



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2016

SPRING RENEWAL INCENTIVES

\$10 Early Renewal Discount

Take **\$10 off** each CFS program for *next* year that you renew by May 31st of *this* year.

On your spring renewal notice, you will see the \$10 “Early Discount” listed to the right of the price of your renewable software. Simply subtract that amount for each program renewed by May 31st.

30% Off First-Time Purchases

Place your software renewal order by May 31st, and take **30% off** the first-time purchase of any additional CFS software ordered by May 31st. If there’s a CFS program you’ve been thinking of trying, now is the time.

20% Off Forms and Supplies

Order your forms, envelopes and tax return supplies by May 31st to get the best deal on supplies—**20% off** our already low prices.

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

Free W2/1099 Forms Starter Kit

Receive a **free starter kit** of forms and envelopes—a \$39 value—when you order **W2/1099 2016** by May 31st.

**RENEW BY MAY 31ST
FOR THE
BIGGEST
SAVINGS
OF THE
YEAR!**



THE ACA: CFS CAN HELP

The Affordable Care Act has created more work for tax professionals, but it has also created an opportunity for more revenue. CFS can help you minimize the work and maximize the revenue with our easy-to-use and affordable software tools.

Both *TaxTools* and *Small Business Tools* contain the following modules to help you assist individuals and businesses in complying with the provisions of the ACA:

- Notice to Employee of Coverage Options for Employers with Health Insurance
- Notice to Employee of Coverage Options for Employers without Health Insurance
- Employer Mandated Coverage Penalty
- Individual Mandated Health Insurance Penalty
- Individual Premium Credit
- Small Business Health Care Tax Credit

Payroll System (941/940, LivePayroll, W2/1099) now contains ACA-mandated Forms 1094-B, 1095-B, 1094-C, and 1095-C. The forms can be found by selecting **General Forms/Utilities** from the **Select Program to Display** drop-down menu. The modules generate approved paper forms; at this time we are unable to provide electronic filing.

Finally, *Tax Corresponder* contains letters to inform your clients about the ACA and let them know that you can assist them in complying with its provisions.

WINDOWS 10

CFS software is Windows 10 compatible. Our programs are also compatible with Windows 8, Windows 7, Windows Vista, Windows XP, Windows Server 2008, and Windows Server 2003.

TAX QUOTABLE

“It’s income tax time again, Americans: time to gather up those receipts, get out those tax forms, sharpen up that pencil, and stab yourself in the aorta.”

— Dave Barry

WHAT’S INSIDE...

NEW AT CFS...

CFS New features in *LivePayroll* and *Quick Reference Guide*;

CFS E-File Update — what can and cannot be e-filed using CFS software.

Page 2.

CFS REMINDERS...

Using CFS Software at Multiple Locations, Sales Tax and Downloads, 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.



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WHAT'S NEW AT



NEW PROGRAM FEATURES

PTO Tracking in LivePayroll

In the middle of last year, we added paid time off (PTO) tracking to *LivePayroll*.

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

PTO balances are brought forward when clients are imported from the previous year. When the first check of the year is created, balances are updated again to reflect any December checks created since the import.

For more information on PTO tracking, see the program's Help file and the *Vacation and Sick Leave* instructional video on our website.

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

Annotation Tools in Quick Reference Guide

Quick Reference Guide can now be annotated with bookmarks, notes, and highlighting. With the network version, annotations are shared with other users on the network.

For more information, see the program's Help file and the *Quick Reference Guide* instructional video on our website.

Quick Reference Guide	\$39 ⁰⁰
annual renewal.....	\$29 ⁰⁰
network upgrade.....	\$50 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 e-filing if the file-upload method is available and no third-party provider is required.

Details follow regarding which forms can and cannot be e-filed using CFS software.

W2/1099 (plus E-File Add-On)

Using *W2/1099* and the *E-File Add-On*, the following information returns can be e-filed with the federal government, as well as many states: W2, 1098, 1098-T, 1099-A, 1099-B, 1099-C, 1099-DIV, 1099-INT, 1099-MISC, 1099-PATR, 1099-R, 1099-S, and 1099-SA.

At this time, we are unable to provide e-filing for ACA information returns (Forms 1094-B, 1095-B, 1094-C, and 1095-C).

W2/1099	\$149 ⁰⁰
annual renewal.....	\$139 ⁰⁰
E-File Add-On.....	\$129 ⁰⁰

941/940 (and LivePayroll)

Our after-the-fact and live payroll programs support e-file for a number of state forms. However, at this time we are unable to provide e-file support for Forms 940, 941, 943, 944, or 945, due to IRS requirements for e-filing of these forms.

941/940.....	\$149 ⁰⁰
annual renewal.....	\$139 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

We had hoped we would be able to employ the same file-upload method for *New York Sales Tax Preparer* that we employed for *California Sales Tax Preparer*. However, the New York State Department of Taxation and Finance uses a manual web-entry system, which means we cannot support e-filing.

New York Sales Tax Preparer can still be used to store your clients' data conveniently on your computer, and to prepare printed forms as an aid to manually entering information online.

Because New York requires e-file and we are unable to provide it, **we have discounted the price of *New York Sales Tax Preparer* by 50%.**

NY Sales Tax Preparer	\$169⁰⁰ \$84 ⁵⁰
annual renewal.....	\$149⁰⁰ \$74 ⁵⁰
network upgrade.....	\$50 ⁰⁰



Using CFS Software at Multiple Locations

Most CFS software is sold on a “per location” basis. Our End User License Agreement (EULA) states:

If you are using the Software at multiple Locations operating under one Firm Name:

- a) You must purchase a Program License for each Location where the Software is used.
- b) You must purchase a Network License for each Location where the Software is used on a separate LAN or WAN (excluding backups).

The EULA includes the following examples:

Example 1: You have two offices. You wish to run TaxTools on all computers at both locations, but not on a network. You must purchase two TaxTools program licenses. You are eligible for a multi-program discount.

Example 2: You have two offices, each of which has its own LAN. You wish to run the network versions of TaxTools and Payroll System at each location. You must purchase two TaxTools program licenses and two Payroll System program licenses. You must also purchase two TaxTools network licenses and two Payroll System network licenses. You are eligible for discounts on both the multiple program licenses and the multiple network licenses.

Example 3: You have three offices. You wish to run the network versions of TaxTools and Payroll System at all three locations, connected to a single server via a WAN. You must purchase three TaxTools program licenses and

three Payroll System program licenses. 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. You are eligible for a multi-program discount.

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

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, while other CFS software is sold on a *per location* 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 User” 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. 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 shipment weight and destination. Costs 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.



WHAT CAN YOU FIND AT TAXTOOLS CFS .COM?

At www.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 and Updates...

Need to download or update your software, or just want to make sure you're running the latest version? Under **Quick Links** or the **Downloads** menu, click on **Download Software** to download and install full programs. Click on **Software Updates** to download an update or check a program's **Update History** to find out what's been changed.

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**.

Seminar Schedule...

Find out where and when CFS will be appearing at tax seminars and shows by selecting **Tax Seminars** from the menu bar.

More...

You will also find product descriptions, customer comments, news and update notices, downloadable 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 2016 program will change to read-only mode after May 31, 2017. To enter new data after that date, you must order the 2017 program. The 2016 and 2017 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.

