Forms Software User Manual

This program is subject to the license agreement on page 37 of this document.

Forms and Forms Software Copyright STF Services Corporation, 1993-2005. All rights reserved. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. The complete program is sold with the understanding that the publisher is not engaged in rendering legal, accounting or any other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

The materials contained in the licensed program and its manual are supplied without representation or warranty of any kind. The publisher assumes no responsibility and shall have no liability of any kind, consequential or otherwise, arising from the use of these materials, or any supplementary programs or materials subsequently issued. All uses of this program and supplementary materials are subject to terms in the end user license agreement. Which can be found on page 37 of this manual.

Forms and Forms Software Copyright STF Services Corporation, 1993-2005. All rights reserved. Windows is a registered trademark of Microsoft Corporation. HP is a registered trademark of Hewlett Packard. All other trademarks and tradenames belong to their respective owners.

Table of Contents

Welcome
Forms Software
About this Manual
Technical Support
Details of this Manual
System Requirements
Installing the Application
Updating the Forms Program
Getting Started
The Document Workspace
The Toolbar
General User Interface Tips
Opening New Forms
Navigating Documents
Completing a Form
Completing a Profile
Changing the Fill-in Font
Finding Text in a Document
Fill-in Field Types 13
Importing Prior Year Client Information
Saving Forms
Working with Profiles
Accessing Saved Documents
Printing Documents
Menu Commands
File Menu
Edit Menu
View Menu
Document Menu
Window Menu
Help Menu

Program Windows	
Opening Blank Forms	
Creating Profiles	
Forms List	
Batch Saving	
Saving Forms	
Applying Profiles and Saving Forms	
Applying Profiles to Open Forms	
Managing Documents	
Change Saved Forms Folder	
Find Text	
Right Mouse Menus	
Go To Page	
Default Settings	
Information Display	
Field Colors	
Default Font	
Default Numeric Display	
Proxy Settings	
Printer Calibration	
Appendices	
Appendix A Hot Keys & Shortcuts	
Appendix B Glossary	
Index	
End-User License Agreement	

Welcome

This section offers an introduction to the forms software. It gives a brief overview of the application and explains how to access Technical Support for questions not answered in this manual. Among the explanations offered are details of this manual, and how to use it to maximize the performance of this new software.

Forms Software	.6
About this Manual	.6
Technical Support	.6
Details of this Manual	.7
System Requirements	.7
Installing the Software	.7
Updating the Forms Program	.7

Forms Software

Welcome to the largest library of official forms and instructions ever published. Interactive forms are published in a fast, easy-to-use electronic format.

Powerful Features

- Find the right forms fast by number or keyword.
- View forms, instructions, and rate tables in full width on any monitor.
- Forms published between CD releases are available via Internet, Between Releases in the Form Library.
- Automatically calculate all returns that call for calculations.
- Print fully approved and fileable 2D barcodes and scannable forms.
- View and print complete instructions that look exactly like government originals.
- Search text in all documents to find answers quickly.
- Automatically transfer client and preparer data to forms and schedules.
- Fill in forms with any font in any size. Government agencies restrict fonts on some forms.
- Use the typewriter mode to make notations anywhere on the form.
- Automatically display due dates and special filing information.
- Refer to the Quick Guides to find which forms each state requires.
- Find state agency addresses, phone numbers, fax numbers and web sites in the Directories.
- Print perfect returns every time.

Government Approved Forms

Special care has been taken to ensure that all fileable forms are government-approved. Automated form processing requirements for barcodes, scanlines, validation fields and more are built into the forms software to ensure filing requirements are met.

About this Manual

This User Manual covers everything needed to get started:

- How to perform the most common functions
- How to use the menus
- How to use the windows

- Performance tips
- A list of keyboard shortcuts
- A Glossary

Technical Support

To contact technical support for this software, choose the Help menu, select About.

Details of this Manual

This manual is organized into three main parts:

Getting Started presents the user with a simple and easy to understand tour of the forms software. This section highlights: how to open forms and instructions; how to save forms and create client profiles. Also explained are the fill-in features and how to retrieve previously saved forms for editing or printing.

Menu Commands offers explanations of the toolbar buttons and menu commands. An image of each toolbar button is included with the details of its function.

Program Windows provides a visual overview of the forms software, with details of different functions performed in the program windows.

Special Typefaces

This manual uses specific typefaces to highlight functions or actions performed in the software.

Arial	denotes Menu Commands and Dialog Box buttons found within the software. Examples are the $\underline{F}ile$ menu and the OK button.
Bold	denotes a reference to Windows in the software.
Underlined Characters	denotes keyboard shortcuts on menu items. Pressing the Alt key and the underlined letter will activate that menu, menu item or command in a window.
Courier New	denotes text the user will enter with the keyboard.
Italic	denotes references to other pages or sections in this manual.
ALL CAPS COURIER	denotes keys or key combinations on the keyboard that are used in entering commands within the software.
Notes and Tips	Notes and Tips

Offers notes and tips to streamline the use of the software.

System Requirements

The following computer configuration is required to run this application:

- Windows 95, Windows 98, Windows NT4.0, WindowsMe, Windows 2000, WindowsXP
- CD-ROM drive or Internet Connection
- Windows compatible printer (laser printer recommended)

Installing the Software

Refer to the instructions included with your purchase for the private password and specific instructions for installing the software.

Updating the Forms Program

The forms software is updated automatically when using the latest version of the CD. Forms on the Internet are updated between releases of the CD. Tips -- Updating CDs

When an updated CD arrives, be sure to replace the old CD. The new CD contains newly released forms and instructions. When the new release arrives, discard the old one.

Getting Started

Getting Started is a brief overview of frequently used features. It details the basic functions of the forms, how to access blank forms, enter data, save and print. Documents can be saved for a client and opened at a later time for review, editing and/or printing.

The Document Workspace

The workspace contains the open document and file tabs. Menu, tool and status bars are also found in the workspace.



The Toolbar

The toolbar provides quick access to some of the most commonly used functions. The following illustration shows the buttons available on the toolbar:



General User Interface Tips

The forms software uses common Windows functions to access tasks and navigate in the program.

Select a task from the menu bar with the keyboard by holding down the ALT key and type the underlined letter in the desired task. Frequently used tasks may be quickly accessed by using hot keys. Hot keys appear to the right of the command in the drop down menus. See Appendix A for a complete list of the hot keys.

This software offers content-specific tasks in pop-up menus. Pop-up menus are accessed using the right mouse button. Different menus appear depending on the location of the cursor. The background of a form, over a data field, over a calculation field or within an instruction offer different options in the pop-up menus.

