# Quick Start Guide for SAXTAX 2010 Programs

## 1. <u>Installation:</u>

**Installing from a Link:**
Please click on the link provided in the setup email received. You will automatically be prompted with a download window. Depending on what operating system you are using (Windows 98, 2000, XP, ect.), you will have the option to Open/Run or Save. Please select Open/Run.

Note: Once the download is complete a warning may appear stating the "The publisher could not be verified. Are you sure you want to run this software". This warning message can be bypassed by clicking Run, which will resume the installation.

**Installing from a CD:**
Insert the CD into the CD drive. It should run automatically. Follow instructions from **Starting the Installation.**

**Starting the Installation:**
Carefully read over all screens during the installation.

- **Welcome Screen**: This screen will let you know what version of SAXTAX you are installing. Also, please make certain steps 1, 2 and 3 on that screen are completed and select next.
- **License Agreement Screen**: Please read over the agreement and select agree.
- **Destination and Drive Screen**: If you would like to change the location of the SAXTAX Software please select browse and find the new location and select next. If you would like to keep the location as is simply select next.
- **Start Installation Screen**: This screen indicates that you will be prompted for your installation code shortly. Please make sure you have this code before proceeding. You should be able to finå in the email sent. If you purchased a CDÊit will be located on the CD sleeve as well as on the letter. Please select next when you are ready to continue forward.
- **Installation Code Screen**: Please enter your installation code. You¦ specific code will load the programs your office purchased.
- **Check List Screen**: This screen will show you what programs will be installed during the installation. Select Ok. Once you have selected ok the installation will begin.
- **Installation Complete**: Once the installation is complete you will see the final screen. This screen indicates that the installation has completed successfully. Select Finish.
  *(If you need assistance with the installation of the efile Interchange Program please visit our website for a detailed help guide)*

## 2. <u>Starting Your Program:</u>
Once you have completed the install you will see a SAXTAX Icon on your desktop. You can use that to access you SAXTAX Software. You can also access it from your Start Menu at the bottom left hand corner of your screen. Select the Programs option from the Start Menu, locate the SAXTAX folder and click SAXTAX 2010. After the Introduction Screen, the Program Manager Screen will appear. This is the "Home Base" for all SAXTAX Programs. Refer to Program Help (F1) for assistance in using the Program Manager. Note: A special Initial Setup Options Screen appears the first time you run SAXTAX to guide you through the initial program setup screens.

## 3. <u>Preparer Information:</u>
Select Preparer Information from the Initial Setup Options Screen or from the Setup Menu to enter firm information pertinent to your company as the tax preparer.

**4. Client Letters & Bills:**
Standard client transmittal letter and bill descriptions are provided with each program. You may access Transmittal Letters or Client Bills from the Initial Setup Options Screen, or from the Setup Menu to review/modify standard letters and bills.

**5. New Client Setup:**
You must set up Basic Client Information to prepare returns for a client.  From the Program Manager Screen, click the Add New Client button to create and enter data for a new client.  All data will automatically "flow" to the client's tax return.  To modify an existing client's basic information, select the client, then click the Edit Client Data button.

**6. Preparing Tax Returns:**
To prepare a tax return, select the desired client from the client list on the Program Manager Screen.  Either click the Prepare Return button, or click the Toolbar shortcut to go to a specific tax return program.  Refer to Program Help for tax program assistance as necessary. To get a quick overview of a specific tax program, go to the Help Menu, then Contents, and view the information under Overview about Using the Program.

**7. Program Help & Technical Support:**
Program Help - Refer to the Program Help Menu for general assistance in using the programs, or press F1 for specific help on any screen.

**Technical Support**
**Phone: (800) 270-3643 • Fax: (877) 721-7249 • Email: Support@ProfitDevelopers.com**

# SAXTAX Software 2010 Client Data Transfer

We ship our 2010 Programs to you as early as possible to enable you to complete Organizers (see enclosed sheets) and Client Data Transfer before tax season begins. The following instructions, along with the Program's On-Line Help Screens (**F1**), should assist you with these activities.

*If you have not already done so, please begin by installing and setting up your 2010 Programs in accordance with the Quick Start Guide on pages 1 and 2 of this document.*

## What Data Transfer Does

Client Data Transfer reads your 2009 client data files, processes them, and rewrites them as 2010 files. Data transfer does not affect your client's files from prior years. You can always go back to check data or reprint returns. All applicable information is carried over and modified as needed. Numerical data entered for last year's returns is deleted and all carryovers are calculated.

## Client Data Transfer (From the Welcome Screen)

Select Client Data Transfer from the Welcome Screen when you first run the program. If you use the default folders, CLI09 and CLI10, for storing your client data, then press the OK button to set up your new files and transfer data.

If you use other folders for storing client data, or you want to select clients individually to transfer, press the Select button and go to step 3 under Manual Transfer below.

