

State Unemployment Forms: Date (10/2008)

Required changes for the 3rd quarter 2008 have been implemented.

Print Payroll Checks – New Separator Bar: Date (06/2008)

A new separator bar is now printed on the employee check stub to make the YTD and Tax Withholding section of the check stub easier to identify.

Payroll Codes – New Payroll Group Codes: Date (05/2008)

A new payroll “**Group Code**” feature has been added to Maintain Payroll Codes (PR53). Group Codes allow you to select up to 20 individual payroll codes to be combined and reported as a single code. For example, if you had 7 different commission codes (i.e. New Service, Repair Service, etc.), a Group Code could be created to report the combined amount of all commission codes as one amount on tax report worksheets, quarterly state reports and check stubs. There are a maximum of five Group Codes per company. The option to change Group Codes can be accessed from **Maintain Earnings/Deduction/Special Tax Codes** by selecting **>Maintain Code Groups**.

To add or change a Code Group, select a Code Number 1 through 5 and click **>Edit**. The following information is available for each group.

- **Description:** Enter a maximum 30-character Code Group description (Example – Combined Commissions).
- **Abbreviation:** Enter a maximum 10-character abbreviation. Abbreviations are commonly used in column headings and labels (Example – Commission).
- **Reverse Print Sign:** Select this option if you desire to reverse the print sign of the combined amount. For example, pension plans are commonly set up and tracked as negative amounts. If you wish to see the combined group code for all pension plans presented a positive number, check this option.
- **Codes in Group:** Select up to 20 individual codes that you wish to include in the Group Code from your payroll code list. A counter displaying the number of codes selected is included for your convenience.
- **Print YTD Combined Amount on Check Stub:** Select this option if you desire to include the YTD Total of the group on the employee check stub. There are a maximum of 10 YTD items available for display on a check stub. Each Group Code listed on check stubs may reduce the number of itemized tax withholdings presented.

To save changes made to any Group Code, click **>Save**. To return to the Maintain Payroll Codes, click **>Close**.

Special Tax Codes – Treat as a Deduction on Stubs: Date (04/2008)

Optionally display special tax code amounts in Total Deductions on Check Stubs. All special tax codes selected for inclusion in Net Pay calculations will also automatically be included in Total Earnings and Gross Pay. For employee convenience, you can optionally present special tax codes as deductions on the check stub. This feature is normally used for codes presented as negative amounts. To activate this feature on any special tax code, select **>Maintain Special Tax Codes**, highlight the code you wish to change and click **>Edit**. Select **>Treat as Deduction for Employee Check Stub** and click **>Save**. This feature only changes the employee check stub presentation and does not affect the actual gross pay or wages within the payroll system. For example, most pension plans are set up to use a negative special tax code. A salaried employee earning \$1,000 and contributing \$75.00 to a 401(k) and paying \$125.00 in taxes would see the following totals on their second check of the year:

Added to Total Earnings (Typical)	vs.	Treat as Deduction for Stub (New)
Salary: \$1,000.00		Salary: \$1,000.00
401(k): -100.00		401(k): -100.00
Taxes: 125.00		Taxes: 125.00
Total Earnings: 900.00		Total Earnings: 1,000.00
Total Deductions: 125.00		Total Deductions: 225.00
Net Pay: \$ 775.00		Net Pay: \$ 775.00
Gross Pay YTD: \$1,800.00		Gross Pay YTD: \$2,000.00

Print Checks - Vac/Sick Time (Print All - Bal.): Date (03/2008)

A new feature has been added to the Print Payroll Check program allowing you to print Vacation/Sick time balances and amounts even if the employee check does not have vacation/sick time accrued or used. The previous setting to 'Print All' has been changed to 'Print All (Active)'. This renamed setting prints an employee's vacation or sick time information on their stub only when time has been added or used. A new **Print All (Balance)** option has been added. Selecting this option will print the vacation or sick time information on the stub any time there is a balance on the employee hour's table.

Form 941: Date (03/2008)

Required changes for the 1st quarter 2008 have been implemented.

State Unemployment Forms: Date (03/2008)

Required changes for the 1st quarter 2008 have been implemented.

Utah Withholding Tax Changes: Date (03/2008)

Revised state withholding tables effective January 1, 2008 require application changes.

Tax Table Updates: Date (02/2008)

The following states have published changes for wages paid on or after January 1, 2008. These changes were announced and published after the 2007 year-end tax updates.

Connecticut
D.C.
Kentucky
Massachusetts
Missouri
Oklahoma
Rhode Island

QSF - Tennessee 4th Qtr 2007 changes: Date (12/2007)

Tennessee has issued updated quarterly state forms for the 4th quarter 2007.

2007 - Federal and State Tax Tables: Date (12/2007)

Federal and State withholding tables and SUTA limits have been updated. These changes are effective for wages paid on or after January 1, 2008.

