



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2014

A SIMPLE INCENTIVE TO RENEW EARLY

Starting this year, we have dramatically simplified our early renewal incentive program. We think you'll be pleased with the change.

Goodbye Vouchers!

Under the previous "voucher" program, for every program you renewed early, you would earn a \$10 or \$5 discount voucher. However, you could not *redeem* that voucher until the following year—and *then* only if you renewed by May 31st.

Hello Early Renewal Discount!

From now on, you receive an *immediate* Early Renewal Discount on every program you renew early—\$10 off every program renewed by May 31st or \$5 off every program renewed by August 31st. (If you look at this year's renewal notice, you will see that the discount has been automatically calculated for you.)

The new Early Renewal Discount program has the following benefits:

- It's easier to explain and easier to understand: you receive an Early Renewal Discount on every program you renew early. Period.
- Unlike the voucher program, if you didn't renew early *last* year, you can still get an Early Renewal Discount when you renew early *this* year.
- If you renew between June 1st and August 31st, you *still* receive a \$5 Early Renewal Discount. You would have received *no* discount under the voucher program.

One thing *hasn't* changed. You still get the best price if you renew your CFS software by May 31st, **plus**—

30% off the first-time purchase of additional CFS software or network upgrades, **and**

20% off forms, envelopes, and tax supplies—

When you renew by May 31st!

25 YEARS AND WE'RE STILL HERE— THANKS TO YOU!

This year, *CFS Tax Software, Inc.* celebrates its 25th year in the tax software development business.

An enormous THANK YOU to you, our customers, for your continued support. We wouldn't be here without you, and we look forward to many more years of doing business with you!



WE VALUE YOUR INPUT!

Customer input is an important part of our software development philosophy. Over the years, many enhancements to our programs have come from the suggestions of our customers. If you have an idea for a new program, module, or feature, we would really like to hear it. Please e-mail your suggestions to us at feedback2@taxtools.com.

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

"The wages of sin are death, but by the time taxes are taken out, it's just sort of a tired feeling."

—Paula Poundstone

WHAT'S INSIDE...

NEW AT CFS...

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

Page 2.

CFS REMINDERS...

Concerning our End User License Agreement, Sales Tax, and Shipping Policies.

Page 3.

CFS ONLINE...

What can you find at taxtools.com?

Page 4.

CFS POLICIES...

FYI—CFS company policies and disclaimers.

Page 4.



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 SOFTWARE

Foreign Address Support

Foreign address fields were added to the Client database of most CFS programs, providing support for the foreign address fields added to many federal and state forms.

New Retirement Modules

Two powerful new retirement planning modules have been added to both *TaxTools* and *Financial Planning Tools*:

The **Social Security Optimizer** determines the optimum age to begin receiving benefits for singles and married couples. For couples, it will also determine if it is beneficial to apply social security spousal options, such as File and Suspend, Restricted Spouse Benefit, and Voluntary Suspension of Benefits. Use of the Optimizer can result in a substantial increase in benefits over options typically chosen by Social Security recipients.

The **Retirement Income Withdrawal Planner** generates a long-term retirement income and asset withdrawal plan over client and spouse life expectancies. It includes provisions for income from wages, pensions, social security, part-time work in retirement, and investments. The flexibility of the planner allows the user to not only project a client's current retirement picture, but also to explore a multitude of "what if" scenarios involving rates of growth, inflation, asset shifting, and withdrawal strategies.

TaxTools	\$199 ⁰⁰
annual renewal.....	\$169 ⁰⁰
network upgrade.....	\$150 ⁰⁰
Financial Planning Tools	\$349 ⁰⁰
annual renewal.....	\$299 ⁰⁰
network upgrade.....	\$100 ⁰⁰

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

2014 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 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



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 an additional license for each additional computer*.

Sales Tax and Downloads

Sales tax laws vary from state to state, but generally, 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, and License Codes. 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 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

The 2014 program will change to read-only mode after May 31, 2015. To enter new data after that date, you must order the 2015 program. The 2014 and 2015 programs may be purchased together for a special discount price of \$550.

Fill-N-Print

After a Fill-N-Print subscription expires, subscribers may still access saved data in "offline" mode. New files may be created once the subscription is renewed.

