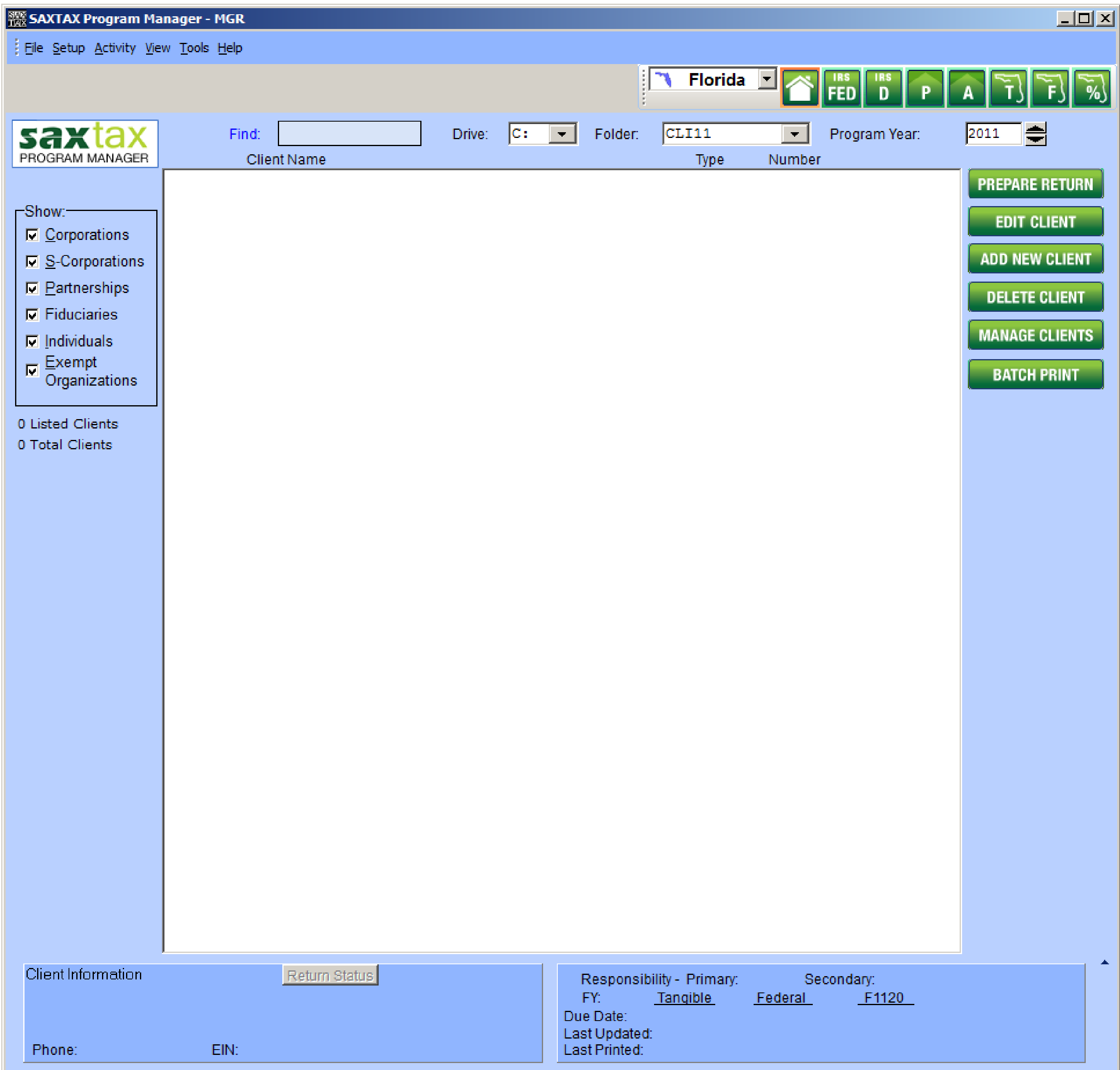
Profit Developers, Inc. (PDI)

Adding a New Client in SAXTAX

Once you have successfully installed the SAXTAX Software please follow the instructions below to add a client.

