

Field	Type	Size	Description	Notes	Valid Answers	Default
Cltnum & CltEng are the unique identifiers to a CPASoftware client						
Cltnum	Text	15	Client Number	Cltnum & Clteng will be the link between the databases		
CltEng	Text	5	Client Engagement			
Edit Flag						
Edit	Byte	1	Editing Client	Must be set to 1 in order to edit Existing Client.Eng If set to 1 and Unique Client.Eng, Add implied	0-Add, 1-Edit or Add	0
Changing of the CLTSORT Name will force a update across Multiple Tables						
CltSort	Text	40	Sort Name	Add ONLY, Changing SortName MUST be made in Admin		
Client Tab						
Cltname	Text	50	Client Name			
EngAddr1	Text	50	Engagement Address Line 1			
EngAddr2	Text	50	Engagement Address Line 2			
EngAddr3	Text	50	Engagement Address Line 3			
EngCity	Text	30	Engagement City			
EngSt	Text	2	Engagement State			
EngZip	Text	10	Engagement Zip			
Engcountry	Text	30	Engagement Country			USA
Mailing Tab						
CltAttn	Text	50	Attention Line			
CInvName	Text	50	Invoice Name			
CinvAddr1	Text	50	Invoice Address Line1	If the Invoice address information is left blank during the load, the engagement information will be used. Address Line 1 will determine whether the invoice information is different than the engagement address. If Invoice Address 1 contains information, the invoice address will be used for all other Invoice fields as well.		
CinvAddr2	Text	50	Invoice Address Line 2			
CinvAddr3	Text	50	Invoice Address Line 3			
CinvCity	Text	30	Invoice City			
CinvSt	Text	2	Invoice State			
CinvZip	Text	10	Invoice Zip			
CinvCountry	Text	30	Invoice Country			
ID/Phone/Email Tab						
CltEmail	Text	50	Email Address for the client			
CltFax	Text	25	Fax Number			
CltPhone	Text	25	Phone Number			
EngFedID	Text	11	Business Federal ID			
Engss1	Text	11	Client Social Security			
Engss2	Text	11	Spouse Social Security			
Description Tab						
EngFYE	Long Integer	4	Fiscal Year End			0
EngRecur	Byte	1	Recurring Engagement	Engagement will occur annually	1-"Yes",0-"No"	1
DeptName	Text	50	Dept Name Field in the Department Table	Tied to the Department Table so that we can get the Dept ID		0
Engentity	Text	30	Entity Type	New Entity Types passed in will be added to the Entity Table		
Engwork	Text	30	Work Type	New Work Types passed in will be added to the Work Table		
EngSicCode	Long Integer	4	SIC Code	Validated against the SIC Code Table		
LOBDescription	Text	35	Line Of Business Description from LOB Tab	Tie to the LOB Table so we can get the LOBID		0
EngRelated	Text	7	Group Name	Used for Group reporting		
EngDesc	Text	30	Engagement Description			
Staff Tab						

CPPNum	Text	9	Primary Partner EmpNum	Validated against the Employee Table		0
CSPNum	Text	9	Secondary Partner	Validated against the Employee Table		0
CRPNum	Text	9	Responsible Partner	Validated against the Employee Table		0
CMGNum	Text	9	Managing Empnum	Validated against the Employee Table		0
CBMNum	Text	9	Bill Manager	Validated against the Employee Table		0
CTRNum	Text	9	Tax Reviewer	Validated against the Employee Table		0
CTPNum	Text	9	Tax Preparer	Validated against the Employee Table		0
Billing Tab						
CinvCredit	Currency	8	Credit Limit			9,999.99
WipLimit	Currency	8	Wip Limit			99,999.99
Custom Fields						
ClcCust1Desc	Text	30	Custom Field Name	The Desc. Fields for all 10 Custom fields in this table must match the description "FCustDesc" field in the FirmCustDef table		
ClcCust1Value	Text	30	Value of Custom Field			
ClcCust2Desc	Text	30	Custom Field Name			
ClcCust2Value	Text	30	Value of Custom Field			
ClcCust3Desc	Text	30	Custom Field Name			
ClcCust3Value	Text	30	Value of Custom Field			
ClcCust4Desc	Text	30	Custom Field Name			
ClcCust4Value	Text	30	Value of Custom Field			
ClcCust5Desc	Text	30	Custom Field Name			
ClcCust5Value	Text	30	Value of Custom Field			
ClcCust6Desc	Text	30	Custom Field Name			
ClcCust6Value	Text	30	Value of Custom Field			
ClcCust7Desc	Text	30	Custom Field Name			
ClcCust7Value	Text	30	Value of Custom Field			
ClcCust8Desc	Text	30	Custom Field Name			
ClcCust8Value	Text	30	Value of Custom Field			
ClcCust9Desc	Text	30	Custom Field Name			
ClcCust9Value	Text	30	Value of Custom Field			
ClcCust10Desc	Text	30	Custom Field Name			
ClcCust10Value	Text	30	Value of Custom Field			
Status Tab						
Engstatus	Byte	1	Status of the client "Active" or "On Hold"	You may pass 0 or "Active" to activate a client Deleting is not available, However placing the client on Hold will allow you to bill and accept payments without letting users key in additional time. Pass 2 or "Hold"	0-"Active", 2-"Hold" 3-"Prospect"	0
MarActDate	Date/Time	8	Date the client became Active			Today
MarInActDate	Date/Time	8	Date the client became InActive			
OffName	Text	50	Office Name Field in the Office Table	Tied to the Office Table so that we can get the cltoff ID		0
LinkApplication	Text	20	Application Link Name	We will store a Link to your app in another Table		
LinkKey	Text	50	Your Unique Key			
Logging Area						
Status	Byte	1	Status of Row	This field will flag success and failures. Errors will start with 100. Numbers will be assigned as project progresses. These error numbers will only be present in the LogMsg field.	0-Needs to be processed 1-Successful Add 2-Successful Edit 3-Warning 4-Fatal	0
LogDate	Date/Time	8	Date/Time the Row was processed			

	LogMsg	Memo		Area where each fatal error or warning will be listed Separately	The (Pipe symbol) will be used to separate multiple errors or warnings.		