2007 - Form 940 Changes: Date (12/2007)

Required changes for Form 940 (FUTA) for 2007 have been implemented.

2007 - Form 944 Changes: Date (12/2007)

Required changes for Form 944 (Federal Annual) for 2007 have been implemented.

2007 - W2/W3 Changes: Date (12/2007)

Forms W2/W3 for 2007 have been updated. For a list of changes in 2007, access the W2 program and click '**What's New for Tax Year 2007**'.

Quarterly State Forms - Detail Export: Date (07/2007)

The Quarterly State Forms ancillary module now includes an option to export employee wage detail to a delimited file. This is extremely helpful if your state requires you to file state unemployment electronically. Almost all states requiring electronic filing offer downloadable software to upload employee wages from a delimited file. To export the employee wage detail, click the option Export Detail from the Wage Total Window. The system will list the detailed records to be saved. Clicking this option will prompt you to name the file you are saving for this session. It is recommended that you save this file in your states software folder being used to transfer the delimited wage records - i.e. C:\QuickFile. You can save the wage records in either a tab (*.Txt) or comma (*.Csv) delimited format.

Form 941: Date (03/2007)

Required changes for the 1st quarter 2007 have been implemented.

State Unemployment Forms: Date (02/2007)

Required changes for the 1st quarter 2007 have been implemented.

Tax Table Updates: Date (01/2007)

The following states have published changes for wages paid on or after January 1, 2007. Please note that these changes were announced and published after the 2006 year-end tax updates.

Colorado
Connecticut
D.C.
Massachusetts
Missouri
Rhode Island
Wisconsin
West Virginia

2007 - Federal and State Tax Tables: Date (12/2006)

Federal and State withholding tables and SUTA limits have been updated. These changes are effective for wages paid on or after January 1, 2007.

2006 - 940 Employer's Annual FUTA Tax Return: Date (12/2006)

The 940 FUTA tax form for 2006 has been completely redesigned. The old 940EZ form has been deleted. A new "Schedule A" form has been added for employers using multiple states or filing to a state subject to credit reductions. Select the 'Additional Help' option from within this tax return program for a full listing of all changes and processing criteria.

944 - New Employer's Annual Tax Return: Date (12/2006)

The new 'Form 944 - Employer's Annual Federal Tax Return' has been implemented.

W2/W3 Changes for 2006: Date (11/2006)

Forms W2/W3 for 2006 have been updated. For a list of what's new in 2006, access the W2 program and click 'What's New for Tax Year 2006'.

Ohio Withholding Tax Changes: Date (09/2006)

Updated state withholding tables effective October 1, 2006

State Unemployment Forms: Date (07/2006)

Changes in the 2nd Quarter 2006 for Texas and Kansas have been implemented.

New Employee SSN options: Date (06/2006)

'Add New Employee' now prompts for the Employee SSN. SSN's are formatted to XXX-XX-XXXX automatically. Additional checking for duplicate numbers is provided. A link to the Social Security Administration's Online Services for additional SNN verification needs is also available.

Automatic Tax Table Updates: Date (03/2006)

A feature has been added to Record Pay Data to check each company's Federal and State Tax Tables against the date sensitive tax tables available on the system to insure the correct tables are being used. Any tax table needing an update will be displayed. The user will be prompted to (1) update the requested table(s), (2) ignore the update(s), or (3) cancel. Tax table updates with an effective future date can be downloaded and automatically implemented as they are required.

NOTE: The automatic update is not available for tax table changes prior to 11/30/2005.

Form 941: Date (03/2006)

Required changes for the 1st quarter 2006 have been implemented.

State Unemployment Forms: Date (02/2006)

Most states required changes for the 1st quarter 2006. All required changes have been implemented. The following states required major changes:

Florida	Updated barcodes and state certification numbers
Kansas	New format with changes to the number of employees per page
Louisiana	New combined reports
New York	Updated barcodes
Texas	New format with changes to the number of employees per page
Wisconsin	Account Number prompts for the new 14-digit Employer Account Number

Tax Table Updates: Date (12/2005)

Updates State and Federal Withholding Tables effective January 1, 2006 (PRTABLE.CDN, CWTABLE.CDN)

W2/W3 Changes for 2005: Date (11/2005)

The entire Form W2/W3 generator has been redesigned for 2005. For a short list of what's new in 2005, access the W2 program and click **What's New for Tax Year 2005**. For a complete detailed list of all Form W2 options, click **How to Prepare and Print W2/W3 Tax Forms**.

940 2005 Changes: Date (11/2005)

Form 940EZ generator for 2005 includes third-party preparer information. Notice that the \$100 minimum for quarterly liabilities has been changed to \$500 for 2005.

Payroll - Calculate Salary from Annual Amount: Date (09/2005)

A new feature has been added to Maintain Employees. You can now enter an annual salary amount for an employee and press F5 to have the system automatically calculate the per pay period amount.

Tax Table Update: Date (07/2005)

Tax table update for Kentucky has been added.

