EasyTABS Clinic

A Virtual Administrative Front Office for the Independent Massage Therapist

Developed in Canada for Canadian Massage Therapists

(Also used by Therapists from other English Speaking Countries)

User Manual

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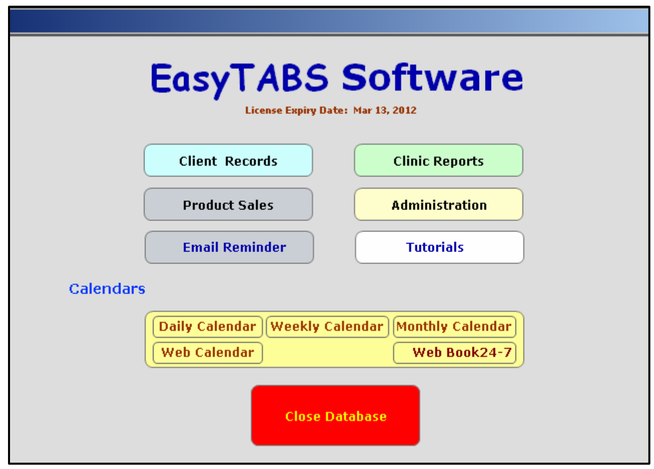
EasyTABS Clinic Software

Introduction

EasyTABS has been developed to provide Massage Therapists with an Electronic Records Office Management solution. By managing clinic and client records electronically, **EasyTABS** ensures that a therapist is using modern, efficient and exact record management techniques.

Home

The software opens to the Home screen.



EasyTABS opening screen

Overview

EasyTABS contains the following Tables:

- **Administrative Table**
- **Contact**
- **Health History**
- **Client Notes**
- **Receipts**
- **Client Assessment**
- **Graphics**
- **Letters to Client**
- **Letters to Others**
- **Flag System**
- **Internal Calendar**
- **Web Calendar**
- **Product List**
- **Product Sales**
- **Expenses**
- **Inventory**
- **Email Messaging**
- **Birthday Email**
- **Gift Certificates**
- **Self Care Manual**
- **ToDo List**

Functions of these Tables

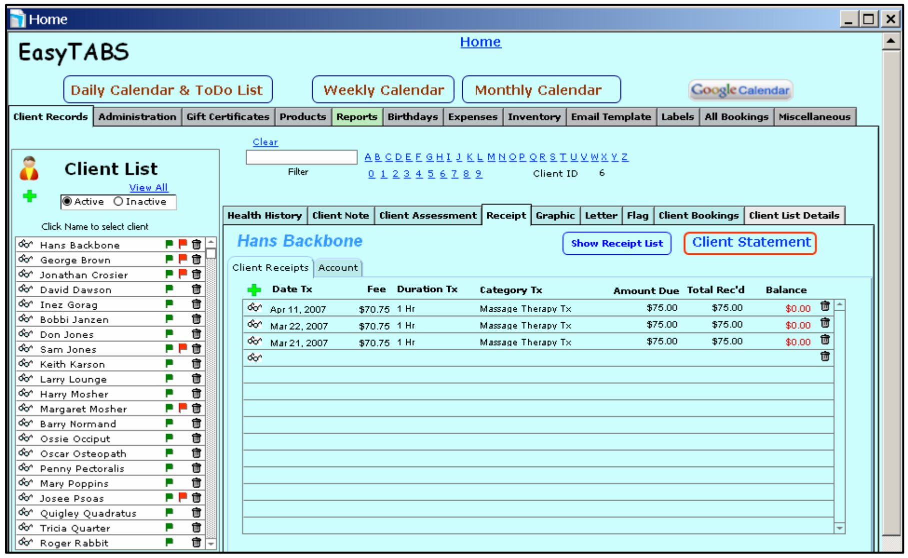
- **Contact** - Contains a list of all of your clients
- **Administrative** - Allows you to personalize the software for your clinic
- **Health History** - Contains records pertaining to the client health history
- **Client Notes** - Allows you to create and manage individual client records chronologically
- **Receipts** - Create and manage client receipts; generate Client Statements
- **Client Assessment** - Used by some therapists to record ROM, etc.
- **Graphics** - Available only in the Windows platform, this table provides four views of the human body which you can “mark up” with colour, marks, etc.
- **Letters to Clients** - Preformatted letters to clients
- **Letters About Clients** - Preformatted letters about clients
- **Flag System** - Flag a condition or service for a client and have the flag popup whenever you book the client using the Internal Calendar
- **Internal Calendar** - An appointment booking calendar, internal to the program. Provides Daily, Weekly and Monthly Calendars.
- **Web Calendar** - A web-based calendar is available for those who want to have access to a Calendar using the web. However, it is NOT CONFIDENTIAL
- **Product List** - Create and Maintain a list of products you sell from which invoices can be created
- **Product Sales** - Create invoices for the sale of products. This table is linked to the Product List so that a running total of the quantity for each item is maintained. Flags notify you when the supply drops below a preset quantity.
- **Expenses** - Enter and Track expenses for your clinic. Create reports that summarize your expenses. Grand Totals are available by Year or by Month
- **Inventory** - Create and maintain an inventory of capital inventory such as computers, tables, chairs, desks, etc. Grand Totals are available by Year or by Month
- **Email Messages** - Create email templates that you can use to send to clients regarding special events, occasions, etc.
- **Birthday Email** - Set a default to search for birthdays in the current week. Then send a personalized email message of congratulations
- **Gift Certificates** - Create gift certificates, gift certificate receipts and track gift certificate redemption
- **Self Care Manual** - A self care manual, developed by Doug Alexander, can be part of your software package for a small increase in yearly fees. You will need to be connected to the internet to access this feature
- **ToDo List** - The ToDo list always you to enter tasks that you want to remember to do. The Due Date, Title, Description (in which you can, for example, enter a person’s name to remind you to call her/him) and Telephone Number, Completed radio button, which triggers the Date Completed auto-entry
- **Colours** - This table is used in the Event Entry Form to provide users with the opportunity to colour-code the events that are booked.

Getting Started – The Basics

1. Set up the **Administrative** table first so that records you create reflect information that pertains to your clinic. Then click on the **Home** button (Top of the screen)
2. From the **Home** screen, go to **Client Records**
3. **Create a client record** by clicking on the green + sign beneath the person icon on the left of the screen. A new screen pops up in which you enter the contact's first name and last name. (That is all you actually have to enter to start creating records fro this contact)
4. Fill in as much info as you have (or that you want to enter right now)
5. Click “Close” (top right on the screen)
6. You now see the contact name in the “portal” (a portal is just a “window” that looks at records from a different area or table)
7. The eye glass icon on the left of the portal row can be used to go back to the data entry screen that you just left (If/when you need to go there)
8. Click on the name that is in the **Client List** portal – it becomes the “current” record
9. Now looking at the tabs to the right of the Client List, you see “**Case History**”, “**Client Notes**”, “**Client Assessment**”, “**Receipt**”, “**Graphic**”, etc. When you click on one of those tabs, all of the records for the current client are displayed. Initially, course, there are no records. So you create a record by using the green + sign.
10. Click on the **Case History** tab, and then on the green + sign. A new window pops up displaying fields that pertain to the **Case History** table. There are two tabs at the top of this screen indicating that there are two screens for this topic. You can complete this screen with the client, or you can print off blank copies (use the icon “Print Hard Copy) for the client to fill out on her/his own)
11. After completing that screen, click the “Close” button, top right.
12. You can now select another tab. **Client Notes**, or **Receipt**, for example. Click the green + sign again and a record for that table is created.
13. Using these tabs, you can create, manage and print client records very quickly/easily. Refer to the rest of the manual to get more details as you need them.

Tabs

Tabs are often used in **EasyTABS** to move from one view of data/information to another. When the button “Client Records” (on the Home Screen) is clicked, you are first taken to a screen resembling the screen shot below.

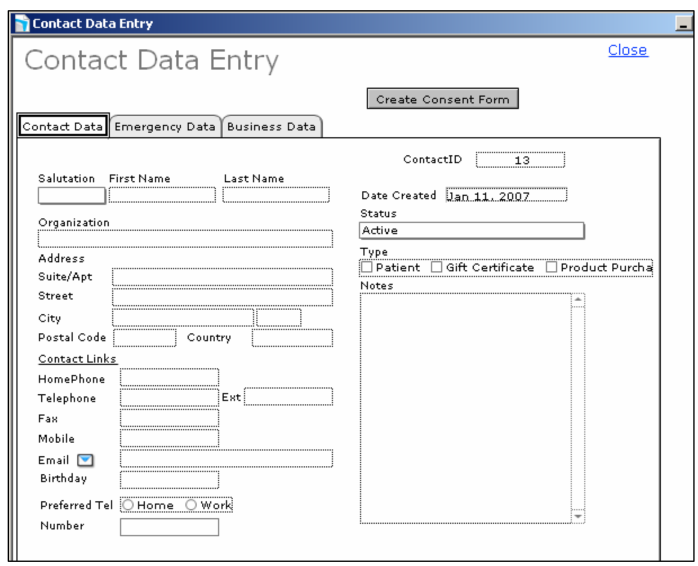


The “Client Records” tab has been selected. There are several more tabs across the top of the screen on the same level as the “Client Records” tab. These other tabs, when selected, change the display of the data being viewed. However, whenever the “Client Records” tab is “active”, you will see the screen above.

Let’s go over what is on this screen.

1. Client List – left side. This is a “portal” that allows you to view all of the client records in your database. There are 21 names visible at any one time.
2. **To create a new client record**, click the green + sign just below the graphic of the person. This will create a new client record and pop up a screen wherein you can enter all of the appropriate information. Within the Contact Entry Form are two more tabs that will display the input fields for Emergency Data and Business Data

   To return to the Client Records portal, select the “Close” button.



3. When back at the Client Records portal, you can view the data for an existing client by selecting the “eyeglass” icon to the left of the client’s name. Clicking that button will display the existing data and allow you to add/delete/modify the data.
4. To “filter” this list and see only some of the names, you click on the letter of the last name (using the alpha list provided). This will insert the letter into the filter field. Immediately the portal on the left is filtered to display only the names of those clients whose first OR last name begins with that letter. If the resulting list is still “too long”, you can use the scroll bar on the left of the portal, or you can increase the character left being used for the filter by placing the cursor in the Filter field and typing in the next 1, 2 or more letters in the first or last name.
5. After having filtered the list to meet your needs, click on the name of the client whose record(s) you want to view and/or use. That person’s name will appear in blue text at the top of the portal on the right portion of the screen. **This client’s name indicates that he/she is the “current client”. As you select the various tabs across the top of this portal, all lists that appear will s you select the various tabs across the top of this portal, all lists that appear will pertain to that “current client”.** That is, when you click the “Case

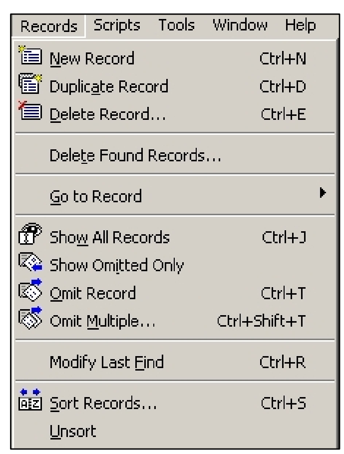
History" tab, any records that get displayed are records for this "current client". If this client does not yet have a "Case History" record, the list will show no data. To create a new (first) Case History record, merely click the Green + sign. A screen will pop up to allow you to enter data for that client. When you have finished with this Case History record, click "Close" to return to the original portal window.

6. All other tabs across the top of this portal will display only data/records for the "current record". This feature allows you to select one client, pop up the appropriate data entry screen for the selected tab, close that window, select another tab and pop up the applicable data entry screen. There is **one tab** for which the above does not apply – **Client List Details**. This tab displays all of the clients in the database very similar to the Client List portal on the left of the screen. The difference is that this portal displays more details. It gives phones numbers, email address and Date of Birth. This allows you to gain access to data that is used often (phone numbers, email, etc) without having to "pop up" the complete client Data Entry Form.
7. **Sort Order** -The list of records for each of the tabs has been set as "reverse order by date of creation". This means that the most recent record is the first one that appears in the list.
8. **Flags** - The Flags tab allows you to pop up a window here you can record data/information about the client that is particular to the treatment. (It is understood that the CMTO regulations say that any information recorded must be applicable to the treatment the client receives. Apparently this precludes the recording, for example, of the condition of the client's pet unless the pet's condition can be seen to be having an impact on the treatment the client needs). Notwithstanding CMTO regulations, whenever a flag note is created, a red flag will appear in the Client List portal. This provides you with a visual reminder that this client has a note (or notes) that may bear considering. The flag will appear as long as there are ANY notes pertain to this client.

