2008 User's Manual

- **Tangible Tax Program**
- **F1120 Program**
- **Payroll Tax Program**
- **Depreciation Program**
- **1120 Program**
- **1120S Program**
- **1065 Program**
- **1041 Program**
- **1040 Program**
- **990 Program**

SAXON TAX SOFTWARE, INC.
P.O. BOX 2550
DELAND, FL 32721
(800) 678-1789 ● FAX (877) 558-7743
www.saxtax.com

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Programs originally conceived, designed, and written by Warren H. Saxon.

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INTRODUCTION

Welcome to SAXTAX

SAXTAX programs provide easy data entry, screens which closely resemble the actual tax forms, year-to-year client information transfer, customized transmittal letters and client bills, customized footnotes, on-screen review of returns, a pop-up calculator, the "tickler" due date monitor, and clear Program Help screens. And, of course, we provide unlimited toll-free technical support.

How to Use This Manual

This manual explains how to install and start your SAXTAX Programs. It also shows you how to start the SAXTAX **Program Manager** and the tax return programs and explains the various menu items. Frequently Asked Questions and Technical Help information are provided for additional assistance. Important notes are highlighted in shaded boxes. Please read these carefully.

Names for buttons, programs, screens, dialogue boxes, tools, menus, keyboard keys, files, directories, and cross-references are provided in **bold** throughout this manual.

INSTALLING YOUR SAXTAX PROGRAM

What You Need

The following are the minimum requirements to run your SAXTAX program:

- IBM or compatible PC with 486 or greater processor
- 16 MB of RAM

Note: Program performance is greatly enhanced when using a Pentium level processor and at least 64 MB of RAM.

- Windows 98 / 2000 / XP / NT
- Hard Drive space requirements depend upon the programs installed.
- To print forms suitable for filing, a Hewlett-Packard or fully compatible laser printer is required.

Note: A Hewlett-Packard Laser 4+ or newer printer is recommended.

Installing from a CD

1. Insert the CD into the CD drive. Setup should run automatically

Note: If the CD does not run automatically, click on the **Windows Start Menu** and select **Run**. Type the CD Drive letter followed by **:\Setup**. (For example, type **E:\Setup** if your CD Drive is **E**.) Then press **OK**.

2. Follow the on screen prompts. When you are asked to enter a product code, enter the code you have been provided. Setup will install program files to the C:\FLINT directory. Use the Browse button to change the default.
3. After the program files are copied to your system and installation is complete, you will be returned to your Windows desktop.

Installing to the Proper Directory

The **\FLINT** directory is the default installation directory for SAXTAX programs. You can install to another directory, but the following should be considered.

Note: Your client data files will always be located under the FLINT directory.

Drive Mapping – If you prefer to install the program files in a directory other than **FLINT**:

- The SAXTAX program will create a FLINT directory to store client data files. This must be a root directory on any drive.
- When installing the program files in a different directory, **Windows** drive mapping may be used. For example, to install to the **C:\Apps** directory, map this as the **H:** drive. Then install SAXTAX to the **H:\FLINT** directory. The installation program will create the \FLINT directory.

Setup Data – If you install the program to the same folder or directory as last year's program, your setup data will be unchanged. Otherwise, or if this is an initial installation, you will have to enter setup data on the following screens:

- Preparer's (Firm) Information
- Client Bill Defaults
- Network User Information (for users with Network Module only)
- Client Transmittal Letter Defaults

Installing on a Network

Your SAXTAX programs will operate with most computer network systems using a file server environment, including Novell and Microsoft.

Note: Because of the complexity of networks, the **SAXTAX Program Manager with Network Module** is strongly recommended for using the programs in a networked environment.

Program Manager with Network Module is an optional program that makes it easier to use SAXTAX programs in a network environment. The program acts like a librarian, automatically checking client files in and out to different users. The program also allows different users to customize their own default settings for preparer (firm) information, transmittal letters and client bills.

Note: **Program Manager with Network Module** ensures that only one person at a time works on a client's returns, which protects the integrity of the client's data. Installation of the programs on individual workstations while using the file server for client data storage will not protect the integrity of your client files.

Network Installation - You can install from a workstation or from the server itself. Be sure that all workstations have identical drive mapping to the server. If you have any concerns regarding the mapping, please consult your network administrator or have the administrator call us.

Program shortcuts and uninstall support will be created on the installation computer. On each additional workstation, create a **Windows** Desktop shortcut "pointing" to the file **SAXTAX08.EXE** on the server. Refer to **Starting the Program Manager** on page 6 for more information.

STARTING YOUR SAXTAX PROGRAM

Starting the Program Manager

The **Program Manager Installation Setup** will automatically create two shortcuts in the **SAXTAX Folder** under **Start**, **Programs**.

- The **SAXTAX 2008** Shortcut will run your SAXTAX program.
- The shortcuts under the **Program Help folder** will access the program help without actually running the program.

The Program Manager Installation Setup will also create a **Windows** Desktop shortcut to run the program. Perform the following steps for any computer or workstation if you need to create a desktop shortcut.

