# Quick Start Guide

This Quick Start Guide gives you the basic knowledge you'll need to use TaxWorks effectively. These instructions cover setting up the program, entering, printing and e-filing a return. A detailed instruction manual is available at **www.taxworks.com/training_materials.aspx**.

## Setting Up the Program

**Step 1** – Close all running programs.

**Step 2** – Insert the TaxWorks CD into your CD drive. Select **Install TaxWorks Professional Software**.

**Step 3 –** The Welcome screen will open. Review the End User License Agreement (EULA) by clicking the **Show EULA** button. You can print the License Agreement for future reference by clicking the **Print** button**.**

By default, TaxWorks 2011 will install to the C drive on your machine. Click the **Change** button if you need to change the default installation path. We recommend that you leave this setting as the default.

If installing to a network refer to the installation instructions at **www. taxworks.com/training_materials.aspx**.

After reading the license agreement and verifying the installation path, click the **Accept & Install** button. TaxWorks 2011 will install to the location specified.

**Step 4** – After all of the files have been installed, select the option to **launch TaxWorks 2011** and click the **Finish** button.

Note: If the program does not start automatically, you may run TaxWorks by double clicking the **TaxWorks Demo 2011** icon on your desktop.

## Entering a Return

The Client Selection Screen automatically opens when starting TaxWorks. Find the Folder: dropdown box and select '**Samples**'. Click the **New** button on the client selection task bar to begin a new return. A pop-up screen displays fields allowing you to enter the taxpayer and spouse's name, SSN, date of birth, and address *(Figure 1).* Enter data and then click **OK** to proceed to the General Information screen. A pop-up screen will warn you that you are in 'Samples' mode. Click **OK**.

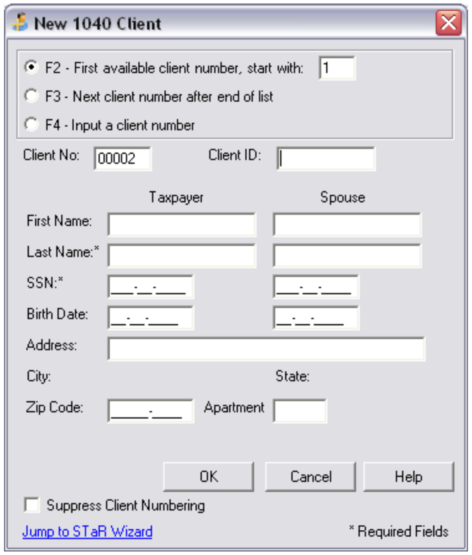


*Figure 1*

When you are in a client's return you'll find five 'panels' on your screen *(Figure 2).* To the left is the forms selection pane *(a).* The center pane is the workspace where you enter the client's information *(b).* The pane below the workspace displays line-by-line helps relating to input fields on the workspace screen. The helps change as you move from field to field *(c).* The output pane displays a form reflecting real-time calculations as data is entered *(d).* The forms pane can be expanded or collapsed to display a summary of the return *(e).*

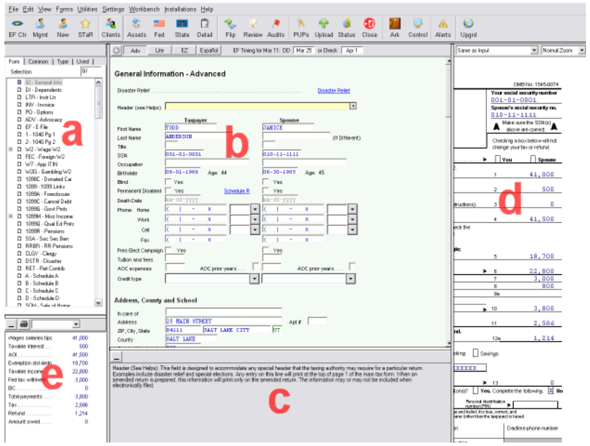


*Figure 2*

Navigation links are available on the workspace screen (blue colored hyper-links). The links allow you to jump from form to form. For example, on the General Information screen click the W2 link to jump to the W2 input screen. You can also select the applicable form from the forms list *(a).*

At any time while entering a return, right click on the output pane *(d)* or click **Flip** on the button bar, to view the entire form with real-time calculations.

## Reviewing a Return

After entering all client information (W2s, Dependents, etc.), press the **Review** button on the button bar to process and review the client's return. You may see a series of audits. These audits provide suggestions to aid you in the preparation of the return, or items that must be completed or fixed before the return can be electronically filed *(Figure 3).* Click the **Fix Now** link to jump to the item in the return referenced in the audit, or press the Fed button on the button bar. You can bypass the audits by clicking 'Close'. We suggest you review all audits before proceeding.