New EFTPS Online Option: Date (06/2005)

A new option has been added to the payroll summary for EFTPS online. You may now select an EFTPS style of either Phone or Online. The new online option is designed for use with the IRS secure web-site at www.efpts.gov.

Direct Deposit Sheet - New feature: Date (05/2005)

Direct deposit sheets printed for selected employees now include company name and address information.

Employee SSN presentation: Date (05/2005)

Optional employee SSN presented on paycheck stubs and direct deposit sheets is now presented in ***-**-#### format to comply with updated IRS recommendations.

Tax Table Update: Date (03/2005)

Tax table updates have been added for the Montana - revision to the original 2005 updates. Iowa tax table updates - please note that the Iowa changes require both tax table and program application changes effective for payroll on or after 04/01/2005.

941 Revisions: Date (03/2005)

2005 Form 941 has been completely redesigned to comply with the new changes handed down by the IRS. The form is now two pages in length. The 941 form interface has also changed to a "form generator" style. For more specific information on these changes, please refer to your 941 help documentation accessed from within the new 941 program.

Quarterly State Forms: Date (03/2005)

First quarter updates have been added for a majority of states in the Quarterly State Forms program.

W2 & W3 Changes for 2004: Date (11/2004)

W2 and W3 forms have been changed to meet required 2004 changes.

Tax Table Updates: Date (11/2004)

Updates State and Federal Withholding Tables effective January 1, 2005 (PRTABLE.DMN, CWTABLE.DMN)

940EZ Revisions: Date (11/2004)

940EZ forms revisions for 2004 have been added.

Earnings Codes - Enhancements: Date (08/2004)

Changes have made to earnings codes to add the option to include the code as wages in percentage of gross pay calculations.

Deduction Codes - Enhancements: Date (07/2004)

Changes have been made in the creation and maintenance of deduction codes. Options are now available to have month-to-date, quarter-to-date, year-to-date, hourly, and percentage of net pay calculations for the codes.

Tax Table Changes - Indiana and Connecticut: Date (06/2004)

Changes were made to the Connecticut, Indiana, Idaho tax tables to reflect tax changes. A new style of local tax table was added for Indiana.

Tax and Information Tables - Flat Tax Calculation: Date (06/2004)

The tax tables allow for a variable flat tax percentage with exemption values. Set Code 1 to a value of -1 on the tax table, then add the percentage per employee to the additional percentage amount.

Print Paychecks - Override Direct Deposit: Date (05/2004)

The option is now available to override direct deposit for all users when printing paychecks.

Special Tax Codes - Safe Harbor Pension Plans: Date (04/2004)

Support is now available for Safe Harbor style pension plans. The program also supports variable limits per employee.

Standard Payroll Reports - New Feature: Date (04/2004)

All Standard Reports now have buttons to select ranges and support F8 to repeat first selected record.

Tax Report Worksheets - Date Range Error: Date (04/2004)

Tax Report Worksheets were corrected to accept a date range for employees with no activity as well as across periods.

Quarterly State Forms - New Features: Date (03/2004)

Quarterly State Forms now support multiple codes and reduction types. Dated file names were also removed on state metafiles.

941 1st Quarter 2004 Revisions: Date (03/2004)

Form 941 revisions for 1st quarter 2004 have been added.

Quarterly State Forms 1st Quarter 2004 Revisions: Date (03/2004)

Quarterly State Forms revisions for 1st quarter 2004 have been added.

W2 & W3 Fonts: Date (03/2004)

Forms W2 and W3 have been changed to use standard tax fonts.

New Employee Labels Feature: Date (03/2004)

Employee labels now support selecting a starting label for printing on partially used sheets.

Missouri Tax Tables: Date (01/2004)

Tax table changes made by the state of Missouri for 2004 required application changes to the Record Pay Data module.

Tax Table Changes: Date (12/2003)

Federal and state tax tables have been updated.

INVENTORY**Job Number Checking in Withdrawal: Date (12/2008)**

Recording Job Cost Withdrawals now verifies the job number and includes an automatic listing on invalid entry exit.

IntelliTrans Importing: Date (11/2008)

Item importing with IntelliTrans now supports Invoice/Sales order and Purchase order descriptions. You can optionally allow multi-line descriptions by using the keyword {CRLF}.

Maintain Categories - Added Markups/Prices Defaults: Date (06/2008)

You can now set markups, quantity breaks and prices on default inventory item categories.

Item Labels Report: Date (03/2008)

Setting the number of copies to print greater than one now prints multiple labels of each item in the current location in consecutive order. Up to 10 labels per item can be printed. For example, if 10 copies are specified, then 10 labels of the first item will be printed, then 10 of the next item etc. until all items are printed.

To print items from multiple locations, ensure the number of copies set on the main page is one. Then on the options page, check the box for 'Print Selected Locations' and set the From and To Locations.