1. Using your mouse, point to a blank spot on your desktop and right click.
2. From the dropdown list, select **New**, then **Shortcut**
3. In the command line box, enter **SAXTAX08.EXE** and its path. For example, **C:\FLINT\SAXTAX08.EXE**. Click **Next** to continue.
4. Enter the name of the shortcut (example: **SAXTAX 2008**).
5. Click **Finish**. The shortcut should now be on the desktop.

To run SAXTAX, click the SAXTAX desktop shortcut or, click the **SAXTAX 2008** shortcut (under **Start, Programs, SAXTAX**). At the introduction screen, press any key or click to continue. The **Program Manager Screen** will appear. If this is the first time you are running the program after installation, the **Program Year** should be set to **'08**. Also, when you use **Program Manager** for the first time, you will see an introductory screen to help guide you through the initial setup steps. You will only see this introductory screen during the initial setup.

> Note: **Program Manager with Network Module** users must enter their user ID (or they can use the drop down to select a user ID. You must sign in as "**MGR"** to access SAXTAX network management functions.

Using Program Help

Program Help

Program Help is provided for each of the SAXTAX programs, including the Program Manager. Use the F1 key to access Program Help for any screen from anywhere in the program. Program Help can also be accessed from each program's Help Menu or by pressing the Help button found on many screens.

Help for each program contains an Overview section and a Menu Items section.

Use the overview section to get a general understanding of how the program works. This is especially helpful for new users of the program, or for previous users starting a new year.

From the main screen of each SAXTAX program

Click the **Help Menu**

Select Contents and click **Overview** to expand the topics.

Other more detailed help is arranged by **Menu Item**. You can get help for all the menu items by opening the **Menu Items** book in **Contents**, or by going to any of the menu items in the program and pressing the **F1** key.

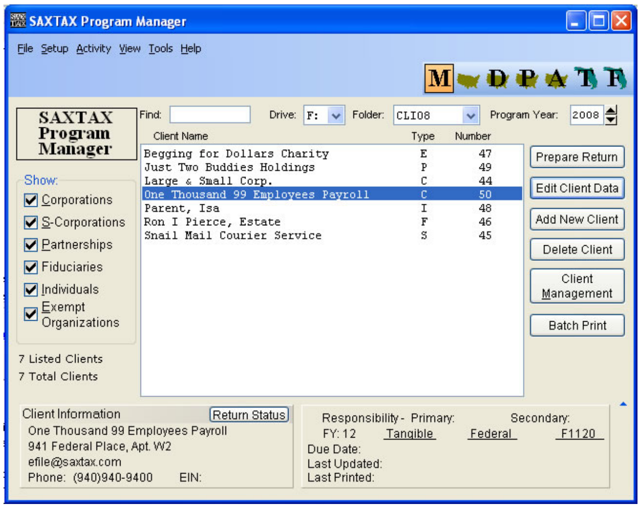
Field and Forms Instructions Help

You can easily access field help and IRS Forms Instructions (for federal returns) and DOR Instructions (for state returns) from any field. Move your mouse pointer to any tax return input field. Click the right mouse button and select **Help** for SAXTAX program help, or **Instructions** for Forms Instructions.

USING THE PROGRAM MANAGER

Understanding the Program Manager

The Program Manager Screen is the “Home Base” for all SAXTAX Program activities. Use the Program Manager to set up all activities concerning clients and program utilities.



Program Manager screen

From this screen you can:

- View **Client List** in a specific drive, directory and program year.
- Show **Client List** by **Entity.**
- Sort **Client List** by **Client Name**, **Type** or **Number.**
- Use **Find** to locate any client
- See “quick view” client information
- Use **Tools, Menus,** and **buttons** to access all **Program Manager** functions
- See the current User ID (**Network Module** only)
- Access **Network Management** functions (**Network Module** only)

> Note: After setting up client information, a tax return is prepared by selecting one client, then clicking the prepare return button. You may also select a tax return by pressing the tool bar buttons right underneath the program menus.

The **Program Manager Screen** provides lots of information. With a quick glance you can see:

- The active drive and directory for client data files,
- The active Program Year,
- A list of clients in the active directory,
  - Sort the list by client Name, Type or Number.
  - Use **Find** to quickly locate any client in the list.
- Demographic information for the currently selected client.

From the Program Manager Screen you have access to:

- **Client Permanent File Screen** (Client demographics)
- **Tickler Due Date Monitor**
- **Client Data Transfer**
- **Client Organizer** activities for Tangible and 1040 clients
- **Client Transmittal Letter** default setup
- **Client Billing** default amounts and options
- **Client File Manangement**
- **Preparer's Firm Information**
- Tools including **Rebuild Client Directory** and **Calculator**
- **Tax Return Preparation** for the selected client
- **Batch Printing** of returns and extensions

Use the pull down menus at the top of the screen to access all program functions. The more frequently used functions have a **Toolbar** button or **Push** button for fast access. Refer to the **online help** for assistance and tips concerning the use of your SAXTAX programs. Press **F1** for help on a specific screen.

