



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2007

## EARLY RENEWAL INCENTIVES

### Early Renewal Discount

On this year's spring renewal form you will find that we automatically applied a discount to this year's renewal price for each program you renewed early last year. Each program you ordered by May 31st of last year will have a **\$10 discount** applied. Each program you ordered by August 31st of last year will have a **\$5 discount** applied.

For every program you renew by May 31st of this year, you will automatically receive a **\$10 discount** on next year's spring renewal form.

**Continue to renew your software early each year, and you can be sure of receiving the discounted price next year!**

### 20% Off First-Time Purchases

Place your software renewal order by May 31st and take **20% off the first-time purchase of any additional CFS software**. The additional software must also be ordered by May 31st. If there are other CFS programs you have been thinking of trying, now is the time!

### 30% Discount on Supplies

Order your forms, envelopes and tax return supplies by May 31st and take a whopping **30% off** the already low price.

See our supplies catalog for a wide selection of forms, envelopes, labels, checks, and tax return supplies.

### Free W2/1099 Forms Starter Kit

Receive a **free** starter kit of forms and envelopes—a **\$39 value**—when you order *W2/1099 Payroll System 2007* by May 31st.

**The deadline for all of these offers is May 31st, so order today!**



## VISIT OUR ONLINE STORE

If you haven't yet visited our new online store, consider using it to place your next order. The CFS Online Store is by far the easiest and most reliable way to order CFS products.

### The CFS Online Store:

- Allows you to see at a glance what products you've purchased in the past;
- Does all of the calculations for you, including calculating your shipping;
- Sends you an automatic confirmation by e-mail as soon as your order is placed;
- Allows us to automate your order, so that you get it faster with less chance of error;
- Exceeds industry-standard encryption methods.

In order to use the CFS Online Store, you will need a MyCFS account. If you don't have an account, it's easy to register. Just go to [www.taxtools.com](http://www.taxtools.com) and click on **MyCFS** under the **Support** menu. On the MyCFS page, click on **Register for a MyCFS Account**. You will need to provide a valid e-mail address and password.

You can access the CFS Online Store from the MyCFS menu or from the Quick Links menu at [www.taxtools.com](http://www.taxtools.com).

## FINDING YOUR LICENSE CODE

Your current license code is the key to unlocking the CFS program(s) you have purchased. It can be found:

- Printed on your receipt;
- By clicking on **License Code Verification** under **Quick Links** at [www.taxtools.com](http://www.taxtools.com);
- By clicking on **License Codes** on your MyCFS home page.

## TAX QUOTABLE

**"It's tax time. I know this because I'm staring at documents that make no sense to me, no matter how many beers I drink."**

**—Dave Barry**

## WHAT'S INSIDE...

### NEW AT CFS...

- CFS** Exciting new 2007 program features;
- CFS** Instructional Videos;
- CFS** IRS changes Schedule D e-file requirements.

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### TECH ISSUES...

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- CFS** Windows Vista compatibility.

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### ONLINE...

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### POLICIES...

FYI—CFS company policies and disclaimers. **Page 4.**



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# WHAT'S NEW AT



## NEW PROGRAM FEATURES FOR 2007

### Expanded Detail in Fields

A common feature to all of the toolbox utility programs, the user can now add expanded detail to any numeric field in a module. If, for example, you wish to enter detailed data for the Interest Income field in the Fed/State Tax Planner, press Ctrl+E or the "=" sign and a detail screen will appear. Data entered on the detail screen is summarized back on the main data screen. Detail screens can also be printed.

### PDF Export

PDF export is now supported in all CFS programs by use of the *PDF995* printer driver. The driver may be installed from the CFS Software CD or downloaded from the "Download Software" page at [www.taxtools.com](http://www.taxtools.com).

Once the driver has been installed, the user can create a PDF file of any printout simply by selecting the *PDF995* printer driver in the printer dialog box at the beginning of a print job.

### CFS Payroll System

The Employer Setup screen now has more flexibility for the user. Employers can now setup payroll for multiple states. User-defined income items, deduction items, and tax items can be added on the setup screen and will appear in the payroll grid. Departments can be added for sorting and reporting.

<b>941/940 Payroll System</b>	<b>\$109<sup>00</sup></b>
annual renewal .....	\$99 <sup>00</sup>
<b>W2/1099 Payroll System</b>	<b>\$109<sup>00</sup></b>
annual renewal .....	\$99 <sup>00</sup>
E-file/MagMedia add-on ....	\$99 <sup>00</sup>
<b>Payroll Corrector</b> .....	<b>\$39<sup>00</sup></b>
annual renewal .....	\$29 <sup>00</sup>
<b>Network Upgrade (all Payroll System programs)</b> ....	<b>add \$100<sup>00</sup></b>

### New Modules in TaxTools

**Auto Mileage and Expense Log** provides the user with a log that can be filled out and saved or printed blank for clients or employees to complete.

