TAXWARE
SYSTEMS INC.

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?

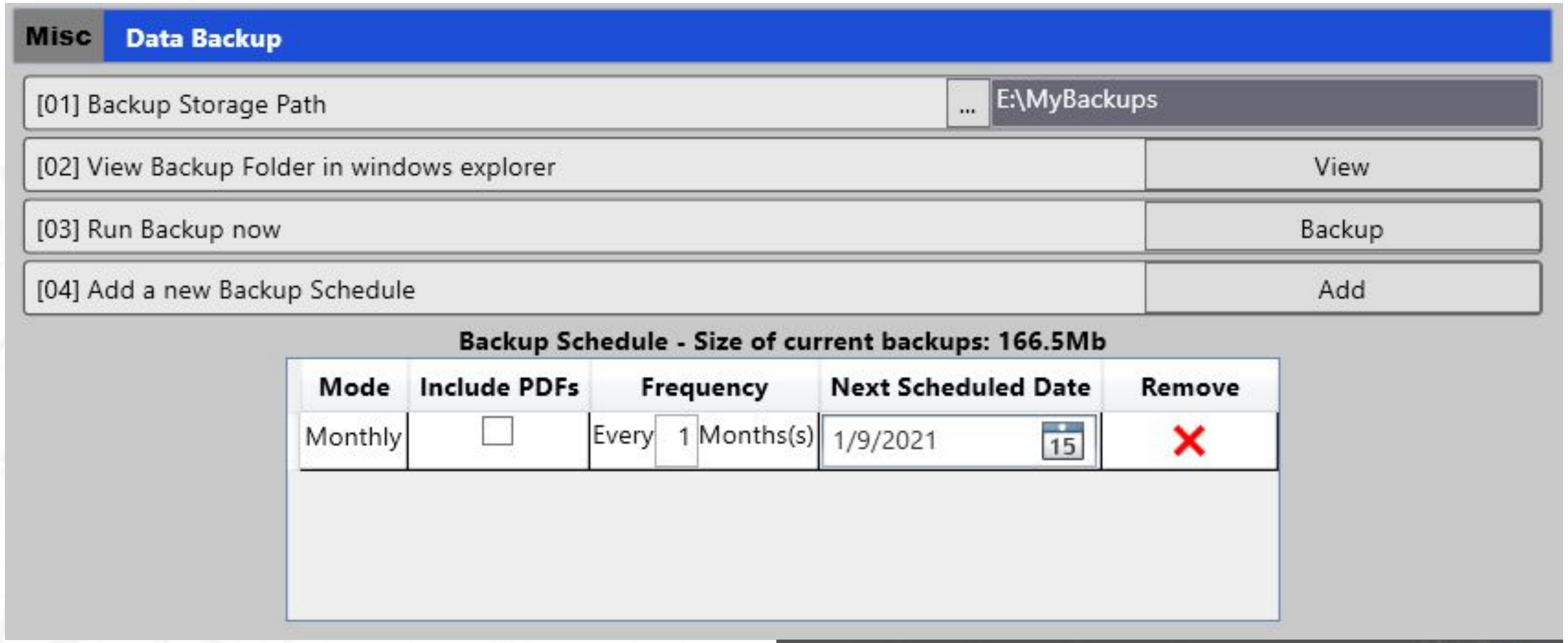
- **No discernible difference for our standard users**
- **Enhanced ease-of-use for our networked users**
- **Lays a foundation to build upon new quality of life improvements**

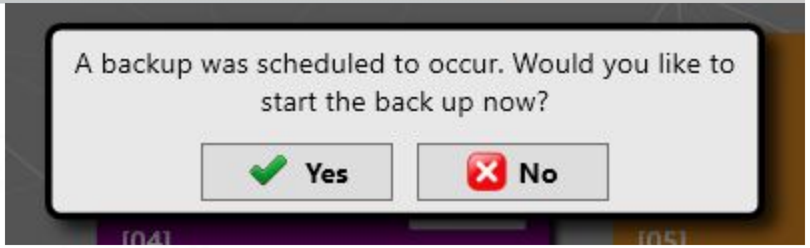
Settings and Data

A few benefits include:

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

Backup Feature





What is it?