Deletion of Client Records

1. A Client Record can be deleted from the database in a number of ways. The most efficient method is to delete the record from the Client List portal.
2. A **Warning** dialogue box appears whenever you attempt to delete a record
3. **Warning! The deletion of a record from the Contact table will result in ALL records for this client in every table being deleted. THIS ACTION CANNOT BE UNDONE**. For this reason, when you attempt to delete a record from the Contact table, you will be given three warnings.

Deletion of records in General

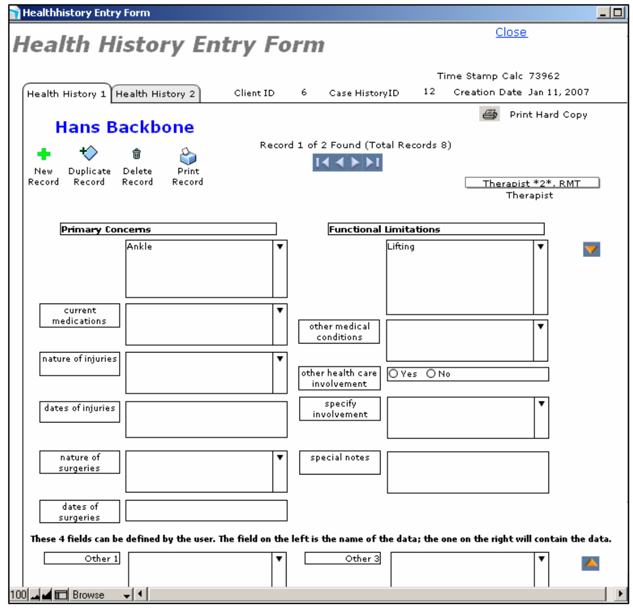


1. The deletion of a record in general is not subject to such ominous results. To delete a record from any portal OTHER THAN THE CONTACT LIST PORTAL will result in the deletion of only that one record.
2. Even so, the deletion cannot be undone. Once you have read the pop up warning, the next Delete step will cause the record to vanish forever.
3. When deleting records that are not displayed in portal, you must be careful.
4. The graphic below shows a dropdown menu from which a deletion can be carried out. Note that there are **two** opportunities to select a phrase with the word "Delete" in them. One is "Delete Record". This deletes the current record only. The other is "Delete Found Records…". When that option is selected, **all records that are part of the 'found set' will be deleted**.

5. One way to avoid this possibility is to use the keyboard commands. The key stroke “Ctrl+E” will delete only the current record. Fortunately, this action will always produce the warning dialogue box. Therefore it is not possible to strike “Ctrl+E” and have a record disappear without a warning.

Other Client Records Tabs

Case History



The Case History tab displays the case/health history records for the current client. The records are displayed in reverse order sorted by creation date.

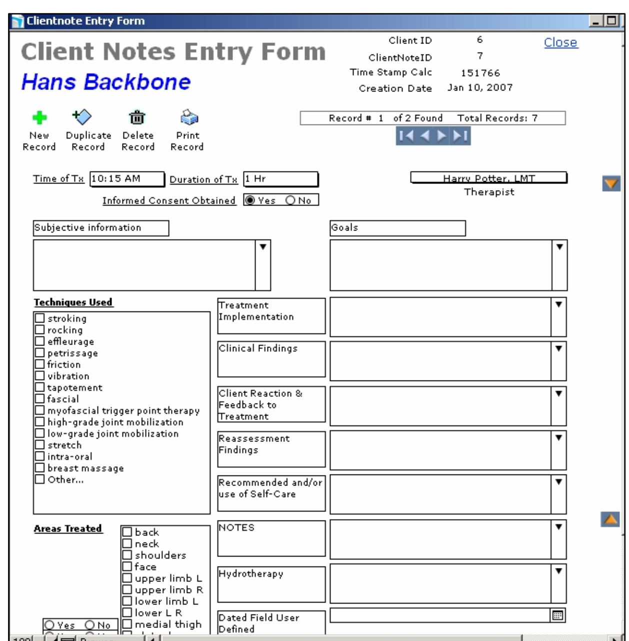
To view a current record, click on the eyeglass icon

To create a new record, click on the green + sign.

The screen shot below shows what the screen looks like. Several of the fields have small arrows to the right side of the box. Click the arrow to view the pop up options. You can select from the existing list, select “Edit” to change the list, or type directly into the field without selecting one of the pre-set options.

Note that there are two tabs in the Case History table. Merely click on the second tab to display the fields for that tab. In both tab displays, there are additional “User Defined” fields. These are fields that you may or may not want to use. Note that the field name is “global”. That means when you name a field, it will be named with that text for every record that you create.

On the left side of the Health History 1 screen are 4 icons: “New Record”, “Duplicate Record”, “Delete Record” and Print Record”. The “Duplicate Record” icon is extremely useful when a client’s yearly review suggests that there are few changes in the data. Merely duplicate the existing record and amend the information to reflect the latest situation. The new record will be created with the current date. It will be displayed in the “Client Records/Case History” tab as the top record.



On the right side of the screen you will see an icon labeled “Print Hard Copy”. Use this button to print the 2 pages from which you can make copies if you prefer to have your clients complete the form in the waiting area.

When you have finished with the data entry for the Case/Health History, click the “Close” button to return to the main “Client Records” screen.

Client Notes

The Client Note records are accessed and/or created in the same way as the Case History records are.

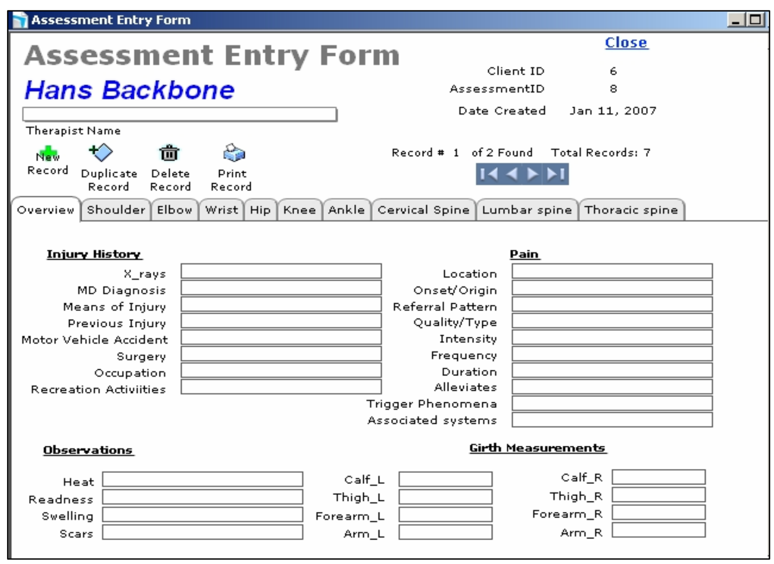
There is only one screen for the Client Note records. The pop up fields are used in the same way as they are for the Case History. Likewise, the buttons on the left side of the screen perform functions as indicated in their labels.

Although not displayed in the screen shot above, there are User Defined fields at the bottom of the screen.

The Time of Treatment, Duration of Treatment, Informed Consent Obtained and Therapist Name fields will need to be completed according to your jurisdiction..

Client Assessment

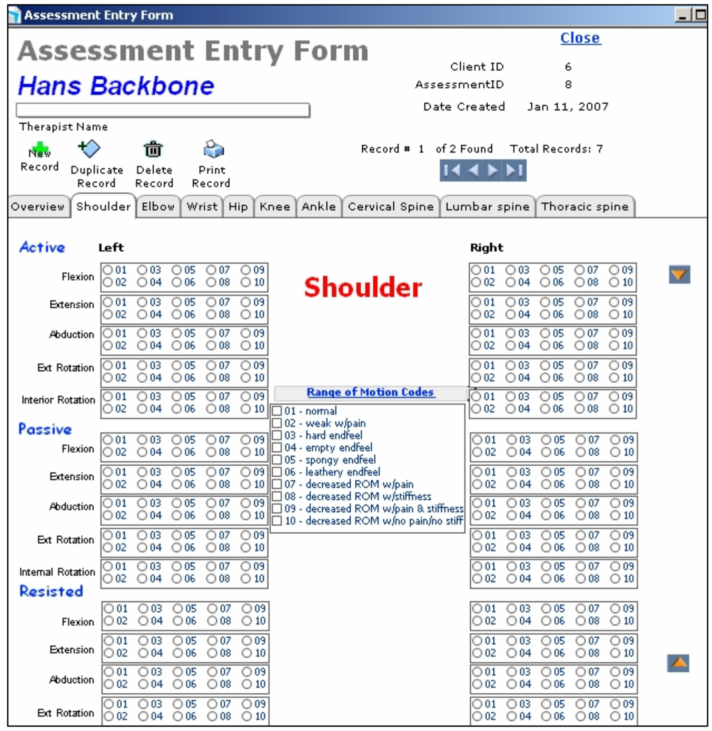
The Client Assessment table contains 10 screens. The Overview screen is shown here.



You can see the other 9 tabs that can be accessed easily.

Here is a screen shot of one of these other 9 screens

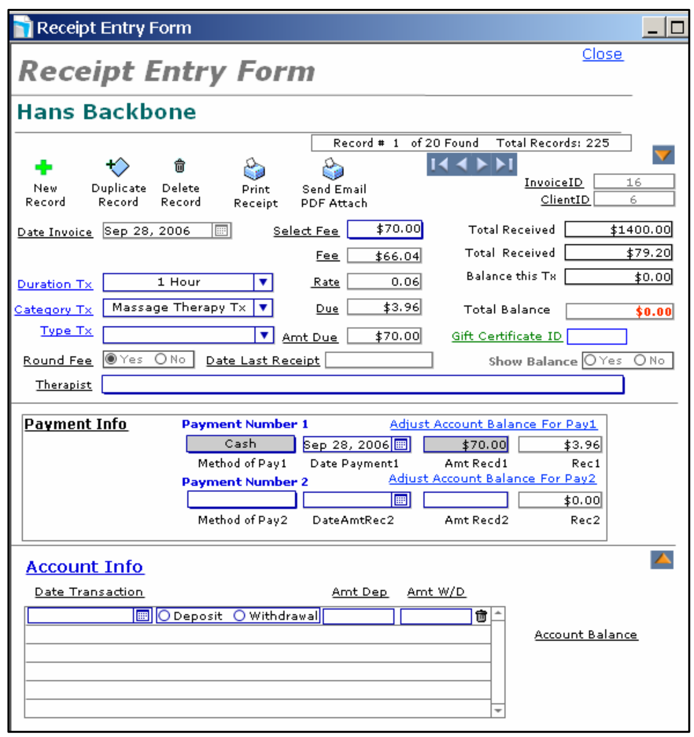
Note that the Range of Motion codes can be edited; however, the format of the text that replaces the existing text MUST be consistent with the original format. This means thate if, for example, you wanted to change the code “01 – normal” to “expected”, you would have to format the new text as “01 – expected”. The numbering system MUST be retained in order for the radio buttons to display properly.



Receipt

The Receipt tab will display all of the receipts for the current client in reverse order, sorted by creation date. This means that the most recent receipt will appear at the top of the list.

The screen shot below shows a newly created receipt. Some data has been entered automatically, based on the selections made in the Preferences tab in the Administration section



The following features have been included in the Receipt form.

- Category of Treatment – the text selected here will be the text that is inserted on the printed receipt. This allows you, for example, to select Massage Therapy Tx for a treatment that could be claimed from a benefits plan and a “Gift Certificate” selection for the purchase of a Gift Certificate (that, of course, cannot be claimed from a benefits plan.
- Select Fee – this amount is an amount that you select. If you have chosen “RoundFee” in the Preferences table, the software will calculate the amount of fee that needs to be entered in order for the end result Amount Due to be a “round fee”. However, if you have chosen “No” to the “RoundFee” option, the Select Fee is the Fee that you are charging for the treatment. Taxes that apply in your jurisdiction are then added

to the Select Fee to give the Amount Due. (In the above shot, the therapist has select "No" to "RoundFee"; the Amount Due becomes $79.50.

