



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Fall 2013

## LAST CHANCE TO RENEW EARLY!

Many of you have already taken advantage of our May and August early renewal specials, 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 are a couple more incentives...

### Renew by October 31st and receive:

- **10% off any first-time software purchase, and**
- **Free Tax Research Online through April 30, 2014!**

*Tax Research Online* has all of the reference material found 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 31<sup>ST</sup>! SAVE TIME AND MONEY, AND...



**GET TAX RESEARCH FREE!**

## 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](http://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.

## DO YOU HAVE A MYCFS ACCOUNT?

It's easy to set up a new MyCFS account or update an old one. Go to *TaxTools.com* and click **MyCFS** on the green menu bar. If you don't have an account, click the **Register** button. If you do have an account, use your e-mail address and password to log in. If you can't remember your password, there's a link for that.

Once you've logged in, your account information will be displayed. Make sure your **Customer Info** is correct, and that your account is linked to your Customer ID. You can make changes to your Customer Info by clicking **Change Firm Name/Address/Email**.

If you need help, call customer service and we'll give you a hand. Remember—your MyCFS account is the easiest way to order software and supplies and keep track of your account information!

## TAX QUOTABLE

"I am thankful for the taxes I pay because it means that I'm employed."

—Nancie J. Carmody

## WHAT'S INSIDE...

### NEW AT CFS...

- New in *CFS Payroll System*;
- E-File Update — *the latest developments in state and federal e-filing.*

Page 2.

### SPECIALS...

Check out our after-tax-season 2-for-1 specials!

Page 3.

### REMINDERS...

Some things bear repeating.

Page 3.

### ONLINE...

What can you find at [taxtools.com](http://taxtools.com)?

Page 4.

### POLICIES...

FYI—CFS company policies and disclaimers.

Page 4.



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# WHAT'S NEW AT



## NEW IN CFS PAYROLL SYSTEM

### More Client List Options

Previously, users were limited to three options for the Client List: Name only, Name and ID, or Name, ID, and Control Number. Now users can choose to display any number of fields, arranged in any order, by using the new Client List Options screen. Columns autosize to fit, and the list scrolls horizontally if necessary.

The Client List Options screen includes other options, such as column headings, gridlines, and the ability to lock the first column. Users can set filters to limit employers that are displayed. Different settings can be saved in multiple Option files.

### Status Fields

New fields have been added to the Edit Client screen to allow users to track employer status with regards to common filing tasks. The fields were named to match the Client Checklist report. There are ten named fields and one blank. Field names can be changed by the user to suit their purposes.

Status fields can be displayed in the Client List and used as filters. The Client List Options screen allows users to establish a highlighting scheme for status fields to help them track filing progress. Highlights can be applied based on the value in a single status field or all status fields.

### Online UI Filing Support

Online UI filing support for one employer at a time is now provided for twenty-seven states, using either a stand-alone module or the UI form module for the state.

For additional information on these features and others, see the *Payroll System* help file.

## 2013 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.

**We can only offer e-file where the file-upload method is available and no third-party provider is required.**

Details follow regarding the latest e-file developments in *CFS Payroll System*, *California Sales Tax Preparer*, and *New York Sales Tax Preparer*.

### CFS Payroll System

*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.

941/940 Payroll System .....	\$139 <sup>00</sup>
annual renewal .....	\$129 <sup>00</sup>
LivePayroll (includes 941/940) .....	\$299 <sup>00</sup>
annual renewal .....	\$289 <sup>00</sup>
Network Upgrade (covers all Payroll System programs) .....	\$150 <sup>00</sup>

### California Sales Tax Preparer

**In 2010, 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 a Sales and Use Tax Return within the program, then transmit the return and payment directly to the BOE with the click of a mouse button.

CA Sales Tax Preparer .....	\$119 <sup>00</sup>
annual renewal .....	\$99 <sup>00</sup>
network upgrade .....	\$50 <sup>00</sup>

### New York Sales Tax Preparer

Unfortunately, the New York State Department of Taxation and Finance uses a manual web-entry system, which means we cannot program our software for automatic e-filing. However, *NY Sales Tax Preparer* can be used to prepare printed forms to assist in manually entering information online.