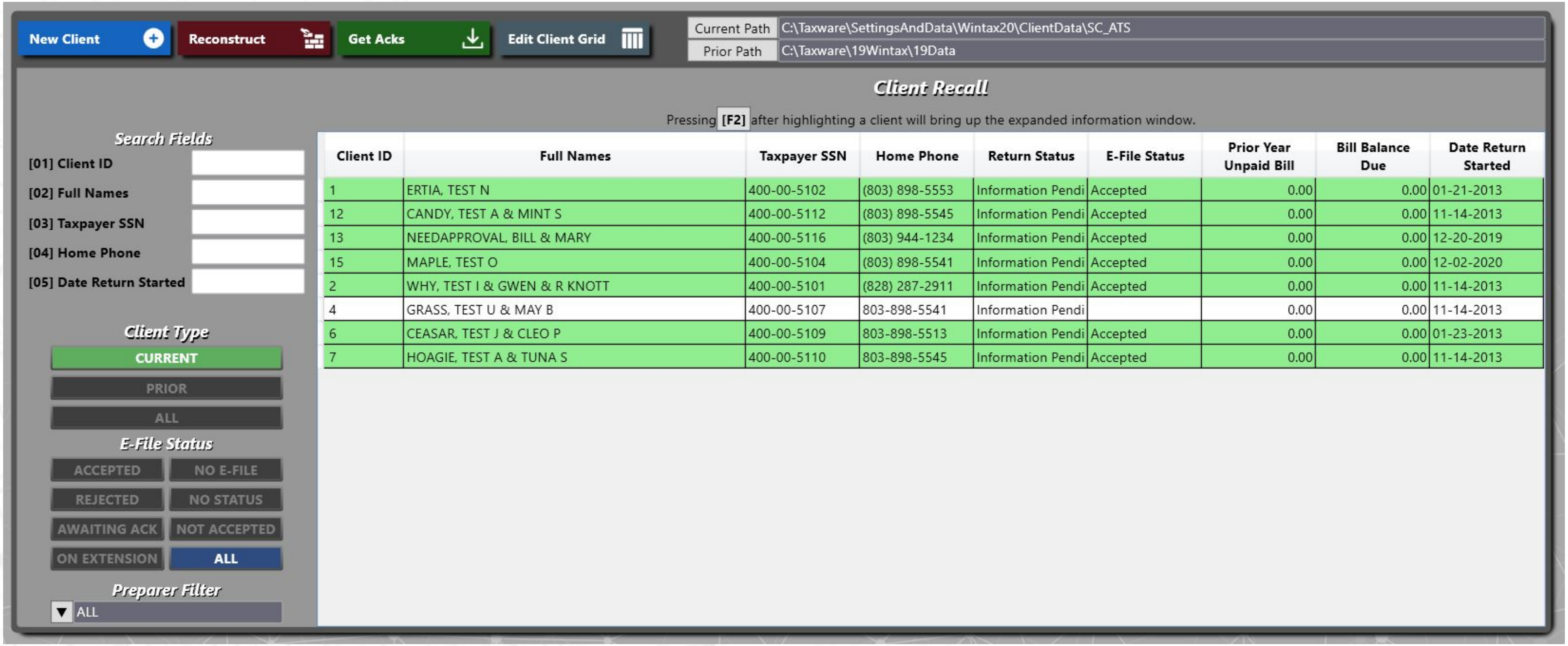
A new streamlined backup system to help ensure you have recent backups of your data

