



# **TAX YEAR 2020 SOFTWARE PREVIEW**



# **Global Enhancements**

## **Topics covered in this section:**

- **Settings and Data**
- **Automatic Backups**

# Settings and Data

Defaults	Data and Program Paths
[03] Taxware 'SettingsAndData' Path	... C:\Taxware\SettingsAndData
[04] Current Year Data Path	... 20Data
[05] Prior Year Data Path	... C:\Taxware\19Wintax\19Data
[06] Depreciation Program Path	... C:\Taxware\20WDepr
[07] DockArk Program Path	...

**What is it?**

**A new centralized directory for applications in the Taxware family to share for storage and features.**

# Settings and Data

**What does it mean for our clients?**

- **No discernible difference for our standard users**
- **Enhanced ease-of-use for our networked users**
- **Lays a foundation to build upon new quality of life improvements**

# Settings and Data

**A few benefits include:**

- **Quicker new year setup**
- **Streamlined network setup**
- **Enhanced network sharing**
- **Applications can share databases**
- **Easier Backups**

# Backup Feature

The screenshot displays the 'Data Backup' window with a blue header. It contains four main sections: [01] Backup Storage Path (E:\MyBackups), [02] View Backup Folder in windows explorer (View button), [03] Run Backup now (Backup button), and [04] Add a new Backup Schedule (Add button). Below these is a table for the backup schedule, titled 'Backup Schedule - Size of current backups: 166.5Mb'. The table has five columns: Mode, Include PDFs, Frequency, Next Scheduled Date, and Remove. A single row is shown with 'Monthly' mode, 'Include PDFs' unchecked, 'Every 1 Months(s)' frequency, '1/9/2021' next scheduled date, and a red 'X' in the Remove column. A confirmation dialog box is overlaid at the bottom right, asking 'A backup was scheduled to occur. Would you like to start the back up now?' with 'Yes' and 'No' buttons.

**Misc Data Backup**

[01] Backup Storage Path ... E:\MyBackups

[02] View Backup Folder in windows explorer View

[03] Run Backup now Backup

[04] Add a new Backup Schedule Add

**Backup Schedule - Size of current backups: 166.5Mb**

Mode	Include PDFs	Frequency	Next Scheduled Date	Remove
Monthly	<input type="checkbox"/>	Every 1 Months(s)	1/9/2021 15	X

A backup was scheduled to occur. Would you like to start the back up now?

Yes No

**What is it?**

**A new streamlined backup system to help ensure you have recent backups of your data**



# **Wintax Enhancements and Features**

## **Topics covered in this section:**

- **New Client Grid Look**
- **Custom Client Grids**
- **Spanish Forms**
- **Batch Reprint Acks**
- **EIP Input**
- **New Depreciation Integration**



# New Client Grid Look

New Client

Reconstruct

Get Acks

Edit Client Grid

Current PathC:\Taxware\SettingsAndData\Wintax20\ClientData\SC\_ATS

Prior PathC:\Taxware\19Wintax\19Data

Client Recall

Pressing **[F2]** after highlighting a client will bring up the expanded information window.

Search Fields

[01] Client ID

[02] Full Names

[03] Taxpayer SSN

[04] Home Phone

[05] Date Return Started

Client Type

CURRENT

PRIOR

ALL

E-File Status

ACCEPTED

NO E-FILE

REJECTED

NO STATUS

AWAITING ACK

NOT ACCEPTED

ON EXTENSION

ALL

Preparer Filter

ALL

Client ID	Full Names	Taxpayer SSN	Home Phone	Return Status	E-File Status	Prior Year Unpaid Bill	Bill Balance Due	Date Return Started
1	ERTIA, TEST N	400-00-5102	(803) 898-5553	Information Pendi	Accepted	0.00	0.00	01-21-2013
12	CANDY, TEST A & MINT S	400-00-5112	(803) 898-5545	Information Pendi	Accepted	0.00	0.00	11-14-2013
13	NEEDAPPROVAL, BILL & MARY	400-00-5116	(803) 944-1234	Information Pendi	Accepted	0.00	0.00	12-20-2019
15	MAPLE, TEST O	400-00-5104	(803) 898-5541	Information Pendi	Accepted	0.00	0.00	12-02-2020
2	WHY, TEST I & GWEN & R KNOTT	400-00-5101	(828) 287-2911	Information Pendi	Accepted	0.00	0.00	11-14-2013
4	GRASS, TEST U & MAY B	400-00-5107	803-898-5541	Information Pendi		0.00	0.00	11-14-2013
6	CEASAR, TEST J & CLEO P	400-00-5109	803-898-5513	Information Pendi	Accepted	0.00	0.00	01-23-2013
7	HOAGIE, TEST A & TUNA S	400-00-5110	803-898-5545	Information Pendi	Accepted	0.00	0.00	11-14-2013



