enter the wages and the withholding would prorate automatically. They did not have to enter the actual wage withholding as well as the wages. This has been changed as requested.

Printer Options

A drop-down box has been added to choose which printer to print to when printing reports.

Import TaxConnect filings into DocuScan

The user now has the ability to import Tax Connect filings into DocuScan attached to the account. The import should happen when the web transactions are imported into the Tax system. The Web Connect filings are named based upon the Transaction ID, and therefore, the Account Number can be determined. They are located in a defined directory and are all PDF's.