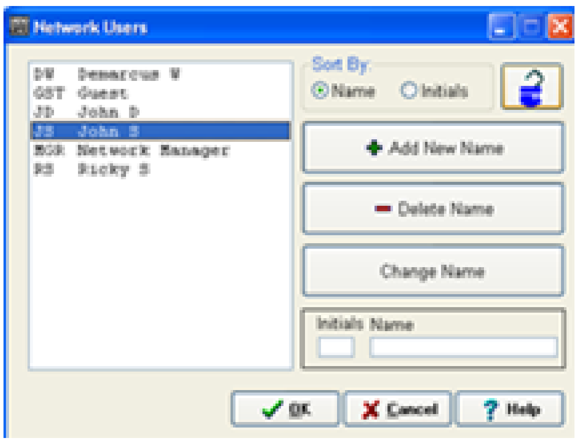
Note: The SAXTAX **installation program** creates a **CLI08 directory** on your system to store your **Client Data Files**. You can create additional client data directories/ folders on the selected drive by typing the new name into the directory box and pressing **Enter**.

Network Module Users

Accessing the Network Users Screen

When you run the SAXTAX Program with the optional Network Manager Module, you will be prompted to enter a user name. "**MGR**" identifies you as the "Network Manager" and allows you to go through the initial set-up to establish user names and default settings for all users.

You must "Sign in" as **MGR** to access the **Network Users Screen.** Then select **Network Management** from the **File Menu**.



Network Users Screen

Use this screen to add, delete and change network users.

All current network users appear on the list.

Setting up Network Users

The MGR can set up user ids for each of the program's users on the Network Users Screen. Each user can then customize preparer information, transmittal letters, and client bills.

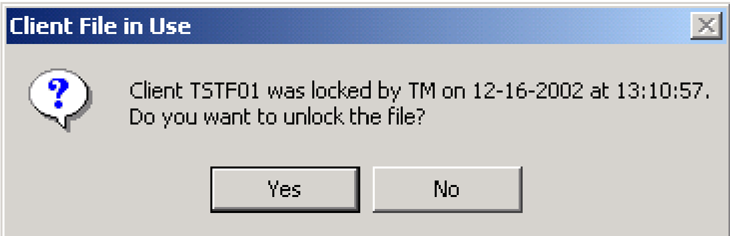
Note: Users should always log in with their user ID, not as MGR.

Files in use

When a user selects or "checks out" a client file to work on a return, the client's name in the Program Manager list of clients will be displayed in a red font. This means the client will be "locked" to all other users until the client is checked back in.

Unlocking Files/Clients (The program won't let me into the return)

Occasionally, a program problem or power outage may cause use of the program to be abnormally terminated. When the program is terminated, a user may be locked out of the client file or directory that was in use at the time the program was terminated.



To unlock client files, your Network Manager (sign in as "MGR") should:

- Find the client file in the program manager client list
- Double click the client and press "Yes" to unlock

Any user can also unlock a file checked out to himself in the same manner.

The Network Manager can also unlock a client by pressing the "Unlock Files" button on the **Network Users Screen.**

Program Manager Tips for New SAXTAX Users

(If you are a current SAXTAX user, you may want to skip ahead to **Program Manager Tips for Current SAXTAX Users** on page 14.)

Note: When you use the Program Manager for the first time, you will see an introductory screen to help guide you through the initial setup steps.

Entering Preparer Information

To enter data about your firm, choose Preparer Information from the Setup menu.

Preparer Information Screen

Enter the information concerning your firm. Data will be saved and transferred from year to year. Refer to Program Help for detailed information.

Viewing or Modifying Client Transmittal Letter Information

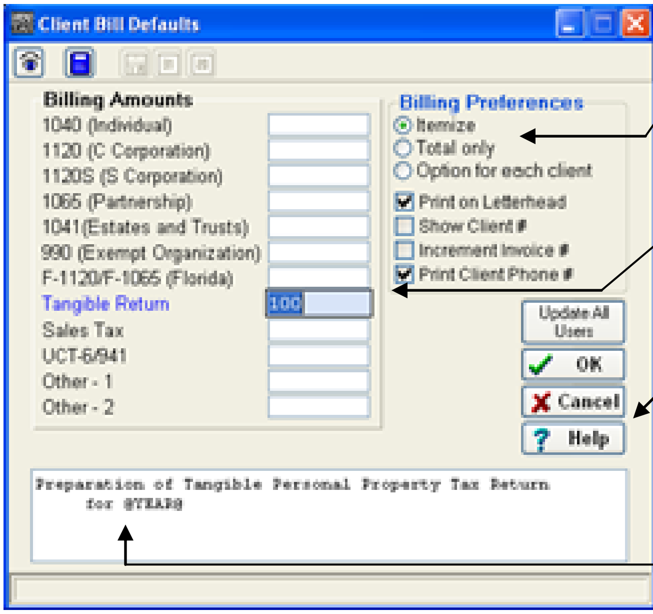
To view or modify client transmittal letter default information, click Setup | Transmittal Letters. The default letters are used as a Master letter for each client's tax return. The letter can be tailored individually for each client, inside the return, and the modifications are saved with the client's return data.

Transmittal Letter Setup Screen

- Select the tab for the type of letter desired.
- Select the part of the letter for viewing.
- Refer to Program Help for detailed information concerning the modification of letters.