If, in the future, New York should ever implement a file-upload system similar to California's, we would hope to be able to develop e-file capability for *NY Sales Tax Preparer*.

**In the meantime, we have discounted the price of *NY Sales Tax Preparer* by 50% until such time as we are able to offer e-file capability.**

NY Sales Tax Preparer .....	<del>\$169<sup>00</sup></del> \$84 <sup>50</sup>
annual renewal .....	<del>\$149<sup>00</sup></del> \$74 <sup>50</sup>
network upgrade .....	\$50 <sup>00</sup>

## AFTER-SEASON 2-FOR-1 SPECIALS



## REMINDERS...

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

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

**TaxTools '13 & '14** ..... \$199<sup>00</sup>  
**Annual renewal**..... \$169<sup>00</sup>  
**Annual network upgrade ..add** \$150<sup>00</sup>

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

**Quick Reference Guide**  
**'13 & '14**..... \$39<sup>00</sup>  
**Annual renewal**..... \$29<sup>00</sup>  
**Annual network upgrade ....add** \$50<sup>00</sup>

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

**CA 571 Preparer '13 & '14**..... \$99<sup>00</sup>  
**Annual renewal**..... \$79<sup>00</sup>  
**Annual network upgrade ....add** \$50<sup>00</sup>

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

**MD Personal Property**  
**'13 & '14**..... \$179<sup>00</sup>  
**Annual renewal**..... \$139<sup>00</sup>  
**Annual network upgrade ....add** \$50<sup>00</sup>

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

**Financial Planning Tools**  
**'13 & '14**..... \$550<sup>00</sup>  
**Annual renewal**..... \$299<sup>00</sup>  
**Annual network upgrade ..add** \$100<sup>00</sup>

**W4 Calculator**—adjust payroll withholding throughout the year:

**W4 Calculator '13 & '14**..... \$89<sup>00</sup>  
**Annual renewal**..... \$49<sup>00</sup>  
**Annual network upgrade ....add** \$50<sup>00</sup>

### Shipping Policies

**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. Some customers will receive the added benefit of not paying sales tax on programs downloaded from the Internet.

There are exceptions to the shipping policy. Users of the CD version of *Tax Research* do not have a choice of shipping options, as they receive quarterly 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** 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.
- Severe weather may cause a delay in delivery. The UPS package guarantee does not apply when transportation networks are disrupted.

### Tips for Ordering Online

Our online store is the easiest and most efficient way of ordering software, forms, and supplies from CFS. Here are a few tips to ensure that your online orders go smoothly:

1. **Use your MyCFS account.** You don't need a MyCFS account to order at our online store; it's possible to order as a "guest." However, doing so may slow your order down and prevent you from earning or redeeming renewal discounts. If you have a MyCFS account, use it. If you don't have an account, it's easy to create one.
2. **Order tax forms for the current tax year.** Our online store is the most efficient way to order your tax forms, as long as you are ordering forms for the current tax year (2013). (It is possible to order prior-year forms by fax.)
3. **Unless absolutely necessary, don't add Special Instructions.** On the "Payment Information" screen, there is a field for "Special Instructions." If you put a note in this field, your order will automatically be placed on hold, because someone has to read your note before the order can be processed. For instance, if you add a note that says, "Please rush," ironically, your order will take longer.
4. **Enter the expiration date for your credit card in the correct format (MM/YY).** A leading zero is required for single-digit months.

### Instructional Videos

*CFS Instructional Videos* provide instruction on installing and updating CFS software and performing specific tasks in programs. They are available from the **Support** menu at *TaxTools.com* or from a link in the Help menu of most CFS programs.

# 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 or **Quick Links**, click on **Technical Support**.

## 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, or click on **MyCFS Account** under **Quick Links**.

## Instructional Videos...

We've posted instructional videos to guide you through everything from installing and updating software to performing specific tasks within programs. The videos have controls that allow you to pause, rewind, and fast forward for viewing at your own pace. Under the **Support** menu, click on **Instructional Videos**.

## Expected Release Dates...

Want to know when to expect your CD or download the program you ordered? 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, important news, helpful 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. **Note:** this option does not apply to the CD version of Tax Research 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 2013

The 2013 program will function through May 31, 2014. To use the program after that date, you must order the 2014 program. The 2013 and 2014 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.

