



T A X W A R E

N e w s - N o v e m b e r 2 0 1 5



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We have been hard at work since the end of the 2014 filing season. Many enhancements and improvements have been made. We are excited about our new Fiduciary, Partnership, and Service Bureau Dashboard programs. We're now making excellent progress on the 2015 programs and anticipate an on-time release date.

We look forward to another successful filing season!

Proforma Organizer

The Proforma Organizer has been updated for the 2015 tax season. It is available to download on our website at the provided link below. If you are currently registered through our website, and we have your current e-mail address, you should have received an e-mail notification with a link to this newsletter. If you didn't receive an e-mail notification, please go to our website and register. This also enables you to use all of the additional support tools available to you on our website.

The proforma download link is:
www.taxwaresystems.com/ftp/wintax/15proforma.exe



Don't forget our customer referral bonus: Each referral from you that results in a new customer for Taxware will give you **\$100** off of your next year's renewal.

R e f e r A F r i e n d



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We have had a busy summer! We have added a lot of fantastic capabilities to the Income Tax programs. We appreciate your ideas and partnership to continue to help Wintax be the best in the industry. Like in prior years, around the middle of December we will post a 2015 enhancements video to our website to guide you through these great new features.

Fiduciary & Partnership

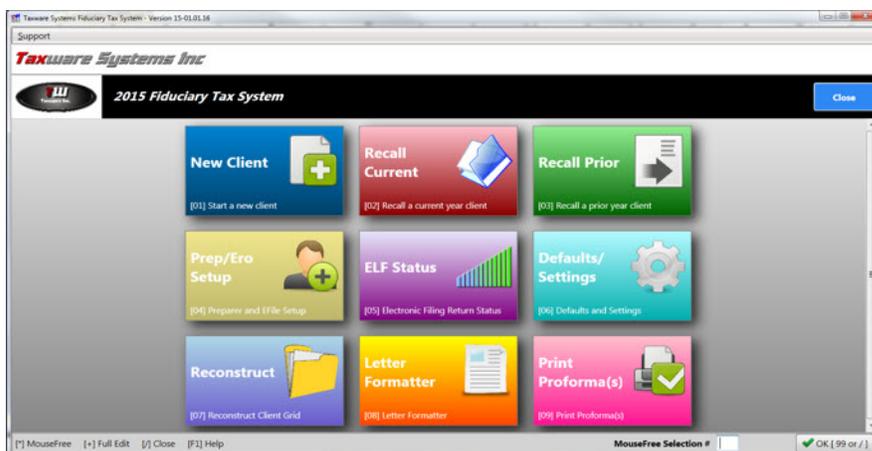
Taking advantage of some of the latest programming tools available, we have re-written our Fiduciary and Partnership Income Tax programs.

We wanted to develop dynamic systems with a more user friendly experience, but keep our existing tax return flow so there wouldn't be a learning curve.

We believe we have hit the mark with this new line up of programs and are excited for their launch!

The new programs have the same overall features, functionality, and great flow as the old programs. Don't worry, we didn't take any features out, but we made some great additions to them that we know you will appreciate. Some of the new key features that were added include:

- **Enhanced Windows 10** and 8.1 tile user interface, fully maximized screen and overall more user friendly experience. Defaults and Settings have been moved to their own page. For most clients, Taxware's standard defaults are adequate and typically do not require adjustments.
- **Added reports** for entity client listing and lost clients.
- **User interface scaling.** This can be done on any page by CTRL mousewheel up or down. You can also go to the Defaults and Settings page and use the scaling slider. The scaler will remember whatever it was set to last when the client exits the program.
- **Easier networking.** Available networked drop down as well as networking filter. The network name is now part of the operating system's client storage and gets ported into the client and e-file databases. This means you can easily switch to another network client's settings, and that you can also filter clients based on your network ID. If you are not networking, simply uncheck the "Enable networking user filter" selection and the "User Filter" goes away. Tax returns' network ID gets set during new client, or prior year recall but can be reassigned in the print configuration menu.
- **"Bread crumb" navigation** is awesome! Now you can know where you are in the tax return all the time. What makes this feature really fantastic is that clicking the blue titles can also be used to go straight to a specific page.
- The completed return will **automatically print** the Federal as well as all the accessed state tax return.





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Fiduciary & Partnership Continued

- **Efile validation** is now native to the new program. The internal and IRS Schema validation for the federal takes place during the load of the validator. We also have color coding of the XML, copy and paste functionality, and search XML utilities.
- E-file tracker has a new **station ID filter**. If networking computers, or station ID ERO's that intend to share the program, a station ID

can be entered and the new e-file tracker will filter their tax returns.