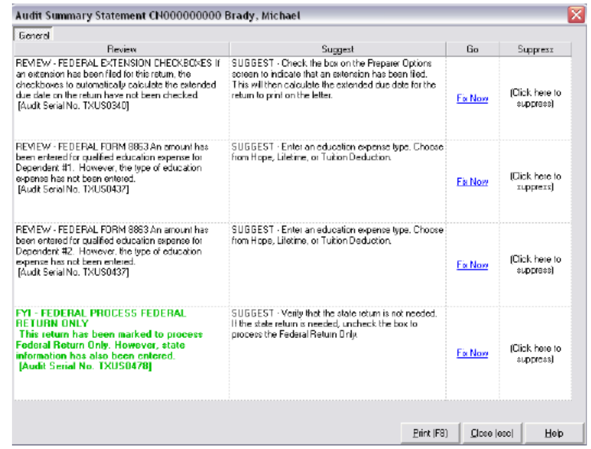


*Figure 3*

After closing the audits, you'll find a list of forms included in your client's return in the left column. Click on a form in the left column to view the completed tax form information.

## Printing a Return

TaxWorks offers several options for printing a client's tax return. After Reviewing the return, **tag** the forms and schedules in the left panel you want to print, then select **Tagged F6** from the printer drop-down menu, or click the **printer icon** button *(Figure 4).*

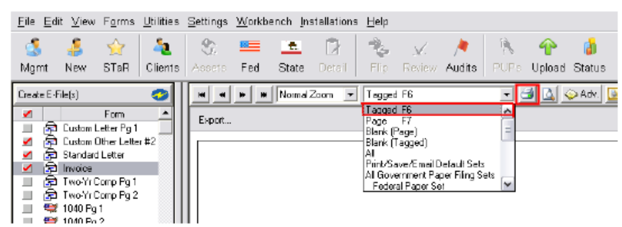


*Figure 4*

## E-Filing a Return

On the General Information screen, scroll down to the Electronic Filing section. Complete the applicable e-file information. Review the return. All red EF Audits must be resolved before the return can be e-filed. From the review form display screen, click the **Create E-File(s)** button above the form selection pane *(Figure 5).*

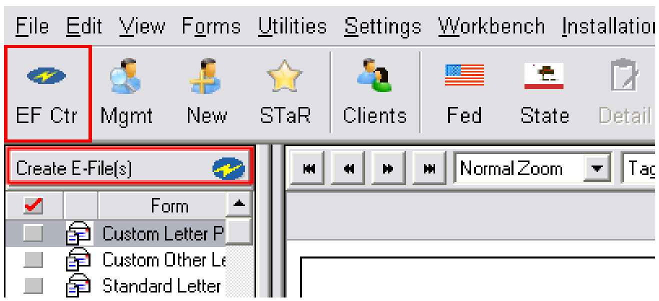


*Figure 5*

A window will appear directing you to login to the E-File Center. To log into the E-File Center use the account number as your user name and the charge number as your temporary password. Click **Log In**. After logging into the E-File Center, a screen will pop up asking you to complete the information and create a new user name and password. Enter the information and click **Submit**.

Log in to the E-File Center using the new username and password. The Financial Products screen will appear. This is where you would complete your bank enrollment. Complete the information if applicable, or bypass by clicking **Proceed to the E-File Center** at the bottom of the screen. The E-File Center overview screen will appear (F*igure 6*). For demonstration purposes, and since the client was entered in the Samples folder, move the radio button to **Samples Mode: On** in the top right-hand corner. Client returns ready to be transmitted will be in the In Send Clients bin. Click **Send Clients**. Tag the clients you wish to send and click **Send and OK**.

Follow the progress of e-file and bank returns by clicking **Acknowledgements** and then **Bank** (if applicable). You can also access the E-File Center from any computer with Internet access at https://www.filingctr.net/2011/.

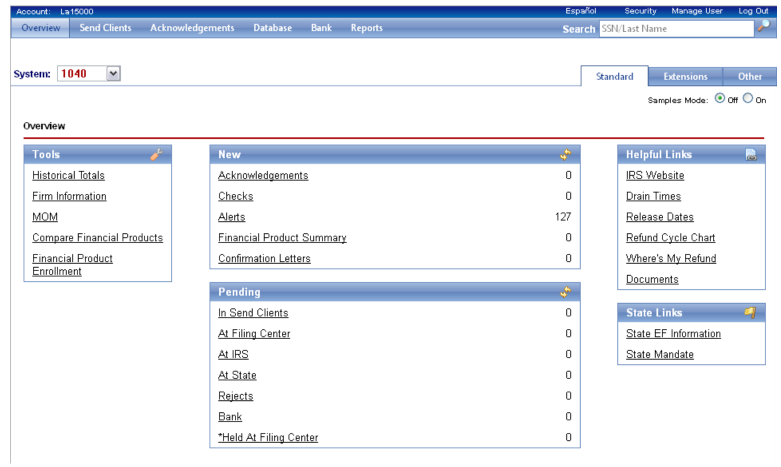


*Figure 6*

Thanks for you for purchasing TaxWorks. Visit us online at www.taxworks.com.