# Custom Client Grid

**Available columns**  
Double-Click to add to current columns

Bank Product  
Bill Balance Due  
Bill Grand Total  
Client ID  
Date Return Started  
E-File Status  
Full Names  
Home Phone  
Preparer  
Prior Year Unpaid Bill  
Return Status  
Spouse Cell Phone  
Taxpayer Cell Phone  
Taxpayer Fullname  
Taxpayer SSN

**Custom Client Grid Setup**

☐ Mask SSNs

Column Name	Width	Position	Remove
Client ID	70	▲ ▼	✗
Full Names	300	▲ ▼	✗
Taxpayer SSN	100	▲ ▼	✗
Home Phone	100	▲ ▼	✗
Return Status	100	▲ ▼	✗
E-File Status	100	▲ ▼	✗
Prior Year Unpaid Bill	100	▲ ▼	✗
Bill Balance Due	100	▲ ▼	✗
Date Return Started	100	▲ ▼	✗

Restore Defaults

Save

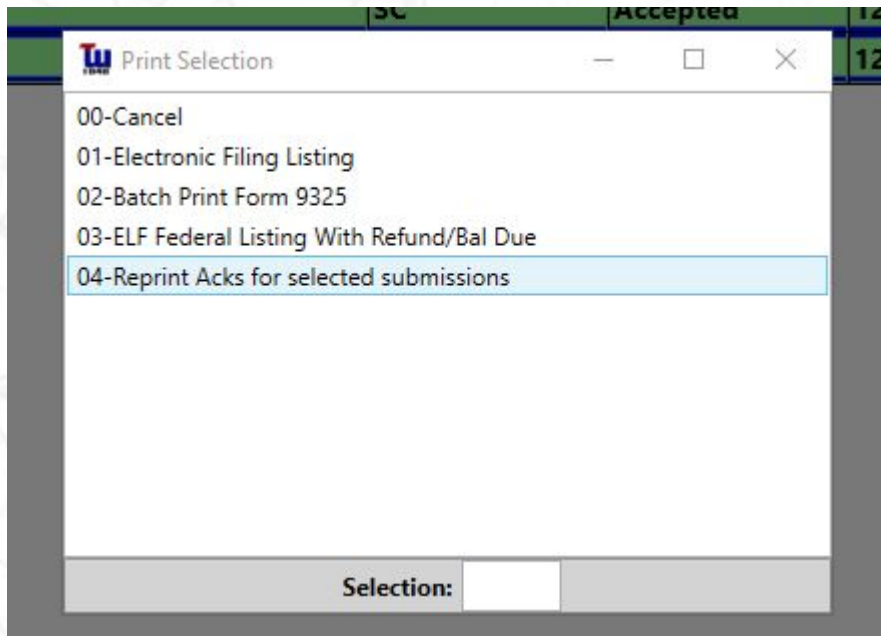
# Spanish Forms Support

- Added support for select Spanish forms
- Added IRS correspondence language preference

