



TAX YEAR 2021
Taxware Quickstart

with Matt



Installation and Setup

Topics covered in this section:

- **Website Download**
 - **Logging In**
 - **Current vs Archive**
 - **Downloading**
- **Installation**

Taxware Website

SE HABLA ESPAÑOL

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SYSTEMS INC.

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DEPENDABLE TECH SUPPORT

All programs come with unlimited year-round free technical support!

[LEARN MORE](#) [SCHEDULE A DEMO](#)

“ My company has been using Taxware for 35 years and we love it. The software is user friendly and the staff is always friendly and helpful.
Jessica V.

EXPERIENCE THE **TAXWARE** DIFFERENCE

- www.taxwaresystems.com
- Video tutorials are available
- Blogs and Bulletins
- Help Forums

Logging In



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USER LOGIN

PLEASE LOGIN

USERNAME

PASSWORD

LOGIN

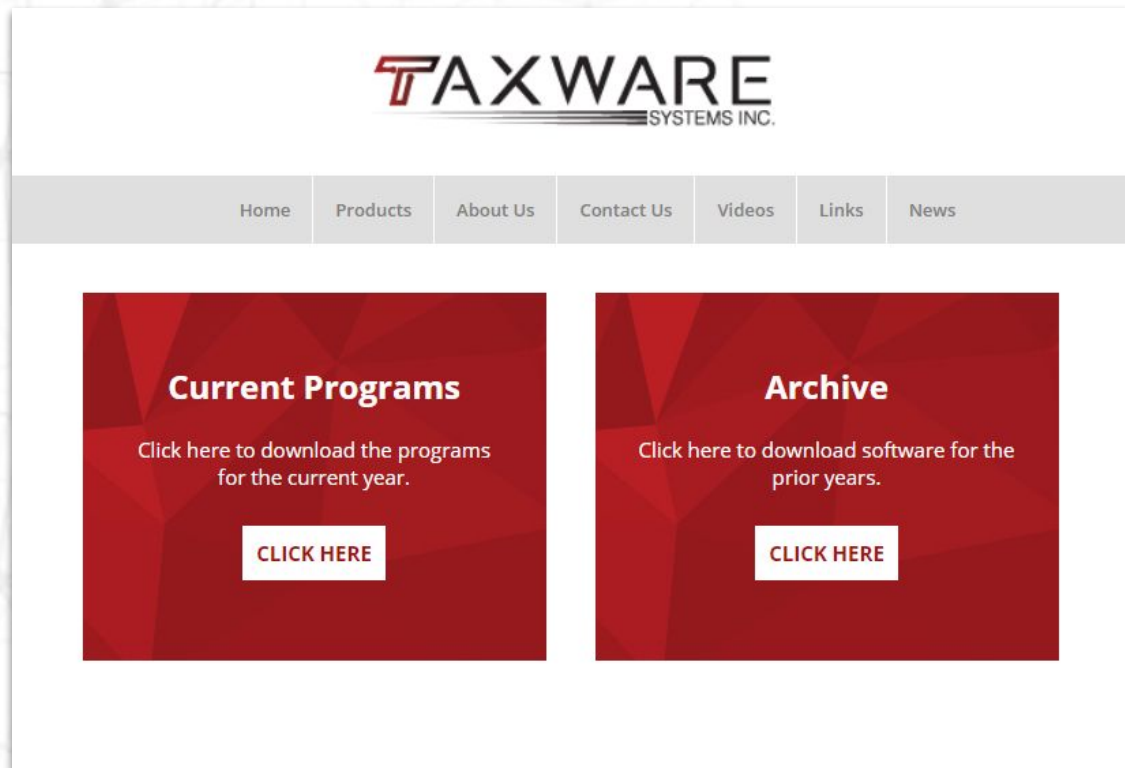
[Help me](#), I forgot my username or password!

Click [here](#) if you have not created a username!

Your browser needs to allow cookies!