There are too many fun things to talk about regarding the new programming line up. Make sure to check out the 2015 enhancement video later in December for a full walk through of these great new programs. We look forward to the continued development of the other programs like the 1120 and 1040 systems in the near future.

Service Bureau Dashboard

This dynamic new application was designed to provide an easier method of quality control for our valued clients that have multiple satellite offices. A general overview of the program is:

1. Satellite or Child offices send tax returns up to the system for a corporate reviewer to check either uploaded PDF's, or downloading the federal tax return file.
2. The assigned reviewer evaluates and approves the tax return which flags it to get sent through to the Taxware electronic filing system.
3. Dynamic statistics and reports to evaluate key indicators and productivity are available for both the corporate/reviewer and satellite offices.

All Offices				All Offices - In Review							
All Returns	Review Needed	Correction Needed	Complete	Office	Client ID	SSN	TP Last Name	TP First Name	Upload Date	Time in Review	Review Status
13	9 0 Almost Late 0 Late	1	3	ED JONES PC	3	400-00-1035	HEATHER	LYNETTE	10/31/2015	3 days 10 hours 52 minutes	00-In Review
TAXWARE SYSTEMS				DAVID HELLMAN	4	400-00-1032	MAGNOLIA	SUSAN	10/31/2015	3 days 10 hours 52 minutes	00-In Review
All Returns	Review Needed	Correction Needed	Complete	daniel test	5	400-00-1036	PEONY	DAVID	10/31/2015	3 days 10 hours 52 minutes	00-In Review
5	3 0 Almost Late 0 Late	1	1	johnny test	3	400-00-1035	HEATHER	LYNETTE	10/31/2015	3 days 1 hour 7 minutes	00-In Review
KING T DALTON				johnny test	5	400-00-1036	PEONY	DAVID	10/31/2015	3 days 1 hour 5 minutes	00-In Review
All Returns	Review Needed	Correction Needed	Complete	johnny test	7	400-00-1060	Ambrosia	Jane	10/31/2015	3 days 1 hour 4 minutes	00-In Review
0	0 0 Almost Late 0 Late	0	0	TAXWARE SYSTEMS	5	400-00-4081	COLLEGE	JOE	11/03/2015	10 hours 52 minutes	00-In Review
ED JONES PC				TAXWARE SYSTEMS	2	400-00-1038	GARDENIA	SAM	11/03/2015	1 hour 11 minutes	00-In Review
All Returns	Review Needed	Correction Needed	Complete	TAXWARE SYSTEMS	7	400-00-1060	Ambrosia	Jane	11/03/2015	1 hour 7 minutes	00-In Review
1	1 0 Almost Late 1 Late	0	0								

We won't go into the detailed specifications of the program in this news letter. If you have multiple offices and are looking to automate some of your processes, get great statistics, and get a great solution for quality control please contact our sales team for more information.



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Support Tips and Tools

By Ryan Luce

Navigating tax software can be daunting at times. Taxware support is here to help with tips and tools to turn tedious returns into yesterday's completed pile! Our year round support staff is available to assist you with questions involving our software, but if you're working late or trudging through the weekend, these helpful tips should see you through:

Patch file won't apply: You may experience an issue where you tell the computer to apply a patch file to your program and nothing happens! You open the program and the same thing repeats itself. This is most common in computers with newer versions of the Windows Operating System (Windows 7, Windows 8.1, and Windows 10). To get around this, right-click the icon you use to launch the program and choose the option 'Run as Administrator'. This will provide the program the elevated privileges it needs to apply the patch.

Best call times: During tax season, no one has time to wait. Be sure to take advantage of our extended hours (6 AM to 6 PM Monday – Friday PST) during tax season. Although call volume fluctuates throughout the day, the lowest volume periods are early morning and later evening. Don't forget that we are also open Saturday from 8 AM to 12 PM during the tax season as well. This is the best time to get those quick questions answered.

Use all the tools available to you: Taxware offers many support options in addition to telephone support. These options include dedicated support e-mail, message boards, and comprehensive self-help tools available on our website and built-in to the program.

Support e-mail: Sending an e-mail to support@taxwaresystems.com is a great way to get your questions answered by a support technician without having to be tied up on a phone call. Your e-mail is automatically entered into our system and assigned a ticket number for easy reference and tracking.

Message Boards: Taxware provides community message boards for users to communicate and find answers. Although these boards are monitored by Taxware support technicians, they are mainly intended to be used for communication between preparers. Questions and advice can be given or found 24/7.

