

Quick Start Guide

This Quick Start Guide gives you the basic knowledge you'll need to use 1040Works effectively. These instructions cover setting up the program, entering, printing and e-filing a return. A detailed instruction manual is available at www.1040works.com/training_materials.aspx.

Setting Up the Program

Step 1 – Close all running programs.

Step 2 – Insert the 1040Works CD into your CD drive. Select **Install 1040Works Speed-Entry Tax 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, 1040Works 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.1040works.com/training_materials.aspx.

After reading the license agreement and verifying the installation path, click the **Accept & Install** button. 1040Works 2011 will install to the location specified.

Step 4 – After all of the files have been installed, select the option to **launch 1040Works 2011** and click the **Finish** button.

Note: If the program does not start automatically, you may run 1040Works by double clicking the **1040Works Demo 2011** icon on your desktop.

When prompted, we recommend that you install the Sample Returns.

Step 5 – Complete this step if you would like to explore electronic filing.

Close the client selection screen. Click **Settings** on the menu bar and then **Control Data**. Enter your firm information. Click **OK**. Click **Settings** again and then **Preparers**. Enter you preparer information on line one. Click **OK**. Click **Clients** on the button bar to return to the Client Selection screen.

Entering a Return

The Client Selection Screen automatically opens when starting 1040Works. Find the Folder: dropdown box and select **'Samples'**.

STaR

Click the **STaR** button on the Client Selection task bar to begin a new return. STaR stands for 'Simple Tax Return'. This input method is preferred when entering simple returns. (Figure 1) The STaR screens are intuitive and presented in a wizard format.

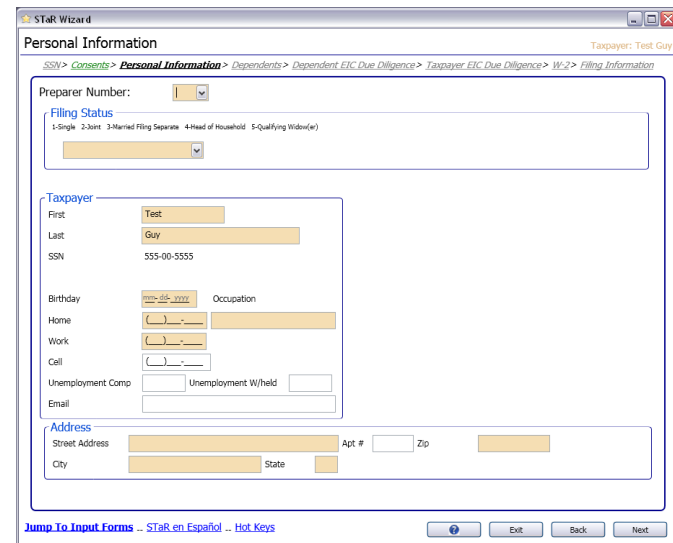


Figure 1

When using the STaR method, simply follow the input screens and advance through the main program headings using the PgDn and PgUp keys, or click **Next**. Toggle between the STaR and Traditional screens, which will be covered next, by clicking the **Jump to Input Field** link in the lower left hand corner.

Traditional

To enter client data using the traditional screen format as the default, close the Client Selection screen. Select **Settings** on the menu bar and then **Control Data**. Select **Switches**. Uncheck the **Use STaR Wizard as default** box in the lower left-hand corner. Click **OK**. This now becomes the default. Click the **Clients** button on the button bar.

Click the **New** button on the client selection task bar. A pop up screen displays fields allowing you to enter the taxpayer and spouse's name, SSN, date of birth, and address. (Figure 2) Enter the tax data and click **OK** to proceed to the General Information screen. A pop-up screen will warn you that you are in 'Samples' mode. Click **Yes** to continue.

Figure 2

When you are in a client's return you'll find four 'panels' on your screen (Figure 3). To the left is the forms selection pane (a). The forms pane can be expanded or collapsed to display a summary of the return (b). The center pane is the workspace where you enter the client's information (c). 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 (d). Several input screens are available in English and Spanish.

Figure 3

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 Form 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, click **Peek** 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 4*). 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.