Viewing or Modifying Client Billing Information

To view and modify client billing default information, click **Setup | Client Bill**. All data will carry to each client's return – where it can be further modified.



Indicate your billing preference.

Enter billing charge for each type of return.

Click Help or use F1 for additional assistance with this screen.

Enter line item descriptions for each type of return. "Variable data" insert codes are replaced with actual data in the final bill.

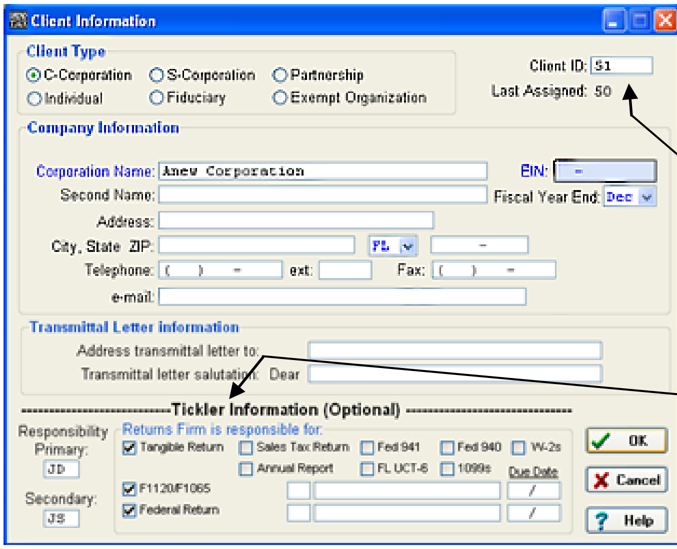
Client Bill Defaults screen

You must be logged in as MGR in order to update client bills and apply to all users.

For Technical Assistance, call SAXTAX at (800) 678-1789

Setting up a New Client

Click the **New Client** button to create and enter data about your client. Demographic data flows to each tax return. Refer to **Program Help** (**F1** or **Help** button) for detailed information concerning the fields on this screen.



You must enter a client number. Use up to 6 alphanumeric characters. The program uses this number to name your client data files.

Tickler information is used to prepare Tickler Due Date Monitor Reports.

New Client Screen

Modifying Client Demographic Information

Use the Edit **Client Data Screen** to change or modify current client data. To access the screen, select a client name and click the **Edit Client Data** button. Changes made on the **Client Information Screen** will flow to the individual tax returns only if the **Allow Override** box is unchecked.

Preparing a Tax Return

Note: Set the **Program Year** to '08 to prepare 2008 Tangible, F-1120, and 941 returns and for 2007 W-2s, 1099's, 940's, Depreciation and Federal Tax Returns. To prepare returns for earlier years, adjust the **Program Year** accordingly. Each return allows you to prepare returns for the current year and 3 prior years.

To prepare a tax return for a client:

- Select a client from the **Program Manager Client List**
- Click the **Prepare Return** button or the appropriate toolbar button to take you into the desired tax return or the Depreciation program. If you have more than one program loaded, the **Prepare Return** button will prompt you to select which return you want to prepare.

Refer to the **Program Help** in the applicable program for specific instructions for preparing different types of returns.

Program Manager Tips for Current SAXTAX Users

You might want to review the activities described in the preceding section as well as the following:

- Client Data Transfer (Rollover from prior year)
- Print Client Organizers (Tangible and 1040)

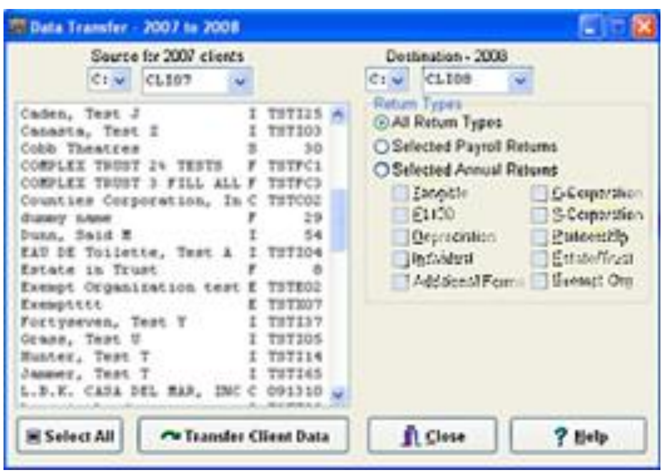
Transferring Client Data

Your 2007 Client Data Files will automatically be transferred (or rolled over) into the 2008 directory. However, if you do not see your company/client listed with your year set to ’08 in the Program Manager, you should transfer your 2007 data to 2008.

The **SAXTAX Program Manager** will transfer appropriate 2007 information (i.e. certain schedule descriptions, Depreciation, and carryover values) into your initial 2008 client files. Your 2007 files will not be affected by the transfer and can be accessed by changing the Program Year.

To transfer data from the most recent year to the current year (2007 to 2008)

- Set the Program Year to ‘08
- From the Program Manager Menu, select **Activity |Data Transfer**. This screen will show you your clients from last year and will allow you to transfer a single client, multiple clients and specific return types for those clients which are selected.



