



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 click on **Add New Client**.

The screenshot shows the 'SAXTAX Program Manager' window. At the top, there is a menu bar with 'File', 'Setup', 'Activity', 'View', 'Tools', and 'Help'. Below the menu bar, there is a state dropdown menu set to 'Florida' and a series of state icons including 'M', 'D', 'P', 'A', 'T', 'F', and '%'. A search bar is labeled 'Find:'. To the right of the search bar are fields for 'Drive: C:', 'Folder: CLI09', and 'Program Year: 2009'. On the left side, there is a 'SAXTAX Program Manager' logo and a 'Show:' section with a list of client types, each with a checked checkbox: Corporations, S-Corporations, Partnerships, Fiduciaries, Individuals, and Exempt Organizations. Below this list, it says '0 Listed Clients' and '0 Total Clients'. On the right side, there is a vertical stack of buttons: 'Prepare Return', 'Edit Client Data', 'Add New Client' (highlighted in green), 'Delete Client', 'Client Management', and 'Batch Print'. The main area is a table with columns 'Client Name', 'Type', and 'Number', which is currently empty. At the bottom, there is a 'Client Information' section with a 'Return Status' dropdown. To the right of this section, there are fields for 'Responsibility - Primary: Tangible' and 'Secondary: Federal', and 'FY: F1120'. Below these are fields for 'Due Date:', 'Last Updated:', and 'Last Printed:'. At the very bottom, there are fields for 'Phone:' and 'Fax:'.

3. The client information window will open. This is where you will enter all company/client information.
 - 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 in 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
 - Tickler Information: If you are preparing different types of returns for the client you will check them off below.

Once complete select OK in the bottom right hand corner.

Client Information

Client Type

C-Corporation
 S-Corporation
 Partnership
 Individual
 Fiduciary
 Exempt Organization

Client ID:

Company Information

Corporation Name: EIN:
 Second Name: Fiscal Year End:

Address:

City, State ZIP:

Telephone: ext: Fax:

e-mail:

Transmittal Letter information

Address transmittal letter to:

Transmittal letter salutation: Dear

-----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 type="text" value=""/>
<input type="checkbox"/> Federal Return	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

Example of an Individual Screen

Client Information

Client Type

C-Corporation S-Corporation Partnership
 Individual Fiduciary Exempt Organization

Client ID:

Company Information

	First Name	MI	Last Name	SSN
Taxpayer:	<input type="text" value="Michael"/>	<input type="text" value="A"/>	<input type="text" value="Test"/>	<input type="text" value="123-45-6789"/>
Spouse:	<input type="text" value="Michelle"/>	<input type="text" value="A"/>	<input type="text" value="Test"/>	<input type="text" value="987-65-4321"/>

Address:

City, State ZIP:

Telephone: ext: Fax:

e-mail:

Transmittal Letter information

Address transmittal letter to:

Transmittal letter salutation: Dear

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

Responsibility **Returns Firm is responsible for:**

Primary: Tangible Return Sales Tax Return Fed 941 Fed 940 W-2s
 Annual Report FL UCT-6 1099s Due Date

Secondary: F1120/F1065 /
 Federal Return /