- **Client Portal in the top right**
- **Login**
 - **Forgot Password?**
 - **New Client?**

Current vs Archive



- **Current Programs**
 - **All programs available to your account**
- **Archive**
 - **Programs back to 2013**

Downloading

DOWNLOAD INSTRUCTIONS FOR GOOGLE C

If you are using Google Chrome you may need to run the downloaded file. Go to the Downloads folder and locate the file you just downloaded. Click on the file with the file selected. Right click on that file and

DOWNLOAD INSTRUCTIONS FOR MOZILLA

If you are using Mozilla Firefox you may need to run the downloaded file. Go to the Downloads folder and locate the file you just downloaded. Click on the file with the file selected. Right click on that file and

- **Click on the program**
- **Click Run or the Name on the bottom**
- **Will open once done downloading**



20wintax.exe

40.4/145 MB, 5 secs left

Installation



- **Next, next, next**
- **Desktop Icons**
- **Master Tax Menu**



Master Tax Menu

Topics covered in this section:

- **Messages**
- **Program Paths**
- **Support**

The New Master Tax Menu

Taxware Systems Master Tax Menu (Version 11-30-21 1.0)

Messages/Alerts

Type	Message Date	Message Subject
Taxware	02/18/2021	8915-E
Taxware	03/16/2021	American Rescue Plan Status
Taxware	03/17/2021	The American Rescue Plan Unemploy
Taxware	03/24/2021	American Rescue Plan Update Unemp
Taxware	04/05/2021	American Resue Plan update
Taxware	10/22/2021	Bank Enrollment Applications
IRS	11/03/2021	Electronic Filing IRS - Annual Shutdov

TAXWARE SYSTEMS INC.

2021 MASTER TAX MENU

SETTINGS HELP VIDEOS PROGRAM MANUAL MESSAGE BOARDS IRS.GOV TAXBOOK TAXWARE CONNECT

TAX PROGRAMS

WINTAX NEXTGEN CORPORATION S-CORPORATION

PARTNERSHIP FIDUCIARY ASSET MANAGER

ESTATE (706) GIFT (709) EXEMPT (909)

PROFORMA DOCARK

ACCOUNTING

WINPAY

GENERAL LEDGER

1099 ACCUMULATOR

MONEY MANAGER

[*] MouseFree [+*] Full Edit [/] Close [Ctrl+Wheel] Zoom

MouseFree Selection # OK [99 or /]

Messages

Taxware Systems Master Tax Menu (Version 11-30-21 1.0)

Messages/Alerts

Type	Message Date	Message Subject
Taxware	02/18/2021	8915-E
Taxware	03/16/2021	American Rescue Plan Status
Taxware	03/17/2021	The American Rescue Plan Unemploy
Taxware	03/24/2021	American Rescue Plan Update Unemp
Taxware	04/05/2021	American Resue Plan update
Taxware	10/22/2021	Bank Enrollment Applications
IRS	11/03/2021	Electronic Filing IRS - Annual Shutdov

TAXWA

SETTINGS **HELP VIDEOS**

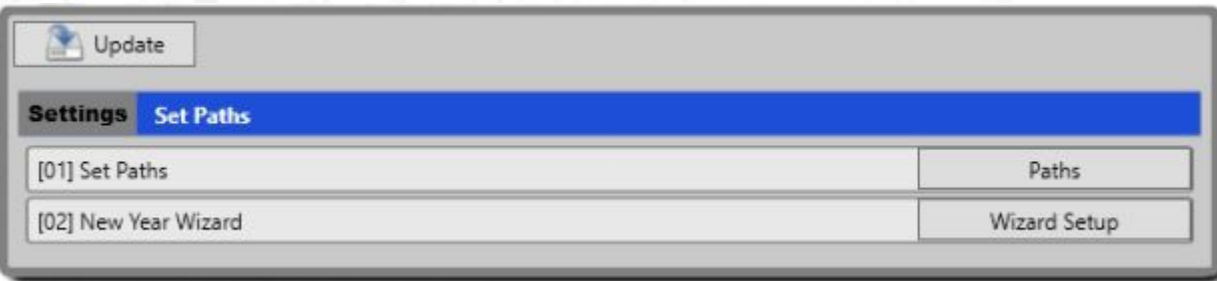
WINTAX NEXTGEN

3

Messages From Taxware

- **Deadline updates**
- **E-File changes**
- **Major tax change news midseason**
- **IRS shutdowns**
- **Master Menu and all five tax programs**