Client Data Transfer Screen

1. Use the drop down arrows to indicate the location of prior year files.
2. Confirm the destination for the current year.
3. Select specific return types if you are not transferring all returns.
4. Select clients using Shift-leftclick or Ctrl-leftclick or the Select All button.
5. Press the Transfer Clients button.

The transfer process may take a few minutes depending on the number and size of your client files. You can minimize SAXTAX during this process if you need to work in other applications.

Handling Corrupt Client Files

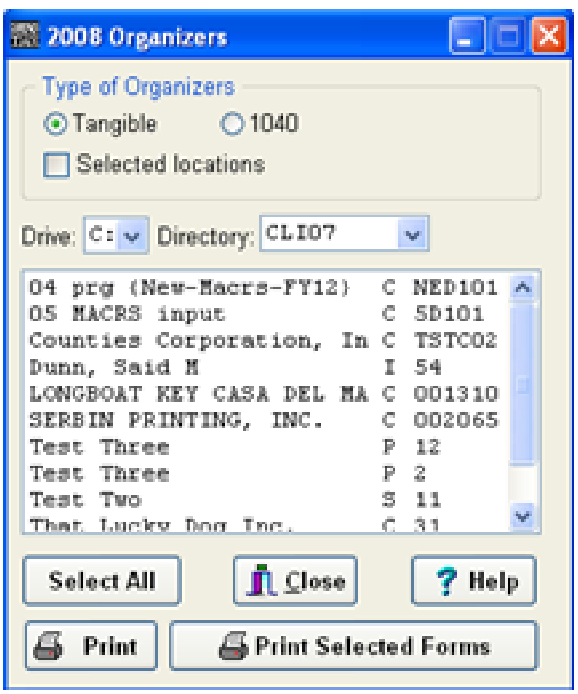
Note: Occasionally a corrupt 2007 client file might not transfer to 2008. If this happens, the transfer should skip the file and give you an opportunity to print a list of those clients which did not transfer.

You have several options for corrupt client files:

- If you have your clients backed up, you may be able to copy or do a data transfer from your backup directory.
- If it is an old client, transfer client data from 2006 to 2007 and then from 2007 to 2008.
- Create the client from scratch in 2008 inputting client information from documents you have on file. This is usually quicker than the option below if you are doing a data transfer and most of the fields which need to transfer are demographic information.
- Send the client files (of the corrupt client) to SAXTAX and we will try to repair them for you. Under the **Tools Menu**, on the **Program Manager Screen**, is a **Backup Clients** utility which will copy various client files into a single zip file. You can then email us, attaching the zip file, or put the zip file on a CD and send it to us.

Printing 1040 or Tangible Organizers

An **Organizer** is a printed summary of last year's data that the client (or tax preparer) can mark up. It generally makes data entry for the new tax year easier. To print organizers for clients you prepared returns for last year; go to **Activity | Organizers | Print Client Organizers**. You will also see two other options under the Organizers menu, **Setup** – which allows you to customize the organizer letter and **Blank Organizers** – which prints a predefined organizer for clients you have not prepared returns for in the past.



Print Client Organizers

1. Specify the location of last year's client files
2. Select Organizer Type
3. Select Client(s)
4. Press the **Print** button

You can also click on the Print Selected Forms button to select specific pages you want to reprint.

Updating Last Year's Information

If you installed your programs "on top" of last year's programs, the following data should automatically carry over from last year. Click the appropriate **Toolbar** button to review or modify each as desired.

- Your Firm/Preparer information
- Client Billing defaults
- Client Transmittal Letter defaults

Creating New Clients

To create new clients go to the Program Manager Screen and click the **New Client** button or the menu combination **File | New Client**.

Preparing a Return for a Selected Client

To prepare a return for a selected client, click the **Prepare Return** button or click the appropriate **Toolbar** button.

Note: The first time you access a client that was transferred from last year, the **Client Information Screen** will open to give you an opportunity to review and modify any data as necessary.

Using the Menu Items in SAXTAX

SAXTAX Programs provide a variety of useful **Tool Menu**, **File Menu**, **Setup Menu**, and **Activity Menu** items. Most are available from any SAXTAX program, and some are available only through **Program Manager**.

The Tools Menu

Using the Calculator

The Calculator can be accessed by any program by using the **F2** key. The product or sum of the calculation can replace the active field of the return when you press the **F2** key or the **insert** key from this screen.

Using Rebuild Directory

Rebuild Client Directory is accessed from the **Program Manager** only and is used to rebuild the "index file" that maintains a listing of all of the clients in a directory. Use this tool if your client list does not appear on the **Program Manager Screen**.

To use the **Rebuild** feature, indicate the correct program year, client drive, and directory on the **Program Manager Screen**. Access the **Rebuild Client Directory** from the **Tools Menu**. Review the screen for correctness and click the **Rebuild** button to continue. The program will indicate "Done" when finished rebuilding. If, after using this feature, your clients still don't appear, call SAXTAX Technical Support at (800) 678-1789.

Backup Client Data

Occasionally, you may wish to backup your client data as a precaution in the event of computer drive failure. To do this, select the **Backup Client Data** from the **Tools** menu option.

