

November 2013

Taxware Inc



In This Issue

**Proforma
Enhancements
Release Schedule
Support Tools
Seminar**

President's Corner

We have been hard at work since the end of the 2012 filing season. Many enhancements and improvements have been made, largely based on input from our valued customers. We are particularly pleased with the roll out of the MeF (Modernized Electronic Filing). Returns were E-filed and acknowledgements received quicker and smoother than ever before. With our growth we have made the addition of several new employees that are in training. We're now making excellent progress on the 2013 programs. Many states are ahead of schedule and the federal is progressing nicely but we are still waiting for several important forms and schedules to be released by the IRS.

We look forward to a successful and profitable upcoming filing season.



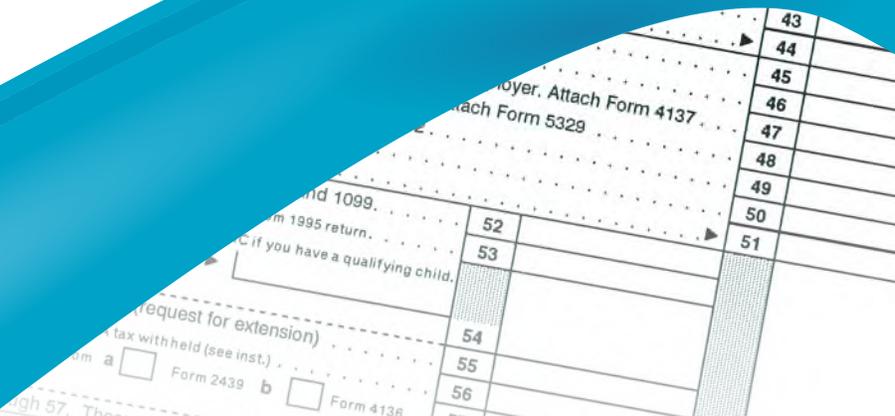
Proforma Organizer & Master Tax Menu

The Proforma Organizer has been updated for the 2013 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/13proforma.exe

The master tax menu download link is:
www.taxwaresystems.com/ftp/util/13twmenu.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.



2013 Enhancements

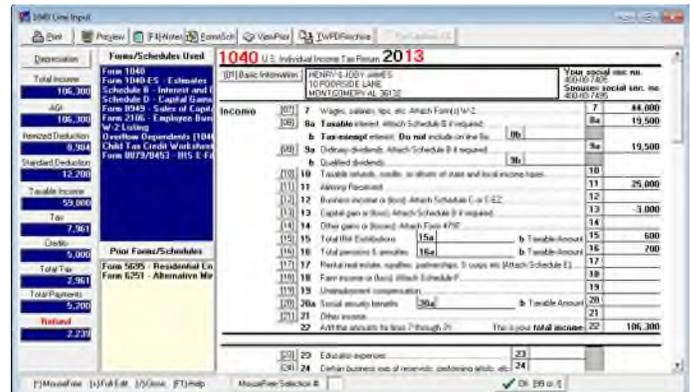


Wintax 1040

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 2013 enhancements video to our website to guide you through these great new features.

Wintax & Master Menu Enhancements

- In the master tax menu we have a built in quick alert message system. We don't plan on sending out messages unless we feel they are important. If you see this new button flashing in red, take some time to look through this information.
 - Complete redesign of the E-File information menu. This redesign includes a Federal/State E-File data grid to quickly select which records to include in the return upload.
 - When using the A2A E-File system, we added a new batch print option to group the acknowledgment files together.
 - Clean up and reorganize the 1040 defaults menu. We had many items that either aren't used or rarely used. We deleted a few options and moved some items down to the bottom of that menu.
 - Added 1099RRB Input.
 - Date debited field and direct deposit date field were added so they could be included in your various letters.
 - 1040 client lookup table has a new yellow color indicator for state rejected, federal accepted indication. Added state E-File status column to the default standard current client grid.
 - 1040 prior year recall overflow indicator(blue/red triangles) will set the triangle color to yellow to indicate a prior year statement was used.
 - Use of city state and zip code lookup expanded to a lot more address fields.
 - Added US form 1040-SS (Puerto Rico).
-
- Line input, and forms and schedules menu have added a Forms and Schedules accessed panel for prior year forms. These can also be directly accessed again by double clicking that specific item. As a form or schedule is accessed it will automatically be removed from the the prior year list.



- Dependents may now be removed and stored in an inactive list. Removed dependents can easily be restored from the inactive list. This is useful for taxpayers who claim dependents in alternate years.
- E-File Status for each state contained in return, tracks state status, easily resends rejected state returns, improved state status tracking.
- TWMenu wizard carries preparer and printer info to 706,709 and 990 programs.
- State agency names, and addresses can automatically pull into the client letter. These fields are currently included in the default and sample letters.
- 1040 print 1099-Misc items and a report to show what form they follow to.
- In 1040 FormPrint, added an option to check all forms for primary state in addition to all federal forms when check all required is used.
- Refund Advantage estimate worksheet print changes. This report also includes a state section.

