

Transaction Recovery Systems, Inc.

TABSIII Task Code Billing using Convascf Program

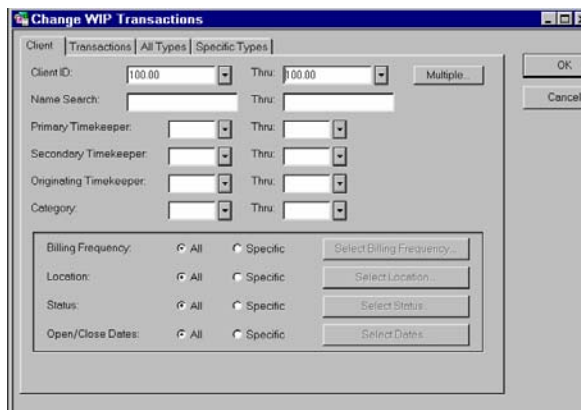
Many firms using TABSIII are moving to the "Task Code Billing" format as required of many of their clients - primarily insurance companies.

The Customer using the Convascf program can still achieve Task Code Billing, while those that are non-task based billers are unaffected.

This can be accomplished by changing the Work-In-Process transactions. To do this, import the ADD-4 transactions as usual using the File |Export|TABS feature, creating the TABS3.ASC file. Do the Integration|Merge Data Capture Trans. routine. Print the error log. Ignore the error messages received on the Error Report listing (37 = Task based billing code not provided). You may also get the error message "87" after performing the Data Integrity Check - also indicating the lack of Task Codes. Ignore this message.

Next, go to Change WIP Transactions.
Choose the Client or Client range to apply the changes to.

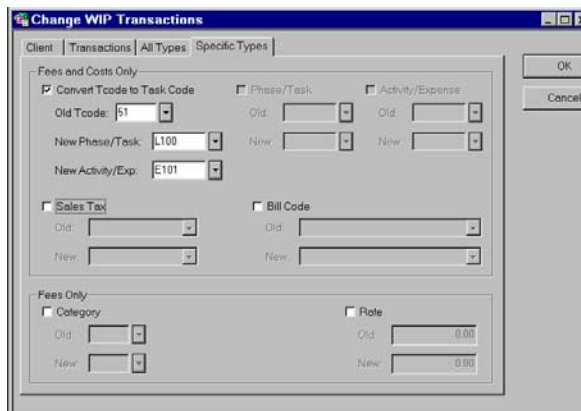
Note: The procedure can be sped up by leaving the Client ID. range blank, and applying the Task Code to the entire client-matter range. Those that use Task Codes will receive the applicable Task Code; those that do not use Task Codes are unaffected.



The screenshot shows the 'Change WIP Transactions' dialog box with the 'All Types' tab selected. The 'Client' section has 'Client ID' set to '100.00' and 'Thru' set to '0.00.00'. Below this are fields for 'Name Search', 'Primary Timekeeper', 'Secondary Timekeeper', 'Originating Timekeeper', and 'Category', each with a 'Thru' field. At the bottom, there are radio buttons for 'Billing Frequency' (All, Specific), 'Location' (All, Specific), 'Status' (All, Specific), and 'Open/Close Dates' (All, Specific), each with a corresponding 'Select' button.

Then choose Specific Types and check Convert Tcode to Task Code, as shown below.

If you are entering postage, fax or other expenses into the ADD-4, change all Tcodes to the applicable Task Codes for each type of expense. Click OK.



The screenshot shows the 'Change WIP Transactions' dialog box with the 'Specific Types' tab selected. Under the 'Fees and Costs Only' section, the 'Convert Tcode to Task Code' checkbox is checked. Below it are fields for 'Old Tcode' (51), 'New Phase/Task' (L100), and 'New Activity/Exp.' (E101). There are also checkboxes for 'Phase/Task' and 'Activity/Expense'. Below that are 'Sales Tax' and 'Bill Code' sections with 'Old' and 'New' fields. At the bottom, there are 'Fees Only' sections for 'Category' and 'Rate' with 'Old' and 'New' fields.