- Payment – There are two Payment Date options. This allows you to collect part of the payment at one time and the remainder at another time. As soon as the Method of Payment is selected, the current date is entered automatically. (If the date of payment is not the current date, merely select the appropriate date using the pop up calendar provided).
- If you are a single user in your clinic, make sure you select your name in the Default Settings pop up. This will result in your name and data being entered automatically in any receipt that is created.
- If there are 2 or more therapists using the software, you can choose to have one of the names entered automatically (And then any therapist other than the one selected will be required to select her/his name for each receipt created), or you can leave the Default Selection blank, where by all users will have to select the appropriate name whenever a receipt is created.
- There are 4 values displayed at the top right of the Data Entry screen. Total Received, Total GST Received, Balance this Tx and Total Balance. Total Received displays the total amount that has been received from this client; Total GST Received is the total GST amount received for the current client; Balance this Tx gives the balance owing for this current treatment; and the Total Balance shows the total owing for this client. **These data are for your convenience. They do not get printed on a receipt.**

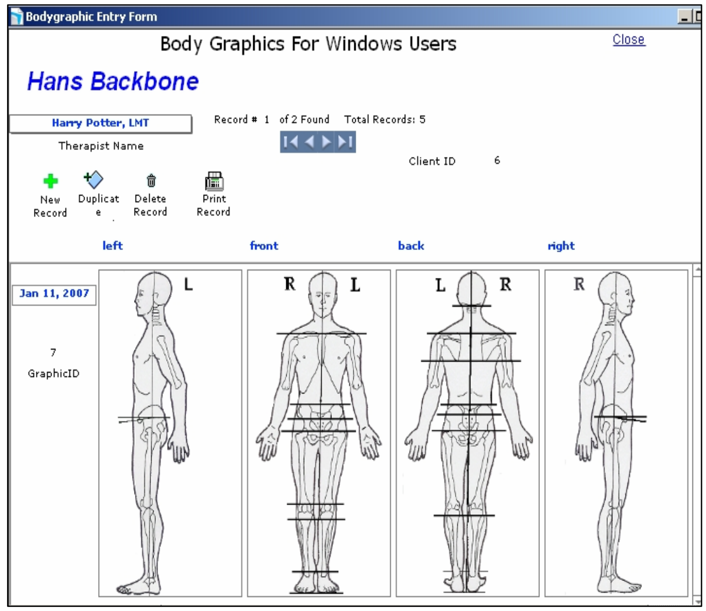
- Account – To address requests from a number of therapists, an Account table has been included. This table works as follows:
  - Client pays for several treatments with one payment (usually in advance)
  - You enter the day's current date in the Account portal followed by selecting the Deposit button from the Type of Transaction field; then the Amount of the deposit
  - When the client receives a treatment, you fill in all fields normally. In the Method of Payment field, you select "Account".
  - Click the button Adjust Account Balance For Pay1, (or Adjust Account Balance For Pay2, depending on which Payment field is being used) to adjust the Account balance. The transaction is recorded in the Account table, and the portal on the Receipt Entry Form shows the results of the transaction.
  - The Account Balance is displayed to the right of the portal.
  - When the Receipt is printed, all information that is appropriate for the treatment is displayed on the receipt, giving a professional form that can be submitted from a benefits carrier.

- Send Email with PDF Attachment – **This feature is available ONLY with FileMaker Pro full License. It is NOT AVAILABLE in the Runtime solution**

  In the **"FileMaker Pro" version,** using the button "Send Email PDF Attach", you can send an email message to the email address of the current record. The software grabs the relevant data and inserts it into an email message. It also saves a copy of the PDF in the folder "PDF_Records", which is stored with the program. (Usually this is at C:\Program Files\MTR\EasyTABS\PDF_Records in the Windows version; the Macintosh version will have been stored according to the Users own selection)

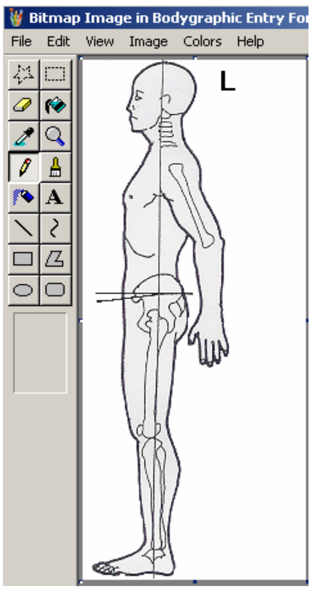
Graphics

The Graphic table is available for Windows users only. Macintosh does not support bmp format, which is required to perform the modifications that are needed in the figures.



The four views of the body can be modified (Windows Users) by double clicking the graphic.

The Bitmap Image shown below pops up. You can use the tools from the toolbar on the left to 'mark up' the graphic. A colour palette (Not shown in this screen shot) is available to provide colour options.



The magnifying glass provides you with the opportunity to increase the size of the figure so that more accurate 'mark ups' can be made.

After a few practice sessions, you will be able to manipulate these figures quickly.

Features:

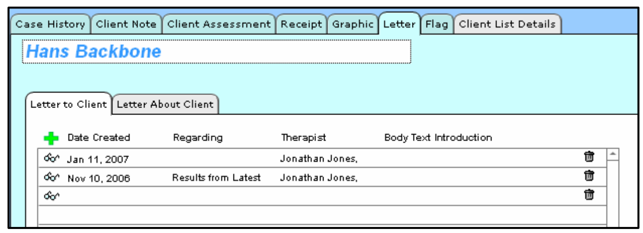
i) If an error is made in the work on one of the graphics, merely click on the text button (left, right, back or , front) located just above the graphic. This will provide you with a new graphic for that view only, leaving the other 3 views unmodified.

ii) You can duplicate an existing graphic using the duplicate button. This is very helpful if you want to modify only one or two of the views from a previous entry.

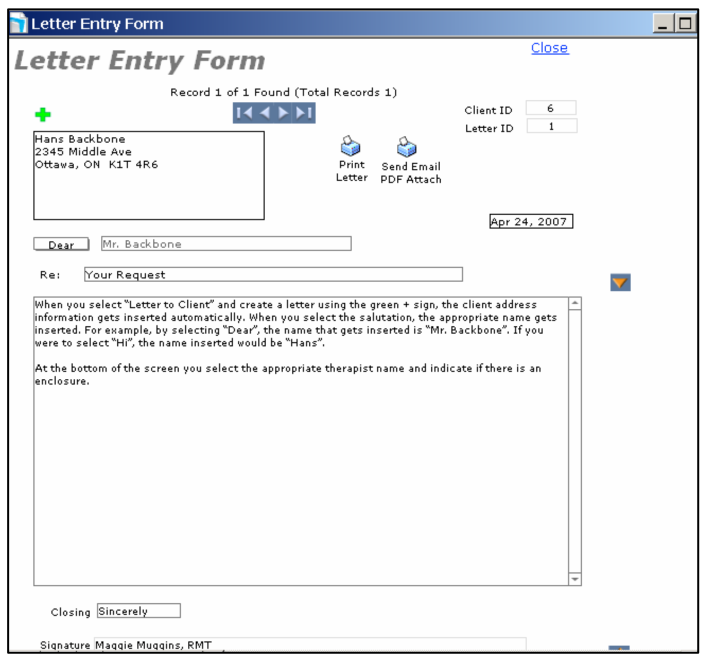
iii) You can move back and forth between graphics records by using the arrows located in the middle of the screen at the top.

<u>Letters</u>

The screen shot to the right shows the Letter display. Within it, there are two tabs: “Letter to Client” and “Letter About Client”. By providing these two options, you can more quickly and more accurately created letters appropriate to your need.



Letter To Client

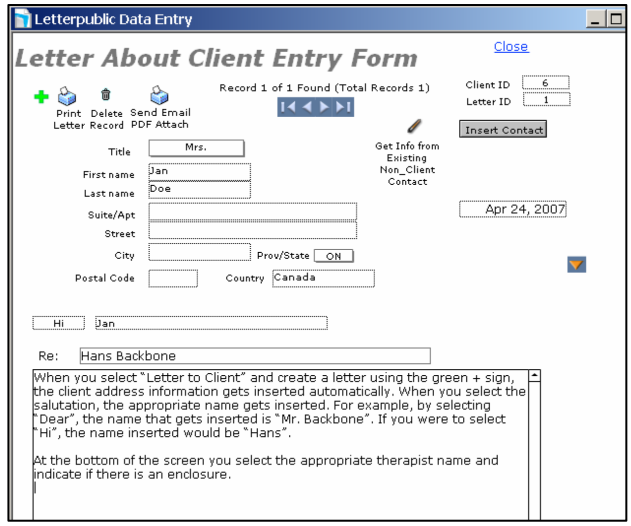


When you select “Letter to Client” and create a letter using the green + sign, the client address information gets inserted automatically. When you select the salutation, the appropriate name gets inserted. For example, by selecting “Dear”, the name that gets inserted is “Mr. Backbone”. If you were to select “Hi”, the name inserted would be “Hans”.
At the bottom of the screen you select the appropriate therapist name and indicate if there is an enclosure.

Note that you could “pop up” a previous letter to a client (Using the eyeglasses icon) and then create a new letter from this screen.

<u>Printing the Letter</u> – You can print the letter or you can send the letter as an attachment to an email message. In the PDF Attachment process, the software grabs the relevant data and inserts it into an email message. It also saves a copy of the PDF in the folder “PDF_Records”, which is stored with the program. (Usually this is at C:\Program Files\MTR\EasyTABS\PDF_Records in the Windows version; the Macintosh version will have been stored according to the Users own selection)

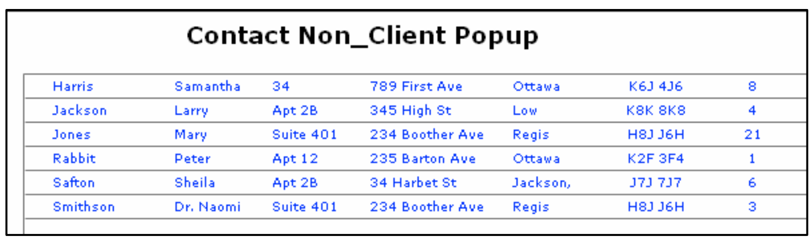
Letter About Client



When you want to create a letter about a client, you use the tab "Letter About Client". When the letter gets created, the field "Re:" gets filled in with the client's name.
(In the process of creating this letter, a dialogue pops up to ask if you want to enter the data into a blank form or do you want to use an existing name. The screen shot to the right was created by the latter method – a blank form).

You then enter the information regarding to whom the letter is being sent. When it has been completed fully, you can add this person to your Letters Contact List by selecting "Insert Contact". The program will than create a new contact for your Letters table and place the data you have entered into the appropriate fields. If you do not want to add this person to your list, just leave it as it is without clicking the "Insert Contact" button.

Printing the Letter – You can print the letter or you can send the letter as an attachment to an email message. In the PDF Attachment process, the software grabs the relevant data and inserts it into an email message. It also saves a copy of the PDF in the folder "PDF_Records", which is stored with the program. (Usually this is at C:\Program Files\MTR\EasyTABS\PDF_Records in the Windows version; the Macintosh version will have been stored according to the Users own selection)



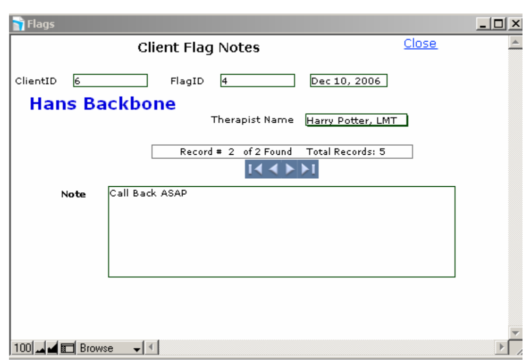
Contact Non_Client Popup

Harris	Samantha	34	789 First Ave	Ottawa	K6J 4J6	8
Jackson	Larry	Apt 2B	345 High St	Low	K8K 8K8	4
Jones	Mary	Suite 401	234 Boother Ave	Regis	H8J J6H	21
Rabbit	Peter	Apt 12	235 Barton Ave	Ottawa	K2F 3F4	1
Safton	Sheila	Apt 2B	34 Harbet St	Jackson,	J7J 7J7	6
Smithson	Dr. Naomi	Suite 401	234 Boother Ave	Regis	H8J J6H	3

When the Insert Contact Button is used, a screen pops up to show the data that has been entered and allows you to enter other info such as telephone numbers and email address.

