



PROFIT DEVELOPERS, INC. (PDI) 2019 SAXTAX Software Installation Guide

1. Installation:

Installing from a Link:

Please click on the link provided in the setup email received. Some email accounts will not allow access to executable links directly from your email. If you are unable to download by clicking on the link directly from the email, simply highlight the entire link, copy, and paste it into the address bar of your web browser. You will automatically be prompted with a download box. Depending on what internet browser you are using this download prompt can open a separate window or a bar along the bottom of the screen. You will have the option to Open/Run or Save/Save As. If you choose the Save option you will be prompted for a location to save the file. Please select a location where you can easily access this file once the download has completed. If you select Open/Run the installation will begin once the download completes automatically.

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?" OR "Do you want the following program from an unknown publisher to make changes to this computer?" This warning message can be bypassed by clicking Run or Yes, which will resume the installation.

Installing from a CD:

Insert the CD into the CD drive. Once the CD is inserted a window should appear. Depending on what Windows operating system you are on, it may prompt you to run the install or it may open an AutoPlay window, in which you will have to double click on the SAXTAX icon to begin the installation.

Starting the Installation:

Please make sure any past or present versions of SAXTAX are completely closed prior to running this installation. If you purchase the Network Management Module and install to a server, please make certain all users have closed the SAXTAX Software before proceeding with 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 have been completed and select next.

License Agreement Screen: Please read over the agreement and select Agree.

Destination & Drive Screen: Please save the software to the default location (C:/FLINT). If you have purchased the Network Module you may select browse and select the appropriate drive letter from the dropdown menu.


Start Installation Screen: This screen indicates that you will be prompted for your installation code on the next screen. If you have a CD, it will be located on the CD sleeve as well as on the letter. Otherwise, the installation code will be located in the installation email. Please select next when you are ready to continue forward.

Installation Code Screen: Please enter your installation code. Your specific code will load the program(s) your office has purchased.

Check List Screen: This screen will show you what programs will be installed during the installation. You will notice that they appear in the large box and they are grayed out, not allowing you to select them, they are preset from your installation code. Please make certain all programs purchased are displayed and 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.

2. Starting Your Program:

Once you have completed the install you will see a SAXTAX Icon  on your desktop. You can use it to access your SAXTAX Software. You can also access it from your Windows 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 2019. After the Introduction Screen (*Please see the following page for information on the Introduction Screen*), the Program Manager Screen will appear. This is the "Home Base" for all SAXTAX Programs and clients. 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 SEXTAX to guide you through the initial program setup screen.

3. Introduction Screen:

The first time to you launch the SEXTAX Software after it is initially installed, you will see the screen below. This is the Introduction Screen. From here you can modify your stored information. This screen will only appear the first time you launch your new SEXTAX Software. After the first time it will load the Program Manager Screen (which is a home base view of all your clients). All the information can be accessed again if you need to make any changes from the Setup Menu on Program Manager Screen.

Preparer Information: On this screen you can modify all your company information. This includes your company contact information and preparer information.

Note: When you have completed each screen select OK.

Return Options: This screen gives you four options. These are just basic settings that you can change on your returns.

Transmittal Letters: The SEXTAX Software includes prewritten transmittal letters for all programs. These letters will print out automatically with your returns, so you may present them to your clients along with their return(s). You can modify these letters from this screen.

Client Bill: On this screen you can set the amount your office will charge for your returns. It is not required, just an option.

SEXTAX Default Printer: This screen will display the current default printer that SEXTAX will print to. If you would like to change it, you may do so here.

Client Data Transfer: Client Data Transfer reads your client data files located in your 2018 SEXTAX database and processes them, and rewrites them as 2019 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. This transfer will only work for previous SEXTAX users.

Setup Item	Description	Action Button
Preparer Information:	Enter demographic and other information for your firm that will be used in printing returns, transmittal letters, and client bills.	Preparer Information
Return Options:	Use your discretion in printing dates on returns, letters and bills, bold print on returns, etc.	Return Options
Transmittal Letters:	Standard transmittal letters are provided with the programs. Review and modify the standard letters from here.	Transmittal Letters
Client Bill:	Standard wording and amounts can be set up for client bills. Enter your default billing amounts and descriptions here.	Client Bill
SEXTAX Default Printer:	Set up your SEXTAX printer if you will be printing to a printer other than your Default Windows Printer, or if you will be printing through a special driver for SEXTAX.	SEXTAX Default Printer
Data Transfer:	If you used SEXTAX last year, transfer data from 2012 to 2013 to avoid having to reenter it. This should be done before entering any new data for 2013.	Client Data Transfer
Exit Setup:	You can always look under the Setup Menu later to enter or modify setup information.	Exit Setup

5. New Client Setup:

You must set up basic client information to prepare returns for a client. If you are a new user and are entering clients or simply adding a new client, please follow the steps. 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 and click on the Edit Client Data button. Please see the *“Adding a New Client”* help guide for more information.