Wintax Enhancements and Features

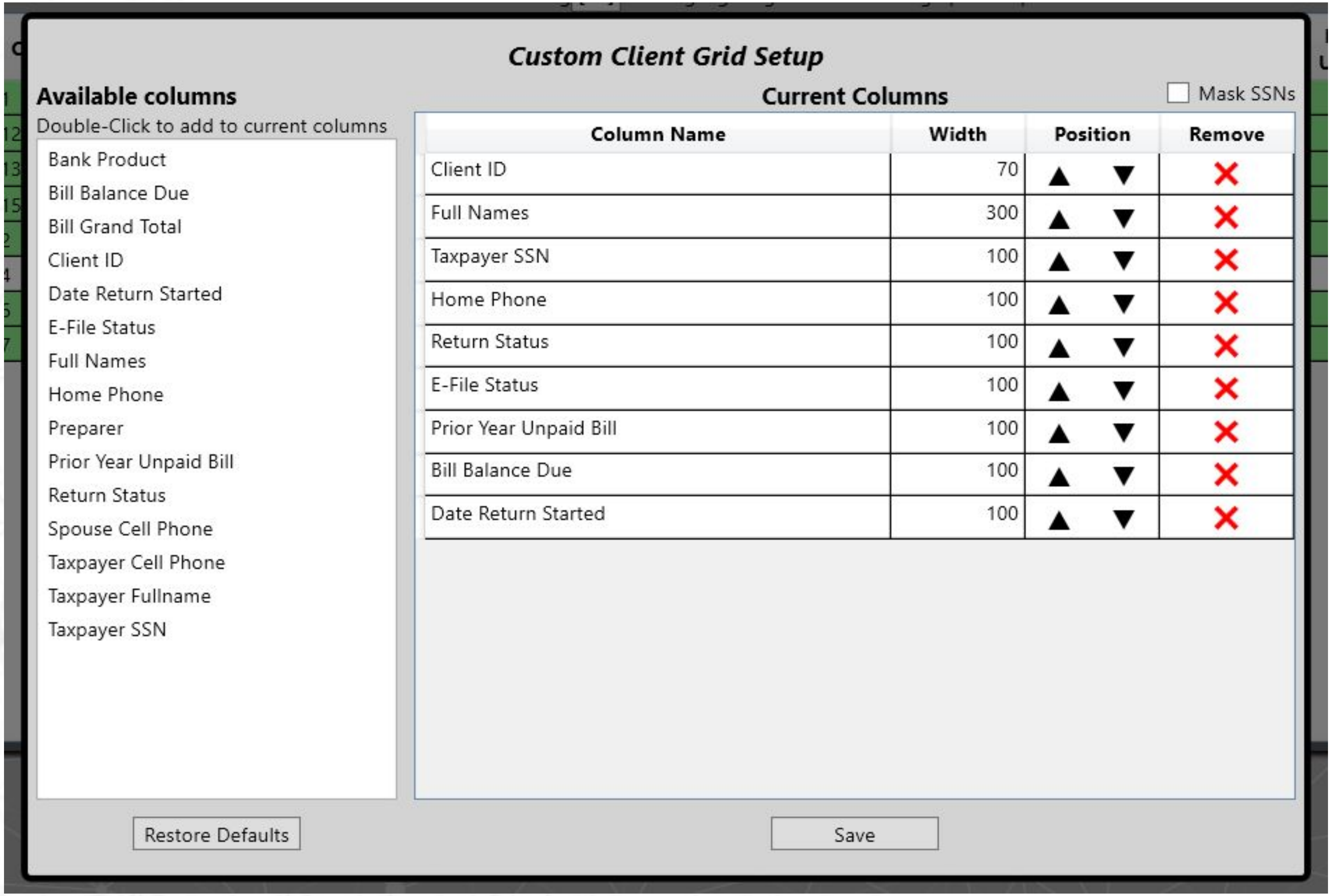
Topics covered in this section:

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

New Client Grid Look



Custom Client Grid



Spanish Forms Support

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

Formulario **1040(SP)** Department of the Treasury—Internal Revenue Service (99)
Declaración de Impuestos de los Estados Unidos Sobre los Ingresos Personales **2020** OMB No. 1545-0074 Sólo para Uso del *IRS*—No escriba ni engrape en este espacio.