Opening Blank Forms

The software contains forms with complete instructions covering Federal, State, City returns, IRS Publications and Practice Aids. The **Blank Forms** window allows for selection of the year and jurisdiction(s) for forms needed. To open a form:

- 1. From the File menu, choose Blank Forms. The Blank Forms window will open.
- 2. Select the desired year, or Internet, between releases (for updated forms between CD releases.)
- 3. If necessary, click the **Reset** button to clear previously selected jurisdictions
- 4. Select one or more jurisdictions by clicking in the corresponding check box.
- 5. Click OK. The Forms List opens with all forms that match the selected jurisdiction(s) for the year selected.
- 6. Enter search criteria in the Form Number or Key Word field *and/or* select a Type from the drop down menu.
- 7. Using the mouse, select the needed documents. Select more than one document by holding down the CTRL key and clicking the needed documents with the mouse.
- 8. Click the Open, Print or Save button on the right portion of the pick list window
 - or While the cursor is over the selected form(s), use the right mouse button to Open, Print or Save.

Tips -- Finding the Needed Form

Use Form Number or Key Word and/or Tax Type to narrow the search.

When searching for a form by name, enter a part of the name. Entering "Motor" will list all forms from the searched jurisdiction that contain the word "Motor" in the title of the document.

Search with or without dashes and spaces in the form number. Entering W2 will return a list of all the forms with W2, W-2 and W 2 in the form number or title.

Search with partial form numbers. Specifying 104 in the Form Number or Key Word field will find Form 1040 as well as Form 6104.

Opening Practice Aids

This software includes a wide variety of supplementary documents that can be customized and saved with a client's forms.

Follow these steps to create attachments and save them to a client.

- 1. Choose Blank Forms from the File menu. The Blank Forms window opens.
- 2. Click the <u>Reset</u> button to clear settings from the previous search.
- 3. Place a check in the box next to Practice Aids with the mouse and click OK.
- 4. In the **Forms List**, select the needed Practice Aid.
- 5. Click Open. The document will be displayed.
- 6. Fill in information as needed.
- 7. Save the form before closing.



Practice Aids contain blank worksheets, payroll records, a client organizer and other items that can be saved in client folders.

Navigating Documents

There are several ways to move the form on the screen to view different sections of the open document. A complete list of keyboard shortcuts for navigating in a document is in *Appendix A*.

Move up or down, right or left

- ➤ Move the form up or down with one of the following methods:
 - From the <u>View menu choose Pan Up</u> or Pan <u>Down</u> to move toward the top or bottom of the current page.
 - Place the mouse cursor over any part of a form, *other than* a fill-in field, click and hold the left mouse button. When the cursor is shaped as a hand, *n* click and drag the mouse in any direction to move the form.
 - Press the Page Up or Page Down key to move up or down within a page.
 - With the mouse, move the vertical scroll bar to move up or down, right or left.

Move to the next or previous page

- ➤ To view the previous or next page of a multi-page document:
 - Click the C or button on the toolbar to move in the desired direction.
 - or Press the CTRL and PAGE DOWN or CTRL and PAGE UP keys.
 - *or* Choose <u>Next Page or Previous Page from the View menu.</u>

Move to a specific page

- ➤ To view a specific page of a multi-page document:
 - 1. From the <u>View</u> menu choose <u>Go</u> To Page to display the Go To Page window.
 - or Press the F5 key.
 - or Right mouse click and select Go To Page.
 - 2. Enter the page number in the window, Click OK

Move to the first or last page

- ➤ To move directly to the beginning or end of a document:
 - Press the CTRL and HOME or CTRL and END keys respectively.
 - or From the <u>View menu choose First Page or Last Page</u>.

View multiple documents

➤ Multiple documents may be open simultaneously. To switch to another open document:

Click the file tab on the left side of the screen that denotes the desired document.

- *or* Scroll through the open files using the small scroll bar in the upper left portion of the screen, above the file tabs.
- *or* While holding down the CTRL, repeatedly press the TAB key to scroll through the open documents. Release the keys when the needed form shows on the screen.
- or From the <u>Window</u> menu, click on the desired form to bring it into view.

View the most recently saved documents

The <u>File</u> menu lists up to nine most recently saved documents. This list includes files saved in the last two weeks. Click any form in the list to open it.

Completing a Form

The fields on a form allow for data entry. To fill in the data fields:

- 1. Move the cursor to the desired field in one of these ways:
 - Using the mouse, click in a field.
 - or Press the TAB or ENTER key to move forward through the fields.
 - or Press the UP or DOWN ARROW key until the cursor appears in the desired field.
- 2. Enter information as needed.

Completing a Profile

Profiles store client and preparer information. This information will transfer to forms when the profile is applied. Be sure to fill in as much information as possible to prevent repetitive typing.

Complete profiles in the same manner as completing forms.

When entering a Taxpayer Identification Number, follow the format specified on the screen.

Changing the Fill-in Font

To change the fill-in font on the current form, use one of the following methods:

With the cursor over a field, right click, select Change Font and select the desired font. This changes the font for the particular field only.

Note -- Changing Fonts

Some forms do not allow for font changes. This is due to government specifications for the forms software. or From the Edit menu, select Change Font. Select All Pages, Current Page or Current Field to make changes to the font.

To change the fill-in font for all new forms:

Open the <u>File menu</u>, select <u>Default Settings</u>, select <u>General</u>, and choose the Change <u>Font button</u>. Make a selection and click OK.

Finding Text in a Document

Use the **Find Text** feature for assistance in locating specific words or sequences of words in documents. The search will begin on the page of the document you are on and continue to search towards the last page.

To use the **Find Text** feature:

- 1. From the Document menu, click Find Text.
- 2. Enter the text to be found and press ENTER
- 3. To find the next instance of the text:

Press ENTER again

or press the Find Next button in the Find Window.

Note -- Find Text

The Find Text feature in the forms software will find text on a document, and does not search user entered data.

Document Settings

Use the **Document Settings** window to change numeric display for the open document. Select to Round Calculations, have Negatives in Parentheses, or Insert Commas.

To use the Document Settings:

- 1. From the <u>Document menu</u>, click <u>Settings</u>.
- 2. Place a check mark in the box next to the setting needed to be changed.

Note -- Document Settings

Numerical settings on some forms cannot be changed due to government specifications.

Fill-in Field Types

Forms may contain several different data field types. A data field's function is identified by its color. The field colors listed below are the software default colors.

The field with the yellow border is the active field. The active field is the field with the cursor.

Aqua fields are fill-in fields.