New Inventory Export Feature: Date (9/2007)

A new file (Inventory Item Summary – INS) has been added to the list of files available for standard export. This new file includes calculated MTD, QTD and YTD quantities and amounts along with calculated current on-hand quantity and cost. All quantities and amounts are automatically combined for all locations. Remember, you cannot filter calculated columns (fields). All MTD, QTD and YTD information is processing date sensitive. For example, by changing your system date back to the prior year, you can access last year's period data. Be careful, the current quantity and current cost available in the export file is not date sensitive and will always reflect the current data regardless of the processing date.

Record Withdrawals - Quantity checking: Date (07/2007)

The Inventory Transaction Withdrawals programs include Quantity on Order (All Location) criteria on the warning display for inventory item(s) insufficient quantity on-hand.

Sales Lot Quantity Reports: Date (03/2005)

New reports have been added to the Standard Inventory Report. These reports are Sales Lot Quantity reports.

Sales Report by Category: Date (03/2005)

The Sales Report by Category report now includes a page detailing a Category Recap.

Review Items - Current Orders: Date (03/2005)

Review Items now includes a drilldown listing for current Purchase Orders and Order Entry Orders. To review a listing of open purchase orders, click the new button to the left of "Quantity on Order". To review a listing of open sales orders, click the new button to the left of "Quantity on Backorder". Please note that these new options are only available for Inventory customers that are operating with the Order Entry and/or Purchase Order modules.

Serial/Lot Selection: Date (03/2005)

All windows pertaining to serial/lot number selection now include the Master Item stock number as well as description.

Bill Of Materials - Sub-assemblies Calculation: Date (05/2004)

Producing Bill of Materials with subassemblies now supports updated costs of subassembly components on higher levels.

Standard Inventory Reports - New Feature: Date (04/2004)

All Standard Reports now have buttons to select ranges and support F8 to repeat first selected record.

New Inventory Labels Feature: Date (03/2004)

Item labels now support selecting a starting label for printing on partially used sheets.

ORDER ENTRY**Record Orders - Add new Ship-to-Keys: Date (06/2008)**

You can now add new ship-to-keys to a customer account during record orders and quotes. To add a new ship-to-key, **right click** on the customer's ship-to address information and select **>Add New Ship-To-Key**.

Record Orders - New Default Line Type: Date (05/2008)

You can now specify the default line type (i.e. 1 = Regular, 2 = Quick Inventory, 3 = Inventory, etc.) to be used for new transactions. This option can be set by selecting **>Show Options** and **>Default Line Type**.

Sales Codes - Suppression of Quantity and Unit Price: Date (8/2007)

Any Sales Code(s) in Accounts Receivable can be set to omit line item quantity and unit price from AR/OE forms. For example, your invoice forms have columns for quantity and unit price for items sold, but perhaps you also sell a service that does not have a quantity associated with it. You can now tell the system not to print the quantity or unit price for the sales code used for service. Activate this feature from **Maintain Sales Code** by selecting the sales code you desire and click Edit. From **Advanced Options - Detailed Line Printing**, click **Suppress Quantity and Unit Price**. This feature will only apply to invoices and orders created after implementation.

Sales Codes - Extended Price Consolidation: Date (8/2007)

Any Sales Code(s) in Accounts Receivable can be set to add extended prices from multiple detail lines and present the total on a single line on AR/OE forms. This option is convenient for customers with multiple detail lines but do not wish to show each line item price. Activate this feature from **Maintain Sales Code** by selecting the sales code you desire and click Edit. From **Advanced Options - Detailed Line Printing**, select **Price Consolidation** and choose **Yes - With Detail** or **Yes - Without Detail**. This feature will only apply to invoices and orders created after implementation.

Example - you have the following three lines on an invoice:

Line Co	de	Description	Extended Price
1 0	100	Blue Wid.....	599.00
2 0	800	Finishing.....	129.00
3 0	900	Handling.....	149.00

If all three sales codes (0100, 0800 and 0900) are **Yes - With Detail**, the invoice lines will print as:

Line Co	de	Description	Extended Price
1 0	100	Blue Wid.....	877.00
2 0	800	Finishing.....	
3 0	900	Handling.....	

If all three sales codes (0100, 0800 and 0900) are **Yes - Without Detail**, the invoice lines will print as:

Line Co	de	Description	Extended Price
1 0	100	Blue Wid.....	877.00

Caution: To avoid presenting quantity and unit price for each line item, you will normally want to activate **Suppress Quantity and Unit Price** for any sales code(s) using this **Price Consolidation** feature.

Packing List, Sales Order and Invoices: Date (07/2007)

Packing List, Sales Order and Invoices forms now allow printing for selected records. The criteria for selecting individual orders to print follows the selected record criteria used in all CertiflexDimension standard reports.

Orders - Quantity checking: Date (07/2007)

The Order Entry Record Orders programs include Quantity on Order (All Location) criteria on the warning display for inventory item(s) insufficient quantity on-hand.