Self-help tools: For those that need immediate help or prefer to solve the problem on their own, there are a variety of self-help tools available. These can be found on the 'videos' section of the Taxware website, or by clicking 'Training' on the Master Tax Menu. Also included in each program is a comprehensive 'Help' menu that can answer many questions. In addition to this, the 1040 program also has a built-in F.A.Q. that answers **many** questions posed to the support staff each tax season. We definitely recommend checking out these options even before picking up the phone.

Fast Support: When all else fails, sometimes it is easier to be helped with a hands-on approach. Technology can make this possible. With your permission, a Taxware support technician can remotely connect to your computer to assist you with your program questions or difficulties. Often times, something that can be difficult to explain can be solved in mere moments by allowing a technician to see the problem first-hand and assist you in resolving it.



We are fortunate to be able to work with great clients that know how to do tax returns. Working with you we are able to provide excellent support. We added a lot of great new clients this year that needed a little extra start up help. That combined with the IRS late start brought the call back times at the beginning and ending of the tax season up some. Except for those days our telephone response time was zero to five minutes which is our overall support goal. We look forward to working with you again this upcoming tax season.



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R e l e a s e S c h e d u l e

Release Schedule The program shipping schedule will be approximately the same as last year. If you would like to be included in the first shipment, make sure your renewal payment is submitted well before these dates.

Proforma organizer available now.

Winpay/W2/1099 Accumulator 12-15-2015. (These programs will be downloaded from our website this year.)

Wintax and other income tax programs starting 12-26-15.

Tax Season Hours The telephone hours will be the same as in prior years running 6 AM to 6 PM(PST) Monday through Friday with a half day Saturday(8 AM-12 PM) support shift.

A n n u a l S e m i n a r

Our annual client seminar dates and location have been finalized. We really encourage you to attend especially if you are a new client. It gives us an opportunity to meet you and personalize our partnership in the tax industry.

The seminar will be held at the Ayres Hotel & Suites Ontario Convention Center on January 5th and January 6th, 2016. The first day will cover tax, depreciation, some enhancements, and software changes. The second day is a half day seminar to go over electronic filing for the 1040 and Entity programs.

As always, the cost is minimal and simply offsets the conference room and food. Please use the attached registration form to get registered.

On a final note, the IRS will shutdown their E-File production of Individual returns this weekend, Saturday, Nov 21. They do this to prepare their systems for the new tax season. Our A2A system will stop accepting Individual returns at that time. The date to shutdown Business return production is Saturday, Dec 26. At this time we plan to continue to accept and process business returns through our A2A system until that cut-off date.

Taxware After Tax Season Dinner



TAXWARE SYSTEMS, INC.

ANNUAL TAX SEMINAR

January 5th & 6th, 2016

To be held at:

Ayres Hotel & Suites

Ontario Convention Center

1945 E. Holt Blvd.

Ontario, California 91761

(909) 390-7778

APPLICATION FOR JANUARY 2016 TAX SEMINAR
PLEASE MAIL OR FAX TO THE ADDRESS LISTED BELOW.

Please type or print the required information.

USER NUMBER _____

COMPANY NAME _____

CONTACT PERSON _____

SIGNATURE _____

Please indicate **how many** from your office will be attending each day:

_____ January 5th 2016 (full day)

TAX PREPARATION: \$75 per person for full day tax seminar, dedicated to program use, changes in tax law, etc. with lunch included, beginning at 9am, and ending after 4.

_____ January 6th 2016 (half day)

ELECTRONIC FILING: \$40 per person for half day electronic filing seminar, featuring procedures and requirements, with a morning break (snack included), beginning at 9am and finishing at noon.

Please select a method of payment:

• I have enclosed a check for the amount needed \$ _____

• Please charge my credit card account for the amount needed \$ _____

Card type: VISA or MASTERCARD Billing Zip Code _____

Name on Card _____

Credit Card Number _____

Expiration Date _____ CVS Code _____

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UPLAND, CA 91786
(800) 877-1065 FAX (909) 931-3199
support@taxwaresystems.com



Ayers Hotel & Suites Ontario Convention Center

1945 E. Holt Blvd
Ontario, California 91761
(909) 390-7778

Ayers Hotel & Suites is conveniently located in close proximity to the Ontario Airport. Rooms come in either one king or two queen beds. All overnight guests can enjoy our great amenities:

- Full Hot American Breakfast
- 24 hour complimentary Shuttle service to the Ontario Airport and Ontario Mills Mall
- Complimentary parking
- Wi-Fi Internet

Taxware Systems
\$99.00 Courtesy Room Rate
For single and double occupancy*

Reservations can be made with the front desk by simply asking for the Taxware Systems event rate. For further information, please contact the hotel.

*\$10.00 for each additional guest in room