Green fields are calculation fields. These fields calculate or pull data from other fields on the form. A calculation field may be overridden by:

Begin typing in the field and select the yes button when prompted to override the calculation.

- or Right mouse click on the green field and select Override Calculation.
- *or* From the <u>Edit menu choose</u> <u>Override Calculation</u>. Choose either <u>All Pages</u>, Current <u>Page</u>, or <u>Current Field</u>.

Restore an overridden calculation by:

Right mouse click and select <u>Restore Calculation</u>.

or From the <u>E</u>dit menu choose <u>Restore Calculation</u>. Choose either <u>All Pages</u>, Current <u>Page</u>, or <u>Current</u> Field.

Red fields are validation fields. The information entered into a red data field must be entered in a specific format. This information is used in creating bar codes, or scan bands for machine reading purposes. When the data is formatted correctly, the field will change to aqua. As long as the field remains red, the data must be re-entered in the validation field to match the specified format.

Note -- Validation Field Fill-in

Data entered in Red Fields must match the format specified in the pop-up note that appears when typing in the field. Dashes, spaces, slashes and all other punctation must be entered exactly as presented in the pop-up note. To access the specified formatting information, be sure the yellow "active border" is on the red data field begin typing in the field. A pop-up note will appear that explains the specific formatting for each data field.

Grey data fields are created by users with the Insert Typewriter Field feature.

Typewriter fields are available for the addition of notations and other information.

To place a typewriter field:

- 1. Choose Insert Typewriter Field from the Edit menu. The cursor shape changes to a bar with the letters Abc on it.
- 2. Move the cursor to the desired position on the form and click.

To remove a typewriter field from a form:

- 1. Click in the typewriter field to make it the active field and select <u>Remove Typewriter Field</u> from the <u>E</u>dit menu.
- *or* Click in the field with the right mouse button and select Remove <u>Typewriter Field</u>.

Note -- Typewriter Fields

Inserted Typewriter Fields are the only fields that can be removed from the form. The original fill-in fields on the form are not removable.

Tips -- Overriding Calcs

Overridden calculations may be restored any time.

Copy prior year client profiles

Prior year client profiles will transfer to the current year saved forms folder.

- ➤ To copy prior year client profiles into the current year forms folder:
 - 1. Choose Copy Profiles from the File menu. The Copy Profiles window opens.
 - 2. Browse to last year's saved forms folder and click OK.

(To locate last years Saved Forms and Profiles Folder, open the prior year software, select Saved Forms and Profiles from the <u>File</u> menu. The top of the window to the right of the Default folder displays the path to the data folder.

This Copy feature will copy folder and profiles from the selected folder. Prepared profiles will be copied also.

Notes -- Copying Client Profiles

The import function does not overwrite or remove any existing client information. If a duplicate file name is encountered during the copy process, the profile in the will not be copied.

The copy function transfers only client and preparer profiles. Forms and/or information entered on forms are not copied from year to year.

Saving Forms

Forms may be saved directly from the forms list to be completed later, or viewed first, then saved.

To save a form from the forms list:

• From the <u>File</u> menu, select Blank <u>Forms</u>. Select the year and jurisdiction(s) needed. Click OK. The **Forms List** will open. Highlight the needed forms and click Batch <u>Save</u>. Select a profile to apply and click OK. The selected forms are now saved in the same folder that the applied profile

had been saved in. The forms that have been selected in the **Forms List** remain selected. This group of forms may be saved to a different client.

To save a form while viewing:

• With a form on screen, select <u>Save</u> from the <u>File</u> menu. The first time a form is saved, you will be prompted to apply a client profile. This may be done now, at a later time or not at all. *See page 15 of this manual for more information about applying profiles.* Tip -- Profiles and Saving

When saving a form for the first time, a window will prompt the user to apply a profile. Enter as much information as possible. When the profiles is applied to a form, data will automatically flow to corresponding fields on the form. The form is saved in the same folder as the profile.

The **Save As** window opens. The title of the form by default is the name of the form. This may be changed by modifying the name in the **Save As** window. Select a client folder to save the form in. Click **Save**.

To save the form with a different name in a different client folder:

• From the <u>File</u> menu, select Save <u>As</u> a Different File. The Save As window opens, select a folder and enter a file name to save the form as. Click Save.

Working with Profiles

Client profiles store client addresses as well as taxpayer information that will automatically flow to a form when applied. Profiles are tailored to different types of clients, or a preparer. When a client profile is created and saved, a client folder is created. The folder is named after the client. Preparer profiles are stored in the root of the forms folder.

- ► To create a new profile:
 - 1. From the <u>File</u> menu select <u>N</u>ew Profile.
 - or From the File menu, select Saved Forms and Profiles and click the New Profile button.
 - 2. Select a profile type from the list. Click OK. A blank profile opens. Enter as much information as possible in the profile at this time. When a profile is applied to a form, corresponding information will flow from the profile to the form.
 - 3. From the <u>File</u> menu, select <u>Save</u>. A folder named after the client will be created. The profile will be saved in that client folder.
 - 4. Preparer profiles are saved in the root of the forms data folder.
- ➤ To apply a profile to a form:

The first time a form is saved, the user is prompted to apply a profile. Double click on the needed client folder, and select a profile to apply. Click **Open**. Data in the profile flows to the form. The **Save** window opens. Click **Save**. The form is saved in the client folder with the profile that was applied.

or

- 1. While a form is on the screen, go to the \underline{E} dit menu, select \underline{A} pply Client Profile.
- 2. In the **Apply Profile** window, browse to the client folder, double click to open it. Select the profile with the mouse and click **Open**. Data from the profile will transfer to the form.
- To apply a preparer profile repeat this process. Preparer profiles are saved in the root of the forms data folder.
- ➤ To edit an existing profile:
 - 1. From the <u>File</u> menu, select Saved Forms and Profiles. Locate the desired client folder and double click. The bottom portion of the window reveals all the documents saved in the client folder. Profiles are listed on top by default.
 - 2. Click on the profile and then click Open.
 - or Double click the profile.
 - or Right mouse click the profile and select Open.
 - 3. From the <u>File</u> menu, select <u>Save</u> to save the changes.

Preparer profiles are stored in the root of the forms folder. To open a preparer profile for editing from the saved forms window:

1. Click on the root folder at the top of the list of folders in the section of the **Saved Forms and Profiles** window to open the root folder.

2. Highlight the needed profile in the bottom section of the window and click Open.

Tip -- Using Profiles

Editing a profile will not change any forms that have previously had that profile applied. Profiles may be applied to a form at any time. Edited or different profiles that are applied to forms update and overwrite any data that was previously transferred to the form.

