



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Fall 2018

LAST CHANCE TO RENEW EARLY!

If you haven't yet renewed your CFS software, forms, and supplies, please consider the following benefits of renewing before the December-January rush:

- Avoid the stress of having to place your order when your office and ours are at their busiest.
- Resolve potential software or hardware problems before tax season begins by installing and testing your software early.

And if you renew by October 31st—or have already renewed—you can take advantage of the following offers:

10% Off First-Time Purchases

Place your software renewal order by October 31st, and take **10% off the first-time purchase** of any additional CFS software ordered by October 31st.

10% Off Supplies

Order your forms, envelopes and tax return supplies by October 31st to get **10% 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.

Remember: if you renew online, you do **not** need to return the enclosed paper renewal form.



“HOW WILL THE TCJA AFFECT ME?”

Are you prepared to answer your clients' questions about the Tax Cuts and Jobs Act? The powerful Federal/State Tax Planner in *TaxTools* can help.

The Tax Planner makes it easy to compare tax under the TCJA and previous tax law. It includes the latest federal tax data, as well as the latest data for 49 states. It calculates total tax based on:

- AMT
- Earned Income Credit
- Self-Employment Tax
- Child Tax Credit
- Phase-outs
- Dependent Care Credit
- Interest and Dividends
- Schedules C, D, E, F, Form 4797
- New Pass-Through Business Deduction
- Retirement Distributions
- ...and more!

In addition to the Tax Planner, *TaxTools* contains over 300 forms, flowcharts, calculators, and worksheets, including:

- Minimum IRA Distribution
- Estate Tax Calculator
- Tax Deferred Exchanges
- Auto Lease Inclusion Amount
- Social Security Optimizer
- Penalty/Interest Calculator
- ...and more!

If you've never had *TaxTools*, now is a good time to buy it. Get both the 2018 and 2019 versions for 10% off the price of one year, when you renew your other CFS software by October 31st!

TaxTools '18 & '19.....	\$199 ⁰⁰
10% discount.....	\$19 ⁹⁰
Total	\$179¹⁰

For other 2-for-1 specials, see **page 3**.

TAX QUOTABLE

“Taxes are paid in the sweat of every man who labors.”

— Franklin D. Roosevelt

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CFS INSIDE SCOOP

941 E-FILE

The *E-File Federal Employment Tax Returns* module included in both the 941/940 and LivePayroll programs allows you to create electronic files for Forms 941, 940, 943, 944, and 945, which you can then manually upload to IRS e-Services.

You are **not** required to e-file federal employment tax returns. However, if you wish to do so using CFS Payroll System, you must first meet the following requirements:

1. You must be a tax preparer. At this time, we are unable to support e-filing for employers filing their own employment tax returns.

2. You must have an IRS e-Services account. If you don't have an account, see the IRS website for information on registering.

3. You must submit an online e-file application via IRS e-Services to become an Electronic Return Originator (ERO) and a Transmitter. You will then be assigned an EFIN (Electronic Filing Identification Number) and an ETIN (Electronic Transmitter Identification Number). If you already have an EFIN for filing income tax returns, you will need to modify your application to include employment tax returns and to be an ERO and Transmitter. If you do not already have an EFIN, the application process can take up to 45 days, so plan accordingly.

There are helpful tutorials on the IRS website to assist you with using e-Services and completing or modifying an e-file application. Also see *Become an Authorized e-file Provider*, Pub 3112, and Pub 4163.

For information on how to use the *E-File Federal Employment Tax Returns* module, see the Payroll System Help file and the instructional video posted on our website.

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.

California Sales Tax Preparer

CFS was the *first* software company to be certified for *both* the BOE's Direct Transmit program in 2010 *and* the CDTFA's new Direct Transmit Program this year. As before, *California Sales Tax Preparer* allows the user to complete a return within the program, then transmit the return and payment directly to the CDTFA.

CA Sales Tax Preparer	\$119 ⁰⁰
annual renewal.....	\$99 ⁰⁰
network upgrade.....	\$50 ⁰⁰

New York Sales Tax Preparer

The New York State Department of Taxation and Finance uses a manual web-entry system, which means we cannot support e-filing. However, *New York Sales Tax Preparer* can 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

CFS USER TIP

Nearly all CFS programs include a utility to print labels, envelopes, or slipsheets from your Client List, a list of government addresses, or your own custom list. Select **Labels/Envelopes...** from the **File** menu.

941/940 and LivePayroll

Both *941/940* and *LivePayroll* will create data files for federal employment tax returns and some state returns. The files can then be uploaded to the appropriate government portal. **Note: to e-file federal employment tax returns, you must be a tax preparer with an IRS e-Services account, an EFIN (Electronic Filing Identification Number), and an ETIN (Electronic Transmitter Identification Number).** (See first column.)

For more information, see the Payroll System help file and the instructional videos posted on our website.

W2/1099 plus E-File Add-On

With *W2/1099* plus the *E-File Add-On*, information returns can be e-filed with the federal government and many states. The program creates data files which are uploaded by the user via a government portal: Social Security Business Services Online for W-2s, IRS FIRE System for 1099s, the appropriate state site for state forms.

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

For more information, see the Payroll System help file and the instructional videos posted on our website.

941/940.....	\$154 ⁰⁰
annual renewal.....	\$144 ⁰⁰
LivePayroll	\$309 ⁰⁰
annual renewal.....	\$299 ⁰⁰
W2/1099	\$154 ⁰⁰
annual renewal.....	\$144 ⁰⁰
E-File Add-On	\$134 ⁰⁰
Network Upgrade (covers all Payroll System programs)	\$175 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 '18 & '19	\$199 ⁰⁰
Annual renewal.....	\$184 ⁰⁰
Annual network upgrade ..add	\$175 ⁰⁰

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

Quick Reference Guide '18 & '19.....	\$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 '18 & '19.....	\$99 ⁰⁰
Annual renewal.....	\$79 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

MD Personal Property '18 & '19.....	\$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 '18 & '19.....	\$550 ⁰⁰
Annual renewal.....	\$299 ⁰⁰
Annual network upgrade ..add	\$100 ⁰⁰

W4 Calculator—adjust payroll withholding throughout the year:

W4 Calculator '18 & '19.....	\$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 major 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.

Installing W2/1099

If you purchase *W2/1099* at the end of the year, months after purchasing other CFS programs, the license code you received when you purchased those other programs **will not work for W2/1099**. You must use the new license code you receive when you purchase *W2/1099*.

The license code will be on your receipt for *W2/1099*. You can also look it up at www.taxtools.com by clicking on **License Code** under **Quick Links**. You will need to log in to your MyCFS account.

If you installed another Payroll System program (941/940, LivePayroll, or Corrector) at the beginning of the year, you do not need to install W2/1099. Just make sure you have installed the *Payroll System* update containing the *W2/1099* release. Then open *CFS Payroll System*, click on the **File** menu, click on **Firm Information**, and enter your new license code for *W2/1099* in the **License Code** field.

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.

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. Select **Instructional Videos** from the **Support** menu.

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 2018 program will change to read-only mode after May 31, 2019. To enter new data after that date, you must order the 2019 program. The 2018 and 2019 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.