Customer Account Status on Record Shipments: Date (07/2006)

The Record Shipments window can now include a 'Customer Account Status'. The status will show either 'Current' or 'Past Due'. Past Due accounts will be colored green, yellow or red depending on the oldest unpaid balance. A drilldown is included for summary aging of the customer account. This feature can be turned on or off from Accounts Receivable Master data under the Orders tab. 'Customer Account Status' is located under 'Shipping'.

Edit Sales Codes and Move Multiple Lines: Date (02/2006)

During maintain orders you can now edit "Sales Codes" on existing detail lines and 'move or re-arrange' multiple lines using a standard Windows drag and drop type interface.

Order Entry - Reprint Invoices for Closed Orders: Date (09/2005)

A new feature has been added to Review Orders. You can now reprint an invoice for a closed order by clicking 'Reprint Invoice'. This option will only be available for closed orders were not converted from a prior version.

Maintain Quotes - New Window Color: Date (03/2005)

Maintain Quotes now displays the access customer options with a bright yellow background. This helps easily differentiate the Maintain Quotes system from the Maintain Orders system.

Maintain Orders - Transferring Quotes to Orders: Date (03/2005)

Maintain Orders now includes the ability to transfer quotes to orders on a per-customer basis. To transfer an open quote to an order, first select the desired customer. Once the customer has been selected, click the new option labeled "Transfer Quotes". The system will display a list of all open quotes for the currently selected customer. Highlight the quote you wish to transfer and click "Transfer". The system will transfer the selected Quote to the order system and automatically select the newly transferred order for editing.

Maintain Orders - Closed Order Inquiry: Date (03/2005)

Maintain Orders includes a new drilldown function for closed orders. To review a closed order from within the maintain order system, select the desired customer and highlight the desired order in the Closed Order Listing and click "View Closed". You must close the detailed drilldown window before normal order processing may continue.

Orders and Quotes - Advanced Printing Criteria: Date (03/2005)

Orders and Quotes now include advanced printing criteria including automatic selection of form styles and printers for easier faxing and e-mailing. To activate these new features, you must be using the "Print Order/Quote after Save" option of "Prompt". If you are using the prompt option, the system will now display a new print window after each transaction is saved, prompting you for additional printing criteria. If you wish to print with the currently selected criteria, click "Yes". To cancel the print for the current transaction, click "No". You may manually switch the selected printer for the current transaction only by clicking "Printer Setup". You may manually switch the current form selection for the current transaction only by changing the "Current Form". You may also affect the Print Form Type for the current transaction only by selecting "Use Default, Use Fax or Use Email/Attachment". Selecting the "Use Fax" option will also scan the list of current printers available to the workstation and automatically select the first printer containing the word "Fax" in the printer name. The fax option will also scan the list of available forms for a form called "Fax Order" or "Fax Quote". Selecting the "Use Email/Attachment" option will also scan the list of available forms for a form called "Email Order" or "Email Quote". The ability to auto-select forms and printers is designed for advanced users that need different quality of forms depending on the

delivery method. For an example, a company that issues a large quantity of Sales Quotes in multiple delivery methods may use the following:

- Form "Fax Quote" - A Rave Quote form with no graphics or colors with built in Cover Sheet.
- Form "Email Quote" - A Rave Quote form with high graphics and colors.
- Form "Print Quote" - A Rave Quote form with graphics and grey-scale colors.

If a user sets their default form to be "Print Quote" and their default Windows printer is set to a standard laser jet and they also have a fax printer available (I.e. WinFax), the following output is applied on Print Form Type Selections:

- Use Default - Quote to default windows printer using the "Print Quote" Rave Form.
- Use Fax - Quote to the WinFax printer using the "Fax Quote" Rave Form
(Customer Fax # in Clipboard).
- Use Email/Attach - Quote to Email Attachment using the "Email Quote" Rave Form.

Reminder: The new advanced printing criteria are specifically designed to affect the current transaction only. The next transaction will automatically revert to the default forms and printers you have previously selected.

Orders - Shipping Notes: Date (03/2005)

Shipping notes can now be included on orders and picking lists generated by the Order Entry program. To add this field to an existing Rave form, right click on the "DimInvoice" data view in the Data View Dictionary and select "Refresh". The new memo will then be an accessible field called "ShipMemo254".

Orders - Salesperson Name: Date (03/2005)

The name of the salesperson may now be printed on Sales Orders and Packing Lists. To add this field to an existing Rave form, right click on the "DimInvoice" data view in the Data View Dictionary and select "Refresh". The new Salesperson name will then be an accessible field called "SalesRepName".

Orders - Cellular Phone Numbers: Date (03/2005)

The cellular phone number has been added to the customer contact information.

Standard Order Entry Reports - New Feature: Date (04/2004)

All Standard Reports now have buttons to select ranges and support F8 to repeat first selected record.

