



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Spring 2011

EARLY RENEWAL INCENTIVES

Early Renewal Discount

On your spring renewal form you will find that we applied a discount to this year's renewal price for each program you renewed early last year. Each program you renewed by May 31st of last year will have a \$10 discount applied. Each program you renewed by August 31st of last year will have a \$5 discount applied.

For every program you renew by May 31st of *this* year, you will receive a \$10 discount on *next year's* spring renewal form.

Renew your software by May 31st *every* year, and you can be assured of receiving the lowest prices on your CFS software!

20% Off First-Time Purchases

Place your software renewal order by May 31st and take 20% off the first-time purchase of any additional CFS software. The additional software must also be ordered by May 31st. If you've been thinking of trying a new CFS program—*LivePayroll*, for instance—now is the time!

20% Discount on 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 supplies catalog for a wide selection of forms, envelopes, labels, 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 Payroll System 2011* by May 31st!

Remember—the deadline for all of these offers is May 31st!



CA SALES TAX NOW DOES E-FILE!

CFS recently became the first—and is currently the only—software company certified for the California Board of Equalization's new Direct Transmit program. Our *California Sales Tax Preparer 2011* software allows the user to complete the Sales and Use Tax Return within the program, then simply click a button to transmit the return and payment directly to the BOE.

- No username or password log-in required.
- Software handles file transmittal automatically; no manual file upload required.
- Confirmation is received in seconds.
- Tax payments are made electronically—either with return transmission using the bank account and routing number, or by the taxpayer using BOE's online or phone payment system.

The following forms may be electronically filed using *California Sales Tax Preparer 2011*:

- Form 401 - Sales and Use Tax Return, including Schedules A, B, C, and G
- Form 401-EZ - Short Form - Sales and Use Tax Return (filed using Form 401)
- Form 1150 - Sales and Use Tax Prepayment Form

Added to the program for electronic filing only is:

- Form 401-E - Consumer Use Tax Return, including Schedules AE and E

The best news? Current *CA Sales Tax Preparer* users can still buy the program for the same low renewal price of \$99!

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

TAX QUOTABLE

“Philosophy teaches a man that he can't take it with him; taxes teach him he can't leave it behind either.”

—Mignon McLaughlin

WHAT'S INSIDE...

NEW AT CFS...

- E-File Update — *the latest developments in state and federal e-filing*;
- EULA Changes;
- CA Payroll Form Changes.

Page 2.

REMINDERS...

Information about shipping, MyCFS, and a few other things you should know.

Page 3.

ONLINE...

What can you find at taxtools.com?

Page 4.

POLICIES...

FYI—CFS company policies and disclaimers.

Page 4.



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WHAT'S NEW AT



E-FILE UPDATE

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.

As reported on the front page, we have added e-file capability to **CA Sales Tax Preparer**, as the state now supports a direct file-upload method of e-filing.

NY Sales Tax Preparer: New York has imposed an "e-file mandate" for certain tax preparers and businesses that prepare their own returns. We have provided links within the program to information on the state's web site, so that users may determine whether or not the mandate applies to them. Because New York still does not support file-upload, we cannot offer e-file capability at this time. However, the software can be used to prepare printed forms to assist in manually entering the information online.

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 submit those forms using the file-upload method.

NY Sales Tax Preparer	\$169 ⁰⁰
annual renewal	\$149 ⁰⁰
network upgrade	\$50 ⁰⁰

EULA CHANGES

We have made changes to the End User License Agreement that accompanies CFS software, relating to businesses with multiple offices. The new EULA now states:

CFS Tax Software, Inc. licenses its software on a per-Office basis. If you are using the Software at multiple Offices operating under one Firm Name:

a) You must purchase a Program License for each Office where the Software is used.

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

Below are three examples of how the multi-office policy works:

Example 1: You have two offices. You wish to run TaxTools on all computers at both offices, but not on a network. You must purchase two TaxTools program licenses, at a discount of \$30 (\$15 multi-office discount x 2).

Example 2: You have two offices, each of which has its own LAN. You wish to run the network versions of TaxTools and CA Sales Tax Preparer at each office. You must purchase two TaxTools program licenses and two CA Sales Tax Preparer program licenses, for which you will receive a \$60 discount (\$15 multi-office discount x 4). You must also purchase two TaxTools network licenses and two CA Sales Tax Preparer network licenses, for which you will also receive a \$60 discount (\$15 multi-office discount x 4).

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

receive a \$90 discount (\$15 multi-office discount x 6). 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.



CA PAYROLL FORM CHANGES

Effective April 1, 2011, the California Employment Development Department (EDD) discontinued Forms DE7 and DE6, replacing them with new forms, as follows:

- Form DE7, *Annual Reconciliation Statement*, is replaced by Form DE9, *Quarterly Contribution Return and Report of Wages*, which must now be filed on a quarterly basis.
- Form DE6, *Quarterly Wage and Withholding Report*, is replaced by Form DE9C, *Quarterly Contribution Return and Report of Wages (Continuation)*, which must also be filed quarterly.