Formulario	<b>1040(SP)</b>	Department of the Treasury—Internal Revenue Service (99)		<b>2020</b>	OMB No. 1545-0074	Sólo para Uso del IRS—No escriba ni engrape en este espacio.
	<b>Declaración de Impuestos de los Estados Unidos Sobre los Ingresos Personales</b>					
<b>Estado Civil</b> <input type="checkbox"/> Soltero <input type="checkbox"/> Casado que presenta una declaración conjunta <input type="checkbox"/> Casado que presenta una declaración por separado (MFS) <input type="checkbox"/> Cabeza de familia (HOH) <input type="checkbox"/> Viudo que reúne los requisitos (QW) Marque sólo un recuadro. Si marcó el recuadro MFS, anote el nombre de su cónyuge. Si marcó el recuadro HOH o QW, anote el nombre del hijo si la persona calificada es un hijo pero no su dependiente ►						
Su primer nombre e inicial de su segundo nombre		Apellido			Su número de Seguro Social	
Si es una declaración conjunta, primer nombre e inicial del segundo nombre de su cónyuge		Apellido			Número de Seguro Social de su cónyuge	
Dirección postal (número y calle). Si tiene apartado postal, vea las instrucciones.					Núm. de apt.	<b>Campaña Electoral Presidencial</b> Marque aquí si usted, o su cónyuge si es una declaración conjunta, desea aportar \$3 a este fondo. El marcar un recuadro a continuación no afectará su impuesto ni su reembolso. <input type="checkbox"/> Usted <input type="checkbox"/> Cónyuge
Ciudad, pueblo u oficina de correos. Si es una dirección extranjera, también complete los espacios a continuación.			Estado	Código postal (ZIP)		
Nombre del país extranjero		Provincia/estado/condado extranjero		Código postal extranjero		

# Batch Reprint Acknowledgments

- Added support to reprint selected acknowledgments from the ELFTracker



ACKNOWLEDGEMENT REPORT					
TRANSMISSION INFORMATION					
IRS Transmission Received MEF A2A					
STATE ACCEPTED RETURNS					
ID	SSN	ACCEPTED	SUBMISSIONID	NAME	GOVCD
1	400-00-5102	12-02-2020	3389472020337j575392	TEST N ERTIA	SC
12	400-00-5112	12-02-2020	3389472020337j575494	TEST A & MINT S CANDY	SC
13	400-00-5116	12-02-2020	3389472020337j575531	BILL & MARY NEEDAPPROVAL	SC
2	400-00-5101	12-02-2020	3389472020337j575565	TEST I WHY & GWEN R KNOTT	SC
6	400-00-5109	12-02-2020	3389472020337j575631	TEST J & CLEO P CEASAR	SC
7	400-00-5110	12-02-2020	3389472020337j575669	TEST A & TUNA S HOAGIE	SC
13	400-00-5107	12-02-2020	3389472020337j575597	TEST U GRASS	SC
15	400-00-5104	12-02-2020	3389472020337n321061	TEST O MAPLE	SC

# EIP Input

Amount from Schedule 3 line 7

**Economic Impact Payment**

Enter the amount that was received and shown on Notice 1444

Enter zero if no EIP was received

Taxpayer

Spouse

Is Taxpayer or Spouse Active Military ☐ Yes

☒ OK

2020 estimated tax payments and amount applied from 2019 return



# New Depreciation Integration

**What does it mean for our clients?**

- **Depreciation is now more streamlined**
- **Year End Update now performed during Prior Year Recall**

# Honorable Mentions

**A couple quick things to note**

- **The 1040X can now be e-filed**
- **We have partnered with EPS for bank products**