If in the process of creating this letter you chose "Existing", a list of existing contacts from the letter contact table is displayed. The screen shot to the right shows a sample list. Merely click the name of the person to whom you are directing the letter and all of the info relevant to that contact will be inserted into the fields in the letter.
Complete the letter as need/desired. Click "Print" to complete the process.

Flags



The "Flag" table provides you with a means of recording info that is treatment specific for individual clients.

You can navigate (browse) between various 'flags' for the current client by using the buttons just above the text of the note.

The first few words of the text are displayed in the portal on the Client Records/flags screen.

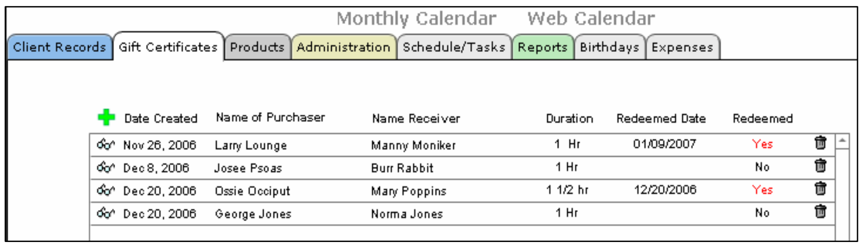
On the **Client Records/Client List** portal, a red flag appears for each client for whom a flag text has been created. This provides a "heads up" for the therapist to check the Client Records/flags screen.

In addition, a red Flag appears in the Calendar on Daily & Weekly layouts. It also appears in the screen used to entry appointment details. In each display, you can jump to the applicable person's "Flag" by clicking on the flag itself. After viewing/reviewing the information, merely click "Close" to exit that screen.

Non-Client-Specific Tabs

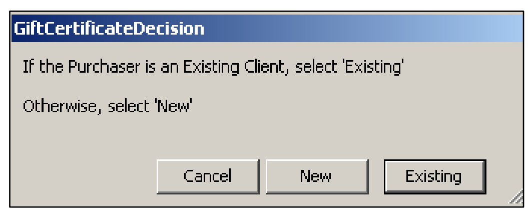
On the main Client Records screen which displays the client list along with many other tabs, the first tab at the top left is the Client Records tab. When that tab is active (that is "selected"), all information in the second row of tabs refers to the client that has been made "current". That is, when a client name is selected from the Client List portal, all info that gets displayed as you tab across from Case History, to Client Notes to Client Assessment, etc., is information that pertains to the selected client.

When you tab away from the Client Records tab at the top left (say, to Gift Certificates), the information displayed is no longer related directly to a "current client". This means that the information in the Gift Certificate portal "stands alone" in that you can have records displayed there that are not part of the Contact table.



This portal shows the date created, name of purchaser, name of receiver and duration. When the Gift Certificate is redeemed, you can insert the current date into the field "Redeemed Date" and the field "Redeemed" displays "Yes" in red text. Note that you cannot type or select "Yes" directly – you must enter a date to trigger the "Redeemed" flag to display "Yes". (The easiest way to insert the date is to use the keyboard – place the cursor in the "Redeemed Date" field and select "CTRL –" from the keyboard). In addition, on the Receipt Data Entry screen, there is a field in which you can insert the Gift Certificate ID. Then, by clicking the text "Gift Certificate ID", the current date is inserted into the Gift Certificate Date Redeemed field.

To create a new Gift certificate record, use the green + sign. To display an existing record, select the eyeglass icon in the appropriate portal row. When you click the green + sign, this decision box pops up. If the purchaser is an existing client, select "Existing"; if the purchaser is a new client, select "New". Of course, to cancel the process, select "Cancel".



Existing Client

When the "Existing" option is selected, the screen to the left pops up displaying the Contact list. Browse/find the client name desired and click on that name. The appropriate information about that contact is recorded and then inserted into the appropriate fields in the second screen shot to the right.

In this case, Quigley Quadratus was selected as the purchaser of the Gift Certificate

(Note that when the popup list is very long, you can "filter" the list using the alpha list at the top of the screen).

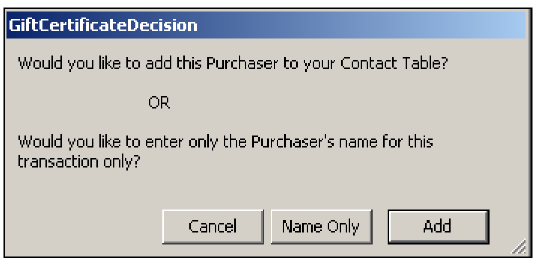
If you had selected New in the decision box on the previous page, you would have arrived at this screen having empty fields where Quigley's dada is now displayed.

If that happens, and you change your mind and want to access the popup Contact info shown above, use the "Pencil" icon labeled "Get Info from Existing Contact". The popup above will appear and you can select the name from the list.

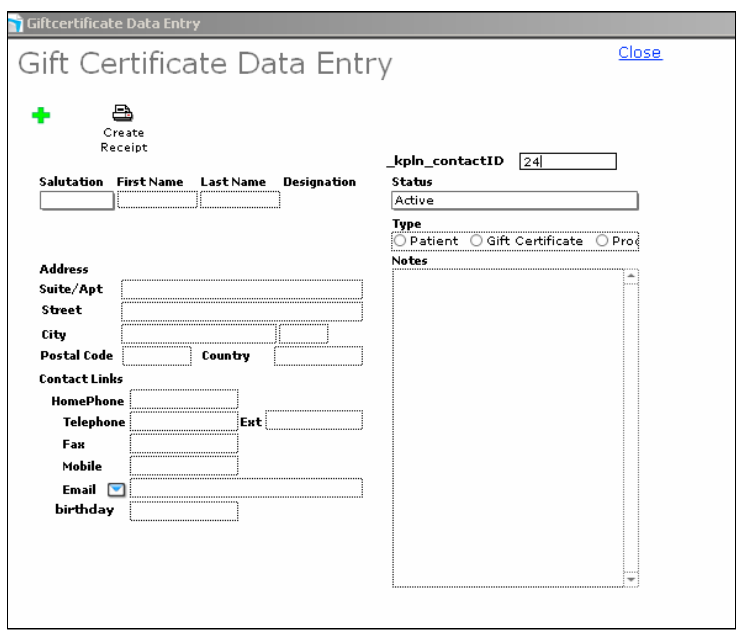
If you arrive at the popup and discover that the person whose data you need in fact is not an existing client, merely click the "Close" button in the popup window.

New Gift Certificate Contact

If you need to create a new Gift Certificate Contact, the decision box below will popup.



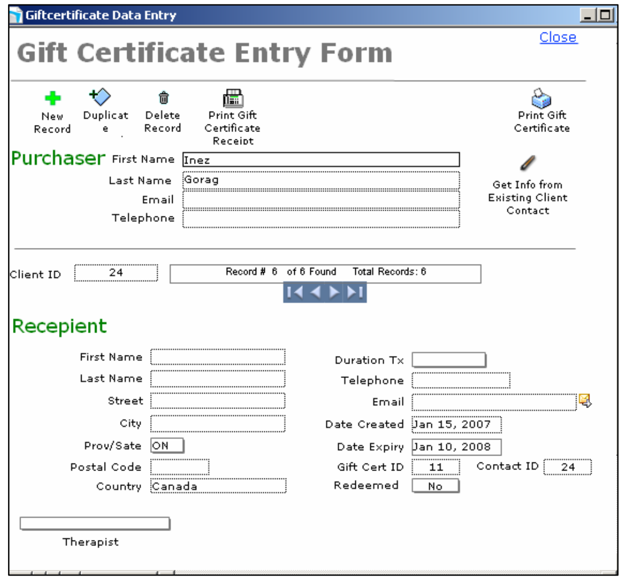
You can then decide whether or not you want to add this new contact to your database or just enter the person's info for this transaction only. In the former case, you will end up with a new Client Contact Record; in the latter case, you will not have access to this person's data for future Gift Certificate purchases..



If you choose "Add", a Gift Certificate Data Entry screen will popup (See next page). This screen allows you to enter information that you will need to complete the Gift Certificate record. However, it does not contain fields that you would need if this person were a client for a massage treatment. Should this happen (that eventually the person becomes a client), you would need to access the person's data from the Client List portal on the opening screen. Using the eyeglasses icon, you would be able access a screen that would provide the added fields that are required by governing colleges.

In point of fact, there is much more info on this screen than you would require to complete the Gift Certificate record. All you would really need is the person's First and Last names. The other fields need only be completed if/when this person becomes a massage client.

Creating the Gift Certificate Receipt



After having filled in the information in the Gift Certificate Entry Form, click "Create Receipt" to popup a second Gift Certificate screen (Shown beneath the one to the right.)

In this screen, complete the form as appropriate, including the Recipient's First and Last Names, the Duration of the Treatment, the Therapist name and any other information that you would like to retain about the Purchaser and/or the Recipient.

The Expiry Date is entered based on the information that was entered in the Preferences table.

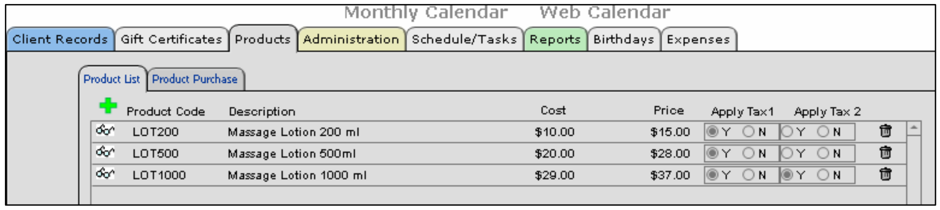
When all information has been entered, you can print the gift certificate (icon labeled "Print Gift Certificate") on the left of the screen) or print the receipt (click the icon that is labeled "Print Gift Certificate Receipt").

A sample of what the certificate will look like is shown to the right. There is more data at the bottom of the screen that has not been displayed here.

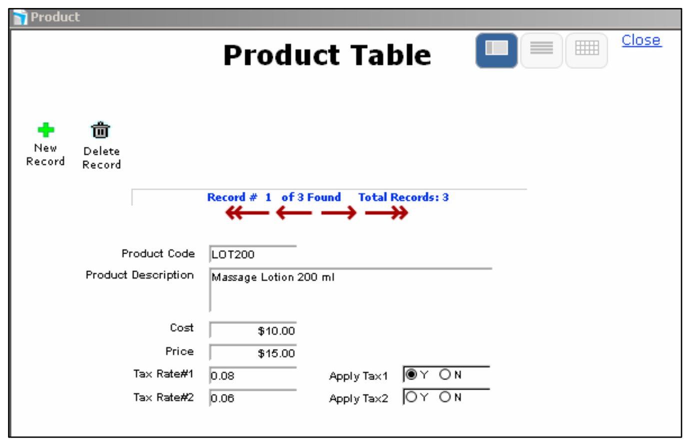
Gift Certificate tracking is not an easy task, whether you are using paper records or Electronic Records. To help with this, we have added a field and a button to the Receipt screen. The field is to enter the Gift Certificate ID when the certificate is presented for payment. Then, you just click on the blue underlined text Gift Certificate ID. That will set the "Date Redeemed" field in the Gift Certificate table to the current date. That in turn will trigger the Redeemed flag to read "Yes".

Product Sales

When the Product tab is selected, you will see a screen with two more tabs – Product List and Product Purchase. Managing these tables is moderately easy.

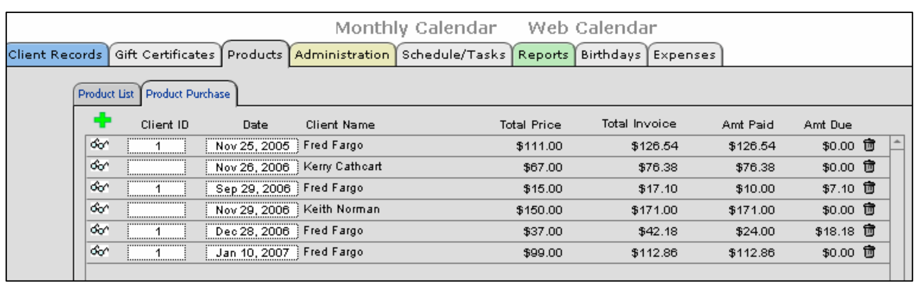


To view an existing Product data, select the eyeglass icon; to create a new Product record, select the green + sign. The information that gets filled in is quite basic – the Product Code must be unique. Various fields in the Product Purchase Invoice screen will draw data from this record, so make sure all fields are filled in.