Form DE88, Payroll Tax Deposit, is unchanged.

CFS Payroll System 2011 (941/940 & LivePayroll) prints state-approved versions of the new forms on plain paper. CFS does not plan on stocking red scannable versions of the new forms.

941/940 Payroll System	\$129 ⁰⁰
annual renewal	\$119 ⁰⁰
LivePayroll (includes 941/940)	\$299 ⁰⁰
annual renewal	\$289 ⁰⁰
Network Upgrade (covers all Payroll System programs)	\$150 ⁰⁰

ABOUT SHIPPING



REMINDERS...

Software

Our 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. California customers receive the added benefit of not paying sales tax on programs downloaded from the Internet.

There are some exceptions to the shipping policy. Users of the CD versions of *Fill-N-Print Tax Forms* or *Tax Research* do not have a choice of shipping options, as they must receive several scheduled CD shipments.

Also, 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

Forms and supplies are shipped UPS Ground. Cost depends upon the size of the order and may be higher for shipments to Alaska and Hawaii.

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.
- If the customer provides an incomplete or inaccurate address and UPS must redeliver the shipment, there will be an additional charge.

Do you have a MyCFS account?

If so, when was the last time you used it? It's easy to set up a new MyCFS account or update an old one. Go to *TaxTools.com* and click **MyCFS** on the green menu bar. Use your e-mail address and password to log in. If you don't have an account click **Register**. If you can't remember your password, there's a link for that. If you need help, call customer service and we'll give you a hand.

Remember—your MyCFS account is the easiest way to order software and supplies and keep track of your account information, license codes, vouchers, and more!

Is your address correct?

CFS doesn't forward mail. Often, the only way we find out that a customer has moved is when their mail is returned to us.

It's easy to notify us of a change of address. You can fax the change to us at 805-522-0187 or e-mail it to feedback2@taxtools.com. However, the easiest way to inform us of a change is online. Log in to your MyCFS account and select **Name/Address Change**.

Don't let an incorrect address keep you from receiving your software and supplies on time or prevent you from getting a discount!

Instructional Videos

We are continually posting new and updated videos on the *Instructional Videos* page of our web site. The site is available from the **Support** menu at *TaxTools.com* or from a link in the Help menu of most CFS programs.

Instructional Videos were designed to take the place of program tutorials, providing assistance with such things as installing and updating CFS software and performing specific tasks in programs. The videos have controls similar to those on a VCR, allowing you to pause, rewind, and fast forward for viewing at your own pace.

How are we doing?

We take pride in our customer service and strive to handle customer questions and concerns courteously and efficiently. If you have recently called CFS customer service, you can help us continue to do our best by participating in a brief online survey. The seven question survey will take as little as a minute of your time and may help us improve the way we handle your next call.

Go to *TaxTools.com* and select **Customer Survey** from the **About CFS** menu on the green menu bar.

“Why can't you take my forms order over the phone?”

We get this question a lot, especially during our busy season, when people are ordering forms at the last minute.

The fact is, forms orders can be complicated, and we want to make sure we get your order right. The best way to ensure this is to have your order in writing.

The quickest, easiest way to order forms is at our online store, using your MyCFS account. There is also an order sheet module in the Payroll System program which you can use to submit your order electronically or print out to fax or mail.

Of course, you can also fax or mail the order sheet on the back of the latest Forms and Supplies catalog, or print out a blank forms order sheet from our website—at *TaxTools.com*, select **Order by Mail/Fax** from the **Purchase** menu.

“What is this update for?”

When we send you a software update notice by e-mail, we generally tell you what is included in that update. However, if you want to know all of the details, each program update has an **Update History** page, which is accessible from the program's update page.

To view the Update History, click the **Update History** link above the **Download** button.

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, click on **Technical Support**.

Forums...

Looking for an answer to a tax- or software-related question? You may find an answer—or be able to answer someone else's question—in one of our discussion forums. Click on **Forums** on the menu bar.

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, License Codes, and Vouchers. Select these options and others from the **MyCFS** menu.

Expected Release Dates...

Want to know when to expect your CD or download your next update? 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, instructional videos, news, 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 or 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. This does not apply to CD versions of Tax Research or Fill-N-Print Tax Forms, and 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 2011

The 2011 program will function through May 31, 2012. To use the program after that date, you must order the 2012 program. The 2011 and 2012 programs may be purchased together for a special discount price of \$550.

Quick Reference Guide

The content of this program is included in CFS Tax Research. It is also available as a stand-alone program for \$39.00 for first-time users and \$29.00 for renewals.