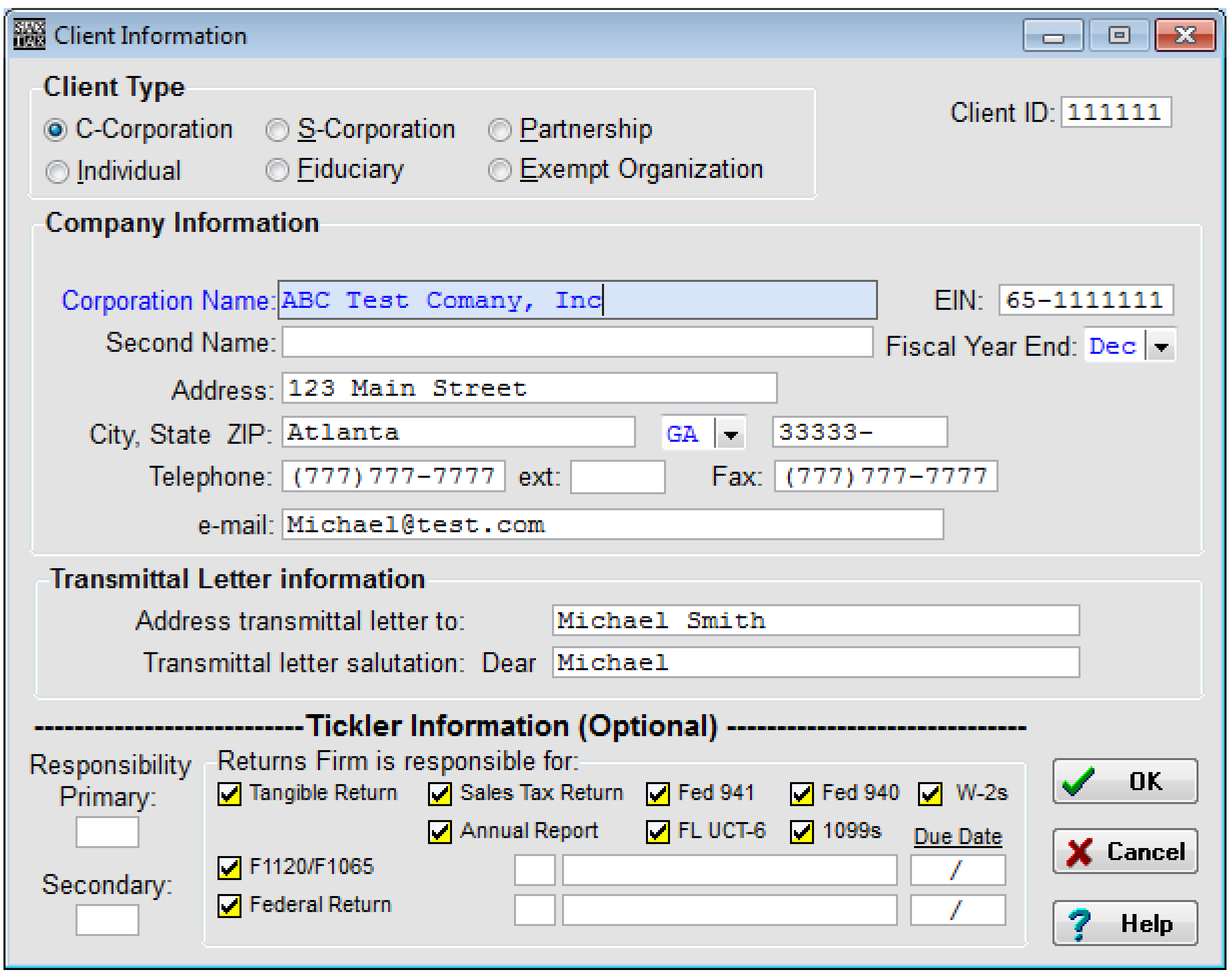
1. Launch the SAXTAX Software
2. Once it has loaded you will be on the Main Screen (Also known as the ***Program Manager***). On the right hand side of the screen select ***Add New Client***.



3. The client information window will open. This is where you will enter all company/client information.

- Client ID: The SAXTAX Program will automatically generate a Client ID starting from 1. You can choose to either leave the default Client ID or create a unique ID. For example, you can select the last four digits of the client's SSN or EIN. Or a combination of numbers and letters. There is a limit of 6 characters.
- Client Type Box: Select what type of return it will be. If it is a 1040 you will select Individual. If the company files an 1120S you will select S-Corporation, etc.
- Company Information Box: In this box you will enter all company information. If it is an Individual the information will change slightly. The first image below is a Corporate Client. The image on the following page is an Individual.
- Transmittal Letter Information Box: In this box you will simply type in the clients name in the Address Transmittal Letter To field. This information will pull into letters the SAXTAX Program can generate for you. Please enter the name how you would like it to appear in the address or the full name. In the Salutation field you will simply type in how you would like to greet the client in the letter. Example: Dear Mike. If you do not utilize transmittal letter you can simply bypass these fields.
- Tickler Information: If you are preparing different types of returns for the client you will check them off below. Once you have entered this client and see the client or company's name listed on the Program Manager screen, right click on it and select "Return Status". You will see the types of returns you selected from the Tickler Information listed. This will allow you to track the progress of the return. You have the option to double click on any type of return and set a status and add notes.

Once complete select OK in the bottom right hand corner.



Example of an Individual Screen