Settings



- **Manual Update**
- **Set Paths for non-standard installation paths**

Program Paths

Menu Set Paths		
[01] Taxware 'SettingsAndData' Path	Shared	C:\Taxware\SettingsAndData
[02] Wintax Program Path	1040	C:\Taxware\21Wintax
[03] Corporation Tax Program Path	1120	C:\Taxware\21WCorp
[04] S Corporation Tax Program Path	1120 S	C:\Taxware\21WSCorp
[05] Partnership Tax Program Path	1065	C:\Taxware\21WPtnr
[06] Fiduciary Tax Program Path	1041	C:\Taxware\21WFiduc
[07] Depreciation Assets Manager Program Path	Depreciation	C:\Taxware\21WDepr
[08] Winpay Payroll Checkwrite Program Path	Winpay	C:\Taxware\TWWinpay
[09] Money Manager Program Path	TMM	C:\TWMoney
[10] Individual Tax Proforma Organizer Program Path	Proforma	C:\Taxware\21WProf
[11] Estate Tax Program Path	Estate Tax	C:\Taxware\21WEstate
[12] Gift Tax Program Path	Gift Tax	C:\Taxware\21TWGift
[13] Exempt Organization Program Path	Exempt Org.	C:\Taxware\21Exempt
[14] 1099 Accumulator Program Path	1099	C:\Taxware\TW1099Acc
[15] TWPFDocArchive Tracker Program Path	TWPFDoc	C:\TWPFDocArk
[16] TW General Ledger	TWGL	C:\TWGL
Client ID		
[17] Taxware Client ID		EXAMPLEID

Settings and Data Path

- Replaces New Year Wizard Program Paths
- If you have non-default program paths you may enter them here

Support



- Taxware Website
- Training Videos
 - Training on the Basics
- Message Board
 - Comments
 - Questions
 - Help other Preparers
- Quick Links

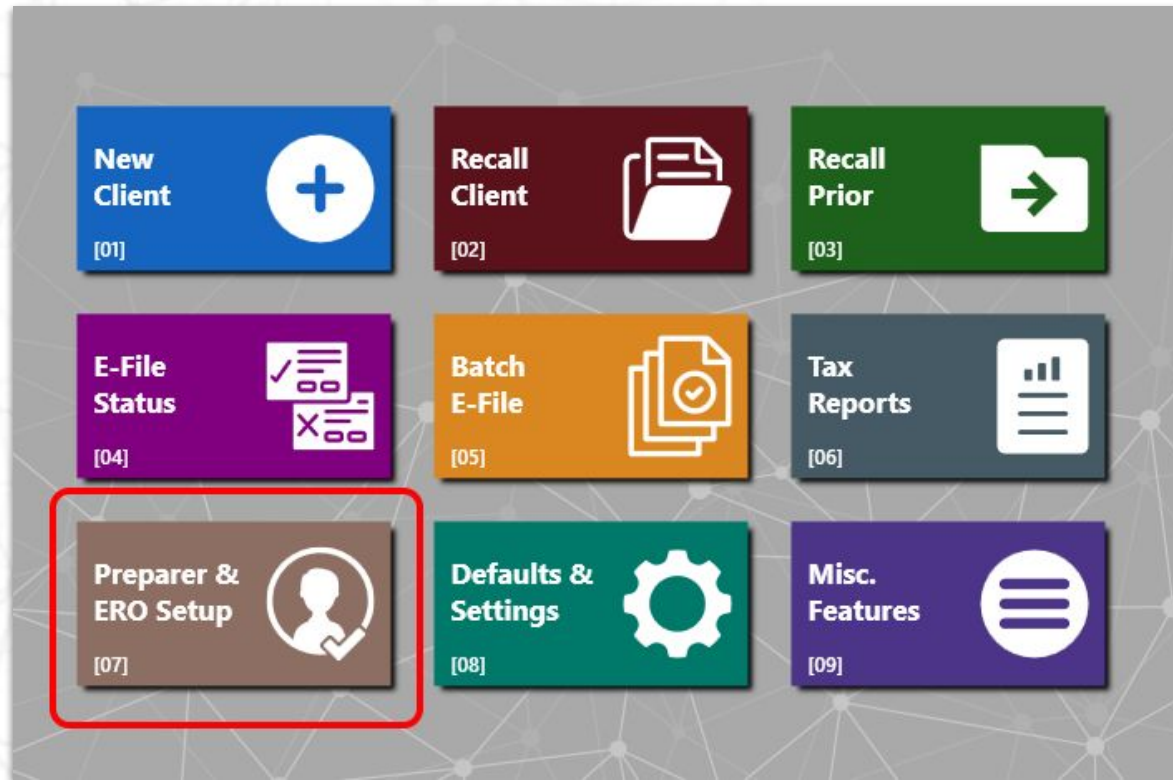


Wintax Setup

Topics covered in this section:

- **Prep/ERO Setup**
- **Settings and Data Folder**
- **Defaults and Settings**
- **Billing Setup**
- **Print Setup**
- **Letter Formatter**
- **Automatic Backups**