Accessing Saved Documents

- ► To view saved documents:
 - 1. From the <u>File Menu</u>, select <u>Saved Forms and Profiles</u>. The <u>Saved Forms and Profiles</u> window opens. The top section of the <u>Saved Forms and Profiles</u> window lists all client folders. The bottom portion of the window lists all documents saved in the folder that is open in the top part of the window.
 - 2. Double click on a folder to view the contents of the folder in the bottom half of the window.
 - 3. Highlight the desired form in the bottom half of the window and click Open.

or

Right mouse click on the desired form to open.

- ➤ To change the saved forms path:
 - 1. Click on the Default Folder button
 - 2. Browse to the desired location for Forms to be saved. Click OK.

Tip -- Saving Forms

A client folder will contain the client forms and profile. When a profile is applied to a form, the form will be saved in the applied client's folder. Data on the profile is transferred to the form when the profile is applied.

Preparer profiles are placed directly in the saved forms folder and are applied in the same manner as client profiles.

Printing Documents

- ➤ To print blank documents from the **Forms List**:
 - 1. Search for the form needed.
 - 2. From the **Forms List** window, select the desired document(s) by clicking with the mouse.
 - 3. Click Print. The Print window is displayed.
 - 4. Select the appropriate printer and number of copies and click OK.
- ► To print saved documents:
 - 1. From the <u>File</u> menu select <u>Saved</u> Forms.
 - 2. Select the client whose documents are needed. The list of documents saved in the client folder is displayed in the bottom of the window.
 - Select the form(s) needed by clicking on each document name in the list. Select multiple documents by holding down the CTRL key while clicking with the mouse.

Tips -- Printing

To print selected pages of a document rather than the entire document, it must be on the screen.

Batch printing of blank forms may be done from the forms list.

Print all of a client's forms by selecting Saved Forms from the File menu. Open the client folder and select the desired forms in the bottom portion of the window.

- 4. From the <u>File</u> menu, select <u>Print</u>, or right mouse click and select Print. The **Print** window opens.
- 5. Select the appropriate printer and click OK.

➤ To print documents that are currently open:

- 1. View the documents to print.
- 2. From the <u>File</u> menu select <u>Print</u> or right mouse click on the document and select Print.
- 3. Select the appropriate printer, print range number of copies and click OK.

Menu Commands

This section offers an explanation of the Menu Commands, and a brief description of each function on all menus.

File Menu	. 18
Edit Menu	. 19
View Menu	. 19
Document Menu	. 20
Window Menu	. 20
Help Menu	. 20

Menu Commands -- Section 3

File Menu

The <u>File</u> menu contains commands to access clients and forms, to save and print forms and instructions, and exit the application.

Use thi	s button or command	То
	Blank Forms	Access blank forms, instructions, IRS publications, and practice aids by entering search criteria. Also access forms via Internet, Between Releases that have been published between releases. A wide variety of customizable practice aids are available. The practice aids range from blank pages to weekly travel expenses.
	New Profile	Open a blank profile form. When the client data is entered in the profile and saved, a client folder is created in the data folder. Preparer profiles contain preparer data. When the preparer profile is applied, the preparer data will flow to the form.
3	Saved Forms and Profiles	Open documents that have previously been saved.
	Close Form	Close the active form.
	Save	Save changes made to a document.
	Save As a Different File	Save a document as a different file. Perhaps for a new client or a different partner.
	Print	Print the active document.
	Copy Profiles	Transfer client profiles from another Saved Forms and Profiles folder into the current Forms data folder.
	Default Settings	Change the default user settings. Select the default font, numeric settings and color selections. Also set proxy server information and reset printer calibration settings.
	Recent Document List	Open any of the last nine saved documents.
	Exit	Close the forms software. If any of the opened documents contain unsaved information, the application will prompt the user to save before exiting.

Edit Menu

The Edit menu contains commands to edit and search fields, forms and/or instructions.

Use thi	s button or command	То
X	Cut	Remove highlighted data in the currently selected field. This data is placed on the Windows Clipboard.
þ	Сору	Copy highlighted data in the currently selected field to the Windows Clipboard.
	Paste	Paste data from the Windows Clipboard to the active field.
	Erase Field	Clear fill-in fields on the active form. Select all pages, the current page or the current field.
	Apply Profile Information	Transfer client or preparer data from profiles to forms to eliminate repetitive typing.
	Insert Typewriter Field	Create a typewriter field anywhere on the document to enter notes, reference attachments, or other custom information.
	Remove Typewriter Field	Delete the selected typewriter field.
	Override Calculation	Disable the calculation attributes for all fields, the current page, or the current field on the active form.
	Restore Calculation	Restore the calculation attributes for all fields, the current page, or the current field on the active form.
AB -	Change Font	Change the font, style and/or size for all fields, the current page, or the current field on the active form.

View Menu

The View menu contains commands for changing the display characteristics of the active window.

Use th	is button or command	То
	Fit in Window	Show the entire document on screen.
	Full Width	Show the document in full width on the screen.
0-	Zoom In	Increase the magnification of the currently viewed document.
<i>.</i>	Zoom Out	Decrease the magnification of the currently viewed document.
	Panup	View the top of page.
	Pandown	View the bottom of the page.
	First Page	Go to the first page of the document.
\bigcirc	Next Page	Go to the next page of the active document.
G	Previous Page	Go to the previous page of the active document
	Last Page	Go to the last page of the document.
	Go To Page	Enter a document's page number to jump directly to.

Menu Commands -- Section 3

Document Menu

The **Document** menu contains commands that will display information about open documents.

Use th	ois command	То
	Filing Information	Display due dates and special filing requirements for the active form.
bod	Find	Find specific text strings in the open document.
	Go to Form	View the form associated with the currently displayed instructions.
i	Go to Instructions	Open the instructions for the corresponding form, open to the first page, to the page with line instructions, or the page with the rate tables.
	Go to Tax Table or Rate Schedule	Go directly to the first page of the tax tables or rate schedule in the instructions.
	Insert Duplicate Page	Insert a duplicate page into the document.
	Settings	Choose numeric display settings for the active document.

Window Menu

The **Window** menu displays information about open forms.

Use this command	То
Open Form List	Display a list of all the open forms. Click on a form in the list to make it the active form.
Close All Forms	Close all forms while leaving the forms software open.

Help Menu

The Help menu contains commands that offer assistance for use of the application.

Use this button or command		То
(2)	User Manual	View this User Manual.
	Tutorials	View a tutorial that demonstrates how to use this forms software program. The tutorials highlight different functions of this software.
	Quick Guides and Directories	Display a list of relevant state forms along with due dates and special filing requirements and display state agency telephone and fax numbers, addresses and available Internet Resources.
	Screen Calculator	Open the Windows screen calculator.
	About	Display information about this software application, or to update your password.