**Employee Time Sheet** can be used for tracking billable employee time.

**Domestic Production Activities Deduction** assists in the preparation of Form 8903, Domestic Production Activities Deduction. The module calculates all three methods for calculating the Domestic Production Activities Deduction (DPAD), and the data is then transferred to Form 8903.

#### New forms include:

**Form 1040-EZ-T** - Request for Refund of Telephone Excise Tax;

**Form 13711** - Request for Appeal of Offer in Compromise;

**Form 13844** - Application For Reduced User Fee For Installment Agreements;

**Form CA DE 999** - California Multi-Agency Form for Offer in Compromise.

<b>TaxTools</b> .....	<b>\$189<sup>00</sup></b>
annual renewal .....	\$149 <sup>00</sup>
network upgrade .....	add \$150 <sup>00</sup>

### Tax Corresponder

#### New letters include:

- Charitable Contributions Directly from an IRA;
- Deductions: Non-Cash Charitable Contributions (after 8/17/06);
- Engagement Letter for Tax-Deferred Exchange;
- Head of Household Response Letter;
- Private Debt Collector Opt-Out Letter.

<b>Tax Corresponder</b> .....	<b>\$49<sup>00</sup></b>
annual renewal .....	\$29 <sup>00</sup>
network upgrade .....	add \$50 <sup>00</sup>

## INSTRUCTIONAL VIDEOS

We have put together several brief instructional videos demonstrating features of CFS software. Currently, topics include:

- Downloading New CFS Software;
- New for Payroll System 2007;
- How to eFile W2s;
- How to eFile 1099s;
- Year-end Forms Filing Tips for W-2s and 1099s;
- Setting Up New York Employers.

The videos play in your web browser, and can be accessed at [www.taxtools.com](http://www.taxtools.com) by selecting **Instructional Videos** from the **Support** menu, or from within most 2007 CFS programs by clicking on the **Instructional Videos** link in the **Help** menu.

Check the Instructional Videos web page periodically, as new videos will be added in the future.

## SCHEDULE D E-FILE CHANGE

The IRS will now allow Schedule D transactions to be reported as summary totals on Schedule D when e-filing. Taxpayers may use a paper copy of Schedule D-1 or an acceptable substitute (such as that generated by *CFS Schedule D Tools*) to detail the transaction data.

When the Schedule D-1 or substitute document is used, it must be mailed to the IRS along with Form 8453. The actual transaction data mailed to the IRS must contain the same information that would be reported on the Schedule D.

<b>Schedule D Tools</b> .....	<b>\$189<sup>00</sup></b>
annual renewal .....	\$149 <sup>00</sup>
network upgrade .....	add \$50 <sup>00</sup>

## TECHNICAL SUPPORT ISSUES



## REMINDERS...

### Scannable forms must not be faxed, photocopied, or exported to PDF.

A number of users have reported having scannable forms rejected by the IRS or a state agency. We have found that most such rejections are due to the submission of forms that were not directly printed from the CFS program.

To ensure that they can be read electronically, scannable forms should not be faxed, photocopied, or exported to PDF files.

**Please make sure that you only submit scannable forms that have been printed directly from the CFS program.**

### CFS Software and Windows Vista

We have received a number of questions regarding CFS software compatibility with Windows Vista, Microsoft's newest operating system.

We have done some testing, and CFS programs do work with Vista. The only problem we have identified is that program Help files are not accessible in Vista. However, we are working on this issue, and hope to resolve it soon.

CFS programs are currently compatible with Windows NT4, 2000, XP, and Server 2003.

*"Yesterday" (new words to a familiar tune)*

*Yesterday—  
All those backups seemed a waste of pay.  
Now, my database has gone away.  
Oh, I believe in yesterday.*

*Suddenly—  
There's not half the files there used to be,  
And there's a deadline hanging over me.  
The system crashed so suddenly.*

*I pushed something wrong—  
What it was, I could not say.  
All my data's gone, and I long for yesterday.*

*Yesterday—  
The need for backups seemed so far away.  
I thought my data was all here to stay.  
Now, I believe in yesterday.*

### Shipping Policy

We have added a "no CD" option for customers who wish to save on shipping by downloading all of their CFS programs from the Internet. CFS customers can now choose from the following shipping options:

1. Receive the initial release of each program on CD and download all updates for **\$7 per order**.
2. Receive the initial release and all significant updates on CD for **\$25 per year**.
3. Download the program and all updates: **no CDs = no shipping charge**.

There are exceptions to this policy. Users of the CD versions of *Fill-N-Print Tax Forms* or *Tax Research* do not have a choice of shipping options, as they must receive several scheduled CD shipments.

