



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 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 *instant discount* on every program you renew early: \$10 off every program renewed by May 31st; \$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 should **STILL** renew by August 31st to receive—

20% off first-time software purchases!

15% off supplies!

Free 2013 W4 Calculator! (See next column.)



W4 CALCULATOR LETS YOUR CLIENTS HAVE IT THEIR WAY!

As a tax preparer, you know that the wisest thing your clients can do when filling out a W-4 is to be as accurate as possible, so as to keep the greatest possible amount in their paychecks without owing anything to the government at the end of the year.

However, you also know that some clients prefer to get that big refund. And others may need to adjust their withholding mid-year, due to a change in circumstances.

W4 Calculator will calculate the correct number of withholding allowances for your clients, so that they can come as close as possible to “breaking even” at the end of the year. It can also be used to calculate the number of withholding allowances to get a desired refund, or to adjust withholding mid-year when circumstances change.

In addition to calculating W-4 allowances, *W4 Calculator* also accurately calculates DE-4 allowances for California taxpayers. It generates Forms W-4, W-4P, W-4V, DE-4, DE-4P, 1040-ES, and 540-ES.

Help your clients get the most out of their paychecks...

Or get that big refund!



***W4 Calculator* normally sells for \$89. However, if you renew your CFS products by August 31st, you can receive the 2013 version of *W4 Calculator* free!**

For information on how to order your free copy of *W4 Calculator*, see the renewal form enclosed with this mailing.

Note: To be eligible for this offer, you must renew next year's software, forms, or tax supplies by August 31, 2013. If you have already renewed and want to take advantage of the offer, please contact us.

TAX QUOTABLE

“The folks at the IRS are regular people just like you, except that they can destroy your life.”

—Dave Barry

WHAT'S INSIDE...

NEW AT CFS...

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

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CFS Tax Software, Inc.
P.O. Box 879
Simi Valley, CA 93062

Phone: 800-343-1157
or 805-522-1157

Fax: 805-522-0187

Internet: www.taxtools.com

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

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 ⁰⁰
annual renewal	\$99 ⁰⁰
network upgrade	\$50 ⁰⁰

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	\$169⁰⁰ \$84 ⁵⁰
annual renewal	\$149⁰⁰ \$74 ⁵⁰
network upgrade	\$50 ⁰⁰

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 '13 & '14	\$199 ⁰⁰
Annual renewal.....	\$169 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 '13 & '14.....	\$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 '13 & '14.....	\$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 '13 & '14.....	\$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 '13 & '14.....	\$550 ⁰⁰
Annual renewal.....	\$299 ⁰⁰
Annual network upgrade ..add	\$100 ⁰⁰



REMINDERS...

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.

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 program releases and updates. You can also stay informed by signing up for our monthly e-newsletter, and by following us on *Facebook* or *Twitter*.

Please keep us posted!

If you make changes to the name, address, or phone number of your firm, we need to know about it. Your firm information needs to be accurate and up-to-date so that you receive our mailings, so that we can notify you of program updates, and so that your license code functions correctly to give you access to the programs you have purchased.

It's easy to update your firm information online. Go to *TaxTools.com* and select **Change Firm Name/Address/Email** from the **MyCFS** menu. You can also fax changes to us at 805-522-0187 or e-mail customerservice@taxtools.com. Please be sure to include your customer ID number.

Our policy is to require firm changes in writing, but for simple changes such as updating or correcting a phone number or an e-mail address, or if you have any questions, please call our customer service department at 1-800-343-1157.

Instructional Videos

CFS Instructional Videos provide instruction on installing and updating CFS software and performing specific tasks in programs. Each video has controls which allow you to pause, rewind, and fast forward, for viewing at your own pace. Instructional Videos 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.