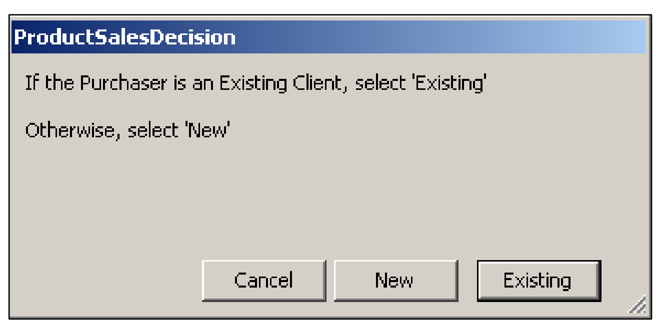


Product Purchase

The Product Purchase portal shows a list of products that have been sold, the date of sale, client name, etc. Again, the eyeglasses take you to an existing record – the green + sign icon creates a new record.

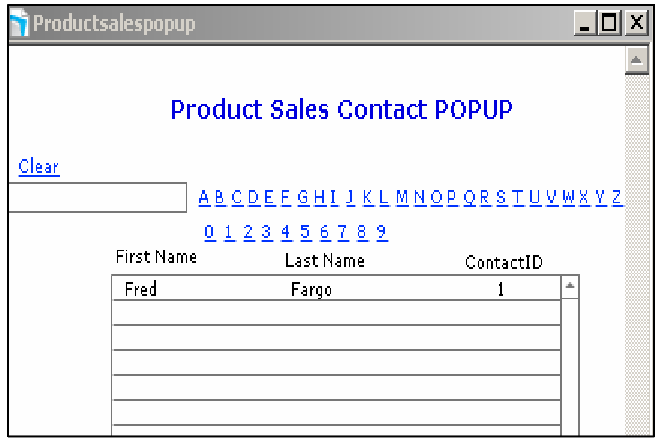


The new record pops up a decision box asking if the purchaser is a new client or an existing client. Selecting “Existing” pops up the dialogue box shown to the lower right (Product Sales Contact Popup). If you have existing records showing the contact information for people who have previously purchased products from you, the list of names will be displayed. Click on the name of the person who is purchasing the product. The appropriate information will be inserted into the Product Invoice record.



Please note the following

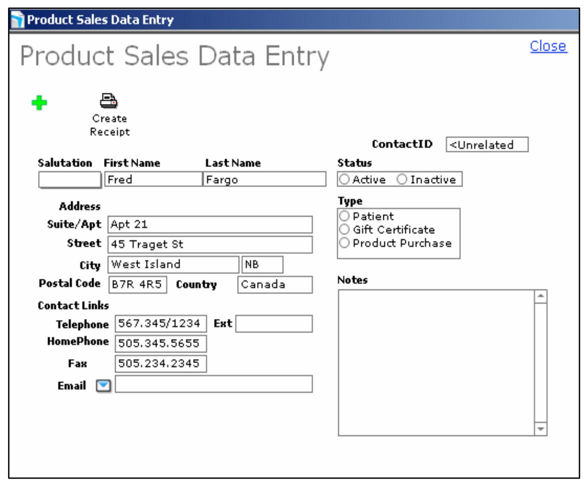
The Product Sales Contact List, unlike the Gift Certificate Contact table, is not connected to the Client Contact table. Here is the reasoning – a Gift Certificate purchase will eventually lead to a client receiving a massage. That info, ultimately, will be part of a client contact record. On the other hand, the sale of a Product may not ever result in a person becoming part of the massage business.



For this reason, we have elected to create a Product Sales Contact list that stands completely separate from the Client Contact table. As previously noted, if the popup list does not contain the name you need, merely click “Close” and re-create a new record, this time selecting “New” instead of “Existing”.

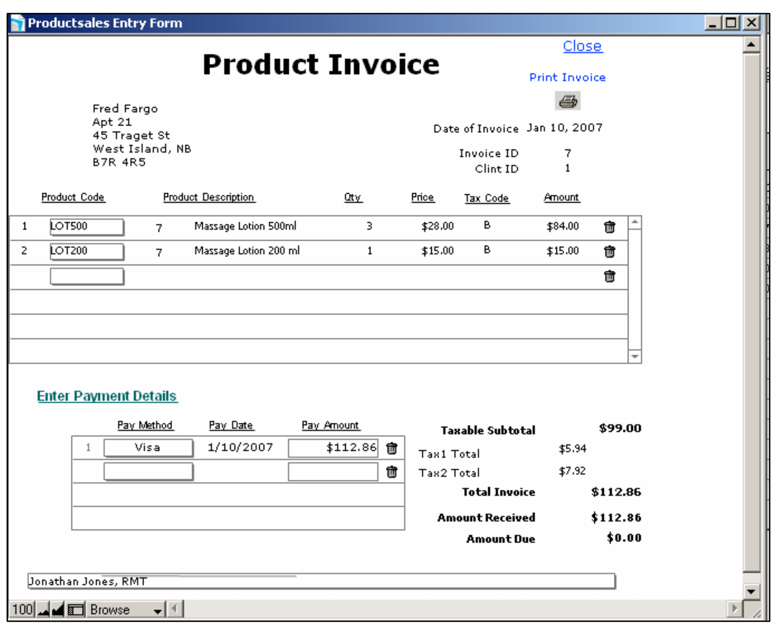
New Product Sales Contact

The screen on the right shows the view you will get when you select “New” in the Product Sales Decision popup. The fields here resemble those in both the Contact Entry and the Gift Certificate Entry screens. There is some data that would appear to be essential (Name, Address, etc.); however, we have included other fields that you may or may not want to use.



In future Product Sales, this person’s data can be accessed by clicking the “Existing” option in the decision dialogue box and then selecting the appropriate name.

Click “Create Receipt” to create an invoice for the sale of a product



Product Sales Invoice

Select the Product Code from the pop up menu;

several fields are populated automatically, with the quantity set to 1. Enter the quantity being purchased and make sure the appropriate tax code is selected. This will give an Amount for the sale for that item (those items) without taxes added in. Below the portal, to the right of the Payment Details, the totals for tax 1 and Tax 2 are displayed, along with Total Invoice amount.

Complete the invoice by selecting the method of payment. The current date is inserted into the “Pay Date” field. Fill in the “Pay Amount”. Click the button on the upper right “Print Invoice”, to complete the transaction and print the Invoice.

Tracking Product Sales

When products are purchased and an Invoice is printed, the software takes the information in the Invoice portal and adjusts the quantity of that product in stock in the Product List. For each item in the list, you can set a “Reorder Quantity”; that is, if you set a reorder quantity for LOT1000 (Massage Lotion 1 L, for example) at 10, then a green flag will appear in the Product List when the quantity in stock is reduced to 10 or lower.

Each product can have its own unique “reorder” number.

When a product gets returned after the Invoice has been printed, you can return to the invoice and click on the garbage can at the end of the portal row to delete that part of the purchase. The quantity is readjusted in the Portal List.

Administration Tab

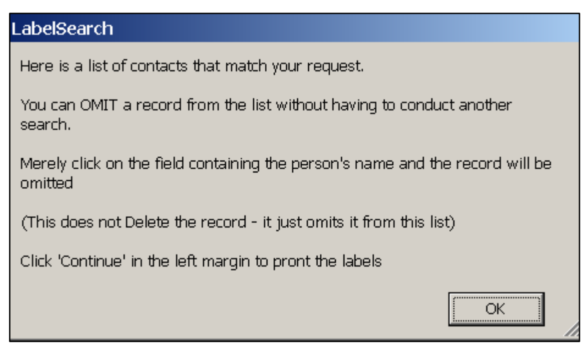
The Administration tab displays 6 or more other tabs. The first deals with the clinic address, logo, etc. The Default Settings screen lets you set automatic entry data for the client receipt.

Labels

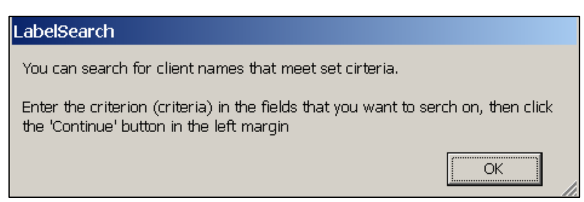
You can print mailing labels. The default format is Avery 5160. There are two options

- Print All
- Search for records having specific criteria

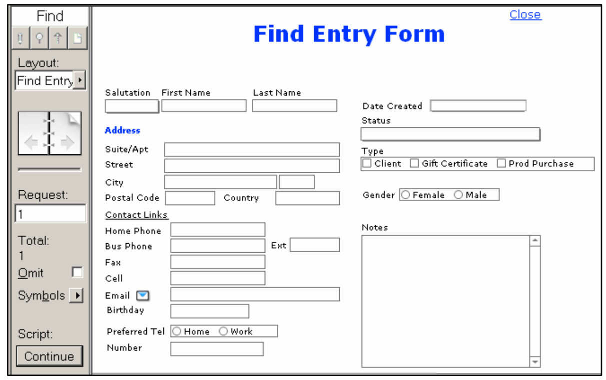
When you want to print all records in the Contact table, you are shown the pop up screen to the right. If there are some records that you do not want to print (perhaps there is an incomplete mailing address, for example), you can Omit that record from the list by clicking the field containing the person’s name.
Make sure you have the labels inserted into the printer and follow the prompts.



When you conduct a Search for client names, a pop up that appears that gives you a prompt as to what you are to do. The search feature is quite powerful – you enter a criterion in the field where you want to conduct the search. You can enter multiple criteria. Here are some guidelines.

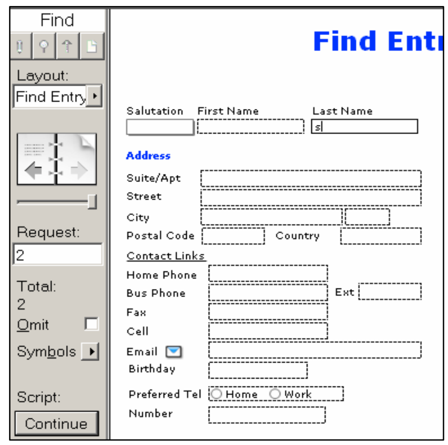


1. When you first enter the "Find" Mode, you will see a screen that resembles the one to the right (There are more fields at the bottom of the screen, not displayed here). You must place a criterion in at least one of the fields.

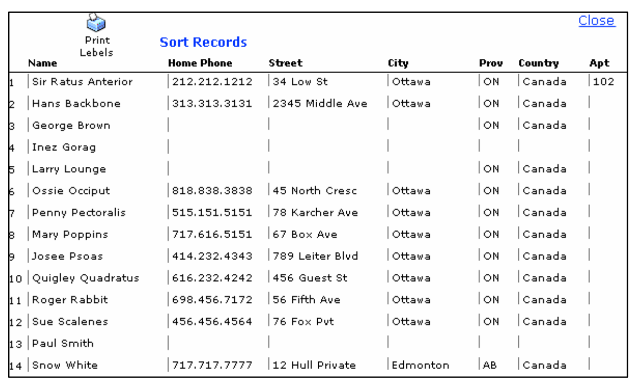


2. When you can put criteria in multiple fields, you are asking the software to conduct an "AND" search. This means that if you put a letter "S" in the First Name field and the Letter "P" in the Last Name field, you will find all records where the first name begins with "S" AND the Last Name begins with "P". Note that in the grey area on the left, you see "Request 1; Total 1"

3. You can create a search that is an "OR" search. This means that, for example, you want to find all those clients whose Last Name begins with "P" or with "S", you do the following:
   - Enter "P" in the Last Name field
   - Using the keyboard, select "Ctrl + N"; a new blank screen appears.
   - Enter "S" in the Last Name field. Note that in the grey area on the left, you now see "Request 2; Total 2". Using the arrow I the booklet in the grey area, you can scroll back and forth through your find criteria.
   - Select "Continue" to complete the search



4. After a list has been obtained, you can sort the list alphabetically using the "Sort Records" text button
5. Finally, when you view the list and see that some records do not contain a complete address, you can Omit these records by clicking on the field that contains the client name. The record is "Omitted", not deleted.