Program Windows

This section highlights the Windows in the forms software.

Opening Blank Forms
Creating Profiles
Forms List
Batch Saving
Saving Forms
Applying Profiles and Saving Forms
Applying Profiles to Open Forms
Managing Documents
Browse For Folder
Find Text
Right Mouse Menus
Go To Page
Default Settings
Information Display
Field Colors
Default Font
Default Numeric Display
Proxy Settings
Printer Calibration



Select a tax year for forms needed. Check the desired jurisdiction(s) with the mouse. Any combination of jurisdictions may be selected for the search. Once the search criteria is supplied, click OK. The **Forms List** window appears listing forms from the selected year and jurisdiction. Practice Aids and Quick Guides and

Directories may be selected also. Entries with plus signs on the left are expandable to reveal more jurisdiction selections. Click on the plus or minus sign to expand or shorten the selection list. When an entry with a plus sign has been checked, all entries under that jurisdiction are also selected. To refine the search to a single entry under the plus sign, uncheck the box next to the plus sign, and check the desired box.

Tip -- Internet Forms

Documents from the Internet function in an identical manner to the documents from the CD. Internet, Between Releases contains forms that have been released or revised since the last release of the CD.

Copy Profiles Image: Copy Proviously created profiles into the current "Saved Forms and Profiles" folder. OK Enter the path to the profiles you wish to copy and then click the "OK" button. Cancel C:\FORMS\ Browse

Copy Profiles

From the File menu, select Copy Profiles. Enter the path to the saved forms folder where the profiles you wish to copy are. Select OK. This will copy profiles into your current saved forms folder.

Creating Profiles

Profiles store Client and Preparer information. Information stored in profiles will be transferred to a form when the profile is applied to the form.

To create a profile, access the **New Profile** window from the <u>File</u> menu, <u>New Profile</u> or click on the New Profile button in the **Tool Bar**. Select a profile type and click OK. Enter the data. From the <u>File</u> menu, click <u>Save</u>. The forms software will create a folder named after the client, and the profile will be saved in that folder. Preparer profiles are stored in the root of the saved forms folder.



Forms List

The **Forms List**, shows all documents for the year and jurisdiction(s) that were selected in the **Blank Forms** window. This list of documents may be refined by entering a Form Number or Key Word and/or selecting a Tax Type.



Save selected documents directly to a client, without viewing them.

Choose one of the following methods to select and open a form:

Using the mouse, click on a document and select Open.

- or Double click a document.
- *or* Using the keyboard, press the up or down arrow to scoll through the forms list. Locate the needed form, and click Open.
- *or* Using the keyboard, press the PAGE UP or PAGE DOWN key to scroll through the forms list a page at a time. When the needed form is located, double click to open.
- or Right mouse click over a document, select Open.

To select multiple documents at one time, click multiple titles while holding down the CTRL key. When all needed documents are selected, click OK to open. Use the right mouse button to open a menu to select Open, Print or Save.

Batch Saving

Save several forms for a client at once or save groups of forms to several clients by using batch save.

From the **Forms List** select the desired forms with the mouse. Click the **Batch** <u>Save</u> button. The <u>Select a Profile</u> **to Apply** window opens. Browse to the desired client folder and double click. Highlight the client profile and click OK. Information in the profile will be transferred to the forms and the forms will be saved in that client's folder. To save the same selection of forms for a different client, select another client folder and repeat the process.

Applying Profiles

Profiles store client and preparer data. When a profile is applied to a form, the data in the profile is transferred to the form. The first time a form is saved, the user will be prompted to apply a profile. Once a client profile has been applied to an unsaved form, that form will be saved in the same folder where the applied profile resides. If no profiles are available, they must be created. *To create a profile, see Creating Profiles on Page 22 of this manual.*

Select Profile	to Apply 🔹 🏾 🔊
Look in:	🔁 forms 🧧 🕝 🏂 📂 🖽 -
Pecent Desktop	 Alabaster Corporation C R Rockingham Dillenger, Beckton, Clayton J Moss Associates Jet Deliveries JK Whitman JK Whitman JW Transportation Shovels and Bakes.com
My Documents My Computer	Stewart and Goble, Attorneys at Law US Flag Company West Lake Industrial Form Maker Charles Kemper.preparer John Public.preparer Vour forms data folder
My Network	File name: John Public.preparer Image: Concel Files of type: Saved Profiles Cancel

Applying Profiles to Open Forms

To apply a profile to a form:

From the <u>E</u>dit Menu select <u>Apply</u> Profile Information. The Select a **Profile to Apply** window will open. Client folders contain the client profiles. Preparer profiles are saved in the root of the forms folder. Double click the needed folder or open it. Select the profile and click Open.

Preparer profiles are stored in the root of the forms folder and have an extension of ".preparer".

Client profiles are stored in client folders and have an extension of ".profile".

When profiles are applied to forms, data in the profile transfers to the form. Updating a profile does not update information previously applied to a form. However, a profile may be applied again to the form. This will update any new or changed information from the profile.

Click to apply the / selected profile.

Saving Forms

Saved forms are organized in client folders.

To save a form currently on the screen:

- From the <u>File</u> menu, select <u>Save</u>. The user is prompted to apply a profile. Select yes or no as needed. If selecting yes, the form will be saved in the applied client profiles folder. When the **Save** As window opens select <u>Save</u>. If no profile is applied, click on the desired client folder or click on the new folder window to create a folder for the client.
- 2. Edit or accept the form name in the File <u>name</u> field in the window. Press <u>Save</u>

To save a form from the **Forms List** please see Batch Saving on page 23 of this manual.



Managing Saved Documents

The **Saved Forms and Profiles** Window displays client's forms as well as client and preparer profiles. Access the **Saved Forms and Profiles** Window to:

- Open saved forms and profiles
- Create client folders and sub folders
- View a list of client folders
- View a list of saved forms
- Change document names
- Change folder names

- Print forms or profiles
- Print a list of all forms in a client folder
- Print all forms in a client folder
- Delete a client folder and all documents in it
- Delete documents
- Change folder where documents are saved

The **Saved Forms and Profiles** window opens when the <u>Saved Forms</u> command from the <u>File</u> menu is chosen or when clicking the Saved Forms and Profiles button on the toolbar.





Right mouse click a document for more tasks to perform.

Change Saved Forms Folder

Documents may be saved locally or on a network.

Open the **Browse For Folder** window by clicking on the **Default Folder** button in the **Saved Forms and Profiles** window.