Asset Number	Asset Description	Asset Number	Tax Type	Tax Code	Basis	Date Acquired	Disp Date
1404	CAT MOTOR GRADER	27.00	TP Schedule C	21	\$154,229	06-01-2003	
1864	DAC WALTER TRUCK	19.00	TP Schedule C	21	\$9,000	01-01-1991	
1960	590 G DIGGER AD	18.00	TP Schedule C	21	\$77,521	01-15-1989	
1987	DALE SKIDLOADER	25.00	TP Schedule C	21	\$33,978	10-08-1997	
1994	FORD F480	7.00	TP Schedule C	21	\$21,477	06-17-1996	
2000	DODGE DAKOTA TRUCK	26.00	TP Schedule C	21	\$14,305	05-30-2000	
2001	DODGE 3500 TRUCK	28.00	TP Schedule C	21	\$10,845	07-21-2001	
2005	FORD F 150 TRUCK	34.00	TP Schedule C	21	\$23,211	02-21-2005	
3M	DAKOTA BUILDING	29.00	Schedule E	109	\$70,000	01-01-1962	
3M	DAKOTA LAND	32.00	Schedule E	109	\$52,000	01-01-1961	
	COMPRESSOR	23.00	TP Schedule C	21	\$1,758	03-31-1994	
	COMPUTER	0.01	TP Schedule C	21	\$2,304	05-20-1994	
	COMPUTER	3.01	TP Schedule C	21	\$2,298	10-09-2013	
	COFFEE	23.00	TP Schedule C	21	\$	01-14-2004	
	DESK	10.01	TP Schedule C	21	\$432	05-20-2012	
	GTCD DIGITIZER	30.00	TP Schedule C	21	\$2,406	12-23-2001	
	KM350 LOADER (D9)	17.00	TP Schedule C	21	\$136,740	01-01-1989	
	LASER	15.00	TP Schedule C	21	\$10,050	11-25-1985	
	LASER EQUIPMENT	29.00	TP Schedule C	21	\$22,430	11-25-2003	
	LASER LEVEL	20.00	TP Schedule C	21	\$	05-05-1994	
	OFFICE EQUIPMENT	25.00	TP Schedule C	21	\$	01-31-2007	
	SCRAPER - 762 JD	12.00	TP Schedule C	21	\$47,844	06-19-2012	
	TRUCK	26.00	TP Schedule C	21	\$24,845	05-05-2007	

2013 Enhancements Continued Assets Manager

- Assets Manager assets lookup grid now has a new basis column, we also added filters by tax code type and added a new enhanced assets search engine.
- Depreciation 8825 carry to 1065 and 1120s programs.
- Assets Manager year end update wizard now prompts for the state 179 max and sets that as that clients default.

Entity Enhancements

- Added LA and OR state 1120/1120s/1065/1041. Added MS, UT, AZ state 1041.
- Added NY 1120s E-File. Added 565,100,100s, and 541 E-File.
- 1041 program update which includes our new metro tile look and screen resize ability. The 1041 program now joins the ranks of the MeF E-File program.
- Added the 7004 E-File capability to the entity programs.
- Entity PDF print conversion. We are beginning the process of redesigning our print procedures that will include the use of PDF print files. This will make it possible to expand printers available for use.
- Added preview options throughout the entity programs using the new PDF option. These new options will make it so individual forms or schedules can be previewed in specific sections of the programs.
- Entity Schedule K and Schedule K1 menus are re-sizable and mouse wheel capable.
- New business code lookup table was added to the entities.
- New 1065 K1 lookup table for the tax matters partners.
- Entities now allow the functionality to choose a different state in use/selection inside of the main menus of the programs.
- 1120/1120s/1065 Other deductions added a fixed meals & entertainment category. This automatically splits the input by 50% and takes the other 50% and makes an entry in the other expenses deduction on the M1.
- Ending inventory on the 1125-A now carry automatically to the Schedule L ending year column.
- Entity programs added a new statement to loans on the Schedule L. Added a new statement for gross income.

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 12-15-2013.

Wintax and other income tax programs starting 12-25-13.

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.

November 2013



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. 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 2014. 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.



Welcome Our New Team Members

Ryan Luce



Office Manager
&
Technical Support Staff

Donovan Neighbor



Software Developer

Curtis Boland



On Boarding Specialist
&
Technical Support Staff

Kaley Brock



Office Assistant

Fun Times



Christmas parties in our industry are challenging. A couple of years ago we started celebrating our work Christmas party in the middle of summer and have been having a lot of fun. This year we helped the Green Knight be victorious at Medieval Times.

TAXWARE SYSTEMS, INC.

ANNUAL TAX SEMINAR

January 7th & 8th, 2014

To be held at:

Ayres Hotel & Suites, Ontario Convention Center

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

APPLICATION FOR JANUARY 2014 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 7th 2014 (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 8th 2014 (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 _____

TAXWARE SYSTEMS, INC.
924 W. 9TH STREET
UPLAND, CA 91786
(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

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.