

November 2012

# Taxware Inc



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## President's Corner

We are gearing up for the upcoming tax season. Many enhancements have been made and we are working on even more. Our major thrust throughout the summer and fall has been the conversion to MeF (Modernized Electronic Filing). We think you will be pleased with the way it functions. This is a major change. We have done considerable testing and have run quite a few live returns during early 2012. We are a little apprehensive that the IRS will be able to handle the volume, but MeF is the new adopted system so we will all probably need to be patient as they work through some of the new program issues. I personally like the many new features including almost instant ACK files. Hopefully you all had a chance to read our June newsletter. It's available in the bulletins section of our website and has a lot of good information about the MeF program.

Taxware had considerable growth last season, resulting in adding several new people to our staff. We are looking forward to a great upcoming season. We continue to enjoy your support and hope you have a great and profitable tax season. Merry Christmas and have a great New Year.



## Proforma Organizer & Master Tax Menu

The Proforma Organizer has been updated for the 2012 tax season. If you are currently registered through our website, and we have your current e-mail address, then you should have received an e-mail notification with the download link. 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.

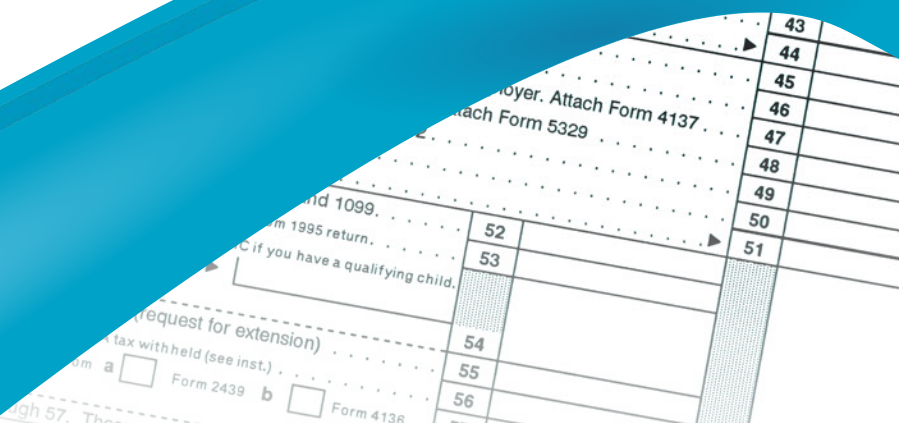
The proforma download link is:

[www.taxwaresystems.com/ftp/wintax/12proforma.exe](http://www.taxwaresystems.com/ftp/wintax/12proforma.exe)

The master tax menu download link is:

[www.taxwaresystems.com/ftp/util/12twmenu.exe](http://www.taxwaresystems.com/ftp/util/12twmenu.exe)

If you are not able to download files or would like a hard copy CD, feel free to get in touch with us and we can send it out upon request.



## 2012 Enhancements



We have had a busy summer! In addition to MeF, 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.

