



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2018

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!**



"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 the best time to buy it. **Get both the 2018 and 2019 versions for 30% off the price of one year, when you renew your other CFS software by May 31st!**

If you already have TaxTools, be sure to renew it by May 31st to save \$10!

TaxTools	\$199 ⁰⁰
annual renewal.....	\$184 ⁰⁰
network upgrade.....	\$175 ⁰⁰

TAX QUOTABLE

"Like mothers, taxes are often misunderstood, but seldom forgotten."

— Lord Bramwell

WHAT'S INSIDE...

CFS INSIDE SCOOP...

- 📄 **941 E-File**— requirements for using CFS Payroll System to e-file federal employment tax returns.
- 📄 **E-File Facts**— what can and can't be e-filed using CFS software.

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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 certified for the California Board of Equalization's Direct Transmit program. *California Sales Tax Preparer* allows the user to complete a Sales and Use Tax 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



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. 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.