To backup the client data once the dialog appears:

Verify that the directory name displayed is the directory that you want to backup. If the directory is not the correct directory, click on the drop-down arrow to select the correct drive and directory, and then choose which client(s) to backup using the shift-leftclick or ctrl-leftclick keyboard and mouse combination or press the "Select All" to select all clients listed.

Verify that the 'Save As' drive, directory and filename are correct. Press the "Create Zip File" button. The program compresses the client data. When the process is complete, a box is displayed with the number of files added. Press the Okay button and then the Close button to return to the Program Manager Screen. If you experience any problems during this process, call SAXTAX at (800) 678-1789.

Restore Client Data

To restore the client data:

From the Tools menu, select the Restore Clients menu item. The Restore Clients dialog box is displayed.

Select the directory that you want to restore from. If the directory is not the correct directory, click on the magnifying glass to select the correct drive and directory, and then choose which file(s) to restore or press the Select All button to select all files listed.

Verify that the 'Restore To' drive and directory are correct.

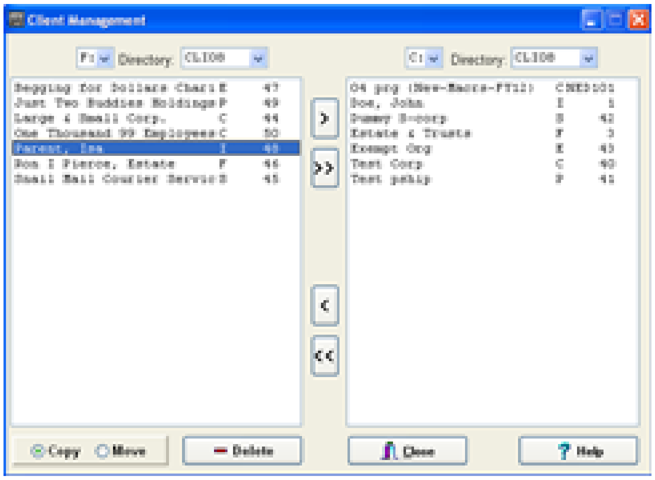
Press the Restore button. The program restores the client data. When the process is complete, a box is displayed with the number of files extracted.

Press the Okay button and then the Close button to return to the Program Manager screen. If you experience any problems during this process, call SAXTAX at (800) 678-1789.

The File Menu

Using Client Management

Use the **Client Management** utility to copy or move client files from one drive and directory to another, or to delete client files. Use this utility to back up client files on a floppy disk or network drive. Access **Client Management** from the Program Manager Screen **File Menu** or click the **Client Management** button.



Client Management Screen

One panel on the screen represents the source and one the target. Client data files can be copied or moved in either direction.

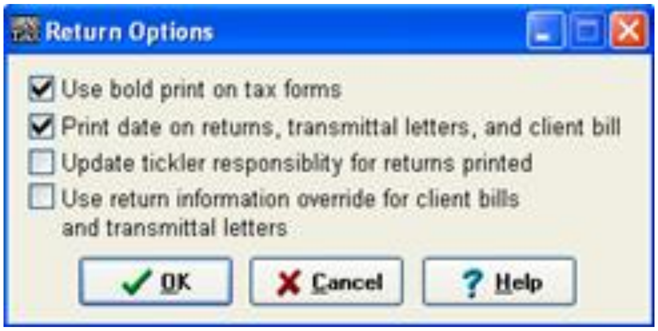
1. Use the drop down arrows to select the source drive and directory in one panel, and the destination drive and directory in the other panel.
2. Select the desired client files and, using the mouse, drag the files from the source panel to the destination panel. The buttons between the panels can also be used for this process instead of dragging.

> Note: The Client Management Screen remembers the last drive and directory you accessed on the right half of the screen and reads clients from that device when you initially come to this screen. **Do not leave this screen with a removable drive selected (floppy, jump drive, external hard drive, etc.).** If the drive requires a disk and it is removed or the drive is not connected, this screen may generate obscure errors.

The Setup Menu

Options

Several options can be set using this screen.



Click the Help button for detailed information concerning these option items.

Return Options Screen

Printer

SAXTAX allows you to specify a default printer for printing your tax returns. This is useful if you always want to print your returns to a printer that is not your **Windows** default printer.

Because of the wide variety of laser printers, you might require special printer driver settings for SAXTAX printing. Use this screen to select a specific printer or driver for SAXTAX printing.

Default Printer Screen

Refer to **Program Help** or to the SAXTAX Web site (www.saxtax.com) for possible printer settings and solutions to printing problems.

