



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 2015

SUMMER RENEWAL INCENTIVES

\$5 Early Renewal Discount

On your summer renewal notice, you will see **\$5.00** in the **Early Discount** column to the right of the **Renewal Price** of your renewable software. Simply subtract that amount from the renewal price of each program you renew by August 31st.

20% Off First-Time Purchases

Place your software renewal order by August 31st, and take **20% off the first-time purchase** of any additional CFS software ordered by August 31st. If there's a CFS program you've been thinking of trying, now is a good time.

15% Discount on Supplies

Order your forms, envelopes and tax return supplies by August 31st to get **15% off** our already low prices.

See our catalog for a wide selection of forms, envelopes, checks, and tax return supplies.

Renew Online

The quickest, easiest way to renew your software and supplies is to do it online. Go to www.taxtools.com and click on **Renewal Notice** under the **MyCFS** menu.

It's not too late...



...to renew early and save!

PTO TRACKING ADDED TO LIVEPAYROLL

Last year, California passed the "Healthy Workplace, Healthy Family Act," mandating paid sick leave as of July 1, 2015. Because of this law, as well as similar laws in other states and cities, we have added a paid time off (PTO) tracking feature to LivePayroll.

Accrual and use of both sick leave and vacation are calculated for each paycheck, according to policies you define and assign to employees. PTO hours can be reported to employees either on the employee's check stub or on a separate report.

If you use LivePayroll 2015, make sure you have downloaded and installed the latest update, so that you will have access to this feature. For information on how to use the feature, see the program's Help file and the **Vacation and Sick Leave** instructional video.

Clicking **Instructional Videos on the Web** in Payroll System's Help menu will take you directly to our **Instructional Videos** web page, where you will find an extensive menu of brief videos to assist you in the use of our programs. Each video has controls which allow you to pause, rewind, and fast forward, for viewing at your own pace.

Under the **Payroll System** heading, look for the **Vacation and Sick Leave** video. While you're at it, you might want to take a look at the instructional videos for our new **Direct Deposit** feature.

LIVEPAYROLL NOW INCLUDES DIRECT DEPOSIT

Did you notice? Last fall we added direct deposit capability to LivePayroll. For more information, see [page 2](#).

TAX QUOTABLE

"It was as true...as turnips is. It was as true...as taxes is. And nothing's truer than them."

—Charles Dickens

WHAT'S INSIDE...

NEW AT CFS...

- Direct Deposit in LivePayroll; State data added to Tax Planner;
- E-File Update — *the latest developments in state and federal e-filing.*

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Check out our after-tax-season 2-for-1 specials! **Page 3.**

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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



DIRECT DEPOSIT IN LIVEPAYROLL

Last year we added direct deposit to our LivePayroll program. The feature does not add to the initial cost of LivePayroll, but it does require setting up an account with National Payment Corporation (NatPay), “the leading company to offer third-party processing of Direct Deposit for employee payroll.”

NatPay charges a one-time setup fee of \$19.95, plus a \$3 setup fee for each additional employer. Each direct deposit transaction carries a fee of \$0.49 or \$0.54, depending on the funding option and turnaround time.

Once an account has been established with NatPay and banking data has been entered, processing direct deposits is as easy as printing paychecks.

Forms required for setting up a NatPay account are included in LivePayroll. We have posted Instructional Videos on our website to walk you through setting up and using direct deposit. (Click **Instructional Videos on the Web** in the program’s Help menu.)

STATE DATA ADDED TO TAX PLANNER

State tax rate schedules have been added to the *TaxTools* Federal/State Tax Planner, giving users pre-programmed data for most states, plus New York City and District of Columbia. In many cases, programming has also been added to calculate unique state exemptions, deductions, or credits.

TaxTools	\$199 ⁰⁰
annual renewal.....	\$179 ⁰⁰
network upgrade.....	\$150 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.....	\$149 ⁰⁰
annual renewal.....	\$139 ⁰⁰
LivePayroll (includes 941/940)	\$299 ⁰⁰
annual renewal.....	\$289 ⁰⁰
Network Upgrade (covers all Payroll System programs)	\$150 ⁰⁰

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 still be used to store your clients’ data conveniently on your own computer, and to prepare printed forms as an aid to manually entering information online.

If New York should ever implement a file-upload system similar to California’s, we would hope 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-TAX-SEASON 2-FOR-1 SPECIALS

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 '15 & '16	\$199 ⁰⁰
Annual renewal.....	\$179 ⁰⁰
Annual network upgrade ..add	\$150 ⁰⁰

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

Quick Reference Guide '15 & '16.....	\$39 ⁰⁰
Annual renewal.....	\$29 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

CA 571 Preparer '15 & '16.....	\$99 ⁰⁰
Annual renewal.....	\$79 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

MD Personal Property '15 & '16.....	\$179 ⁰⁰
Annual renewal.....	\$139 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

Financial Planning Tools '15 & '16.....	\$550 ⁰⁰
Annual renewal.....	\$299 ⁰⁰
Annual network upgrade ..add	\$100 ⁰⁰

W4 Calculator—adjust payroll withholding throughout the year:

W4 Calculator '15 & '16.....	\$89 ⁰⁰
Annual renewal.....	\$49 ⁰⁰
Annual network upgradeadd	\$50 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.

Note: 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 ordinarily shipped UPS Ground. Cost depends upon the size of the order and may be higher for shipments outside the contiguous United States.

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, 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 and, in most cases,* no 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 2015 program will change to read-only mode after May 31, 2016. To enter new data after that date, you must order the 2016 program. The 2015 and 2016 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.

*An exception would be software purchased at a seminar in a state that requires sales tax on downloaded software.

