



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Fall 2011

LAST CHANCE TO RENEW EARLY!

Many of you have already taken advantage of our May and August early renewal specials, thereby earning vouchers to apply to next year's renewals.

But if you *haven't* renewed, we are trying one last time to encourage you to do so before the December-January rush, when both your office and ours will be at their busiest.

It's the smart thing to do. You'll save time by ordering early, and saving time means saving money. And if that isn't reason enough, here's another incentive...

Free Tax Research Online!*

Renew any CFS software title by October 31st and receive a free subscription to *CFS Tax Research Online* through April 30, 2012. *Tax Research Online* has all the reference material on our *Tax Research CD*—Internal Revenue Code, IRS Regulations, Announcements, Notices, Publications, Revenue Rulings and Procedures, MSSP Audit Technique Guides, Court Opinions and more—all available for fast, easy searching from any computer with Internet access.

RENEW BY OCTOBER 31ST!
SAVE TIME AND MONEY, AND...



GET TAX RESEARCH FREE!

* If you have already renewed early and want to take advantage of this offer, call CFS at 800-343-1157, or fax your request to 805-522-0187.

LAST CHANCE TO SAVE ON SUPPLIES!

Order your forms, envelopes, and tax return supplies by October 31st to take **10% off the regular low price.**

When you buy forms from CFS, you know you are buying forms that are compatible with CFS software. And our prices are *significantly* lower than those of our competitors.

We also carry competitively priced tax return supplies, compatible with our own and most other companies' software. Our presentation folders come in a wide variety of styles and colors, and if we don't have exactly what you want, you can even design a custom folder to your own specifications.

Order from our supplies catalog or online at www.taxtools.com. You can also generate a forms order sheet from within *CFS Payroll System* by selecting "Complete Forms Order..." from the Help menu.

WE'RE ON FACEBOOK AND TWITTER!

Now you can use your favorite social media to stay informed of CFS program releases, updates and other news! Look for links to our Facebook and Twitter pages at the bottom of our home page, www.taxtools.com.

W2/1099 & PAYROLL CORRECTOR

By the time you receive this newsletter, *W2/1099 Payroll System* and *Payroll Corrector* should be available for download at www.taxtools.com.

If you renewed *W2/1099* by May 31st, you will receive a **free forms starter kit**. If you chose to pay for shipping when you ordered the program, you will receive a software CD. Starter kits and CDs will likely be mailed in October.

TAX QUOTABLE

"There is just one thing I can promise you about the outer space program: your tax dollar will go further."

—Wernher von Braun

WHAT'S INSIDE...

NEW AT CFS...

- CFS** E-File Update — *the latest developments in state and federal e-filing;*
- CFS** CA Sales Tax Does E-File;
- CFS** EULA Changes.

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WHAT'S NEW AT



E-FILE UPDATE

There are three methods of e-filing—(1) web-based, (2) file upload by the preparer directly to the taxing agency, and (3) file-upload to a third-party provider who then forwards the file to the taxing agency. CFS can only support the second method.

With web-based e-filing, the process cannot be automated. The user must log in to a website and manually enter the information. With the file-upload by the preparer method, the software can create the file and the preparer can either log in to a website and upload the file or transmit the file directly to the agency's internet portal. CFS can create files in the proper format for e-filing, but the taxing agency must allow for the file to be submitted by the preparer. CFS cannot act as a third-party provider handling customers' e-file data.

CA Sales Tax Preparer: We have added e-file capability to *CA Sales Tax Preparer*. For details, see the article in the next column.

NY Sales Tax Preparer: New York has imposed an "e-file mandate" for certain tax preparers and businesses that prepare their own returns. We have provided links within the program to information on the state's web site, so that users may determine whether or not the mandate applies to them.

New York currently uses a web-based system, but the state recently announced that next year they will begin working with vendors to develop a file-upload system. At that time, we hope to be able to develop e-file capability for *NY Sales Tax Preparer*. In the meantime, the software can be used to prepare printed forms to assist in manually entering the information online.

CFS Payroll System currently supports payroll form e-filing for a number of states. We will offer e-filing for additional state forms—and for Form 941—if and when it is possible to directly submit those forms using the file-upload method.

CA SALES TAX DOES E-FILE!

Last year, CFS became the first software company certified for the California Board of Equalization's Direct Transmit program. Our *California Sales Tax Preparer* software allows the user to complete Sales and Use Tax Return within the program, then simply click a button to transmit the return and payment directly to the BOE.

- No username or password log-in required.
- Software handles file transmittal automatically; no manual file upload required.
- Confirmation is received in seconds.