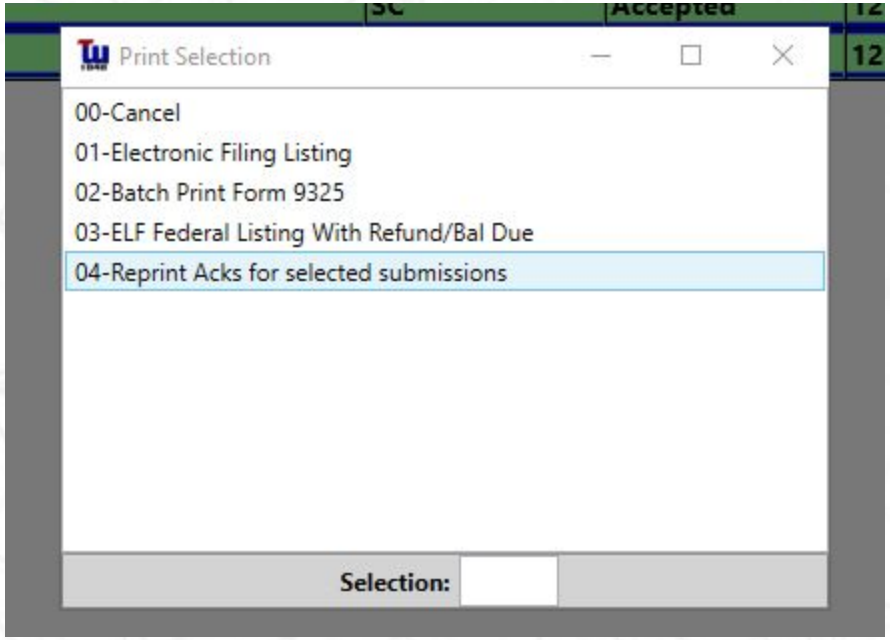
Estado Civil Marque sólo un recuadro.
☐ Soltero ☐ Casado que presenta una declaración conjunta ☐ Casado que presenta una declaración por separado (*MFS*) ☐ Cabeza de familia (*HOH*) ☐ Viudo que reúne los requisitos (*QW*)

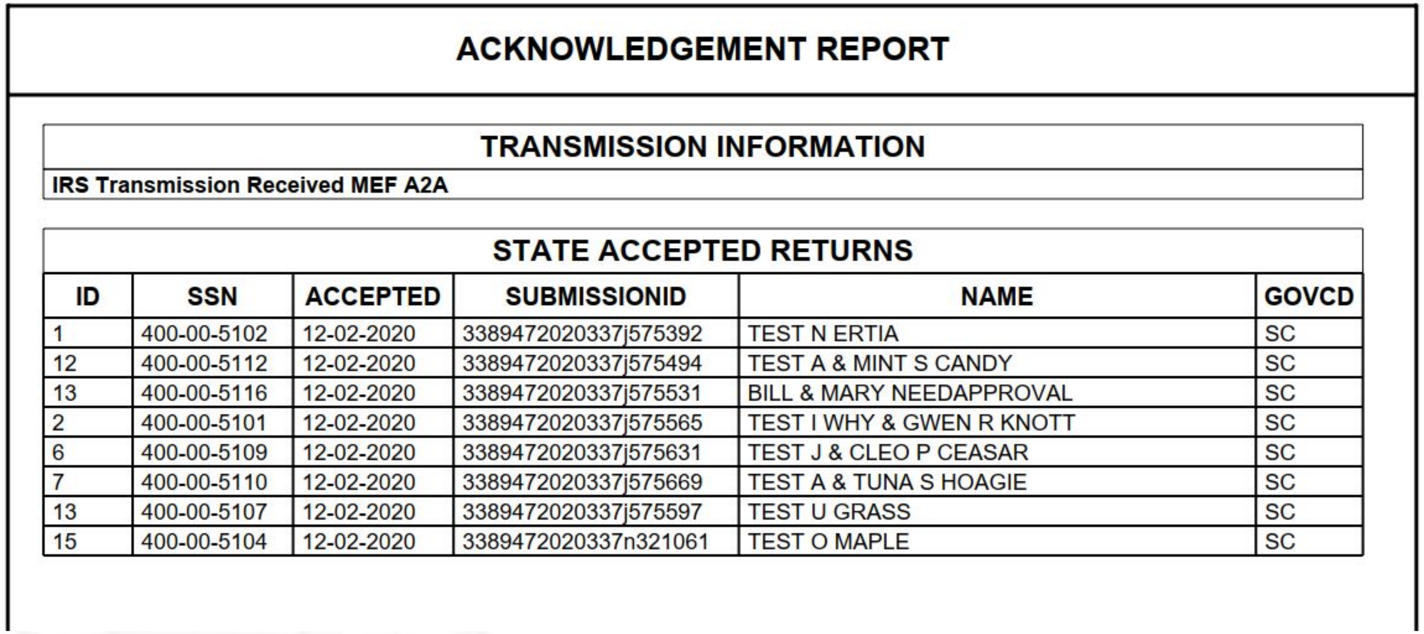
Si marcó el recuadro *MFS*, anote el nombre de su cónyuge. Si marcó el recuadro *HOH* o *QW*, anote el nombre del hijo si la persona calificada es un hijo pero no su dependiente ▶