	Name	Home Phone	Street	City	Prov	Country	Apt
1	Sir Ratus Anterior	212.212.1212	34 Low St	Ottawa	ON	Canada	102
2	Hans Backbone	313.313.3131	2345 Middle Ave	Ottawa	ON	Canada	
3	George Brown				ON	Canada	
4	Inez Gorag						
5	Larry Lounge				ON	Canada	
6	Ossie Occiput	818.838.3838	45 North Cresc	Ottawa	ON	Canada	
7	Penny Pectoralis	515.151.5151	78 Karcher Ave	Ottawa	ON	Canada	
8	Mary Poppins	717.616.5151	67 Box Ave	Ottawa	ON	Canada	
9	Josee Psoas	414.232.4343	789 Leiter Blvd	Ottawa	ON	Canada	
10	Quigley Quadratus	616.232.4242	456 Guest St	Ottawa	ON	Canada	
11	Roger Rabbit	698.456.7172	56 Fifth Ave	Ottawa	ON	Canada	
12	Sue Scalenes	456.456.4564	76 Fox Pvt	Ottawa	ON	Canada	
13	Paul Smith						
14	Snow White	717.717.7777	12 Hull Private	Edmonton	AB	Canada	

Birthday Check

On that screen also you will find a radio button that lets you set the software to search, on startup, for client birthdays for the current week. A screen pops up to let you view and/or print the list.

If you do not want to have this search conducted on each startup, set this radio button to "No".

Tax Settings

In this screen, set tax values that are appropriate for your jurisdiction. In addition, you can set the software to set your invoice values to "Round Fee" or not. A "Yes" to Round Fee means that the calculation will be carried out so that the final amount due will include all taxes. A "No" to Round Fee means that taxes will be added on to the fee at the end of the calculation.

Users

The Users tab allows you to create user profiles for each of the people who will be using the software. The fields are self-explanatory.

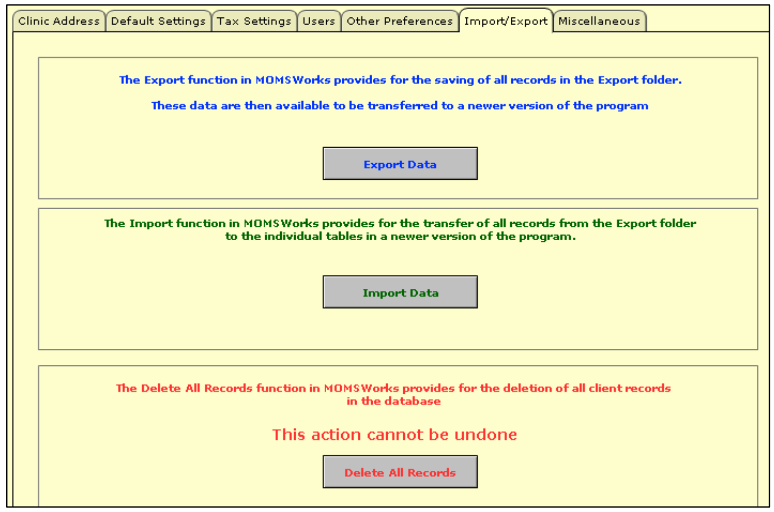
Other Preferences

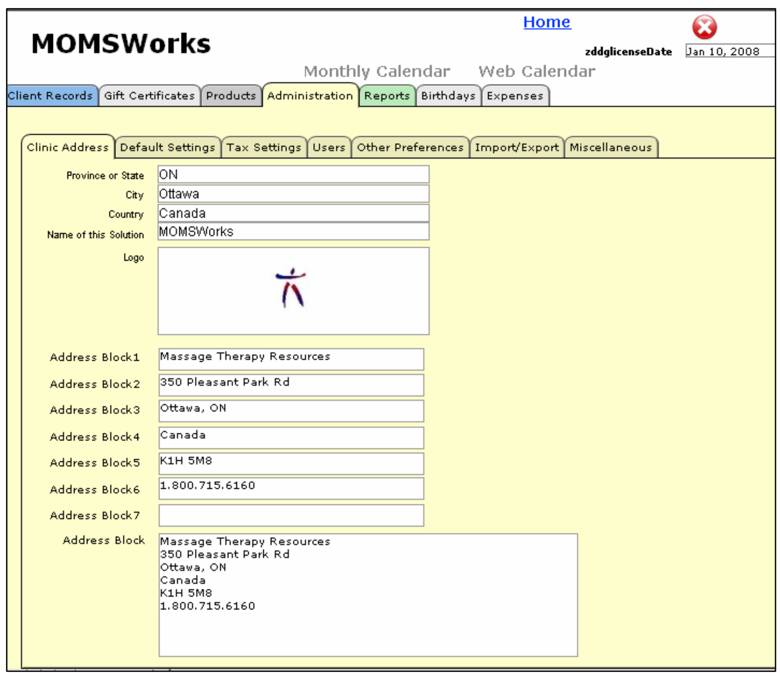
In this tab, you can set Gift Certificate Expiry duration, the Cancellation Fee value and the Cancellation Notification duration. These values will be used in the Consent form and the Gift Certificate form.

In addition, you can modify Techniques Used and Areas Treated check box display in the Client Notes table. When modifying the Areas Treated values, you must make sure that you retain the 4 areas named "medial thigh", "gluteals', "chest", and "breast". In addition, these values MUST be in positions 9, 10, 12 & 13 respectively in the list. This will ensure that they align with the check boxes that confirm that client consent has been obtained for the treatment of these areas.

Import/Export

This tab provides you with buttons that can used during the Import and the Export of the data. (In truth, few therapists will use these buttons – they are primarily for the use of MTR staff. However, as the software evolves, there MAY become a time when end-users will need to export and/or import data.



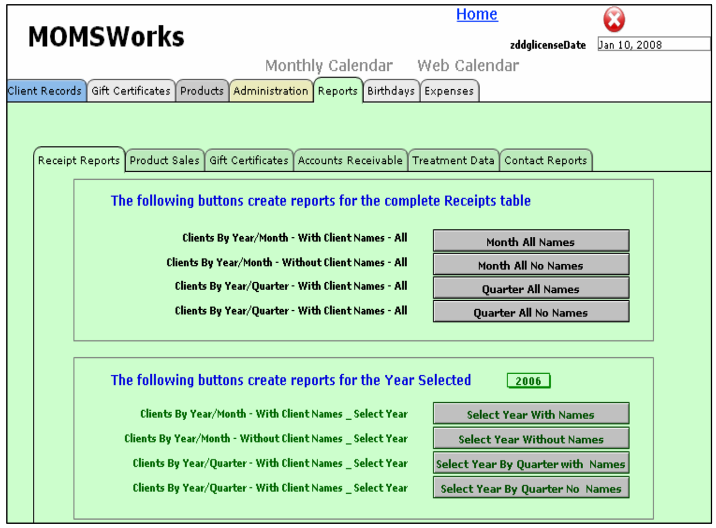


Delete All Records

This is the most dangerous button in the software. For that reason, there are three (3) warnings given whenever this button is used. You will have to confirm your wish to delete all records 3 times before the action is finally taken.

Reports

The Reports tab reveals 6 further tabs. It is within these tabs that you can locate buttons that will create reports that pertain to many aspects of your clinic activity. In the screen shot on the right, the top portion will give reports that will search all records for your complete database, irrespective of the year or month. Use these buttons when you want to create a report that displays data for all activity since you began using E-Records.



The bottom portion allows you to select a specific year.

The other buttons are best explored when you have several months of data to display. They do not reveal much when you are first starting out.

Some of the tabs have limited buttons in them at the time of the writing of this manual. As the software evolves, more buttons will appear in these tabs.

Birthdays

This tab displays two sub_tabssub tabs; Birthdays By Month and Birthdays All. Birthdays By Month will show all clients whose birthdays are in the month selected. In the portal you will find the client's Date of Birth, email address, home phone number and age. There is a button attached to the email address that can be used to create an email to the client.

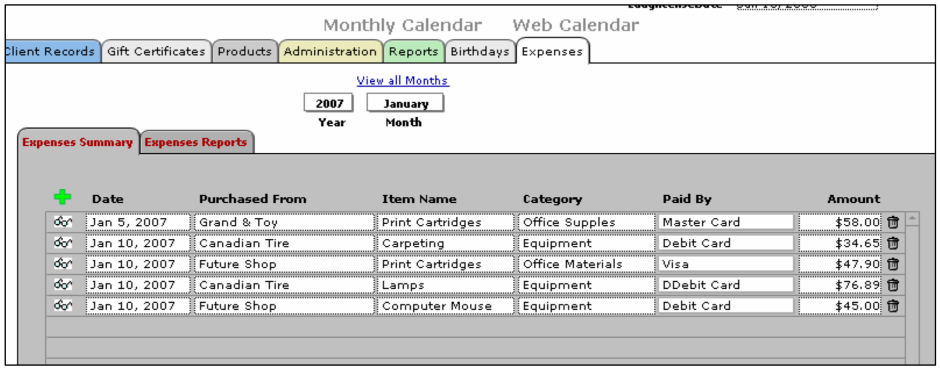
The Birthdays all tab reveals all clienclient names, sorted alphabetically by last name. The same fields are displayed in this layout as are displayed in the Month view.

Client Name	Date Birth	Email Address	Home Phone	Age
Sir Ratus Anterior	Mar 17, 1945	sra@yahoo.cpm	212.212.1212	61
Hans Backbone	Nov 19, 1956	hansb@hotmail.com	313.313.3131	50
Inez Gorag				
Margie Masseter	Dec 20, 1986	mm@yahoo.com	717.717.1717	20
Nancy Netherwood				
Ossie Occiput	Jun 13, 1964	occi@rogers.com	818.838.3838	42
Penny Pectoralis	Sep 28, 1933	pennyp@hotmail.com	515.151.5151	73
Mary Poppins	Aug 10, 1939	mary@umbrella.com	717.616.5151	67
Josee Psoas	Feb 7, 1978	ohsaycanu@see.com	414.232.4343	28
Quigley Quadratus	Jun 23, 1968	qq@hotmail.com	616.232.4242	38
Roger Rabbit	Apr 27, 1973	rr@briarpatch.net	698.456.7172	33
Sue Scalenes	Nov 16, 1935	scalenes@elbow.com	456.456.4564	71
Paul Smith				
Snow White	Feb 27, 1934	whitey@dwarf.ca	717.717.7777	72

Expenses

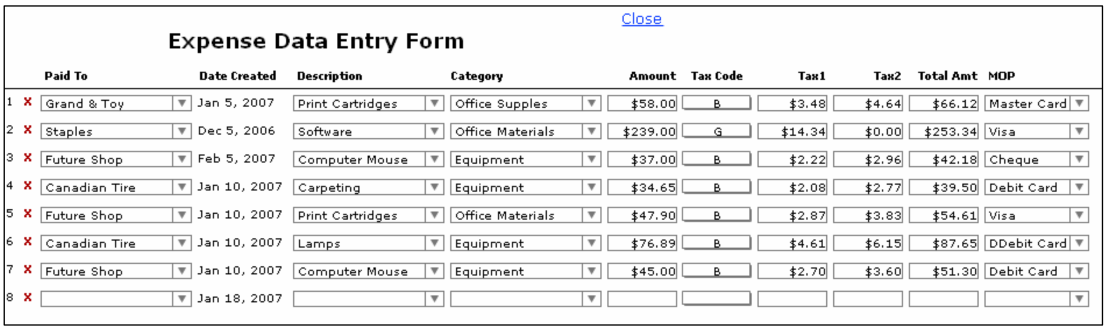
This tab displays two other tabs -– Expenses Summary and Expenses Reports.

Expenses Summary shows a portal that summarizes expenses that have been entered. The summary can be by Year & Month or by Year only. To enter an Expense, click the green + sign. You will then see the screen to the lower right.



