



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 2009

## EARLY RENEWAL INCENTIVES

### \$5 Renewal Discount!

For every program you renew by August 31st of this year, a **\$5 renewal discount** will automatically be applied to the same program on next year's spring renewal form.

### 10% Off First-Time Purchases!

Place your software renewal order by August 31st and take **10% off the first-time purchase of any additional CFS software**. The additional software must also be ordered by August 31st. If there are other CFS programs you have been thinking of trying, such as our new *LivePayroll* program, now is the time!

### 20% Discount on Supplies!

Order your forms, envelopes and tax return supplies by August 31st and take **20% off** the already low price.

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

### Renew Online!

The quickest, easiest way to renew your software and supplies is to do it online. Go to *TaxTools.com* and click on *Renewal Notice* under the *MyCFS* menu.

### It's not too late...



...to renew early and save!

## ORDER SUPPLIES EARLY AND SAVE!

Order your forms, envelopes, and tax return supplies by August 31st and **take 20% off the regular low price!**

When you buy forms from CFS, you know that they will be compatible with CFS software. And our prices are *significantly* lower than those of our competitors. Our tax return supplies are also competitively priced, and we carry a wide variety of styles and colors.

Order from our supplies catalog, online at *TaxTools.com*, or generate a forms order from within *CFS Payroll System*.

### Please check your order!

When you receive a shipment of tax forms or supplies, please open it immediately and check your order. Verify that we sent you the correct items and that there is nothing you forgot to order. Keep in mind that items are sometimes damaged in transit.

Forms and envelopes must be returned sealed and unused within 30 days, but no later than December 15th. Refunds do not include shipping charges.

## 20 YEARS AND STILL GOING STRONG!

This year, *CFS Tax Software, Inc.* celebrates its 20th year of tax software development.

Many companies are now in trouble because they incurred too much debt and/or engaged in imprudent business practices before the economic crisis struck. CFS, however, has never had any debt, and we see no need to incur any in the future. Thanks to continuous careful and safe fiscal management, we are well positioned to weather the global economic storm.

Thank you for your continued support. We look forward to many more years of doing business with you!

## TAX QUOTABLE

"America is a land of taxation that was founded to avoid taxation."

—Laurence J. Peter

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# WHAT'S NEW AT



## THE ABC'S OF E-FILING

We receive many calls from customers wanting to know why our programs don't support e-filing for Form 941 or a particular state payroll or sales tax form. To answer that question, here are a few facts about e-filing:

To begin with, there are two methods of e-filing forms—web-based and file-upload. With web-based e-filing, the user must manually log in to a government website and fill out the necessary information on a succession of screens. When finished, the user hits a “submit” button, and the form is filed. With web-based e-filing, our software can indirectly aid the user by compiling data and providing software-generated reports containing the information to be manually entered online.

With the file-upload method of e-filing, the user creates a file from within a software program, and the file is uploaded to a government website. Usually, the software user/preparer directly submits the file to the government. However, sometimes the file-upload method requires the software company to act as an intermediary or third-party provider; the user sends the file to the software company, and the software company forwards the file to the government. With the file-upload method of e-filing, it may be possible for our software to create the file to be uploaded. **However, if the software company is required to submit the file, CFS is not equipped to act as a third-party provider.**

When a third-party provider is required, the burden of successfully filing the form lies with the software company, and they must charge a service fee to cover their costs. Tax preparers are accustomed to the ease in which Form 1040 is e-filed with this method. Because so many 1040's are e-filed and the system has been in place for so long, this third-party file-upload method is relatively inexpensive and virtually

trouble-free. However, other third-party filing systems—Form 941, for example—are more expensive, and our surveys have determined that CFS customers would not be willing to pay the service fee required.

**The bottom line is, we can only offer e-file for forms where the file-upload method is available and no third-party provider is required.**

*CFS Payroll System* currently supports payroll form e-filing for a number of states that use the file-upload method with no third-party provider requirement. We will offer e-filing for additional state forms—and for Form 941—if and when it is possible to submit those forms using the file-upload method with no third-party provider requirement.

941/940 Payroll System.....	\$109 <sup>00</sup>
annual renewal.....	\$99 <sup>00</sup>
LivePayroll (includes 941/940) .....	\$299 <sup>00</sup>
annual renewal.....	\$289 <sup>00</sup>
Network Upgrade (covers all Payroll System programs) .....	\$125 <sup>00</sup>

*California Sales Tax Preparer* can currently be used to prepare printed forms to assist the preparer in manually entering information online. The California State Board of Equalization is continuing to develop a file-upload method for the future. When they do, we will develop the necessary program code to provide file-upload e-file capability for *California Sales Tax Preparer*.

CA Sales Tax Preparer .....	\$109 <sup>00</sup>
annual renewal.....	\$99 <sup>00</sup>
network upgrade.....	\$50 <sup>00</sup>

### Note to customers who wish to avoid paying sales tax by downloading software from the Internet:

By law, California sales tax applies only to tangible products. When you purchase a program from us on CD, we must collect sales tax on the purchase because you are receiving a tangible product (the CD). However, when you download a program from the Internet, we do not collect any sales tax because you are not receiving a tangible product from us.