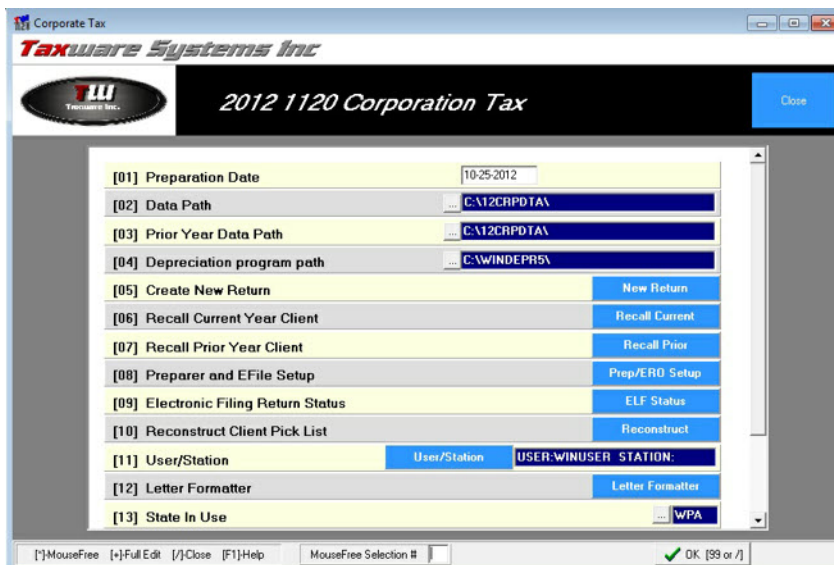
- In print setup, a selection to mark SSN's as confidential (555-55-XXXX) has been added.
- Added a default setting to enter routing transit number and banking information twice for verification. This is located with the SSN verification.
- If using the electronic signature pad, the ability to sign all signature documents in one location has been added.
- Added an option to print all signature documents with the 8879 print selection.
- Backup and restoration of clients can be done in a batch, a range of clients or all clients. System configuration files can also be backed up and restored.
- The electronic filing tracker can now select a federal return and change the status back to transmit.
- The employer, zip code, payer and other databases can now be edited from the miscellaneous features menu.
- Added additional EIC due diligence questions.
- Gambling losses can now be entered in the W2G input screen.
- On the W-7 screen there is a new option to print the W-7 in Spanish.
- Telephone numbers added to the new client wizard.
- After starting a tax return by scanning a W2 barcode, the program will ask for date of births and occupations after the scan is complete.
- We no longer default to uppercase in the 1040 system.
- Client recall grid will sort by clicking on indexed fields like last name, SSN, client ID, etc.
- Line input, forms and schedules, and the entity menus have added a Forms and Schedules accessed panel. These can also be directly accessed again by double clicking that specific item.
- Forms and schedules menu has a new search utility that will help you find a specific form or schedule and then take you directly to that form or schedule.

- Primary screens are larger with increased capabilities in maximization.
- On the current year client grid, we added return type, date started, and date completed columns.
- Added additional overflow statements associated with specific fields in the Schedule F and Form 2106.
- Added the clear forms and schedules function to 1040 line input screen.
- Additional 2441 validations.
- Added a client listing report for clients that utilized Schedule EIC.
- Client listing report of clients that have amended returns.
- In tax reports we added a birthday tax report client listing for taxpayers and dependents.
- Client listings in the tax reports section will now have a defined title at the top of the reports.

- When using the dependent wizard, if the number of months in the home remains the default 12 months the program will skip the category and automatically set it to "Lived With You".
- Font color will now change to red if a field has been overridden on the 1040 line input menu.
- Added the ability to password protect deleting a client, transmitting a tax return, and a few other areas of the system and tax return data. You can also choose which items to password protect.

**Entity Enhancements**

- The entities that are currently participating in MeF have a new overall look and feel.
- Clients can now be deleted in the entity programs by single selection in the client grid and using the delete key.
- In the entity programs we added entry into the defaults and settings off the start menus.
- From the new defaults and settings menu in the entity programs, clients can now be copied to a new client ID.
- MeF E-File acknowledgments enhanced printing design.
- Expandable primary screens.
- IFA and A2A electronic filing transmission methods for 1040, 1120, 1120s, and 1065 programs.



**Support Tools and Release Schedule**

**Training Videos** We have and continue to add a lot of useful training videos located in the videos section of our website. We think it's a good idea to review these great resources to get ready for the tax season. The videos cover a wide range of topics from help with network setup, to how to use the new enhancements, and electronic filing. We have tried to cover some of the most common setup and other questions. Let us know if there is video you would like to see us add.

**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 12-15-2012.
- Wintax and other income tax programs starting 12-25-12.