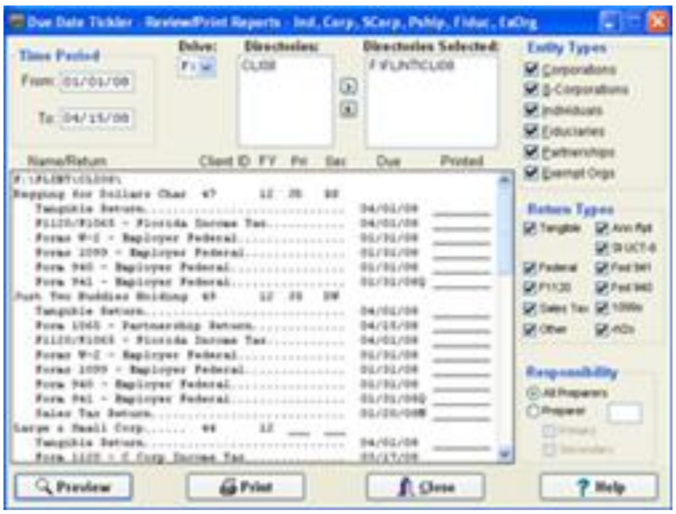
The Activity Menu

Printing Labels and Lists

Use this feature to print mailing labels and client management lists. Refer to the **Program Help** for detailed information concerning the printing of **Client Labels and Lists**.

Using the Tickler Due Date Monitor

This feature is very helpful for planning your firm's activities. Data for developing **Tickler Reports** is entered on the **Client Permanent Files Screen**. (Select the client and click the **Permanent File** button to view and modify this data).



Due Date Tickler Screen

1. Specify the desired time period
2. Specify the client drive and directories
3. Specify Return Types
4. Specify Responsibility
5. Click Preview to view a list of return due dates and last printed dates
6. Press the Print button for a hardcopy.

For Technical Assistance, call SAXTAX at (800) 678-1789

USING THE TAX RETURN PROGRAMS

Now that you have installed the programs and set up your clients, you are ready to use SAXTAX to prepare tax returns.

> Note: Please refer to the **Program Help** located in each of the SAXTAX programs for further information.

Preparing a Client's Tax Return

> Note: Before you can access a client's tax return, be sure that you select the desired drive, directory and program year from the drop down lists at the top of the **Program Manager Screen**.

Access each tax return from the **Program Manager Screen**.

1. Select the desired client.
2. Use the **Prepare Return** button or the appropriate tool button to open the desired tax program. Prepare return is also listed under the File Menu.

Once you are inside the return, the left pane shows you a list of all the forms that the program supports. (In the 1040 we also support the 8283 which can be accessed from Schedule A.) (In Depreciation, use the Forms Menu.) Above the forms are three buttons, side by side. When the first button is "down", you can see the forms we support. When the second button is "down" you can see the forms you have already entered data for on this return. When the third button is "down" you can see a "Print Preview" version of the return.

Data Entry – All data is entered on "fill in the blank" screens. If you are having trouble accessing a field, it may be a calculated field or a field that will only allow you to access a schedule (by pressing the * key). In other cases, the field may be grayed out because the form does not require data entry for specific lines. Use the tab key to tab through the applicable fields for data and schedule entry.

Pull-down menus – All program functions can be accessed through the menus at the top of the screen.

Program Help – Each of the SAXTAX programs, including the Program Manager, provides Help which can be accessed by pressing the **F1 key**, pressing the **Help** button (found on many dialogs), or by pressing **Help | This Screen** from the pull-down menus. For IRS or DOR Instructions help, **right click** on a data entry field and select **Instructions**.

Toolbar buttons – While we think the pictures on our tool buttons are self-explanatory, it may initially be confusing to some. To understand the function of a tool button, put your mouse "over" the button and wait. A short explanation of the tool's function will appear.

Detail entry – Click on the magnifying glass, next to data entry fields, or press the * key in order to access information required to support the form's data.

Reviewing Tax Returns

Depreciation Program – To print or review your returns, click the **printer** button on the toolbar or **File | Print Preview**. This will bring you to another screen where you can select the different reports and forms (see the tabs just below the tool buttons) that you want to print or review.

Additional Forms Program – The print button only prints and previews the current form you are entering information on. It **does not** print all of the forms you have information on.

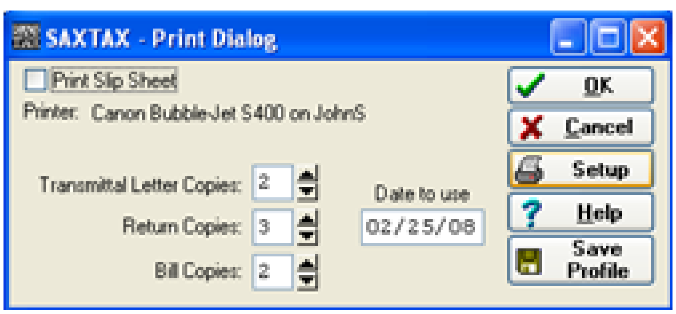
All other programs – To review your clients returns before printing, click the rightmost button of the 3 buttons above the forms list.

Printing Tax Returns

Tax returns are printed from within each tax return program. A Hewlett-Packard Laser Printer or 100% HP compatible laser printer is required to print approved forms (see note). All the tax forms are approved by the appropriate agencies for filing.

Note: The actual printing process is a function of Windows and your printer driver software. While all testing of the programs is done on HP laser printers, you may also have successful results on high quality inkjet and bubble jet printers. But we can guarantee the results only for HP laser (or fully compatible) printers.

Printing the Full Return – Click the Printer button on the program toolbar to print the entire return. Before the return prints, you will be prompted for various copies of transmittal letters (if they are enabled in the Program Manager), client bills (if the client billing screen has "prepare bill for client" checked), the return, K-1's, and other applicable forms or letters.



