

# Taxware Systems

September 2009 Newsletter

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## **PAST TAX SHOWS**



Taxware's Valerie talking to CSEA president David Shaw.

It was great to be able to talk to some of you at the tax shows earlier in this year. Its always good to be able to put a name to a face. If you have plans on going to any of the upcoming tax seminars make sure you stop by the booth and say hello.

## **UPCOMING TAX SEMINARS**

Due to budget difficulties the Franchise Tax Board is not sponsoring seminars this year. The IRS and EDD are going to continue them in the same format as last year and Taxware will be attending. Go to [ftb.ca.gov](http://ftb.ca.gov) and search for e-services workshops for registration information.

- IRS - Dallas September 8-9
- FTB\IRS - Ontario September 8
- FTB\IRS - San Diego September 9
- FTB\IRS - Garden Grove September 15
- FTB\IRS - Burbank September 16
- FTB\IRS - Los Angeles September 17
- Taxware - Annual Seminar (dates to be announced)

## **TRAINING VIDEOS**

We are revamping our videos web page. Videos will be posted as they are completed so we encourage you to check back from time to time. Currently the planned videos include:

- Short Wintax Tutorial
- Depreciation Integration
- Getting Electronic Filing Approval
- Past Webinars
- Electronic Filing Tracking
- New Wintax Letter Formatter
- Wincorp E-File
- Topaz Signature Pad Installation and Use.

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## ENHANCEMENTS

Our goal is to consistently make the software better. In the May newsletter we gave a brief description of our off season enhancements. There have been a couple of additions and some items that I would like to report on. If you missed the May issue, it can be found in our bulletins web page at [www.taxwaresystems.com/bulletins.asp](http://www.taxwaresystems.com/bulletins.asp)

- ✓ **Tax Reports** This is in addition to Taxbase. These built in reports are finished and ready to release with the 2009 Wintax program. We have added several reports that have been requested so make sure you check them out when you get the new program. They are accessed from "Reports/Letters" in the tax start menu. Various client listings have been added including a grouped listing by preparer as well as reports to show new and lost clients. All of the new reports can easily be exported to various document formats.
- ✓ **Corporation Electronic Filing** has been piloted this year with test transmissions and internal testing for the 2008 filing system. If everything continues to test well, we should be able to make this available for the 2009 filing season. With the IRS's Mef system, having an e-services account with the IRS is mandatory. When you set up your account make sure you make the selection to e-file 1120's.
- ✓ **Wintax Letter Formatter** The new letter formatter is finished and will be available in the 2009 Wintax program. We are creating a short training video on how to utilize the new features. Creating and modifying formats utilizes simple drag and drop concepts making it really easy to use.
- ✓ **TWOofficeManager** This office management database system was added, and released on a limited basis, last year. This program is designed to help multiple offices communicate tax return data easily. Keeping returns flowing from satellite offices to the main office for transmission, viewing, and quality control. It has gone through some additional development this season. If you would like to demo it with some of your 2008 returns contact us at [sales@taxwaresystems.com](mailto:sales@taxwaresystems.com) for a download link and an office login. This program requires an Internet connection.



- ✓ **Topaz Signature Pad** We are adding the ability to have your clients sign their 8879's using the electronic Topaz signature pad. This allows your client to sign the electronic filing docs as PDF's without actually printing them out. For form 8879 and other electronic filing signature documents, we are currently working on placing the signature(s) on the signature line automatically. If you are planning on having your clients sign additional documents then Adobe Acrobat Standard or a program with similar capabilities will be needed. (Taxware has currently tested the signature pad T-L460 with Adobe Acrobat Standard 8.0) The cost of the signature pad is \$250(plus tax if in CA). If you would like to order one contact us at [sales@taxwaresystems.com](mailto:sales@taxwaresystems.com) with your name client ID and we can fax or e-mail you an order form.

*Note: The Adobe Acrobat Reader does not have the signature capability so it can't be used to capture the signatures.*



- ✓ **The Tax Book** We added this research guide link to the Wintax program. If "TheTaxBook WebCD" has been installed on your computer, this button will be enabled automatically. For Taxware clients they will sell the WebCD for \$59. Contact them and let them know you are a Taxware client to receive your discounted rate. [www.thetaxbook.com](http://www.thetaxbook.com)

## WEBINARS

The next webinar is going to be September 22 at 10AM Pacific time. We do limit the attendees to 15 so that people can have an opportunity to ask questions. These are primarily to help new clients get used to the programs, but they also show how to use some of the office management tools and other functions built into Wintax. If you would like to attend a webinar send us an e-mail at [info@taxwaresystems.com](mailto:info@taxwaresystems.com) with your name, client ID, and a message that you would like to attend this webinar. If you have already called in and been put on the attendee list you do not need to send an e-mail request. Prior to the webinar we will send you the net meeting ID and link. The webinars are free and they are a great opportunity to receive training from the comfort of your computer.

We still highly encourage everyone and especially new clients to attend the annual tax seminar that will be held in Ontario. We are still working on the final date for the annual seminar but traditionally its held in the beginning of January.

## REFER A FRIEND

Refer A Friend Program

# Taxware Systems

Get your Taxware Systems tax software

# FREE

- 25% - Refer one friend and get 25% off on your software renewal.
- 50% - Refer two friends and earn 50% off your software renewal.
- 75% - Refer three friends and receive 75% off your software renewal.
- Free - Refer four or more friends and receive your software for FREE!

Taxware Systems "Refer A Friend" program and discounts apply to closed sales, per tax season of our three main tax packages as defined as 1250, 1450, and 1850. Multiple office sales do not apply to satellite offices. Some other restrictions apply. Please contact us if you have any questions.

The shipping schedule for the 2009 tax season will be approximately the same as last year. Proforma organizers shipped in November, Accounting and payroll in early to mid December, and the main tax release shipping late December through the first part of January.