



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2017

Now Is the Best Time to Renew

\$10 Early Renewal Discount

Now is the best time to renew your CFS software. Take **\$10 off** each CFS program for *next* year that you renew by May 31st of *this* year.

On your spring renewal notice, note 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

Now is the best time to buy the CFS program you’ve always wanted to try but have never ordered. 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.

20% Off Forms and Supplies

Now is the best time to order your forms, envelopes and tax return supplies. Take **20% off** all forms and supplies ordered by May 31st.

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

Free W2/1099 Forms Starter Kit

Now is the best time to renew **W2/1099**. Not only do you save \$10, but you receive a **free starter kit** of forms and envelopes—a \$39 value—when you order by May 31st.

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



Avoid Phishing Scams

Phishing is a form of identity theft in which scammers try to trick their victims into divulging personal information, generally by means of emails with links to counterfeit websites. The IRS recently issued several warnings about phishing scams targeting tax professionals (IR-2017-03, IR-2017-39, IR-2017-64). Below are some tips to help you identify and avoid such scams.

Beware of links. One thing all phishing scams have in common is that they want you to “click here.” Don’t do it. Usually, clicking a link will take you to a counterfeit website, but it could run an executable file to install malicious software on your computer. Instead of clicking, hover your mouse over the suspicious link. The actual address of the link will pop up—generally at the bottom of your browser or email app. If the actual address does not look legitimate or does not match the text of the link, it’s probably a scam.

Beware of emails that appear to come from popular businesses. Scammers use graphics to make it appear that their emails come from legitimate businesses. They pick popular businesses—Bank of America, Visa, Yahoo, Google, etc.—knowing the odds are that their victims have accounts with those businesses. The web addresses they use may also resemble the addresses of the businesses they are counterfeiting, but will be slightly different.

Look for spelling and grammatical errors, awkward wording. Language errors and strange, awkward wording generally indicate that the email comes from another country and is a scam.

Don’t respond to threats. Legitimate businesses do not try to alarm their customers, but cybercriminals often employ threats—for example, warning that your security has been compromised, or that your account will be closed if you do not respond.

Tax Quotable

“The income tax has made more liars out of the American people than golf has. Even when you make a tax form out on the level, you don’t know when it’s through if you are a crook or a martyr.”

— Will Rogers

What’s Inside...

CFS INSIDE SCOOP...

- Ⓢ 941/940 or LivePayroll — which is right for you?
- Ⓢ E-File Facts — what can and can’t 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...

CFS company policies and disclaimers.

...page 4.



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INSIDE SCOOP

941/940 OR LIVEPAYROLL?

We first released our popular *941/940* program nearly a quarter century ago. It was strictly an after-the-fact payroll program, meaning the user enters payroll data after checks have been issued and the program uses that data to generate reports and federal and state tax forms.

Ten years ago, we released *LivePayroll*, which essentially upgraded *941/940* to a live payroll program by adding the capacity to print checks. Since then we have added other features, such as direct deposit and vacation and sick leave tracking.

In short, *LivePayroll* has all of the features of *941/940*, but in addition, it does the following:

- Calculates wages based on employee's annual salary or hours worked/hourly rate;
- Calculates federal, state, and local withholding and other payroll deductions;
- Prints paychecks;
- Processes direct deposits;
- Tracks and reports workers compensation;
- Tracks and reports vacation and sick leave.

If you need a payroll program with the above features, *LivePayroll* should fit the bill. However, if you only need to file your clients' payroll taxes, *941/940* should suffice.

941/940.....	\$154 ⁰⁰
annual renewal.....	\$144 ⁰⁰
LivePayroll (includes 941/940)	\$309 ⁰⁰
annual renewal.....	\$299 ⁰⁰
Network Upgrade (covers all Payroll System programs)	\$175 ⁰⁰

E-FILE FACTS

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	\$154 ⁰⁰
annual renewal.....	\$144 ⁰⁰
E-File Add-On.....	\$134 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.....	\$154 ⁰⁰
annual renewal.....	\$144 ⁰⁰
Network Upgrade (covers all Payroll System programs)	\$175 ⁰⁰

CFS USER TIP

To hide unused state forms: click **Configuration** on the toolbar; under "Form Display Options," click **Display State Forms**; uncheck states you do not wish to see; click **OK**, **Save Settings**, and **Close**.

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

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, when shipped, is sent on CD by first-class mail. However, more and more customers are choosing to download their software. They get the software sooner, save money on shipping, and in some cases save additional money on sales tax. (See *Sales Tax and Downloads*, previous column.)

When ordering software, customers are asked to choose from the following three shipping options:

1. Download the program(s) as well as any future updates for **\$0**,
2. Receive the initial release of the program(s) on CD and download any updates for **\$7**, or
3. Receive the initial release of the program(s) on CD as well as all major updates for **\$25**.

Due to the unusually large number of updates, users of **NY Sales Tax Preparer** may only choose from options one and 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...

Our **Instructional Videos** page contains links to short, silent, online videos that can assist you with general tasks, such as installing and updating CFS software, or with specific tasks, such as e-filing information returns with the W2/1099 E-file Add-on or setting up direct deposit in LivePayroll. VCR-like controls allow you to pause, rewind, and fast forward for viewing at your own pace.

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 \$379.00. 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 2017 program will change to read-only mode after May 31, 2018. To enter new data after that date, you must order the 2018 program. The 2017 and 2018 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.