The following forms may be electronically filed using *California Sales Tax Preparer 2011*:

- Form 401 - Sales and Use Tax Return, including Schedules A, B, C, and G
- Form 401-EZ - Short Form - Sales and Use Tax Return (filed using Form 401)
- Form 1150 - Sales and Use Tax Prepayment Form
- Form 401-E - Consumer Use Tax Return, including Schedules AE and E

The best news? Current *CA Sales Tax Preparer* users can still buy the program for the same low renewal price of \$99!

EULA CHANGES



We have made changes to the End User License Agreement that accompanies CFS software, relating to businesses with multiple offices. The new EULA now states:

CFS Tax Software, Inc. licenses its software on a per-Office basis. If you are using the Software at multiple Offices operating under one Firm Name:

- a) You must purchase a Program License for each Office where the Software is used.
- b) You must purchase a Network License for each Office where the Software is used on a separate LAN or WAN (excluding backups).

Below are three examples of how the multi-office policy works:

Example 1: You have two offices. You wish to run TaxTools on all computers at both offices, but not on a network. You must purchase two TaxTools program licenses, at a discount of \$30 (\$15 multi-office discount x 2).

Example 2: You have two offices, each of which has its own LAN. You wish to run the network versions of TaxTools and CA Sales Tax Preparer at each office. You must purchase two TaxTools program licenses and two CA Sales Tax Preparer program licenses, for which you will receive a \$60 discount (\$15 multi-office discount x 4). You must also purchase two TaxTools network licenses and two CA Sales Tax Preparer network licenses, for which you will also receive a \$60 discount (\$15 multi-office discount x 4).

Example 3: You have three offices. You wish to run the network versions of TaxTools and Payroll System at all three offices, connected to a single server via a WAN. You must purchase three TaxTools program licenses and three Payroll System program licenses, for which you will receive a \$90 discount (\$15 multi-office discount x 6). However, you need only purchase one TaxTools network license and one Payroll System network license, as you are running the programs on a single network.

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 '11 & '12	\$489 ⁰⁰
Annual renewal.....	\$159 ⁰⁰
Annual network upgrade ..add	\$150 ⁰⁰

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

Quick Reference Guide '11 & '12.....	\$39 ⁰⁰
Annual renewal.....	\$29 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

CA 571 Preparer '11 & '12.....	\$99 ⁰⁰
Annual renewal.....	\$79 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

MD Personal Property '11 & '12.....	\$179 ⁰⁰
Annual renewal.....	\$139 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

Financial Planning Tools '11 & '12.....	\$550 ⁰⁰
Annual renewal.....	\$299 ⁰⁰
Annual network upgrade ..add	\$100 ⁰⁰



REMINDERS...

Shipping Policies

Software:

Our software is shipped by first class mail. When ordering software, customers may choose from the following three 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**.

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.

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.

Forms and Supplies:

Forms and supplies are shipped UPS Ground. Cost depends upon the size of the order and may be higher for shipments to Alaska and Hawaii.

UPS Next Day and 2nd Day shipping options are also available, with cost depending upon shipment weight and destination.

Note:

- UPS can only deliver to a street address, not to a post office box.
- If the customer provides an incomplete or inaccurate address and UPS must redeliver the shipment, there will be an additional charge.

Don't forget to download and install your software!

Remember—if you requested the “no CD” shipping option (see *Shipping Policies*), 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 program releases and updates.

You can also check for releases and updates at the **News and Updates** section of *TaxTools.com* and our new **Facebook** and **Twitter** pages.

W2/1099 License Code

Remember—when you install **CFS Payroll System W2/1099**—even if you have already installed **Payroll System 941/940** or **LivePayroll**—you may need to enter a **new license code**.

Your license code is printed on your receipt. You can also look it up at *TaxTools.com* by clicking on **License Code** under **Quick Links**. You will need to log in to your **MyCFS** account.

When you install the program, make sure that you are using the latest code. (It may vary only slightly from your old license code.) **You must enter the correct code to activate the program.**

Is your address correct?

CFS doesn't forward mail. Often, the only way we find out that a customer has moved is when their mail is returned to us.

It's easy to notify us of a change of address. You can fax the change to us at 805-522-0187 or e-mail it to feedback2@taxtools.com. However, the easiest way to inform us of a change is online. Log in to your MyCFS account and select **Name/Address Change**.

Don't let an incorrect address keep you from receiving your software and supplies on time or prevent you from getting a discount!

WHAT CAN YOU FIND AT TAXTOOLS CFS .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 by selecting **Tax Seminars** from 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 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 applicable 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 \$329.00. 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 2011

The 2011 program will function through May 31, 2012. To use the program after that date, you must order the 2012 program. The 2011 and 2012 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.