Also, due to the number of updates required, users of *NY Sales Tax Preparer* **must** download all updates from the Internet, and therefore cannot choose option two.

**California customers will receive an added benefit by choosing the third option. There is no sales tax on programs downloaded from the Internet!**

### Don't forget to download and install your software!

Remember—if you requested the "no CD" shipping option, you will not receive a CD, so don't forget to download and install your purchased CFS software!

Make sure we have your current e-mail address and our e-mails are not being blocked by your spam blocker, so that we can remind you about updates.

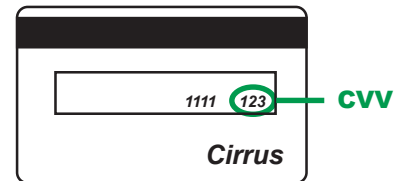
You can also stay informed of updates by periodically checking the "News & Updates" section of our web site at [www.taxtools.com](http://www.taxtools.com).

### Credit Card Security Code

To protect our customers from identity theft, we now ask for the CVV (Card Verification Value) security code for all credit card transactions.

The CVV security code is only printed on the credit card; it is not contained in the magnetic stripe information or on sales receipts or billing statements. You must have the card in your possession in order to use this code. By giving us your CVV, you are helping us to ensure that the order is being placed by you, the card holder.

**For Visa, Mastercard and Discover cards**, the CVV is a three-digit number located on the signature panel on the back of the card, immediately after the account number:



**For American Express**, the CVV is a four-digit number located on the front of the card, to the right and above the account number:



### W2/1099 Forms Starter Kits

You will only receive a **free** starter kit of forms and envelopes if you order *W2/1099 Payroll System 2007* **by May 31st**.

However, starter kits are available for purchase for \$39. See [www.taxtools.com](http://www.taxtools.com) for details.

# WHAT CAN YOU FIND AT **taxtools<sup>CFS</sup>.com**?

At [www.taxtools.com](http://www.taxtools.com), you'll find all kinds of useful information, including...

## Software Updates...

Need to update your CFS software, or just want to make sure you're running the latest version? Under **Quick Links**, click on **Software Updates**. Click on the CFS program you want to update, and you'll be taken to a screen where you can find the latest downloadable update, along with an **Update History**.

## UPS Tracking...

Track forms and expedited software shipments from our web site. Under **Quick Links**, click on **Package Tracking**.

## Expected Release Dates...

Want to know when to expect your CD or download your next update? Under the **Support** menu, click on **Release Dates**.

## Show/Seminar Schedule...

Find out where and when CFS will be appearing at tax shows and seminars. Click on the **Show Listing** menu.

## Technical Support...

Need help? You might find the answer in the **Frequently Asked Questions (FAQ)** section of our **Technical Support** page. If not, you can submit a **Technical Support Request**. Under the **Support** menu, click on **Technical Support**.

## MyCFS...

Your **MyCFS** account allows you to shop securely at our new online store **and** gives you secure access to your personal customer information, including order history, vouchers earned, license code, and renewal information. Login or create an account by selecting **Login** under the **MyCFS** menu.

## More...

At [www.taxtools.com](http://www.taxtools.com), you will also find product descriptions, customer comments, instructional videos, links, news, and downloadable demos.

## CFS POLICIES AND DISCLAIMERS

### Return Policy

Software returns will be accepted no later than 30 days from receipt of program(s). If the order has already been shipped, a refund will be granted minus shipping.

Forms returns will be accepted no later than 30 days from receipt of order but not after 12/15/07. Forms orders placed after 12/15/07 cannot be returned.

### Free Shipping

There is no shipping charge or sales tax if you download the program and all updates and do not receive a CD. However, if you later request a CD, CFS is required by law to charge sales tax on the original order.

### Update CD Service

There is a charge of \$25 if you would like the initial release and all major updates on CD. This does not apply to CD versions of Tax Research or Fill-N-Print Tax Forms, and is not available for NY Sales Tax Preparer.

### Multi-Program Network License

You can purchase network upgrades for CFS programs for an additional fee. However if you purchase several CFS programs, you might want to consider our Multi-Program Network License, which upgrades all CFS programs to the network version for an annual price of \$299.00. The Multi-Program Network License is not a stand-alone program—you must buy the single-user programs you wish to upgrade. This offer does not apply to AME Payroll or Fill-N-Print programs.

### Financial Planning Tools 2007

The 2007 program will function through May 31, 2008. To use the program after that date, you must order the 2008 program. The 2007 and 2008 programs may be purchased together for a special discount price of \$550.

### Quick Reference Guide

The content of this program is included in CFS Tax Research. It is also available as a stand-alone program for \$39.00 for first-time users and \$29.00 for renewals.