Type the path to the forms folder in the Folder line or browse to the desired location. Click OK when finished.

Users must have full access rights to the forms folder.

Program Windows -- Section 4

Find Text

Search an open document to find all the occurrences of a string of text using the **Find** window. From the **Document** menu, select **Find Text**. Enter the text to find. To continue the search, click **Find Next**. To search the entire document, begin the search from page one.



Right Mouse Menus

Use the right mouse for quick access to a variety of functions. To access these functions place the mouse cursor over the specified areas of the form and press the right mouse button.

Use the right mouse button while the cursor is over the background of a form to:

Use the right mouse button while the cursor is over a data entry field to:



Find Text...Go To Line InstructionsGo To Page...Override CalculationGo To FormChange FontPrintSaveClose

Go To Page

The Go to Page window offers quick, direct access to any page in the document.

To access the **Go To Page** window:

- 1. From the \underline{V} iew menu select \underline{G} o To Page.
 - or Press the F5 key.
- 2. Type in the desired page and select OK.

Go To Page		X
Currently on pa	ge 1 of 286.	ок
Go to page:	43	Cancel

Default Settings - General

The **Default Settings - General** window allows changes to settings in the software. Changes made here will be set as the default for all documents to be opened in the future.

Information Display

Check or uncheck the settings as preferred. Time and Date Stamp print in the upper margin of the form.

Field Colors

Press a colored field button to change the fill-in field colors on the form. Select one or more field colors to change. All references to field colors in this manual refer to the default colors.

Default Numeric Display

Check or uncheck settings as preferred. Note: Some forms prohibit settings being changed due to government specifications.



Default Font

This shows the default font that will be used on all new forms. The **Font** window is accessed by selecting the <u>Change</u> Font button. Choosing a different default font will not change the font on a currently open or saved form. It will change the font on new forms. To change the font on a currently open form, from the <u>E</u>dit menu select <u>Change</u> Font. Note: Some forms prohibit fonts being changed due to government specifications.

Font			? 🔀
Font	Font style:	Size:	
Courier New	Regular	12	ОК
Courier New O Estrangelo Edessa O Franklin Gothic Mediur O Garamond O Gautami O Georgia T Haettenschweiler	Regular Italic Bold Bold Italic Sample AaBbYy: Script:	12 E	Cancel

Default Settings - Internet Proxy Server

When accessing Internet forms though a proxy server, the address of the proxy server must be entered in the **Proxy Server Configuration** window.

To enter the proxy server information:

Select the <u>Copy</u> settings from Internet Explorer button. This will copy proxy server information that has been entered in Internet Explorer connection settings to the forms software.

or

Enter the proxy server address and port number.

If a <u>U</u>sername and <u>P</u>assword are required for access to the Internet through a proxy server enter them in the corresponding fields.

If the proxy server settings do not transfer from Internet Explorer, or you are unsure of the address, ask your local network administrator or help desk for the proxy server address and port number and enter the information in the corresponding fields.

_				
Proxy Server Configuration				
Proxy Server Information				
HTTP proxy name or IP address Port number				
Copy settings from Internet Explorer				
Authentication Information				
If your proxy requires clear text authentication, enter your username and password below.				
Username :				
Password :				
OK Cancel <u>R</u> eset				

Program Windows -- Section 4

Default Settings - Printer Calibration

Default Settings - Printer Calibration	X
Selecting a printer from the list below and clicking OK will clear the calibration settings for the selected printer. This will allow you to recalibrate the printer the next time you print a form that requires calibration.	OK Cancel
Available Printers	

Select the printer you are using. Click OK. This will reset the printer listed in the **Default Settings - Printer Calibration** window. The next time a form which requires calibration is printed you will be prompted to run the calibration wizard. Instructions for calibration are detailed in the wizard.

A properly calibrated printer will print machine read forms to specifications set by government agencies. This will help to ensure machine readability of these forms.

Document Settings

Select numeric display settings for the open document in the **Document Settings** window. Place a check mark in the box next to the needed setting to activate it.

Open the **Document Settings** windows by from the **Document** menu and click on Settings.

Placing a check mark next to Round Calculations will round all calculating fields.

A check mark next to Negatives in Parentheses will place negative numbers in parentheses. When unchecked, negative numbers are preceded by a minus sign.

With Insert Commas checked, commas are inserted.

Document Settings		
Document Numeric Display Outright Round Calculations Negatives in Parentheses Insert Commas	OK Cancel	
Due to filing requirements, the numeric display in some fields cannot be altered.		

Appendices

This section of the manual shows how to maximize the use of the forms software by using advanced features. These sections offer a general reference for quick lookup of features in the forms software.

Appendix A Hot Keys & Shortcuts	30
Appendix B Glossary	33
Index	35
End-User License Agreement	37

Menu Command	Keyboard Shortcut	Hot Key Combination
<u>F</u> ile	Alt+F	
Blank <u>F</u> orms	Alt+F+F	Ctrl+F
<u>N</u> ew Profile	Alt+F+N	Ctrl+N
Saved Forms and Profiles	Alt+F+O	Ctrl+O
<u>C</u> lose Form	Alt+F+C	Ctrl+F4
<u>S</u> ave	Alt+F+S	Ctrl+S
Save <u>A</u> s Different File	Alt+F+A	
<u>P</u> rint	Alt+F+P	Ctrl+P
Copy Profil <u>e</u> s	Alt+F+E	
Default Settings	Alt+F+D	
<u>G</u> eneral	Alt+F+D+G	
Internet Proxy Server	Alt+F+D+I	
Printer Calibration	Alt+F+D+P	
E <u>x</u> it	Alt+F+X	Alt+F4

Switch between open forms

Navigational and Editing Shortcuts	
Move down a data field	Down Arrow <i>or</i> Tab <i>or</i> Enter
Move up a data field	Up Arrow
Move to beginning of field	Home key
Move to end of field	End key
Highlight entire data field	Double click with the mouse cursor in the field
Highlight to end of field	Shift+End
Highlight to beginning of field	Shift+Home