New Order Labels Feature: Date (03/2004)

Order labels now support selecting a starting label for printing on partially used sheets.

PURCHASE ORDER

Job Number Checking in Record Orders: Date (12/2008)

Record Purchase Orders now verifies the job number and includes an automatic listing on invalid entry exit.

Email Attachment Enhanced: Date (11/2007)

Record Purchase Orders has been changed to allow Emailing order attachments for revised orders. To utilize this feature, you must use the Order Printing Option of 'Prompt after Save'. With this selection, the system now includes an option to email confirmations with attachments even when saving revised orders. Please note that revised orders use a separate email confirmation section of [POREVISED] within the email confirmation system.

Record Receipts - Enter to Start: Date (07/2007)

You can now use the <Enter> key to start a receipt regardless of the Use Enter as Tab setting.

Purchase Order - Fax and Email Address on Forms: Date (09/2005)

A new feature has been added to Maintain Orders that saves the vendor fax number and email address to the Purchase Order File. This new detail can be printed on Rave Purchase Order forms in the following manner:

- Vendor Fax Number: Use Field CustomText2(20)
- Vendor Email Address: Use Field CustomText2(50)

Hint: You can manually add the fax and email information to an existing order created prior to this new feature by selecting 'Edit Order' and then 'Save'.

Change Sales Tax Ledger Account: Date (06/2005)

You can now change the Sales Tax Ledger Account on any individual purchase order during vouchering by selecting 'Options' and then clicking "Change Tax GL Account".

Open Item Tracking by Job: Date (03/2005)

Accounts Payable Open Item Tracking by Job is now supported if all vouchered lines are allocated to a single job.

Record Purchase Orders - Copy Job Address: Date (03/2005)

A feature has been added to Record Purchase Orders to copy the address of a job into the order. To copy job name and location information into a purchase order's ship-to information, click "Copy Job Address". The system will display a list of your active jobs. Select the desired job and then click "Ok".

Standard Purchase Order Reports - New Feature: Date (04/2004)

All Standard Reports now have buttons to select ranges and support F8 to repeat first selected record.

New Purchase Order Labels Feature: Date (03/2004)

Purchase Order labels now support selecting a starting label for printing on partially used sheets.

JOB COST

Reschedule Invoices 'By Job' in Accounts Payable: Date (07/2006)

Job Cost customers with retainage on vendor invoices will find it easier to pay all final invoices before closing a job. All retainage invoices, even those in suspense, can be paid simultaneously using the new feature in Accounts Payable to reschedule invoices 'By Job'.

Close and Delete Jobs - New Feature: Date (05/2004)

A new button for Find Jobs has been added to the Close and Delete Jobs program.

Maintain Job Notes - New Feature: Date (05/2004)

A lookup cost code option has been added to Maintain Job Notes. You can access this feature by pressing F6 from the Cost Code prompt.

Export Job Cost - New Feature: Date (05/2004)

The Job Cost Control file (JC0) is now available to export from the Export Data feature.

Standard Job Cost Reports - New Feature: Date (04/2004)

All Standard Reports now have buttons to select ranges and support F8 to repeat first selected record.

CLIENT WRITE-UP

2008 - Federal and State Tax Tables: Date (12/2008)

All Federal and State withholding tables and SUTA limits published by 12/01/2008 have been updated. These changes are effective for wages paid on or after January 1, 2009. Please check for additional changes in the near future as many taxing agencies have not yet published their 2009 tables.

2008 - Form 940 Changes: Date (12/2008)

Required changes for Form 940 (FUTA) for 2008 have been implemented.

2008 - Form 944 Changes: Date (12/2008)

Required changes for Form 944 (Federal Annual) for 2008 have been implemented.

2008 - Batch Smart Learn: Date (11/2008)

Smart Learn now skips small adjustment batches when deciding which descriptions to repeat.

2008 - W2/W3 Changes: Date (11/2008)

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State Unemployment Forms: Date (10/2008)

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Record Batch - Auto Split FICA/MED with Detail: Date (06/2008)

Detailed Payroll check entry now supports automatic splitting of FICA/Medicare if **Check FICA/Medicare** is active and the amount of the FICA code entered is exactly the amount of the FICA/Medicare combined for the current check wages and earnings.

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Kentucky
Massachusetts
Missouri
Oklahoma
Rhode Island

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2007 - Federal and State Tax Tables: Date (12/2007)

Federal and State withholding tables and SUTA limits have been updated. These changes are effective for wages paid on or after January 1, 2008.

2007 - Form 940 Changes: Date (12/2007)

Required changes for Form 940 (FUTA) for 2007 have been implemented.

2007 - Form 944 Changes: Date (12/2007)

Required changes for Form 944 (Federal Annual) for 2007 have been implemented.

2007 - W2/W3 Changes: Date (12/2007)

Forms W2/W3 for 2007 have been updated. For a list of changes for 2007, access the W2 program and click **'What's New for Tax Year 2007'**.