Print Return

- Confirm the print date.
- Enter the number of copies desired.
- Use the **Setup** button to change the printer and printer parameters. This is a standard **Windows** interface.
- **Save Profile** saves "number of copies" as your standard configuration for this screen.

Printing Selected Pages Only – From the program menu select **File | Print Forms** or from the toolbar select the Print Selected Forms (multiple pages) button. There is also a button on the toolbar, when you are previewing, to print a single page.

Batch Printing

You can batch print Federal and State tax returns or extensions. Select the clients you want to batch on the Program Manager screen. Select multiple clients by clicking on a client, and holding the shift key to select a range of clients or hold the CTRL key to select various clients.

Returns

Once you have selected the clients you want to print, press **Batch Print**. From the dialog, select the type of return or returns you want to print (i.e. Tangible, 1120, etc.). If the return is an S Corporation or Partnership, a copy of the K-1's will print with the return. If you want to print a copy of the K-1's and letters to send to the shareholders or partners, you must also select "K-1's and K-1 letters". Use the same procedure to select multiple items in the batch "Print dialog box" as you would to select multiple clients in the Program Manager above.

Extensions

If you need extensions to print with an explanation (or any other information), you need to make sure this information is entered inside the return. If no program information has been entered, the extension or extension letter will print with only the Name, EIN/SSN and address. Refer to the instructions of the return for extension filing requirements.

Tangible Returns with Multiple Locations

You can batch print returns with multiple locations or you can select individual locations to print. Use the above procedures to select your Tangible clients in the program manager screen. After clicking on the batch print button, select either "Tangible- All locations" or "Tangible- Selected locations". When you choose "Tangible- Selected locations", a dialog box will appear and you can then choose the locations you want to print. If you have multiple clients that have locations, the dialog box to select the location will appear just before specified client's return starts to print.

Saving Client Data

Your client **data is saved when you print a return or exit the return** in the normal manner. However, the program **does not** have an auto-save feature, that saves after a certain amount of time, so we suggest that you manually save data periodically to prevent data loss due to computer problems or power outages. To periodically save data, click the **Save** tool.

FREQUENTLY ASKED QUESTIONS

Following are some common questions heard from our customers. We also maintain an updated list of FAQ's on our web site: www.saxtax.com.

"What is the best way to transfer my clients between computers?"

It's best to use the **Client Management Screen** in the SAXTAX **Program Manager** to move, copy, or delete client files between networked computers. For "stand alone" computers, use the **Client Management Screen** to copy or move files to and from a diskette. This will ensure the movement of all the files and will prevent the index file from being corrupted.

"How can I 'backup' my client files?"

From the Program Manager, use the Backup Client Data on the Tools Menu. You can also use the Restore option under the Tools Menu to unzip your client files back to the original location.

"I need to input a great deal of information into a Program. In case of a power outage or other interruption, how can I make sure I won't lose any of the data I have entered before I am finished?"

Periodically save your data by clicking the **Save** tool or **File | Save**.

"Can I enter a negative amount in a field that normally won't allow it?"

With the cursor on that field, press the **F2** key to bring up the calculator. Enter figures into the calculator so that the result is the negative amount you want. Press the **F2** key again to enter or "paste" that amount in the field.

"Do I need to keep last year's version of the program on my computer?"

No. Your current version of SAXTAX can be set to do returns for up to three prior years in addition to the current year.

Change the **Program Year** from the **Program Manager Screen** (upper right of the screen). If you need earlier years, you should contact SAXTAX Technical Support for assistance.

"My clients are gone! What can I do?"

The client files are probably still on your disk, but you may have changed the directory or year on the Program Manager screen. First make sure the Program Manager is pointing to the right drive, directory and year for your clients.

If you still cannot locate them, the client index file may have been corrupted and needs to be rebuilt. From the **Program Manager Tools Menu**, select **Rebuild Client Directory**. Verify the location of client files and click the **Rebuild Directory** button. You should receive the "Done" message when the process is complete. Return to the **Program Manager** and the clients should be listed. Call SAXTAX if you continue to have problems.

TECHNICAL HELP

If you need assistance for a problem that you cannot resolve, please check the following before calling us:

1. Have you checked the program help and/or the instructions?
2. Does the problem occur on more than one client's return?
3. If you have SAXTAX loaded on more than one machine, can you reproduce the problem on another machine?
4. Can the problem be duplicated? Sometimes exiting the program and going into the same return will fix the problem. Sometimes only a certain sequence of events will cause a problem. The quicker we can reproduce the problem, the quicker we can fix the problem and update the program.
5. If the problem affects a printed return, do you have a printed copy you can fax us?
6. Are you at your computer? Many problems are difficult to diagnose unless we can work with you at your computer.

Note: Please use our toll free technical support (800-678-1789). If there is a problem with your program it will be corrected.

Phone: (800) 678 – 1789 FAX: (877) 588 – 7743

Email: info@saxtax.com

Website: www.saxtax.com

For Technical Assistance, call SAXTAX at (800) 678-1789

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