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.	**Campaña Electoral Presidencial** 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. ☐ **Usted** ☐ **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

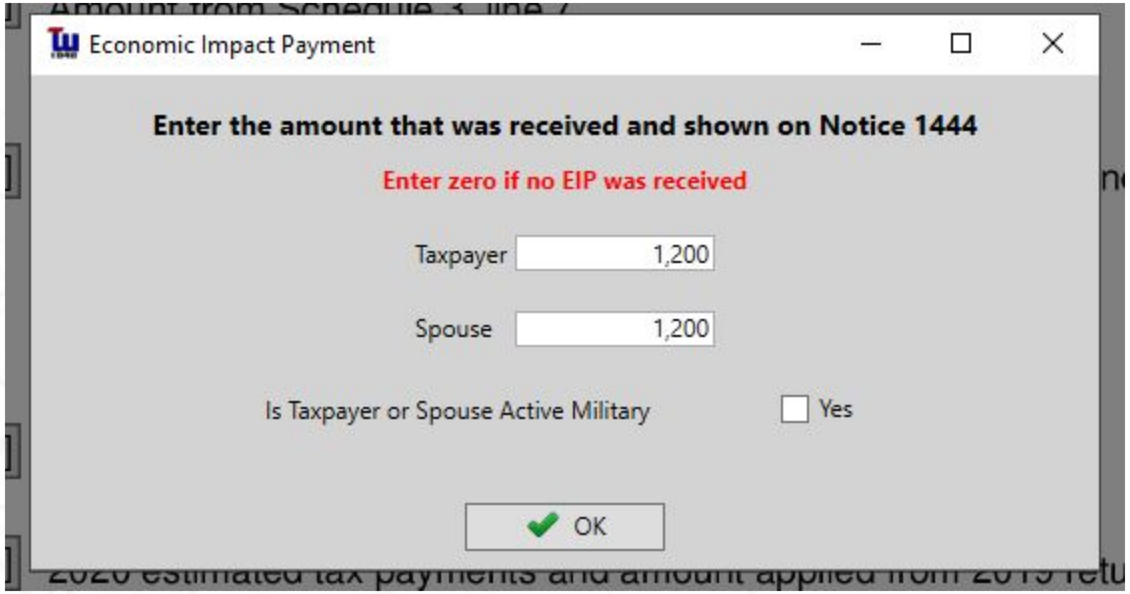
TRANSMISSION INFORMATION

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



Economic Impact Payment
Enter the amount that was received and shown on Notice 1444
Enter zero if no EIP was received
Taxpayer
1,200
Spouse
1,200
Is Taxpayer or Spouse Active Military
Yes
OK

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.