Date	Purchased From	Item Name	Category	Paid By	Amount
Jan 5, 2007	Grand & Toy	Print Cartridges	Office Supplies	Master Card	$58.00
Jan 10, 2007	Canadian Tire	Carpeting	Equipment	Debit Card	$34.65
Jan 10, 2007	Future Shop	Print Cartridges	Office Materials	Visa	$47.90
Jan 10, 2007	Canadian Tire	Lamps	Equipment	DDebit Card	$76.89
Jan 10, 2007	Future Shop	Computer Mouse	Equipment	Debit Card	$45.00

When the eyeglass icon is clicked, you will see the existing expense data; when you click the green + sign icon, you will see the existing data and a new record with the cursor placed in the

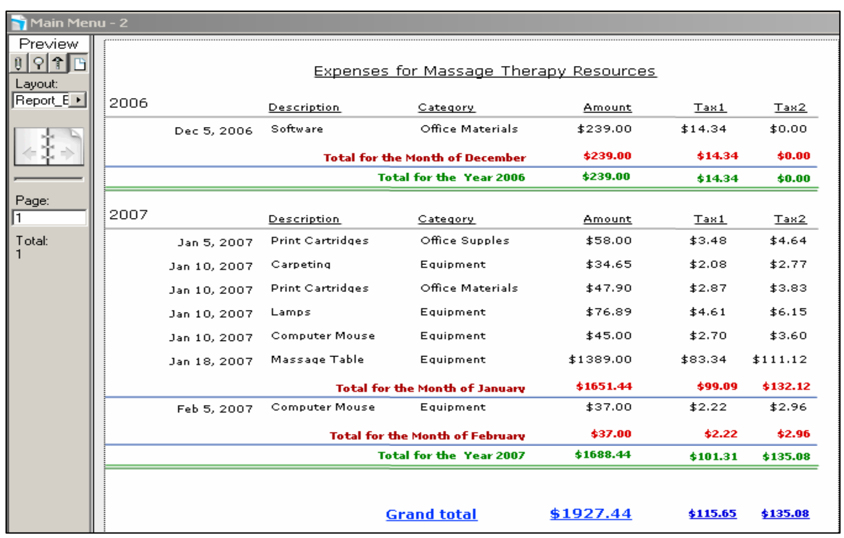


	Paid To	Date Created	Description	Category	Amount	Tax Code	Tax1	Tax2	Total Amt	MOP
1	Grand & Toy	Jan 5, 2007	Print Cartridges	Office Supplies	$58.00	B	$3.48	$4.64	$66.12	Master Card
2	Staples	Dec 5, 2006	Software	Office Materials	$239.00	G	$14.34	$0.00	$253.34	Visa
3	Future Shop	Feb 5, 2007	Computer Mouse	Equipment	$37.00	B	$2.22	$2.96	$42.18	Cheque
4	Canadian Tire	Jan 10, 2007	Carpeting	Equipment	$34.65	B	$2.08	$2.77	$39.50	Debit Card
5	Future Shop	Jan 10, 2007	Print Cartridges	Office Materials	$47.90	B	$2.87	$3.83	$54.61	Visa
6	Canadian Tire	Jan 10, 2007	Lamps	Equipment	$76.89	B	$4.61	$6.15	$87.65	DDebit Card
7	Future Shop	Jan 10, 2007	Computer Mouse	Equipment	$45.00	B	$2.70	$3.60	$51.30	Debit Card
8		Jan 18, 2007								

"Paid To" field. Click on the down arrow in that field to check if the Paid To business has been used previously. If "Yes", then select the name of the enterprise from the list. If "No", type the name of the enterprise into the Paid To field. The Date Created will be filled in automatically; complete the remainder of the fields either by typing the text into the field or by selecting it from the pop up menu, viewed by clicking on the down arrow in the field. (The Tax Code is "B" for both GST & PST in Canada – Tax1 & Tax2 elsewhere; "G" is for GST (Tax1), "P" is for PST (Tax2), and "H" is for Harmonized tax, used in some of the provinces in Canada.)

Expense Reports

The second tab reveals two buttons (more to come) that allows you to create a report that displays where money was spent sorted by year and a report that sorts expenses sorted by the enterprise to which the payment was made



	Date	Description	Category	Amount	Tax1	Tax2
2006						
	Dec 5, 2006	Software	Office Materials	$239.00	$14.34	$0.00
			Total for the Month of December	$239.00	$14.34	$0.00
			Total for the Year 2006	$239.00	$14.34	$0.00
2007						
	Jan 5, 2007	Print Cartridges	Office Supplies	$58.00	$3.48	$4.64
	Jan 10, 2007	Carpeting	Equipment	$34.65	$2.08	$2.77
	Jan 10, 2007	Print Cartridges	Office Materials	$47.90	$2.87	$3.83
	Jan 10, 2007	Lamps	Equipment	$76.89	$4.61	$6.15
	Jan 10, 2007	Computer Mouse	Equipment	$45.00	$2.70	$3.60
	Jan 18, 2007	Massage Table	Equipment	$1389.00	$83.34	$111.12
			Total for the Month of January	$1651.44	$99.09	$132.12
	Feb 5, 2007	Computer Mouse	Equipment	$37.00	$2.22	$2.96
			Total for the Month of February	$37.00	$2.22	$2.96
			Total for the Year 2007	$1688.44	$101.31	$135.08
			Grand total	$1927.44	$115.65	$135.08

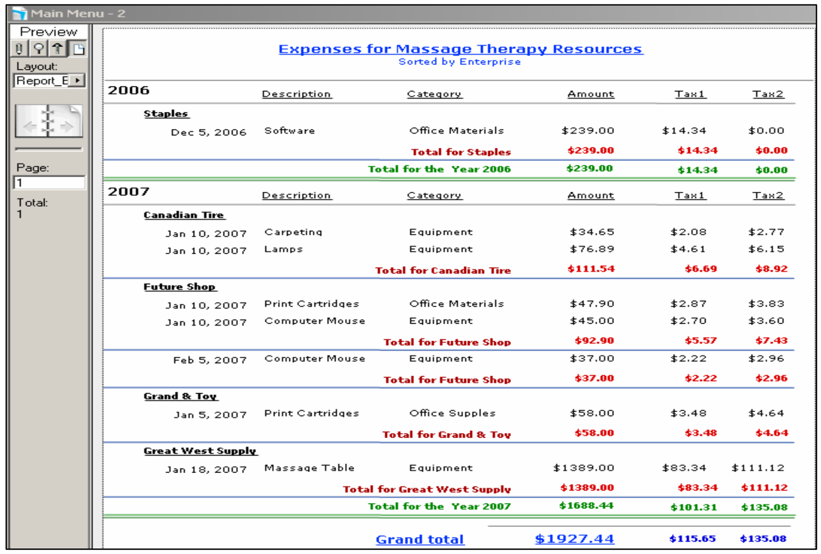
Expense Report All

On the right is the Expense Report for all expenses since you started recording this data.

Expense Report by Enterprise

The report on the right shows the Expenses that have been incurred sorted by Year and by the name of the enterprise to which the payment was made.

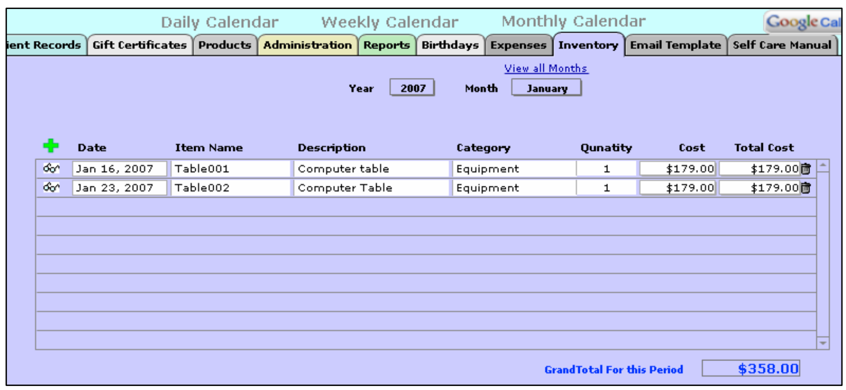
Yearly totals are also shown.



Inventory

We have included an Inventory table in which you can keep track of the non-product items that you have purchased. Use the Green + sign to create a new item and use the glasses icon to view an existing inventory.

We have also placed a field at the bottom of the Inventory portal that gives you a Grand Total of the amount you have spent on these items. The portal can be displayed for the complete year or for any given month in the year.



Calendars in EasyTABS

There are two Calendar options in the software. The first is computer based – it is resident on your computer only. The second is web based.

1. The computer based calendar is accessed by clicking the icon/text from any number of locations in the program. There are several text buttons – on the Home screen, there “daily”, “Weekly” and “Monthly” buttons. From other screens, the 3 buttons are displayed at the top of the portals. The strength of this calendar is that it can be used to search for client appointments AND connect these records to an email to remind them of the appointment.
2. The web based calendar can be one of your choosing. The Google web calendar has been set as the default. The advantage to the web calendar is that you can access it from any computer anywhere in the world. In addition, the web calendar offers many more options when it comes to screen displays. Note that you must create a Google Email Account to use the Google web based calendar.

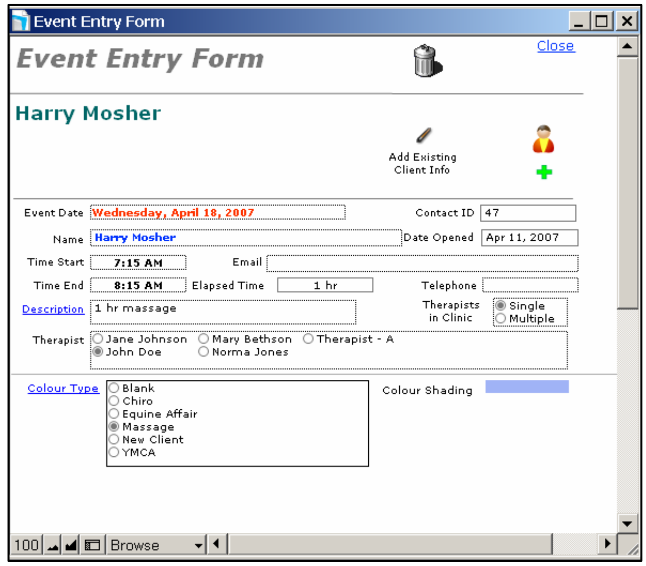
You can use a different Web Calendar by inserting the web address for the calendar of your choice in the Administration/Other Preferences screen. Please note that we do not provide training and support for the web calendar. Contact the supplier for details on how the calendar that you use functions.

Recording/Making an Appointment

Using the program-based calendar, an appointment (or a booking) can be made from several screens.

- From the "**Client Records**" screen, you can select the **Daily**, **Weekly** or **Monthly** calendar
- From the **Monthly** calendar, click the word "**Book**" (Vertical text orientation) in the day of the date you want. A screen pops up with the chosen date inserted in the "Activity Date" field. In this screen, you can choose from these three options:
  - Enter the name of the person or event in the "Name" field; select the **Time Start** – the **Time End** will be set according to the Preference setting for Default Duration; enter other data that you have or want to record. (Note that an appointment created using this method will not be displayed in the Individual Appointments tab portal)
  - Using the **"Add Existing Client Info"** button, you can pop up a list of existing client names; from that list, merely click the name you want and his/her data will be inserted in the appropriate fields. (Note that if you have created a new record by selecting "Book" above, there is an intermediary step whereby you choose to insert the data in the current record or choose a new record – if you have just created a record using the "Book" button, you most likely will select "Insert"). When selecting an existing client, information such as telephone number, email address and ClientID will be included in the data inserted. The Client ID will enable the software to display the appointment in the "**Individual Appointments**" tab of the "**Client Records**" screen.
  - If the person is not yet in your client contact table, you can create a new client record for this client by selecting the green + sign just below the person graphic on the **Event Entry Form**. This button pops up a screen into which you can enter the person's data/information. Note that all fields do not have to be completed at this time – the only data that is absolutely necessary to create Client Contact record is the person's first name and last name. (This is useful to know when a new client is on the phone and you want to get the booking done quickly – the full client details can be added to the Contact record at a later date/time).
- From the "**Weekly Calendar"**, navigate to the appropriate week using the forward and back buttons and, in a similar way as for the Monthly booking, click on the word "Book" in the selected date. The steps shown above for the Monthly calendar booking are the same for the Weekly booking.
- From the "**Daily**" button, you will pop up a screen that displays the current date. Use the green + sign to create a new appointment. Select "Insert" in the first dialogue box. Follow the above instructions to complete the booking
- From the "**Client Records**" screen, you can select a client and then select the "**Individual Appointments**" tab; again, using the green + sign, you can pop up the Event Entry Form and proceed as you would for the above options. Note that the only way you can ensure that the client telephone number and email address appear in the booking of the event is to use the **"Get Information from Existing Client"** button (short of typing the information into the fields manually). So, if you do pop up an event record with the clients name already inserted, AND you want to include the email address and telephone number, merely use the **"Get Information from Existing Client"** button and select "**Insert"** when that dialogue box is displayed.