## Client Data Transfer (Manual Transfer)

- **Make sure the Program Year on the Program Manager Screen is set to "10". If set to "09", you will overwrite your last year's data files.**

- From the Program Manager screen, under the *Activity Menu*, choose *Data Transfer from Prior Year*.

- Enter the Source Drive and Directory, or Folder, where your 2009 clients are stored.

- Enter the Destination Drive and Directory, or Folder, for the 2010 client files.

- Press the *Select All* button (to select all clients)*,* or choose specific clients for transfer. To select more than one specific client, hold the CTRL key and click the client name with the left mouse button.

- Review your choices and press the *Transfer Clients* button to begin the transfer. Note, while the transfer is in progress, you can minimize the Program and work with different applications.

- You will see the "Done" message when the transfer is finished. Note: the appearance of an Error Log button indicates that some client files did not properly transfer. Press the button to see a list of those clients. Try to transfer the clients again or contact SAXTAX (800-678-1789) for assistance.

- Once the transfer is complete, close the Client Data Transfer Screen. If your Program Manager drive and directory are the same as your transfer destination, your clients should appear on the Program Manager Main Screen. If not, change the Program Manager drive and directory to see your transferred clients.

*For users with both the SAXTAX Depreciation and Tangible Programs*
**Transfer of Assets from the Depreciation to the Tangible Program**

When you are ready to complete a tangible return, you may transfer assets from the Depreciation Program to the Tangible Program. Select a client in the Program Manager and go into the Tangible Program. Go to the *Setup Menu* and select *Transfer from Depreciation,* or click the tool on the tool bar. Be sure to transfer tangible and depreciation data files from 2009 to 2010 (see above) and update your new depreciation files through 12/31 before you transfer from Depreciation to the Tangible program. Refer to Program Help (**F1**) for assistance, or call SAXTAX Technical Support at (800) 270-3643.

# SAXTAX Software 2010 Tangible & 1040 Organizers

We ship our 2010 Programs to you as early as possible to enable Client Organizer Preparation and Data Transfer (see enclosed sheets) before tax season begins. The following instructions along with the Program's On-Line Help Screens (F1) should assist you with these activities.

*If you have not already done so, please begin by installing and setting up your 2010 Programs in accordance with the Quick Start Guide on pages 1 and 2 of this document.* **Make sure the Program Year on the Program Manager Screen is set to "10".**

## Printing Organizers

- Organizers are printed using information from last year's client data files.  Printing organizers does not affect your client files from previous years. See below for special steps in printing 1040 Organizers.

- From the Program Manager screen, under the *Setup Menu*, choose *Organizers*.

- For each program, press the *Review or Modify Cover Page Text* button to review and/or make changes to the Organizer cover page. The cover page that appears will be your cover page from last year, so be sure to check dates and other information carefully. Several insert code variables (tax year, firm information, due date, etc.) are available for automatic printing of applicable data on your cover page.

- To print, from the Program Manager screen, under the *Activity Menu*, move your pointer to *Organizers*. For new clients, select *Print Blank Organizers* to print a generic organizer without any data carried over from last year.

- For last year's clients, select *Print Client Organizers*:

  - ➢ Specify the source drive and directory for your 2009 client data files.
  - ➢ Select the type of organizers to print – Tangible or 1040.
  - ➢ Select the clients desired.  To select all clients, press the *Select all Clients* button. All names should then be highlighted.

- Review your selections and press the *Print* button to start the printing process.

## Special Steps for 1040 Organizers

- Setup – Organizer Cover page – SAXTAX has a customizable cover page and a default cover page that cannot be modified.

  - ➢ Check the *Customize Cover Page* box to review, modify and use your customized Organizer cover page.
  - ➢ Otherwise, the SAXTAX default cover page will print with your Organizers.
  - ➢ Press the *Print Cover Page* button to review the customized and default letters.

- Setup – Organizer Questionnaire – Under the tab *Questionnaire and Forms* press the *Modify Questionnaire* button.

  - ➢ Check off the questions you would like to include on the questionnaire that will print with your Organizers.  Under the *User Defined Questions* tab, you can add additional questions for inclusion.

- Setup – Forms to be Included – Under the tab *Questionnaire and Forms* press the *Organizer Forms to Include* button.
  - ➢ Check off the forms to include when you print blank organizers.  (e.g.  You probably want to print most forms for all blank organizers, but you may not want to print a Schedule F form.)
  - ➢ Check off the forms to include when you print client organizers.  All applicable forms based on last year's return will automatically print whether or not you check them off here.  You may, for example, want to always print itemized deduction forms even when a client did not itemize last year.

