



PROFIT DEVELOPERS, INC. (PDI) Adding a New Client in SEXTAX

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

1. Launch the SEXTAX 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**.

SAXTAX Program Manager - MGR

File Setup Activity View Tools Help

Florida

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saxtax PROGRAM MANAGER

Find: Client Name

Drive: C: Folder: CLI11 Type Number

Program Year: 2011

Show:

- Corporations
- S-Corporations
- Partnerships
- Fiduciaries
- Individuals
- Exempt Organizations
- Organizations

0 Listed Clients
0 Total Clients

PREPARE RETURN
EDIT CLIENT
ADD NEW CLIENT
DELETE CLIENT
MANAGE CLIENTS
BATCH PRINT

Client Information **Return Status**

Phone: EIN:

Responsibility - Primary: Secondary:
FY: Tangible Federal F1120
Due Date:
Last Updated:
Last Printed:

3. The client information window will open. This is where you will enter all company/client information.
 - Client ID: The SEXTAX 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 SEXTAX 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.

The screenshot shows a 'Client Information' window with the following sections:

- Client Type:** Radio buttons for C-Corporation (selected), S-Corporation, Partnership, Individual, Fiduciary, and Exempt Organization. Client ID: 111111.
- Company Information:** Corporation Name: ABC Test Comany, Inc; EIN: 65-1111111; Second Name: (empty); Fiscal Year End: Dec; Address: 123 Main Street; City, State ZIP: Atlanta, GA, 33333-; Telephone: (777) 777-7777; Fax: (777) 777-7777; e-mail: Michael@test.com.
- Transmittal Letter information:** Address transmittal letter to: Michael Smith; Transmittal letter salutation: Dear Michael.
- Tickler Information (Optional):** Returns Firm is responsible for:

Primary:	<input checked="" type="checkbox"/> Tangible Return	<input checked="" type="checkbox"/> Sales Tax Return	<input checked="" type="checkbox"/> Fed 941	<input checked="" type="checkbox"/> Fed 940	<input checked="" type="checkbox"/> W-2s
Secondary:	<input checked="" type="checkbox"/> F1120/F1065	<input type="checkbox"/>	<input checked="" type="checkbox"/> Annual Report	<input checked="" type="checkbox"/> FL UCT-6	<input checked="" type="checkbox"/> 1099s
	<input checked="" type="checkbox"/> Federal Return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: OK, Cancel, Help.

Example of an Individual Screen

Client Information

Client Type

C-Corporation S-Corporation Partnership
 Individual Fiduciary Exempt Organization

Client ID: 456789
Last Assigned: 4

Company Information

	First Name	MI	Last Name	SSN
Taxpayer:	John	P	Smith	123-45-6789
Spouse:	Mary	R	Smith	987-65-4321

Address: 123 Main Street
City, State ZIP: Miami FL 33333-
Telephone: (777) 777-7777 ext: Fax: (777) 777-7777
e-mail: maryandjohn@email.com

Transmittal Letter information

Address transmittal letter to: John & Mary Smith
Transmittal letter salutation: Dear Mr. & Mrs. Smith

-----**Tickler Information (Optional)**-----

Responsibility Primary:
Secondary:

Returns Firm is responsible for:

<input checked="" type="checkbox"/> Tangible Return	<input checked="" type="checkbox"/> Sales Tax Return	<input checked="" type="checkbox"/> Fed 941	<input checked="" type="checkbox"/> Fed 940	<input checked="" type="checkbox"/> W-2s
<input type="checkbox"/> F1120/F1065	<input type="checkbox"/> Annual Report	<input checked="" type="checkbox"/> FL UCT-6	<input checked="" type="checkbox"/> 1099s	Due Date
<input checked="" type="checkbox"/> Federal Return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	/

OK
 Cancel
 Help