Colour Coding Event Entries



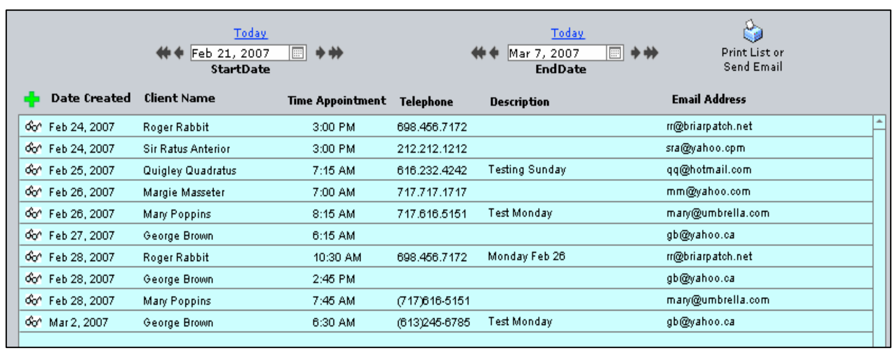
In the Event Entry Form (see diagram on the right), there is a series of radio buttons next to the title “Colour Type”. These selections can be modified by clicking on the “Colour Type” phrase. This will pop up a screen that allows you to assign text to a colour. Then, when creating the appointment, you merely select the appropriate radio button to have the selected colour displayed in the Daily, Weekly and Monthly calendars.

There are two methods for displaying Appointments:

- When the “**Individual Appointments**” tab is selected, you will see appointments for the “current” client only. That is, the lest you see is for the client whose name is displayed
- When the “**All Appointments**” tab is selected, you will see a list of all appointments that have been filtered using the StartDate and EndDate fields. More about this feature below.

Email Appointment Reminder

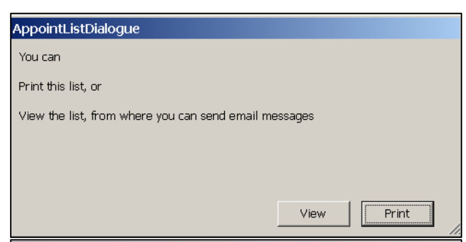
This software provides users with an option to send “reminder email messages to clients giving them the date and time of the appointment. Because of the need to merge data from a Template record and an Appointment record, it is important that the “Reminder of Appointment” template adhere to a set format. Here are some screen shots that show how this works:

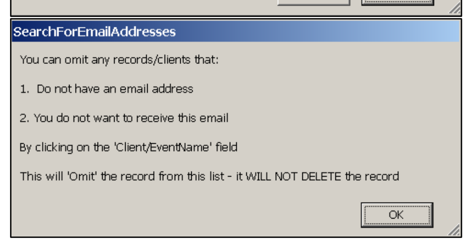


1. Click the tab “All Appointments”; or Click Email Reminder” on the Home Screen. You will see the screen on the right.
2. There are two fields that control the display – StartDate and EndDate. You can adjust the display be changing either of these two dates using the next and previous arrow buttons. The single arrow moves the date by 1 day, while the double arrow moves it by 7 days.
3. When you get the date range you want, select the icon “Print List or Send Email”. You will see the dialogue box.
4. If you want to print the list, select “Print”; if you want to send an Email message, select “View”.
5. You will see a second dialogue box, explaining how to manage the list.

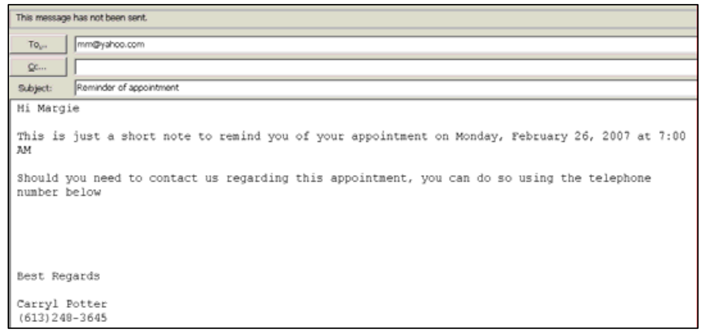
   After you select “**OK**”, you can omit records from the list by clicking on the “**Client/Event Name**” field.

6. After you have fine tuned the list, you can send the email using the Text button “**Appointment Reminder**”.





7. Do not use either of the other two buttons. The **Appointment Reminder** button invokes a template that merges the date and time of the appointment into the email message. The other two buttons do not do that.



8. When the button has been selected, you will get another dialogue box giving additional instructions.
9. After editing the Template fields, select the “Set Variables” button. The next screen shows you a list of the recipients – merely select “Send” to send the messages. **You can opt not to send the message at this point by closing the message box in the email client program.**
10. The default email program on your computer will pop up with the first person’s email address and the text that you entered into the template fields. Note that the message is personalized with the client’s first name in the body.
11. You must select “Send” in your email program to send the message. The next client’s message will pop up and you select “Send” again. Repeat this until the messages stop popping up.
12. The final dialogue box reminds you to open your email program to ensure the messages were in fact sent

Calendar Filters

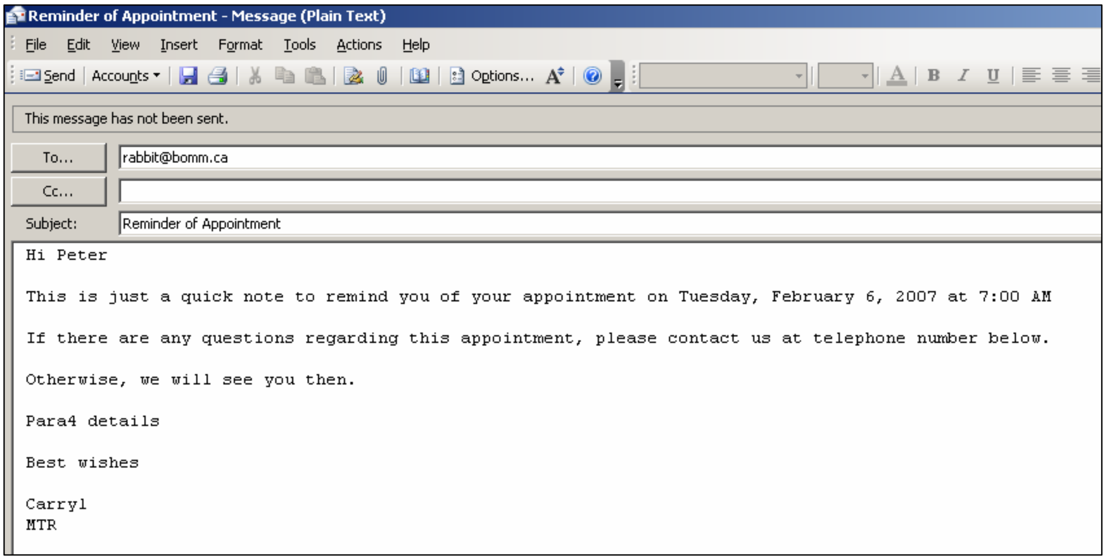
The internal calendar offers three filters: **Therapist Name**, **Description**, and **Type (colour)**. These filters are available on the Daily, Weekly and Monthly displays. Using these filters, you can see only the bookings for a selected therapist, or description or type. After selecting one of the filters, a second filter can be applied to get, for example, all appointments for Therapist #1 followed by, for example, Cranial Sacral as a description. This will display all cranial sacral appointments for Therapist #1. The third filter can also be applied to reduce the appointments displayed further.

Repeat Appointments

Repeating appointments can be booked using the Repeat Appointment feature. Follow these steps:

1. Go to the Event Entry Form and enter all of the information for the first date.
2. Click button “Set Up Repeat”
3. Fill in the fields “Repeat Every” (select the number of weeks between each appointment)
4. Fill in “This Number of Times”
5. The Total Number of Appointments will read 1 more than the number of times
6. Close the window
7. The Repeat Start Date will be shown as well as the Repeat End Date.
8. Click “Book Repeats”
9. The appointments are booked and you are shown a screen that displays the appointments.
10. **Please Note: The booking process does not cross check to see if the therapist has been booked in any one of these spots.** You must click on each Date from the displayed list. The listing of the appointments for that day is shown. By selecting the Therapist name from the filter, you can easily check to see if there is a conflict. Pop up the Event Entry Form using the eyeglass icon to modify the appointment appropriately.
11. You can then Print this list or just close the window.

Generic Email Messages



Using the tab Email Template, you are taken to two more tabs, one labeled **"Email Appointment Reminder"** (Explained above) and the other named "**Email Generic**". This second tab shows a portal that contains a list of email templates. At the top of the portal is a button labeled "**Email Generic**". Here is an outline of how these features work:

- You can **create an email template** by clicking on the green + sign.
- You then enter data/information that you want to have in the email. The fields that show a **red *** next to their right edge are fields whose data will appear in an email. The other fields are provided for you to use to categorize and label your email templates. They will not appear in the email message.
- Before selecting the **"Email General"** button, select from the radio button how you want to have the message sent. Select "Group" when you want to send an email message to a large number of people. The individual email addresses will not be shown to other recipients, so confidentiality is retained. This method/option is best suited to the sending of large numbers of messages. **Make sure that the salutation reads something generic such as "Hello everyone". The individual names will not appear in the message.**
- When the radio button **"Group"** is selected, one email is sent to everyone that ends up being part of the 'found set'. The email addresses are all inserted in the "BCC" field of the message. (For those who are not aware of this, the "BCC" field allows you to send email messages to groups of people without the individuals being able to see who else received the email – very important for privacy).
- When the radio button **"Individual"** is selected, one email is sent to everyone that ends up being part of the 'found set'; however, in this case, the person's first name is inserted into the salutation. Therefore, the salutation in the template would be, say, "Hello". The software then finds and inserts the person's first name in the email message. **Please note that when "Email Individual" is used, the software loops through everyone in the found set – you will be required to select "Send" after each person's individual message appears on the screen**. (This same process is used in the **"Email Appointment Reminder"** message described above. The caution here is that, if your found set is 250 clients, it will take a long time to click each person's message to send it). When there are large numbers of people in the found set, it is recommended that you use the **"Group"** radio button.

Tech and Database Support

When you purchase a License Agreement for this software, you receive 3 months of free training and support. After the first 3 months, additional support can be purchased by contacting us.

It is important to note that we do not provide computer literacy training. Our support is focused on the database and its functions. The full power of databases in general can be explored through many online training modules. Further to this, it is extremely important that you learn how to backup your software on a regular basis. See the section on backing up the database elsewhere in this manual.

Licensing of EasyTABS Software

The license for the software can be purchased in various lengths with the minimum length being 1 year. Most users will want to opt for the yearly license, which gives the best duration per dollar rate.

1.	**Yearly License Price**	**-**	**$79.00**
2.	**Two-Year**	**-**	**$149.00**
3.	**Three-Year License**	**-**	**$199.00**
4.	**Life Time License**	**-**	**$429.00**

- You will be reminded by the software when you are within 1 month of the license expiry. That reminder will run for 3 openings.
- With 10 days remaining, you will again be reminded of the coming expiry. This reminder will run for 3 openings.
- When you are within 5 days of the license expiry date, you will be reminded each time you open the software until you have exceeded the expiry date
- After expiry, you will have full access to all functions in the software except the creation of new records. This will mean that you can get Reports, print Receipts, etc. However, you will not be able to create any new records until the license has been renewed.

Loyalty Pricing of EasyTABS Software

Effective January 1, 2008, users of the MOMS software program will be eligible for assistance in the transfer of data/records to the EasyTABS program. Below are the fees that will apply:

1.	Transfer of the Preferences, Contacts and Receipts data	-	$50.00 CDN
2.	Transfer of data as noted in #1 AND Case History, Client Notes and Calendar data	-	$75.00 CDN
3.	Transfer of Data from other databases (for example, Excel)	-	Please contact us for an estimate.