Seems simple, doesn't it? It is—if you are only purchasing one program. However, because most of our programs come on one Multi-Program CD, you may be charged sales tax on a downloaded program if you purchase a CD at another time, **even if it is for a different program.**

Let's say you purchase *TaxTools* in January and download the program from the Internet. You will not be charged any sales tax. However, when it comes time to buy *CA Sales Tax Preparer* in February, let's say you decide to purchase that program on CD. Of course, you would expect to pay sales tax on *CA Sales Tax Preparer*. **However, you probably did not realize that, because *TaxTools* is contained on that same CD, we must also retroactively collect sales tax on your previous purchase of *TaxTools*.**

The following rule applies to all CFS software that is sold on the Multi-Program CD (i.e., everything but *Tax Research* and *Fill-N-Print*): if you purchase **any** program on CD, we must charge you sales tax on **every** program you have purchased (or will purchase) by download that is also contained on that CD.

If you wish to avoid paying sales tax, download **all** of your CFS software!

## AFTER-SEASON 2-FOR-1 SPECIALS

CFS is currently offering after-tax-season 2-for-1 specials on the following programs:

**CFS TaxTools**—over 300 tax-planning, retirement, and financial utilities, forms, and flowcharts:

TaxTools '09 & '10 .....	\$189 <sup>00</sup>
Annual renewal.....	\$149 <sup>00</sup>
Annual network upgrade ..add	\$150 <sup>00</sup>

**CFS Quick Reference Guide**—tables, charts, and other important information, in a powerful searchable format:

Quick Reference Guide '09 & '10.....	\$39 <sup>00</sup>
Annual renewal.....	\$29 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**CFS CA 571 Preparer**—prepares and prints California Business and Agricultural Property Statements:

CA 571 Preparer '09 & '10.....	\$99 <sup>00</sup>
Annual renewal.....	\$79 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**CFS MD Personal Property**—prepares and prints Maryland Personal Property Returns:

MD Personal Property '09 & '10.....	\$179 <sup>00</sup>
Annual renewal.....	\$139 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

**CFS Financial Planning Tools**—comprehensive **Financial Planner**, plus over 100 forms, worksheets, flowcharts, and calculators:

Financial Planning Tools '09 & '10.....	\$550 <sup>00</sup>
Annual renewal.....	\$299 <sup>00</sup>
Annual network upgrade ..add	\$100 <sup>00</sup>



## REMINDERS...

### Shipping Policy

Our shipping policy allows customers to choose from the following three options:

1. Receive the initial release of each program on CD and download all updates for **\$7 per order (not per program)**.
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**.

By choosing option three, you will not only save money on shipping, you will also have immediate access to your software. California customers receive the added benefit of not paying sales tax on programs downloaded from the Internet (see *Note to customers...* on Page 2).

There are some exceptions to the shipping 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 large number of updates required, users of *NY Sales Tax Preparer* **must** download all updates from the Internet, and therefore cannot choose option two.

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

Remember—if you requested the “no CD” shipping option (see *Shipping Policy*, above), 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 *TaxTools.com*.

### “Per Office” or “Per Firm Name”?

CFS software is sold on a “per office and/or firm name” basis. This may sound confusing, but it's really pretty simple. The license agreement you see when you install our software includes the following provisions under the heading, “2. Use of the Software:”

#### A. SINGLE USER VERSION

If you have purchased a Single User Version license, you may run the Software on one or more computers for one Office operating under one Firm Name, but not on a Local Area Network or by Remote Access.

#### B. NETWORK VERSION

If you have purchased a Network Version license, you may run the Software on one or more computers on a Local Area Network for one Office operating under one Firm Name.

#### C. REMOTE ACCESS

CFS Tax Software, Inc. licenses its software on a per-Office basis. This Agreement does not cover Remote Access. If you wish to run the Software at more than one Office using some form of Remote Access, contact CFS at 1-800-343-1157 for licensing requirements.

What this means is:

- If you purchase the SINGLE USER version of a CFS program, you may install it on one or more computers in the same office using the same firm name, but not on a network.
- If you purchase the NETWORK version of a program, you may install it on a Local Area Network for one office using the same firm name.
- If your firm has more than one office, you must purchase a separate copy of the software for each office.
- If your firm shares an office with another firm operating under a different name, each firm must purchase a separate copy of the software.

# WHAT CAN YOU FIND AT TAXTOOLS COM?

At *TaxTools.com*, you'll find all kinds of useful information, including...

## 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** or get live **Chat Support** from a technician. Under the **Support** menu, click on **Technical Support**.

## Forums...

Looking for an answer to a tax- or software-related question? You may find an answer—or be able to answer someone else's question—in one of our discussion forums. Click on **Forums** on the menu bar.

## 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**.

## MyCFS...

Your **MyCFS** account allows you to shop securely at our online store **and** gives you secure access to your personal customer information, including: Renewal Notice, Order History, Package Tracking, License Codes, and Vouchers. Select these options and others from the **MyCFS** menu.

## 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 **Show Listing** on the menu bar.

## More...

At *TaxTools.com*, you will also find product descriptions, customer comments, instructional videos, news, links, downloadable program demos, and more!

## CFS POLICIES AND DISCLAIMERS

### Return/Refund Policy

Software and tax supplies returns will be accepted no later than 30 days from receipt of item(s). All tax year forms/envelopes must be returned sealed and unused within 30 days of receipt, but no later than December 15th of the same tax year. All refunds will be paid less shipping charges.

Shipping damage must be reported directly to the carrier as soon as possible (no more than 14 days).

### 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 Fill-N-Print.

### Financial Planning Tools 2009

The 2009 program will function through May 31, 2010. To use the program after that date, you must order the 2010 program. The 2009 and 2010 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.