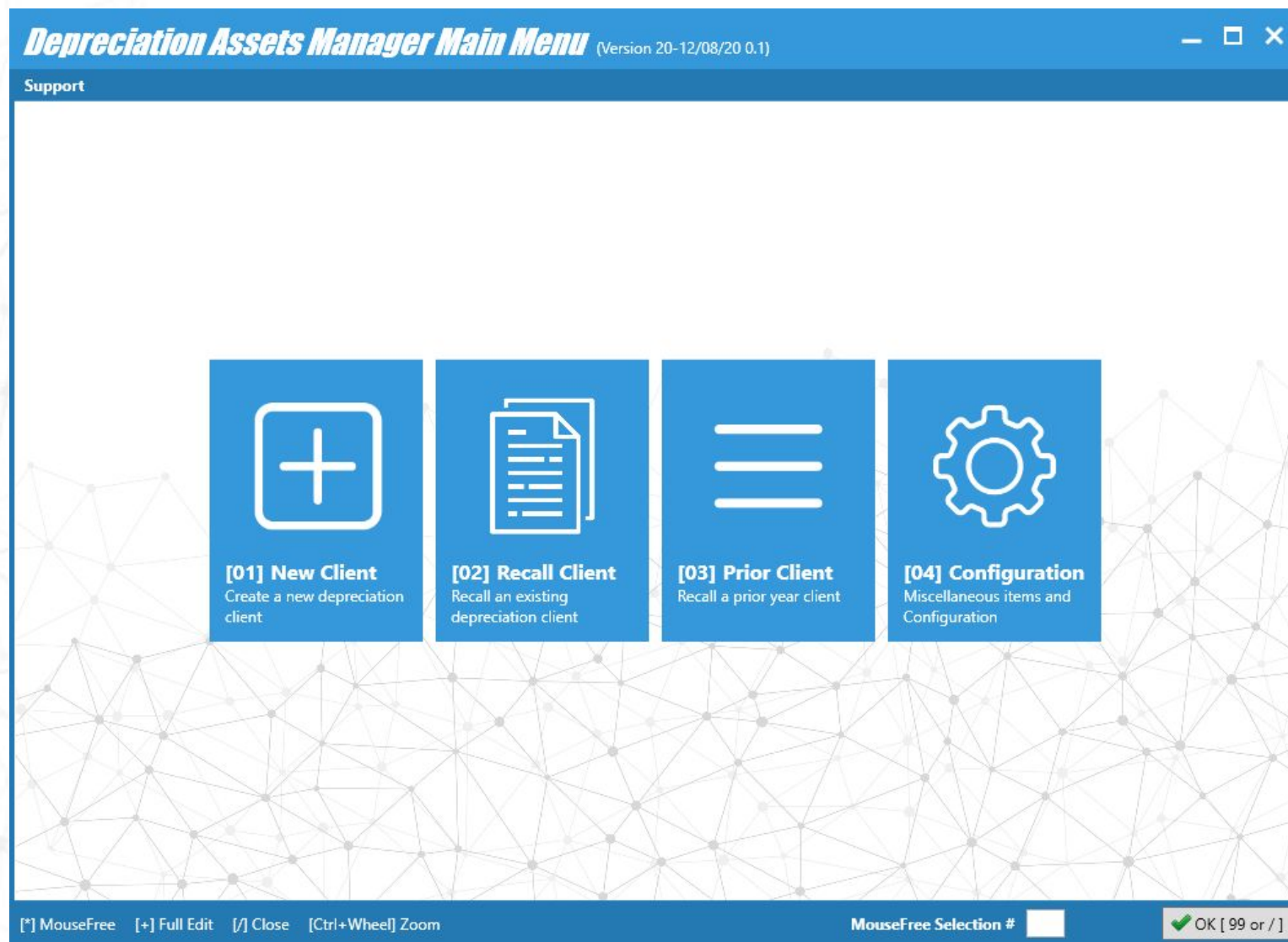


# **Updated and New Applications**

**Topics covered in this section:**

- **Depreciation**
- **TaxComm**

# Depreciation



# TaxComm

## TAXCOMM

### ALL OF YOUR TOOLS IN ONE PLACE

DESIGNED BY TAX PROFESSIONALS FOR TAX PROFESSIONALS



#### SECURE FILE REQUESTS

Securely request and receive **all documents needed** to complete the tax return.



#### VIDEO MEETINGS

Keep client relationships strong through video meetings. **Face to face** communication is important in the tax industry.



#### E-SIGNATURE

Receive **electronic signatures** requested with no pay-per-signature charges.



#### SECURE MESSAGES

**Secure messaging** with standard or potentially privileged tax advice.



Includes a Taxpayer-synced mobile application for picture and document upload as well as document signature!\*

\*CURRENTLY AWAITING MOBILE APP APPROVAL.

# Coming Up Next!

## TODAY

**Next :** Taxware Quickstart with Matt the Magnificent

**11AM PT :** Introducing TaxComm - The Complete Client Communication Tool

**1PM PT:** How Textellent Can Benefit My Tax Practice

## WEDNESDAY

**9AM PT:** Wintax NextGen 1040 & Review of New Laws and E-File

## THURSDAY

**9AM PT:** Entities 101

**11AM PT:** Business Builder Session: Best Ways to Exceed Expectations

THANK YOU FOR CHOOSING

**TAXWARE**  
SYSTEMS INC.