Quarterly State Forms - Detail Export: Date (07/2007)

The Quarterly State Forms ancillary module now includes an option to export employee wage detail to a delimited file. This is extremely helpful if your state requires you to file state unemployment electronically. Almost all states requiring electronic filing offer downloadable software to upload employee wages from a delimited file. To export the employee wage detail, click the option **Export Detail** from the Wage Total Window. The system will list the detailed records to be saved. Clicking this option will prompt you to name the file you are saving for this session. It is recommended that you save this file in your states software folder being used to transfer the delimited wage

records – i.e. C:\QuickFile. You can save the wage records in either a tab (*.Txt) or comma (*.Csv) delimited format.

Fiscal Year End Closing – New Multiple Closing Accounts: Date (07/2007)

Closing a fiscal year now allows you to select from 10 retained earnings accounts and percentages. The system defaults to closing to a single account. To change the account or to close to multiple accounts, click **Edit**. The system will display a window from which you can select up to 10 accounts. All closing accounts must reside on the Balance Sheet (F/S Line Number). Each closing account supports a closing percentage (0.01% to 100.00%). Prior to validating, the total of all percentages must equal 100.00%.

Calculator Mode supported on Summarized Payroll: Date (06/2007)

The calculator is now available for wages and tax amounts when using the summarized data entry mode for payroll checks from the Client Write-Up batch.

Multiple Vendor Accounts Listing: Date (06/2007)

When in the batch, you can now list multiple vendor GL Accounts by using the Alt F6 key at the General Ledger Account prompt.

Form 941: Date (03/2007)

Required changes for the 1st quarter 2007 have been implemented.

State Unemployment Forms: Date (02/2007)

Required changes for the 1st quarter 2007 have been implemented.

Tax Table Updates: Date (01/2007)

The following states have published changes for wages paid on or after January 1, 2007. Please note that these changes were announced and published after the 2006 year-end tax updates.

Colorado
Connecticut
D.C.
Massachusetts
Missouri
Rhode Island
Wisconsin
West Virginia

2007 – Federal and State Tax Tables: Date (12/2006)

Federal and State withholding tables and SUTA limits have been updated. These changes are effective for wages paid on or after January 1, 2007.

2006 – 1099/1096 Changes: Date (12/2006)

The 1099/1096 changes for 2006 have been implemented. The option to override 1099 minimums has been modified to allow easier selection of specific forms and amounts.

2006 – 940 Employer’s Annual FUTA Tax Return: Date (12/2006)

The 940 FUTA tax form for 2006 has been completely redesigned. The old 940EZ form has been deleted. A new “Schedule A” form has been added for employers using multiple states or filing to a state subject to credit reductions. Select the ‘Additional Help’ option from within this tax return program for a full listing of all changes and processing criteria.

944 – New Employer’s Annual Tax Return: Date (12/2006)

The new ‘Form 944 – Employer’s Annual Federal Tax Return’ has been implemented.

W2/W3 Changes for 2006: Date (11/2006)

Forms W2/W3 for 2006 have been updated. For a list of what's new in 2006, access the W2 program and click **'What's New for Tax Year 2006'**.

Active Service - Working Capital Needs: Date (11/2006)

'Working Capital Needs', a new Service Center business calculator, has been added. Your working capital is used to meet short-term obligations such as accounts payable and purchasing inventory. If your working capital dips too low, you risk running out of cash. Even very profitable businesses have trouble if they lose the ability to meet their short-term obligations. This calculator assists in determining working capital needs for the next year.


Active Service - Quarter Sales and Expense Graphs: Date (11/2006)

Two new Service Center web graphs have been added. Both the Ledger Sales and the Ledger Expense graphs are available in quarter-to-date formats.

Active Service - Transaction Type Summary: Date (11/2006)

A new Service Center overview called 'Client Write-up Transaction Summary' is now available. This overview summary is designed to quickly identify and total the number of transactions processed for each accounting client. The service displays a count of General Ledger transaction grouped by transaction type in a comparative year format including Month-to-Date, Quarter-to-Date and Year-to-Date columns. A 'Period Ending' date option is also included in this service.

EZ-Finder added to Review Accounts: Date (11/2006)

'EZ-Finder', a new search program, has been added to Review General Ledger. This handy utility makes it easy to find almost anything in General Ledger. To access EZ-Finder, click the EZ-Finder  icon from the Review Account screen. For more details on EZ-Finder, click 'Options' and select 'How to Use EZ-Finder'.

Update Batch Transaction: Date (10/2006)

Update Batch Transactions now includes a pop-up warning message if the batch to be posted is not in balance.