# SAXTAX Software 2010 Network Management Module

The Network Management Module facilitates the use of all SAXTAX Programs in a network environment by checking client files in and out to different users, ***ensuring that only one person at a time works on a client's return***. It allows multiple users to customize their own default settings for preparer information, transmittal letters, and client bills. Users will also be able to access data in different folders and different program years without interfering with one another.

**Installation Note:** To operate properly, your SAXTAX Programs must be installed to the network file server. We suggest that you install to the server from a workstation. Installation of the Program on individual workstations while using the file server for client data storage will not protect the integrity of the client data files.

*Install the SAXTAX Software (which, if purchased, will include your Network Management Module along with all other programs purchased) in accordance with the Quick Start Guide on pages 1 and 2 of this document.* Use the instructions on the following page to create a SAXTAX Shortcut on each workstation "pointing" to the network file server.

**Network Management:**  When you run your SAXTAX Program, the User ID List box will appear. Choose an ID from the drop down list or enter your ID (in CAPS). Entering "MGR" identifies you as the "Network Manager" and allows you to go through the initial setup to establish default settings for all users.

***Access the Network Users (setup) Screen***: While on the Program Manager Screen, from the *File Menu*, select *Network Management*. This option is only available when you have signed in as "MGR"
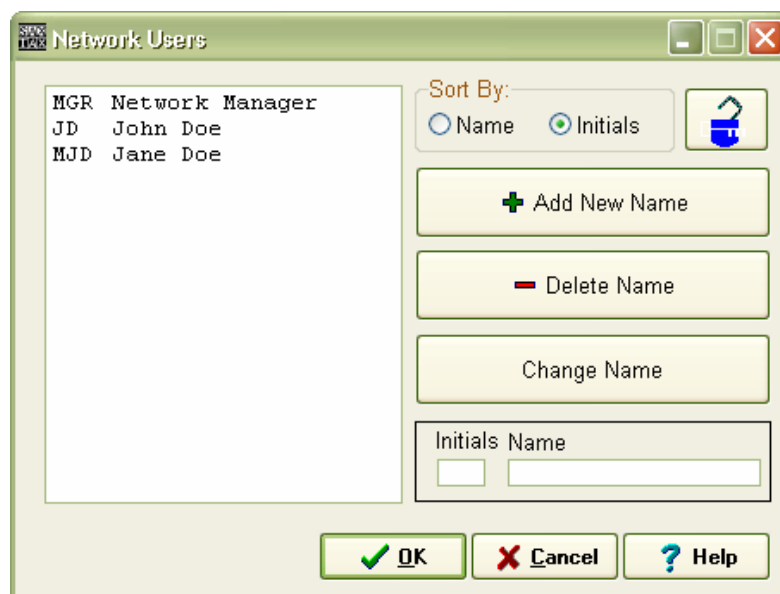


***Network Users Setup:*** The Manager (MGR) can set up User ID's for each of the program's users on the Network Users Screen. Each User can then customize preparer information, transmittal letters, and client bills. Only one person should log on as MGR. ***Users should always log on with their User ID (not as MGR).***

***Unlock Files:*** Occasionally, a program problem or power outage may cause the program to be abnormally terminated. When this happens, a user may be locked out of the client file or directory that was in use at the time the program was terminated. If you see the "File in Use" message and you are certain that the file is not currently in use, you will need to "unlock the file".

***To unlock all client files***, the Network Manager (sign on as "MGR") should go to the Network Management Screen. Make sure other users are out of SAXTAX and click the Unlock Files button. Files should now be unlocked and you can return to the Program Manager Screen. Note, if the unlock procedure is done by a regular user of the program, he should exit the program (logout) as the Network Manager and return to the program using his own User ID.

# Adding a SAXTAX Windows Desktop Shortcut

The 2010 Program installation will create a "SAXTAX 2010" Shortcut on your desktop, which will "point" to your new installation.

If you have installed SAXTAX to a network server and want to create a new SAXTAX desktop shortcut on the network workstations, follow one of these procedures:

## Create the Shortcut "from Scratch"

- Using your mouse, point to a blank spot on the Windows desktop and right click.
- From the list, choose *New*, then *Shortcut*.
- In the *Command Line* box, enter the EXE file and its path. For example, if you installed to the F: drive and the FLINT folder, the entry should be: F:\FLINT\SAXTAX10.EXE . Of course, you can use the Windows browse utility to help locate SAXTAX10.EXE. Click *Next* to continue.
- Enter the name for your shortcut (for example: SAXTAX 2009).
- Click *Finish*. The shortcut should now be on the desktop screen.

## "Drag" the Shortcut from Windows Explorer

- Open the Windows Explorer. Shrink the window so the desktop can be seen.
- Locate the folder containing the SAXTAX Programs.
- Open the folder and locate the file SAXTAX10.EXE.
- Use the mouse to drag the file to the desktop. A shortcut is created.
- Rename the shortcut as desired. To rename, right click and choose *Rename*.