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

**E-mail Support Tickets** We have started using a "ticket system" to manage emails sent to our support email account. This will allow us to track, follow up, and manage emailed support issues. Any email you send will automatically generate a ticket in this system. You will use email as you have before (and hopefully even more) but you will now get an automated reply with a ticket number as a confirmation. Responses from us will reference that number in the emails subject line. You can reply to these messages to follow up on a specific ticket so the contents of your email will be added to the original ticket.

If you have used other email addresses for general emails to us, especially for support related items, then you should update our email address to support@taxwaresystems.com.

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## Additional Support Tools

If you are not currently registered with the users section of our website we highly recommend that you register. This is a self registration process and you select your username & password. This gives you access to our message boards which are divided by program type. Questions are answered by us as well as other clients that may have insight on something you are working on 24/7.

Registering also signs you up for automatic email notifications and newsletters. This was really a huge benefit to our clients last year. The IRS had some serious e-file issues last year and within moments we were able to send an email out to provide that critical information to you. We also made a couple of large programming changes that we were able to keep you in the loop about. We do not send very many e-mails but when we do it's important information we need to get to you quickly.

There is also an Updates area where updates can be manually downloaded. Even more important, it lists the latest version dates of each program so that you can easily verify that your program is current.

It may seem a little "old school", but we still use faxes for support. Having a visual copy of the form with your notes on what your concern is helps your support technician to be able to research and correct issues much faster. Of course if you prefer to scan your noted document and email it to us as a PDF that will work as well. Our dedicated support email address is [support@taxwaresystems.com](mailto:support@taxwaresystems.com). Our goal is to address your concerns as well as provide an update as quickly as possible.

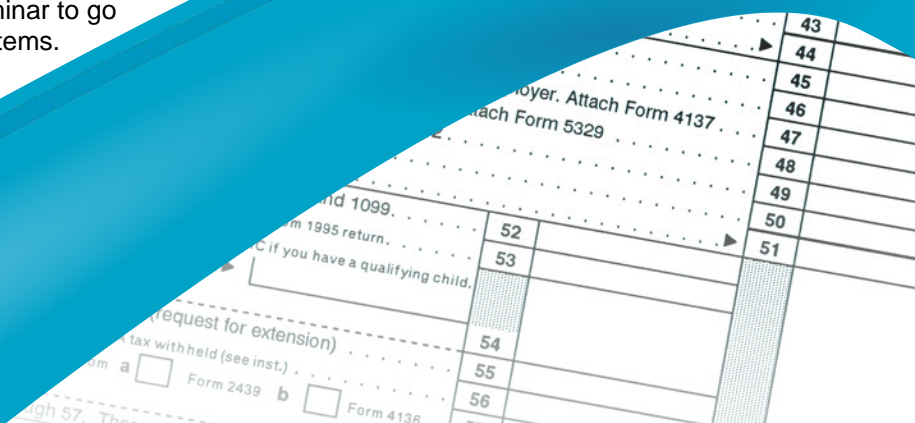


## Annual Live Taxware Seminar

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 7th and January 8th 2013. 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 using both the IFA and A2A systems.

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



# TAXWARE INC.

ANNUAL TAX SEMINAR

January 7<sup>th</sup> & 8<sup>th</sup>, 2013

To be held at:

**Ayres Hotel & Suites,  
Ontario Convention Center**

1945 E. Holt Blvd,  
Ontario, California 91761  
(909) 390-7778 ext 1252

APPLICATION FOR JANUARY 2013 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 7<sup>th</sup> 2013 (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 8<sup>th</sup> 2013 (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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(800) 877-1065 FAX (909) 931-3199  
support@taxwaresystems.com

# Ayres Hotel & Suites Ontario Convention Center



1945 E. Holt Blvd  
Ontario, California 91761  
**(909) 390-7778 ext 1252**

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
- Shuttle service to the Ontario Airport and Ontario Mills Mall
- Complimentary parking
- Wi-Fi Internet
- Fitness Center
- Pool & Spa

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

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