



# SOFTWARE NEWS

A Newsletter from CFS Tax Software, Inc.

Summer 2016

## SUMMER RENEWAL INCENTIVES

### \$5 Early Renewal Discount

Take **\$5 off** each CFS program for *next* year that you renew by August 31st of *this* year.

On your spring renewal notice, you will see the \$5 “Early Discount” listed to the right of the price of your renewable software. Simply subtract that amount for each program renewed by August 31st.

### 20% Off First-Time Purchases

Place your software renewal order by August 31st, and take **20% off** the first-time purchase of any additional CFS software ordered by August 31st. If there’s a CFS program you’ve been thinking of trying, now is a good time.

### 15% Off Forms and Supplies

Order your forms, envelopes and tax return supplies by August 31st to get **15% 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](http://www.taxtools.com) and click on **Renewal Notice** under the **MyCFS** menu.

## RENEW BY AUGUST 31<sup>ST</sup> AND SAVE!



## THE ACA: CFS CAN HELP

The Affordable Care Act has created more work for tax professionals, but it has also created an opportunity for more revenue. CFS can help you minimize the work and maximize the revenue with our easy-to-use and affordable software tools.

Both *TaxTools* and *Small Business Tools* contain the following modules to help you assist individuals and businesses in complying with the provisions of the ACA:

- Notice to Employee of Coverage Options for Employers with Health Insurance
- Notice to Employee of Coverage Options for Employers without Health Insurance
- Employer Mandated Coverage Penalty
- Individual Mandated Health Insurance Penalty
- Individual Premium Credit
- Small Business Health Care Tax Credit

*Payroll System* (941/940, LivePayroll, W2/1099) now contains ACA-mandated Forms 1094-B, 1095-B, 1094-C, and 1095-C. The forms can be found by selecting **General Forms/Utilities** from the **Select Program to Display** drop-down menu. The modules generate approved paper forms; at this time we are unable to provide electronic filing.

Finally, *Tax Corresponder* contains letters to inform your clients about the ACA and let them know that you can assist them in complying with its provisions.

## WINDOWS 10

CFS software is Windows 10 compatible. Our programs are also compatible with Windows 8, Windows 7, Windows Vista, Windows XP, Windows Server 2008, and Windows Server 2003.

## TAX QUOTABLE

“Rich bachelors should be heavily taxed. It is not fair that some men should be happier than others.”

— Oscar Wilde

## WHAT’S INSIDE...

### NEW AT CFS...

- CFS** New features in *LivePayroll* and *Quick Reference Guide*;
- CFS** E-File Update — what can and cannot be e-filed using CFS software.

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### SPECIALS...

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# WHAT'S NEW AT



## NEW PROGRAM FEATURES

### PTO Tracking in LivePayroll

In the middle of last year, we added paid time off (PTO) tracking to *LivePayroll*.

Accrual and use of sick leave and vacation are calculated for each paycheck, according to policies the user defines and assigns to employees. PTO hours can be reported to employees either on the employee's check stub or on a separate report.

PTO balances are brought forward when clients are imported from the previous year. When the first check of the year is created, balances are updated again to reflect any December checks created since the import.

For more information on PTO tracking, see the program's Help file and the *Vacation and Sick Leave* instructional video on our website.

LivePayroll (includes 941/940) .....	\$299 <sup>00</sup>
annual renewal.....	\$289 <sup>00</sup>
Network Upgrade (covers all Payroll System programs) .....	\$150 <sup>00</sup>

### Annotation Tools in Quick Reference Guide

*Quick Reference Guide* can now be annotated with bookmarks, notes, and highlighting. With the network version, annotations are shared with other users on the network.

For more information, see the program's Help file and the *Quick Reference Guide* instructional video on our website.

Quick Reference Guide .....	\$39 <sup>00</sup>
annual renewal.....	\$29 <sup>00</sup>
network upgrade.....	\$50 <sup>00</sup>

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 .....	\$149 <sup>00</sup>
annual renewal.....	\$139 <sup>00</sup>
E-File Add-On.....	\$129 <sup>00</sup>

### 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 the IRS requirements for e-filing of these forms.

941/940.....	\$149 <sup>00</sup>
annual renewal.....	\$139 <sup>00</sup>
Network Upgrade (covers all Payroll System programs) .....	\$150 <sup>00</sup>

## E-FILE UPDATE

### 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 <sup>00</sup>
annual renewal.....	\$99 <sup>00</sup>
network upgrade.....	\$50 <sup>00</sup>

### 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 .....	<del>\$169<sup>00</sup></del> \$84 <sup>50</sup>
annual renewal.....	<del>\$149<sup>00</sup></del> \$74 <sup>50</sup>
network upgrade.....	\$50 <sup>00</sup>

## 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 '16 & '17 .....	\$199 <sup>00</sup>
Annual renewal.....	\$179 <sup>00</sup>
Annual network upgrade ..add	\$150 <sup>00</sup>

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

Quick Reference Guide '16 & '17.....	\$39 <sup>00</sup>
Annual renewal.....	\$29 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

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

CA 571 Preparer '16 & '17.....	\$99 <sup>00</sup>
Annual renewal.....	\$79 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

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

MD Personal Property '16 & '17.....	\$179 <sup>00</sup>
Annual renewal.....	\$139 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>

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

Financial Planning Tools '16 & '17.....	\$550 <sup>00</sup>
Annual renewal.....	\$299 <sup>00</sup>
Annual network upgrade ..add	\$100 <sup>00</sup>

**W4 Calculator**—adjust payroll withholding throughout the year:

W4 Calculator '16 & '17.....	\$89 <sup>00</sup>
Annual renewal.....	\$49 <sup>00</sup>
Annual network upgrade ....add	\$50 <sup>00</sup>



## 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 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. 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.

## Don't Forget to Download and Install Your Software

Remember—if you requested the “no CD” shipping option, 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 stay informed by signing up for our monthly e-newsletter, and by following us on *Facebook* or *Twitter*.

### 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.

### 2016 Forms Will Ship Soon

We generally begin shipping forms in the summer. When your forms order is shipped, you will receive an e-mail with a UPS tracking number.

Please check your order as soon as it arrives. Damages or discrepancies must be reported within 14 days of receipt. Forms and envelopes may be returned sealed and unused within 30 days, but no later than December 15th. Refunds do not include shipping charges.

# WHAT CAN YOU FIND AT TAXTOOLS.COM?

At [www.taxtools.com](http://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...

We've posted instructional videos to guide you through everything from installing and updating software to performing specific tasks within programs. The videos have controls that allow you to pause, rewind, and fast forward for viewing at your own pace. There is no audio. Under the **Support** menu, click on **Instructional Videos**.

## 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 \$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

The 2016 program will change to read-only mode after May 31, 2017. To enter new data after that date, you must order the 2017 program. The 2016 and 2017 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.