6. Preparing Tax Returns:

To prepare a tax return, select the desired client from the client list on the Program Manager Screen and click the Prepare Return button and select which return you would like to prepare. You can also choose the type of return you would like to prepare by selecting it from the toolbar in the upper right hand corner of the software. You can simply hover over each icon and it will display what form it is. The SEXTAX Software offers state programs for Georgia as well as Florida. If you purchase multiple state program(s) you will see a dropdown menu in the upper right hand corner in which you can choose your state.

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: (772) 337-2921 • Fax: (772) 337-0651 • Email: CustomerSvc@ProfitDevelopers.com

SEXTAX SOFTWARE

**A DIVISION OF PROFIT DEVELOPERS, INC. (PDI)
P.O. BOX 7280 – PORT SAINT LUCIE, FL 34985-7280**



PROFIT DEVELOPERS, INC. (PDI) 2019 SEXTAX Client Data Transfer

We ship our software to our customers as early as possible to enable you to complete Organizers 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 2019 programs in accordance with the "Software Installation Guide" **Make sure the Program Year on the Program Manager Screen is set to "2019".***

What Data Transfer Does

Client Data Transfer reads your 2018 client data files, processes them, and rewrites them as 2019 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 CLI folders 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, choose the Select option. Once you have chosen this option you will see a new Data Transfer screen. On this screen you can manually pull over the clients you would like to pull into the new database. To do so click on the first client, hold down the Control key (Ctrl) on your keyboard and click on every client you wish to pull over into the new 2019 database. Once they are all highlighted select, Transfer Client Data and this will complete the transfer.

Client Data Transfer (Manual Transfer)

IMPORTANT: Make certain the program year on the Program Manager Screen is set to "2019". If the date is set to any other year you will overwrite your past 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 2018 clients are stored. It should automatically pull up the location/directory.
- Enter the Destination Drive and Directory, or Folder, for the 2019 client files. Again, it should automatically pull up the location/directory.
- Press the *Select All* button (to select all clients), or choose specific clients for transfer. To select more than one specific client, hold the Control Key (Ctrl) 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 SEXTAX (772) 337-2921 for assistance.

Close the Client Data Transfer Screen once this transfer has completed. 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 SEXTAX 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 2018 to 2019 (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 SEXTAX Technical Support at (772) 337-2921.



PROFIT DEVELOPERS, INC. (PDI) 2019 SEXTAX Tangible & 1040 Organizers

We ship our software to our customers as early as possible to enable you to complete Organizers 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 2019 Programs in accordance with the "Software Installation Guide" **Make sure the Program Year on the Program Manager Screen is set to "2019".***

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 organizers from the Program Manager screen select *Organizers* from 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 2018 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

SEXTAX has a customizable cover page and a default cover page that cannot be modified.

- From the Program Manager screen, under the *Setup Menu*, choose *Organizers*.
- Select *Federal 1040 Return* from the *Type of Organizers* dropdown menu
- Check the *Use Customize Cover Page* box to review, modify and use your customized organizer cover page. Otherwise, the SEXTAX default cover page will print with your organizers. Once you have made any changes select the *Print Cover Page* button to review the customized and default letters.
- Next select the *Questionnaire and Forms* Tab and the select *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.
- Under the same *Questionnaire and Forms* Tab select the *Organizer Forms to Include* button.
- Check off the forms to include when you print blank organizers. (e.g. You may 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.



PROFIT DEVELOPERS, INC. (PDI) 2019 SEXTAX Network Management Module

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

Network Management: When you run your SEXTAX 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"

Use the Network Users Screen to add, delete or change network users.

All current SEXTAX users will appear on the list.

User ID	User Name
MGR	Network Manager
JDS	John Smith
MSJ	Mary Johnson
RSD	Ronald Davis
SJW	Sarah Wilson
ECP	Edward Parker

Click to "Unlock and allow access to files that may be locked due to abnormal termination"

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 SEXTAX 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; that person should exit the program (logout) as the Network Manager and return to the program using his own User ID.



PROFIT DEVELOPERS, INC. (PDI)
Adding a SEXTAX Desktop Shortcut

The 2019 SEXTAX installation will create a "SEXTAX 2019" shortcut on your desktop, which will "point" to your new installation (Default: C:\Flint\SEXTAX19.EXE)

If you have installed SEXTAX to a network server and want to create a new SEXTAX desktop shortcut on the separate workstations, follow the instructions below to do so.

Creating a Shortcut

- Using your mouse, point to a blank area on your desktop and right click.
- From the menu that appears select *New*, then *Shortcut*.
- A new window will appear. You will see a *Browse* box, please select this box and browse to the drive where SEXTAX is located. Next, find and open the *Flint* folder. Within the Flint folder you will find a file called *SEXTAX19.exe*. Please click on this file to highlight and select *Ok*. You will now see the directory listed in the box. Select *Next* to continue.
- On the next screen you will enter the name for your shortcut (for example: SEXTAX 2019).
- Click *Finish*. The shortcut should now be on the desktop screen.