



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2013

## EARLY RENEWAL DISCOUNT CHANGES

This year, we are taking the first step toward simplifying our early renewal discount system.

Under the old system, for every program renewed early, you earned a discount voucher—\$10 for renewing by May 31st and \$5 for renewing by August 31st. However, you could not *redeem* that voucher until the following year—and *then* only if you renewed by May 31st.

Under the new system, which we plan to implement next year, there will no longer be a one-year delay between earning a voucher and applying it. Beginning next year, you will receive an *immediate discount* on every program you renew early—\$10 off every program renewed by May 31st and \$5 off every program renewed by August 31st.

The new system is simpler and has the following benefits:

- Although you won't receive a discount if you don't renew early, at least you won't forfeit your chance for a discount the following year.
- If you renew after May 31st but by August 31st, you will still receive a \$5 discount.

The only change this year is that you will not *earn* any vouchers for renewing early. You won't need them, because next year you will receive a discount for renewing early *regardless* of whether or not you renewed early this year.

However, you still must renew by May 31st to *redeem* the vouchers you earned last year, and to receive—

**30% off first-time software purchases!**

**20% off supplies!**



## 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 receiving 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 tax forms, *provided you are ordering forms for the current tax year.* (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.

## FREE W2/1099 FORMS STARTER KIT

Receive a free starter kit of forms and envelopes—a \$39 value—when you purchase *W2/1099 Payroll System* for the first time or renew it by May 31st!

## TAX QUOTABLE

"You must pay taxes. But there's no law that says you gotta leave a tip."

—Morgan Stanley ad

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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.

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>

## 2013 E-FILE UPDATE

### 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>



## REMINDERS...

### CFS EULA

The End User License Agreement (EULA) for most CFS programs 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.

### Fill-N-Print EULA

The Fill-N-Print End User License Agreement is different from the EULA for other CFS programs. It states that—

By purchasing the Software License, you are granted the non-exclusive right and license to use one copy of the Software in machine-readable form at one site, on one computer, for the time period specified when you purchased the License.

Additional License rights may be granted for use of the Software at more than one site and on more than one computer, provided an additional License has been purchased.

In other words, whereas most CFS software is sold on a *per office* basis, Fill-N-Print is sold on a *per computer* basis. If you intend to install Fill-N-Print on more than one computer—even if it's in the same office—you *must purchase a multiple user license*.

Fill-N-Print multiple user licenses are available for 3, 5, 10, 15, and 25 users.

### Sales Tax and Downloads

If you are a California resident (or, in some cases, a resident of another state purchasing software at a seminar), when you purchase a program on CD we must collect sales tax because you are receiving a **tangible product** (the CD). When you download a program from the Internet, we do not collect sales tax because there is no **tangible product** involved.

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, **even if you purchase the CD for a different program at a different time**.

If you purchase **any** program on CD, we must charge you sales tax on **every** program you have purchased (or purchase in the future) that is also contained on that CD, **even if you download it**.

### 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. Customers receive the added benefit of not paying sales tax on programs downloaded from the Internet. (See *Sales Tax and Downloads*, in the previous column.)

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.

# 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.