Prep/ERO Setup



- **Preparer Setup**
- **ERO Setup**
- **Transmitter Setup**

Settings and Data Folder

Defaults Current User and ID

[01] Change Current User	WINUSER
[02] Taxware Client ID	YourClientIDHere

Defaults Data and Program Paths

[03] Taxware 'SettingsAndData' Path	C:\Taxware\SettingsAndData
[04] Current Year Data Path	21Data
[05] Prior Year Data Path	20Data
[06] Depreciation Program Path	C:\Taxware\21WDepr
[07] DockArk Program Path	

Defaults Defaults and Setup

[08] Default Preparer	1 - test
[09] Default ERO	
[10] Billing Setup	Billing Setup
[11] Print Setup	Print Setup
[12] Preparation Date	12-13-2021

- **Single Computer**
 - **Eliminate New Year Wizard**
 - **Data Folder Switching**
- **Networked Computers**
 - **E-File Tracker**
 - **Preparers**
 - **EROs**
 - **Billing and Print**

Old vs New





OLD:

- **Each program points to its own folder**

NEW:

- **Each program points to a central folder**
- **The program will then sort the folders correctly itself**

Defaults & Settings

New Client [01] 	Recall Client [02] 	Recall Prior [03] 
E-File Status [04] 	Batch E-File [05] 	Tax Reports [06] 
Preparer & ERO Setup [07] 	Defaults & Settings [08] 	Misc. Features [09] 

Defaults & Settings

The screenshot displays a software configuration window titled "Defaults & Settings". It is organized into three main sections, each with a blue header bar:

- Current User and ID:**
 - [01] Change Current User: WINUSER
 - [02] Taxware Client ID: YourClientIDHere
- Data and Program Paths:**
 - [03] Taxware 'SettingsAndData' Path: C:\Taxware\SettingsAndData
 - [04] Current Year Data Path: 21Data
 - [05] Prior Year Data Path: 20Data
 - [06] Depreciation Program Path: C:\Taxware\21WDepr
 - [07] DockArk Program Path: (empty)
- Defaults and Setup:**
 - [08] Default Preparer: 1 - test
 - [09] Default ERO: (empty)
 - [10] Billing Setup: Billing Setup
 - [11] Print Setup: Print Setup
 - [12] Preparation Date: 12-13-2021

- **Client ID and Auto-updates**
- **Default Preparer & ERO**
- **1040 Defaults**
- **E-File Defaults**
- **Textellent Integration**
- **Billing and Print Setup**

Billing Setup

1040 Billing Information

[01] Change Current Bill Bill Profile 1

[02] Bill Name Bill Profile 1

[03] Change Rates Change Rates

[04] Change Form Filter Change Filter

[05] Set all rates to zero Zero Rates

[06] Print invoice number on bill Yes

[07] Compute state sales tax Yes

[08] Sales Tax Rate 0.0000

[09] Include list of forms with bill Yes

[10] Show amount billed for each form Yes

[11] Print credit card information page Yes

[12] Detail Section Title

[13] Envelope type 00-Number 10

Fed/State Filters

Federal

Alabama

Arizona

Arkansas

California

Form/Schedule	Amount
Form 1040V - Payment Voucher	0.00
Form 1040ES - Estimates	0.00
Form 1040 - U.S. Individual Income Tax Return	0.00
Form 1040X - U.S. Amended Individual Income	0.00
Form 1040NR - Nonresident Alien Income Tax R	0.00
Form 1040SS - U.S. Self-Employment Tax Retur	0.00
Schedule 1 - Additional Income and Adjustmer	0.00
Schedule 2 - Tax	0.00
Schedule 3 - Nonrefundable Credits	0.00
Schedule 4 - Other Taxes	0.00
Schedule 5 - Other Payments and Refundable C	0.00
Schedule 6 - Foreign Address and Third Party C	0.00
Form 2210/F - Underpayment Penalty	0.00
Schedule A - Itemized Deductions	0.00
Schedule B - Interest and Dividend Income	0.00
Schedule C - Profit or Loss from Business	0.00
Schedule C-EZ - Net Profit from Business	0.00
Schedule D - Capital Gains and Losses	0.00
Form 8949 - Sales of Capital Assets	0.00
Schedule E - Supplemental Income	0.00
Schedule F - Farming Income	0.00
Schedule R - Credit for Elderly or Disabled	0.00
Schedule SE - Self Employment Tax	0.00
Form 1316 - Foreign Tax Credit	0.00

1040 Billing Information

Description	Amount (+/-)
[14] Adjusted Item #1	0.00
[15] Adjusted Item #2	0.00
[16] Adjusted Item #3	0.00
[17] Discount	0.00
[18] Remark #1	
[19] Remark #2	
[20] Remark #3	
[21] Remark #4	
[22] AuditGuard additional mark up fee (this will add to base price)	

