



SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 2011

EARLY RENEWAL INCENTIVES

\$5 Renewal Discount!

For every program you renew by August 31st of this year, a **\$5 renewal discount** will automatically be applied to the same program on next year's spring renewal form.

10% Off First-Time Purchases!

Place your software renewal order by August 31st and take **10% off the first-time purchase of any additional CFS software**. The additional software must also be ordered by August 31st. If there are other CFS programs you have been thinking of trying, now is the time!

15% Discount on Supplies!

Order your forms, envelopes and tax return supplies by August 31st and take **15% off** the already low price.

See our supplies catalog for a wide selection of forms, envelopes, checks, labels, folders and other tax return supplies—all competitively priced!

Renew Online!

The quickest, easiest way to renew your software and supplies is to do it online. Go to *TaxTools.com* and click on *Renewal Notice* under the *MyCFS* menu.

It's not too late...



...to renew early and save!

WE'RE ON FACEBOOK AND TWITTER!

Now you can use your favorite social media to stay informed of CFS program releases, updates and other news! Look for links to our Facebook and Twitter pages at the bottom of our home page, *TaxTools.com*.

CA SALES TAX DOES E-FILE!

Last year, 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 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.

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
- 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

"The avoidance of taxes is the only intellectual pursuit that carries any reward."

—John Maynard Keynes

WHAT'S INSIDE...

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- CFS** E-File Update — *the latest developments in state and federal e-filing*;
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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.

New York currently uses a web-based system, but the state recently announced that next year they will begin working with vendors to develop a file-upload system. At that time, we hope to be able to develop e-file capability for **NY Sales Tax Preparer**. In the meantime, 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.

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. We have also added a module to assist in e-filing Form DE9C.

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

AFTER-SEASON 2-FOR-1 SPECIALS

CFS is currently offering after-tax-season 2-for-1 specials on the following programs:

CFS TaxTools—over 300 tax-planning, retirement, and financial utilities, forms, and flowcharts:

TaxTools '11 & '12	\$189 ⁰⁰
Annual renewal.....	\$159 ⁰⁰
Annual network upgrade ..add	\$150 ⁰⁰

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

Quick Reference Guide '11 & '12.....	\$39 ⁰⁰
Annual renewal.....	\$29 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

CFS CA 571 Preparer—prepares and prints California Business and Agricultural Property Statements:

CA 571 Preparer '11 & '12.....	\$99 ⁰⁰
Annual renewal.....	\$79 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

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

MD Personal Property '11 & '12.....	\$179 ⁰⁰
Annual renewal.....	\$139 ⁰⁰
Annual network upgradeadd	\$50 ⁰⁰

CFS Financial Planning Tools—comprehensive **Financial Planner**, plus over 100 forms, worksheets, flowcharts, and calculators:

Financial Planning Tools '11 & '12.....	\$550 ⁰⁰
Annual renewal.....	\$299 ⁰⁰
Annual network upgrade ..add	\$100 ⁰⁰



REMINDERS...

Shipping Policies

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.

Don't forget to download and install your software!

Remember—if you requested the “no CD” shipping option (see *Shipping Policies*), you will not receive a CD, so don't forget to download and install your purchased CFS software!

Make sure we have your current e-mail address and our e-mails are not being blocked by your spam blocker, so that we can remind you about program releases and updates.

You can also check for releases and updates at the **News and Updates** section of *TaxTools.com* and our new **Facebook** and **Twitter** pages.

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.

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.