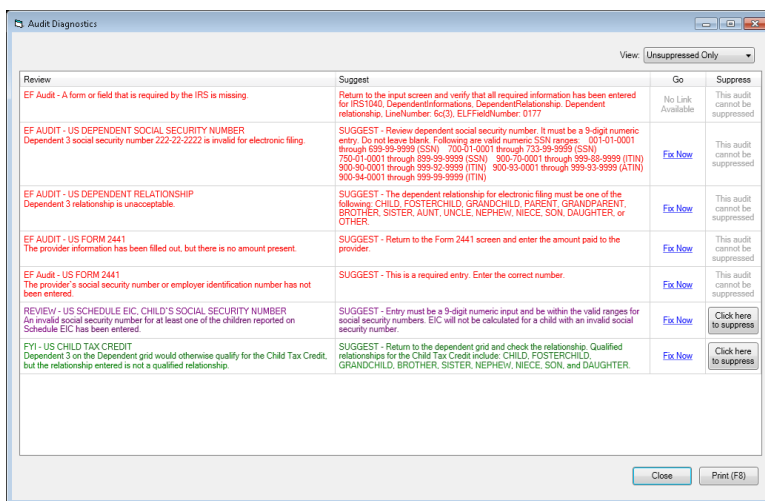


Figure 4

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

1040Works 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 5*).

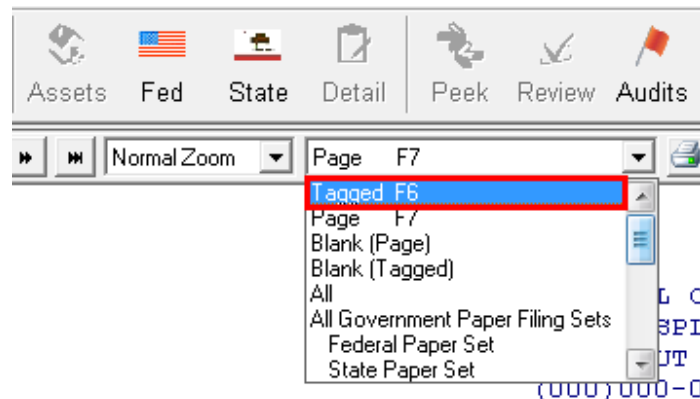


Figure 5

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 6*).

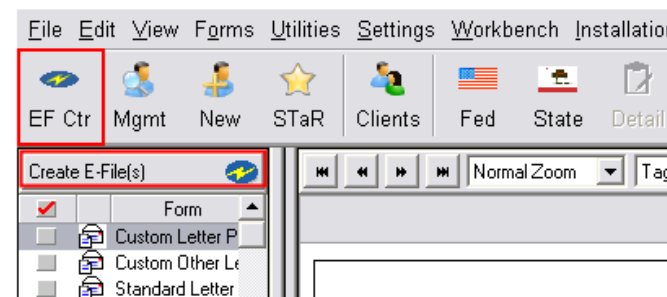


Figure 6

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 (*Figure 7*). 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/>.

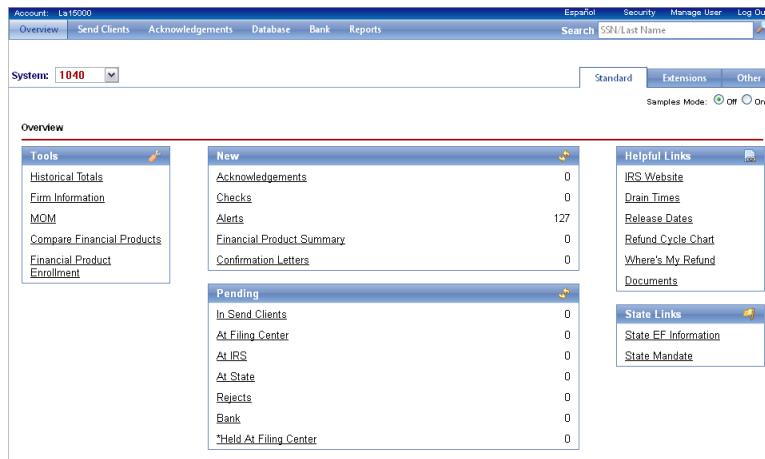


Figure 7

Thanks for you for purchasing 1040Works. Visit us online at www.1040works.com.