- Profiles
- Misc settings
- Per form pricing
- States
- Default adjustments and remarks
- Snapshot Nature

Print Setup

Defaults Print defaults editor

[01] Change Active Setting ▼

[02] Active Print Default's Name Standard Settings 1

[03] Mask SSN Yes

[04] Client Copy Yes

Form Filter

Form Name	Print if Required	Print Always	Number of Copies
Bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Title Page	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Slip Sheets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Filing Instructions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Client Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Basic Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Detail Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Prior Year Comparison	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Diagnostics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Form 1040V - Payment Voucher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Form 1040ES - Estimates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Form 1040 - U.S. Individual Income Tax Return	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 1 - Additional Income and Adjustments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 2 - Tax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 3 - Nonrefundable Credits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 4 - Other Taxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 5 - Other Payments and Refundable Credits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Schedule 6 - Foreign Address and Third Party Designee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Form 2210/F - Underpayment Penalty	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1

[05] Title Page ▼ titlepage.frx [09] Print in reverse order Yes

[06] Client Letter ▼ defaultletter.frx [10] Auto Create PDF file when printing complete return Yes

[07] Slip Sheet 1 ▼ slipsheet.frx [11] Set return status when printing complete return ▼ Leave status unchanged

[08] Slip Sheet 2 ▼ slipsheet2.frx [12] Select Printer ▼ Microsoft XPS Document Writer

- Required vs Always
- States
- Default Letters
- Mask SSN
- Client Copy
- Auto Create PDF
- Letter Formatter

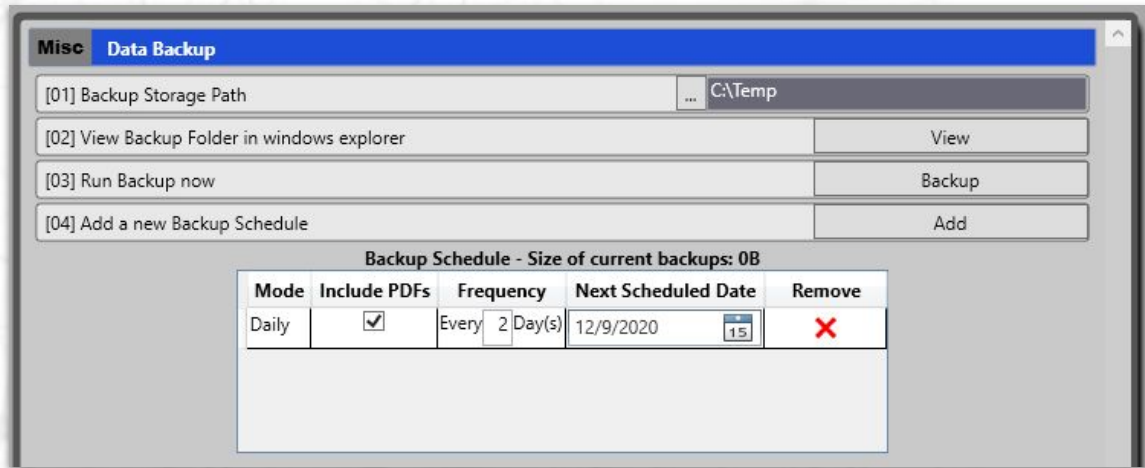
Letter Formatter

The screenshot shows a web application titled "Formatter Client Letter Formatter". It features a sidebar on the left with a list of existing client letter formats, including "alternateLetter.frx", "CompareDefault.frx", "DefaultLetter.frx", "DefaultLetterEspanol.frx", "EngagementLetter.frx", "MyLetter.frx", "PrivacyPolicy.frx", "SlipSheet.frx", and "TitlePage.frx". The main area contains two buttons: "[01] Add New Client Letter Format" with an "Add" button, and "[02] Copy Existing Client Letter Format to New Client Letter Format" with a "Copy" button. Below these buttons is a table with the following data:

Client ID	Name	TPSSN	Address	City, State, Zip
1	Gnu & Ohld Clyent	400-00-1234	1234 Sunnyvale Ave	DUARTE CA 91010
2	Christina Coffin	400-00-2000	321 Kights Ave	DUARTE CA 91010
7	Johnny B Tester	400-00-0007	1234 Random Ct	DUARTE CA 91010

- **What Can You Change?**
- **Basic Steps**
- **For more information see the video on our website**

Automatic Backups



- **Backup Path**
- **View**
- **Backup**
- **Add new schedule**

THANK YOU FOR CHOOSING

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