Ctrl+Tab

Menu Command	Keyboard Shortcut	Hot Key Combination
<u>E</u> dit		Alt+E
C <u>u</u> t	Alt+E+U	Ctrl+X <i>or</i> Shift+Delete
Сору	Alt+E+C	Ctrl+C
Paste	Alt+E+P	Ctrl+V <i>or</i> Shift+Insert
<u>E</u> rase Field	Alt+E+E	
<u>A</u> ll Pages	Alt+E+E+A	
Current Page	Alt+E+E+P	
Current Field	Alt+E+E+C	
Apply Profile Information	Alt+E+A	Ctrl+A
Insert Typewriter Field	Alt+E+S	
Remove Typewriter Field	Alt+E+T	
Override Calculation	Alt+E+O	
<u>A</u> ll Fields	Alt+E+O+A	
Current Page	Alt+E+O+P	
Current Field	Alt+E+O+C	
Restore Calculation	Alt+E+R	
<u>A</u> ll Fields	Alt+E+R+A	
Current Page	Alt+E+R+P	
Current Field	Alt+E+R+C	
Change Font	Alt+E+H	
<u>A</u> ll Fields	Alt+E+H+A	
Current Page	Alt+E+H+P	
Current Field	Alt+E+H+C	

Menu Command	Keyboard Shortcut	Hot Key Combination
View	Alt+V	
<u>F</u> it in Window	Alt+V+D	Ctrl+E
Full <u>W</u> idth	Alt+V+W	Ctrl+W
Zoom <u>I</u> n	Alt+V+I	Ctrl++
Zoom <u>O</u> ut	Alt+V+O	Ctrl+-
Pan <u>U</u> p	Alt+V+U	Page Up
Pan <u>D</u> own	Alt+V+D	Page Down
First Page	Alt+V+S	Ctrl+Home
<u>N</u> ext Page	Alt+V+N	Ctrl+Pg Down
Previous Page	Alt+V+P	Ctrl+Pg Up
Last Page	Alt+V+L	Ctrl+End
<u>G</u> o To Page	Alt+V+G	F5
<u>D</u> ocument	Alt+D	
<u>Filing Information</u>	Alt+D+F	
Fi <u>n</u> d Text	Alt+D+N	
<u>G</u> o To Form	Alt+D+G	
Go to Instructions	Alt+D+I	
Go To <u>T</u> ax Table or Rate Schedule	Alt+D+I+T	
Insert Duplicate Page	Alt+D+P	
S <u>e</u> ttings	Alt+D+E	
<u>W</u> indow	Alt+W	
List of Open Forms		
<u>C</u> los <u>e</u> All	Alt+W+E	
<u>H</u> elp	Alt+H	
User Manual	Alt+H+U	
Tutorials	Alt+H+T	
Screen Calculator	Alt+H+S	
<u>A</u> bout	Alt+H+A	

Active Field

The field where the cursor is located. The active field is outlined with a yellow halo, making it easy to identify.

Active Form

The form that is currently displayed. Several forms or instructions can be open at one time, but only one document can be active.

Apply Profile Information

Flows client information into applicable fields on a form. See client profiles.

Blank Forms Library

The complete collection of documents included in this program.

Calculation Field

A field whose value is automatically entered. Calculation Fields are "jumped over" while working on the form for ease of data entry. To override a Calculation Field, begin to type in the field and answer yes when prompted to override the calculation, or right mouse click on a calculation field and select Override Calculation. Go to Edit, and choose override calculation for the entire page, or the entire form.

Client Profiles

Files containing information about clients that can be applied to forms.

To create a Client Profile, go to File, New Profile (or click New Profile icon on toolbar), select type of profile and fill in the fields.

To apply a Client Profile to a form, go to Edit, Apply Profile Information and select the profile. If a profile has not been applied to a form, when closing or saving, a window will open with the option to do so.

Note: applying a Client Profile to a form does not automatically save that form. Save the form in the usual manner.

Field Properties

A specific way data should be formatted in a Validation Field. For example: "This field must contain data. Fill in like this: XXX-XX-XXXX" indicates the Validation Field must be filled-in and must contain nine numbers formatted with hyphens.

Filing Information

A window containing due dates and other critical information about the form. Machine-read forms will offer specifics to ensure a fileable copy of the form.

Fill-in Field

A field on a document that allows data entry.

Form Tabs

Tabs on the left side of the workspace that identify all open forms.

Import

Integrates the prior years client data into client folders and profiles.

Keyword

A part of a word, an entire word, or a complete phrase used to search for a form.

Pan Up

Move toward the top of the page.

Pan Down

Move toward the bottom of the page.

Preparer Profile

A file which contains preparer information, and will flow to the corresponding fields when applied to a form.

Proxy Server

Another computer on a network that connects workstations to the Internet.

Quick Guides and Directories

A listing, by state, that contains information about that state's forms. Included are: due dates, addresses, phone numbers and payment information.

Toolbar

The row of buttons displayed under the menu bar. The buttons on the toolbar provide easy access to common tasks in the forms software.

Tutorials

A self running demonstration of the software located under the Help menu.

Typewriter Field

A field placed anywhere on the form that is used to enter notes, make reference to attachments, or other custom information. Typewriter fields are removable.

Typewriter Field Cursor

When adding a typewriter field, the cursor changes shape; this altered cursor is the typewriter field cursor.

Validation Field

Fields that require data to be input in a specific format. These fields are red if data is missing or incorrectly entered. A popup note details the required format.

Zoom In

Increases the magnification of a page, making the text appear larger.

Zoom Out

Decreases the magnification of a page, making the text appear smaller.

Adobe Acrobat Print Settings

If a form has been saved as an PDF (Adobe Acrobat format) and will be printed from Adobe Acrobat, you must set the following settings in Acrobat for the form to meet government specifications. In the printer dialog box, be sure the three settings pictured here are unchecked.

Copies and Adjustments		
Number of <u>c</u> opies: 1 🚍		
 Shrink oversized pages to pap Expand small pages to paper a Auto-rotate and center pages 	ber size size	Bioperies
	Tupe: HP Sedes	Plint as isable
	Where: Ready loans	Park to rile
	Pint Range C All C Sciented segar/partie: C Equant page Page 1 to 23 Pint Even and bio Even C Connersjo	Copies and Adjustments Number of gapies: 1
	FodSorp Option Perigetot Company and 2 2 Disrugence Speed Dispression Form Color Managed Disprinter	Person K-850-4 1100
	Printing Tipo Advanced	OK Cancel

Α

Acrobat PDF Print Settings, 34 Apply profile information, 15, 19, 24

B

Blank forms, 23 forms list, 18 forms open, 22 **C**

Calculation override or restore, 19 Calculator open windows, 20 Calibration printer, 16, 28 Change client folder names, 25 fill in font, 12 form names, 25 Client profile, 15, 22 Commas insert, 27 remove, 27 Copy prior year profiles, 14, 18 profiles, 22 Create client folders, 25 new profile, 15, 22