Support for QuickBooks 2006 added to QB Importer: Date (07/2006)

QuickBooks 2006 changed their data files from a proprietary format used since the early nineties to a protected SQL format. QB Importer now must rely on an external interface provided by Intuit for accessing QuickBooks 2006 data. Before using QB Importer to import QuickBooks 2006 data, the following is required:

- 1) QuickBooks 2006 must be installed on the workstation using QB Importer.
- 2) The company with the data to be imported must be open in QuickBooks 2006.
- 3) When QB Importer attempts to access the opened QuickBooks company file, QuickBooks 2006 will require you to grant authorization. The utility used by QB Importer to open the file is QBXML_Reader.
- 4) The transaction extraction process can take 10 to 20 times longer to run when compared to previous versions. To access QuickBooks 2006 data, software must now rely on the interface provided by Intuit. The Intuit interface is just not very fast.

A 'QuickBooks File Version' switch is used to indicate the version of QuickBooks data to be imported. If the QuickBooks file is 2006 or above, select 'Version 2006 or Newer'. If the QuickBooks file is 2005 or below, select 'All Versions Prior to 2006'.

State Unemployment Forms: Date (07/2006)

Changes in the 2nd Quarter 2006 for Texas and Kansas have been implemented.

New Employee SSN options: Date (06/2006)

'Add New Employee' now prompts for the Employee SSN. SSN's are formatted to XXX-XX-XXXX automatically. Additional checking for duplicate numbers is provided. A link to the Social Security Administration's Online Services for additional SNN verification needs is also available.

Print Financials - Prior year date range: Date (03/2006)

You may now use prior year dates in financial statement columns designed to ask for specific date ranges at print time.

Form 941: (03/2006)

Changes for the 1st quarter 2006 have been implemented.

New Federal Tax Deposit Amount: Date (02/2006)

The amount of Federal Tax Deposit has been added to the end of the Detailed Tax Report when printed in MTD, QTD, or YTD formats.

Tax Table Updates: Date (12/2005)

Updates State and Federal Withholding Tables effective January 1, 2006 (PRTABLE.CDN, CWTABLE.CDN)

Running Balances - Batch Transactions: Date (11/2005)

A new option called 'Running Balances' has been added to Record Batch Transactions. Selecting this option will display a batch listing that includes a running balance for each transaction and for the complete batch.

W2/W3 Changes for 2005: Date (11/2005)

Form W2/W3 generator has been redesigned for 2005. For short list of what is new in 2005, access the W2 program and click **What's New for Tax Year 2005**. For a complete detailed list of all Form W2 options, click **How to Prepare and Print W2/W3 Tax Forms**.

1099/1096 Changes for 2005: Date (11/2005)

Form 1099 generator has a simplified wizard that supports Form W2-Misc. and Form W2-INT. New 409A deferrals support new edits for state wages and 409A income.

940 2005 Changes: Date (11/2005)

Updated the Form 940EZ generator for 2005 to include third-party preparer information. Notice that the \$100 minimum for quarterly liabilities has been changed to \$500 for 2005.

Review Ledger Accounts - New Layout: Date (06/2005)

The Audit Detail drilldown window for Ledger Accounts has been reorganized for easier use.

QuickBooks Interface - Updated: (03/2005)

The QuickBooks Interface has been updated to include support for QB 2005.

941 Revisions: Date (03/2005)

2005 Form 941 has been completely redesigned to comply with the new changes handed down by the IRS. The form is now two pages in length. The 941 form interface has also changed to a "form generator" style. For more specific information on these changes, please refer to your 941 help documentation accessed from within the new 941 program.

Quarterly State Forms: Date (03/2005)

First quarter updates have been added for a majority of states in the Quarterly State Forms program.

Post Batch Transactions - Account Detail: Date (03/2005)

Post Batch Transactions now includes an option to track the balancing account detail for batch transactions. To activate this feature, click 'Track Balancing Account Detail'.

Record Batch Transactions - FICA/Medicare Calculation: Date (03/2005)

Summarized Payroll entries within the batch now include an option to automatically calculate FICA and Medicare. To use this option, from the summarized payroll window, enter your standard and overtime wages and then click 'Calculate FICA'.

BANK RECONCILIATION**Expanded Statement available during Reconciliation: Date (07/2007)**

The calculated bank statement available during reconciling can now be copied to the Windows Clipboard and printed. To copy the statement, click **Review Statement** and then click **Copy**.

Import cleared checks from bank: Date (11/2006)

You can now download a transaction file from your banking institution; and use it to assist in account reconciliation. The system will mark checks that have cleared only if both the check number and the check amount from the bank file match your CertiflexDimension bank reconciliation records. This option is for cleared checks only.

Popular bank statement formats supported are:

- Open Financial Exchange Files (OFX File Extension)
- Quicken Web Connect Files (QFX File Extension)
- Quicken Interchange Format Files (QIF File Extension)
- Tab Delimited Text File

To use this feature, download and save the transaction file from your bank. From within Bank Reconciliation 'Record Transactions', select Reconcile, Options and Import Cleared Checks. Choose the downloaded file and the program will automatically mark all checks that have cleared your bank.