D

Default Settings fill in field colors, 27 numeric display, 27 Default settings fill in font, 27 Delete client folders, 25 client forms, 25 Directories, 20 Document Menu, 20, 32 Document Settings, 20 insert commas, 12, 28 negatives in parentheses, 12, 28 round calculations, 12, 28 Document Workspace, 9 Documents managing, 25 open saved, 16, 25 printing, 16, 25

E

Edit profiles, 15 Edit Menu, 19, 31 End-User License Agreement, 37

F

Field Types calculation, 13 red. 13 typewriter, 13 File Menu, 18, 30 Filing Information, 20 Fill in Field Colors change colors, 27 restore defaults. 27 Fill in Font change, 12, 19 change default, 18, 27 restore default, 18, 27 Find Text in a document, 12, 26 Forms fill in, 12 list. 23 open blank, 22 open saved, 25 print from list, 16 save, 14, 24

G

Go To first page, 19 last page, 19 next page, 19 page, 26 page number, 11, 19 previous page, 19 rate tables, 25 tax table, 25

Η

Help Menu, 20, 32

I

Insert Commas default settings, 27 document settings, 12 Installation, 7 Interface Tips, 9 Internet between releases, 18 forms from the, 22

J

Jurisdiction select, 22

L

List forms, 23

Μ

Menu document, 20 edit, 19 file, 18 help, 20 view, 19 window, 20 Move the form up or down, 11 to first page, 11 to last page, 11

Ν

Navigating documents, 11 short cuts, 30 Negatives in Parentheses default settings, 27 document settings, 12 New Profile, 15, 22 Next Page go to, 11 Numeric Display - Default insert commas, 27 negatives numbers, 27 round numbers, 27 0

Open blank forms, 23 practice aids, 10 recently used forms, 11 saved forms, 16, 25

Ρ

Page go to first, 19 go to last, 19 go to next, 19 go to previous, 19 Pop Up menus, 26 Preparer profile, 15, 22 Print all forms in client folder, 25 blank forms, 16, 23 list of client folders, 25 saved forms, 16, 23, 25 Print Settings acrobat PDF, 34 Printer calibration, 16, 28 Prior year profiles copy, 18 Profile apply, 15, 19, 24 copy, 22 create, 15, 18, 22 edit, 15 new, 15, 18, 22 save, 22

Q

Quick Guides, 20

R

Right Mouse pop-up menus, 26 **Round Calculations** default settings, 27 document settings, 12

S

Save forms, 14, 24 multiple forms, 23 profiles, 15, 22 Save As different file, 14, 18 Saved Forms edit, 16 open, 16 print, 16 Search for forms, 10 for text, 12 Settings document, 12, 20 Short Cuts navagational, 30

Т

Technical Support, 6 Text search document for, 12 Toolbar items, 9 **Typewriter Field** insert or remove, 13, 19

U

Update CD, 7

V

View Menu, 19, 32

W

Window Menu, 20, 32 Workspace, 9

Υ Year

select, 22

End-User License Agreement

This is a legal agreement regarding your use of this software, which includes all of its content, forms, images, text, technology, and user interface (the "Software"). By launching the Software application, you agree to be bound by the terms of this Agreement. If you do not agree to the terms, return the Software or certification of its destruction along with all accompanying documents and packaging to the place of purchase for a full and prompt refund or credit.

1. Grant: By purchasing the Software License, you are granted the nonexclusive right and license to use one copy of the Software in machine-readable form at one site, on one computer, for the time period specified when you purchased the License. Additional License rights may be granted for use of the Software at more than one site and on more than one computer, provided an additional License has been purchased.

Distribution of the Software via the Internet, wide area networks (WANs), bulletin board systems, or any other means of distribution of any kind is prohibited without the prior written consent of the copyright owner.

2. Restrictions: You may not transfer, rent, sell, lease, lend, give, sublicense, copy, reproduce, or distribute any portion of the Software, or create derivative works from the Software. However, you may make one copy of the Software for backup purposes on a single computer. Documentation or other written materials accompanying the Software may not be copied. You may not, nor may you permit anyone to modify, reverse engineer, decompile, disassemble or alter the Software in any way.

3. Limited Warranty: The Software will perform, under normal use, substantially in accordance with the written materials for a period of thirty (30) days from the date of receipt. If the Software is delivered on Compact Disc (CD-ROM disc), the CD-ROM Disc is warranted against defects in materials and workmanship for ninety (90) days. If the Software or CD-ROM disc does not perform according to this warranty, the Software and/or CD-ROM disc will be replaced, or the purchase price of the Software License will be refunded as your exclusive remedy. This Limited Warranty is void if defects resulted from accident, misuse, misapplication, abuse, repair or modification of the Software. Claims under this warranty must be submitted to the place the Software License was purchased, along with the Software and its original packaging and printed materials, within thirty (30) days of the cause of such claim.

THIS IS A LIMITED WARRANTY AND THE ONLY WARRANTY. ALL OTHER WARRANTIES OF ANY KIND ARE DISCLAIMED, WHETHER EXPRESS OR IMPLIED, STATUTORY OR IN COMMUNICATION WITH YOU. ALL OTHER WARRANTIES INCLUDING, WITHOUT LIMITATION, WARRANTIES FOR MERCHANTABILITY, NONINFRINGEMENT, AND FITNESS FOR ANY PARTICULAR PURPOSE ARE SPECIFICALLY DISCLAIMED. NO WARRANTY IS MADE THAT THE SOFTWARE WILL BE ENTIRELY FREE OF ERRORS OR THAT DEFECTS WILL BE CORRECTED.

This Limited Warranty gives you specific legal rights. You may have other legal rights which vary from state to state.

4. Liability: In no event shall any liability accrue for any damages, including, but not limited to, lost data, lost profits, lost business, interest, penalties, assessments, claims by third parties or other special, consequential or indirect damages arising from the use or inability to use the Software or its accompanying written materials, even if the possibility of such damages may have been known in advance. In any event, the total liability arising from any legal claim, whether tort, contract or otherwise, shall be direct damages up to, in the aggregate, the amount paid for the Software License.

Some states do not permit the limitation or exclusion of incidental or consequential damages, so this limitation may not apply to you.

5. Termination: Your license and right to use the Software shall terminate at the end of the period for which the License is granted, or upon the return of the Software and accompanying printed materials to the place of purchase, or upon noncompliance with this agreement. The provisions of this Agreement shall remain in full force and effect except to the extent they are invalid or unenforceable under applicable law.

This License Agreement is the complete and entire agreement regarding your use of the Software, and supersedes all other communication regarding the Software License. You acknowledge your acceptance of the terms and conditions of the License, and you agree to be bound by them. This Agreement is governed by the laws of New York State, and may be assigned without notice.

You should retain a copy of this Agreement for future reference.