

UNLIMITED PRO PREMIUM DESKTOP

(Powered by TaxSlayer Pro Premium)

2019

QUICK START MANUAL



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2018/2019 Federal Tax Rate Schedules

Single			
2018	2018	2019	2019
Marginal Tax Rate	Taxable Income	Marginal Tax Rate	Taxable Income
10%	\$0—\$9,525	10%	\$0-\$9,700
12%	\$9,526—\$38,700	12%	\$9,701—\$39,475
22%	\$38,701—\$82,500	22%	\$39,476—\$84,200
24%	\$82,501—\$157,500	24%	\$84,201—\$160,725
32%	\$157,501—\$200,000	32%	\$160,726—\$204,100
35%	\$200,001—\$500,000	35%	\$204,101—\$510,300
37%	\$500,001 or more	37%	\$510,301 or more
Head of Household			
2018	2018	2019	2019
Marginal Tax Rate	Taxable Income	Marginal Tax Rate	Taxable Income
10%	\$0—\$13,600	10%	\$0-\$13,850
12%	\$13,601—\$51,800	12%	\$13,851—\$52,850
22%	\$51,801—\$82,500	22%	\$52,851—\$84,200
24%	\$82,501—\$157,500	24%	\$84,201—\$160,700
32%	\$157,500—\$200,000	32%	\$160,701—\$204,100
35%	\$200,001—\$500,000	35%	\$204,101—\$510,300
37%	\$500,001 or more	37%	\$510,301 or more
Married Filing Jointly / Qualifying Widow(er)			
2018	2018	2019	2019
Marginal Tax Rate	Taxable Income	Marginal Tax Rate	Taxable Income
10%	\$0—\$19,050	10%	\$0-\$19,400
12%	\$19,051—\$77,400	12%	\$19,401—\$78,950
22%	\$77,401—\$165,000	22%	\$78,951—\$168,400
24%	\$165,001—\$315,000	24%	\$168,401—\$321,450
32%	\$315,001—\$400,000	32%	\$321,451—\$408,200
35%	\$400,001—\$600,000	35%	\$408,201—\$612,350
37%	\$600,001 or more	37%	\$612,351 or more
Married Filing Separately			
2018	2018	2019	2019
Marginal Tax Rate	Taxable Income	Marginal Tax Rate	Taxable Income
10%	\$0-\$9,525	10%	\$0-\$9,700
12%	\$9,526—\$38,700	12%	\$9,701—\$39,475
22%	\$38,701—\$82,500	22%	\$39,476—\$84,200
24%	\$82,501—\$157,500	24%	\$84,201—\$160,725
32%	\$157,501—\$200,000	32%	\$160,726—\$204,100
35%	\$200,001—\$300,000	35%	\$204,101—\$306,175
37%	\$300,001 or more	37%	\$306,176 or more

Filing Season Changes for 2019 Tax Returns

Form 1040-SR U.S. Tax Return for Seniors – New for 2019 returns, taxpayers aged 65 and over will have the option to file on new Form 1040-SR. The new form has a larger font size making it easier to read.

Redesigned Form 1040 Schedules – For 2019 returns, the six (6) Form 1040 supplemental schedules have been redesigned and condensed into three (3) schedules.

Standard Deduction – The standard deduction has increased slightly for all filing statuses. For 2019, the standard deduction amount will be \$12,200 for Single and Married Filing Separate filing statuses, \$18,350 for Head of Household and \$24,400 for Married Filing Joint and Qualifying Widow(er). The additional standard deduction amount for taxpayers who are age 65 or older and/or blind is \$1,650 for Single and Head of Household and \$1,300 for Married Filing Joint, Married Filing Separate and Qualifying Widow(er). The standard deduction for a dependent filing their own return is \$1,100 or \$350 plus the dependent's earned income, not to exceed the standard deduction amount for their filing status.

Increased Schedule A Medical Expense Threshold – The threshold for medical expenses reverts back to 10% of AGI for 2019 tax returns.

Health Care: Individual Responsibility Payment – The penalty for not having health insurance no longer applies for 2019 federal tax returns. The District of Columbia, Massachusetts and New Jersey have state health insurance mandates and penalties for 2019.

New Qualified Business Income Deduction Forms 8995 and 8995-A – Taxpayers with Qualified Business Income, Qualified Real Estate Investment Trust dividends or qualified income from a Publicly Traded Partnership will use Form 8995 or 8995-A to figure the amount of their QBI deduction.

Increased Income Thresholds for the Qualified Business Income Deduction – For 2019 returns, the income thresholds for the QBI deduction increase to \$321,400 for MFJ taxpayers, \$160,724 for MFS taxpayers and \$160,700 for all other filing statuses.

Alimony Deduction Eliminated – For divorce decrees signed after 12/31/2018 that require alimony payments, the payer will not cannot take a deduction for payments made. In addition, the recipient is not required to claim payments received as income on their return.

Increased 401(k) Contribution Limits – For 2019, 401(k) contribution limits increased to \$19,000 with a \$6,000 catch-up amount for taxpayers over age 50.

Increased IRA Contribution Limits – For 2019, IRA contributions limits increased to \$6,000 with a \$1,000 catch-up amount for taxpayers over age 50.

Increased AMT Exemptions – AMT exemptions have increased for 2019 making fewer taxpayers subject to the tax. For 2019, the AMT exemption amount will be \$71,700 for Single taxpayers, \$111,700 for Married Filing Joint taxpayers, \$55,850 for Married Filing Separate taxpayers and \$25,000 for Estates &

Trusts.

Increased HSA Contribution Limits – For 2019, HSA contribution limits have increased to \$3,500 for taxpayers with self-coverage and \$7,000 for taxpayers with family coverage.

1040EZ

Department of the Treasury—Internal Revenue Service

Income Tax Return for Single Joint Filers With No Dependents

For calendar year 2018

1 **1041** U.S. Income Tax Return for Estates and Trusts

Department of the Treasury—Internal Revenue Service

For calendar year 2018

Information about Form 1041

A Check all that apply:

- ☐ Decedent's estate
- ☐ Simple trust
- ☐ Complex trust
- ☐ Qualified disability trust
- ☐ ESBT (S portion only)
- ☐ Grantor type trust
- ☐ Bankruptcy estate—Ch. 7
- ☐ Bankruptcy estate—Ch. 11
- ☐ Pooled income fund

B Number of Schedules K-1 attached (see instructions) **1**

Check here if the estate or trust is a:

- ☐ 1 Interest income
- ☐ 2 Total ordinary income
- ☐ 3 Qualified dividend income

IRS, State Tax Agencies and Tax Industry Partners Expand Identity Safeguards for 2019 Filing Season

For the fourth year, the IRS, state tax agencies and leaders of the tax industry have partnered to enact a series of defenses against identity and refund fraud. The public-private Security Summit partnership has put an additional safeguard in place for the 2019 filing season to further combat identity theft and tax refund fraud.

UNLIMITED PRO - DESKTOP is committed to ensuring the data and privacy of its valued customers are protected and has put into place additional security features as outlined by the Security Summit Initiative for the 2019 program and UNLIMITED PRO - DESKTOP Account Websites.

IRS EFIN Tracking Number – In order to comply with the IRS and industry partners' efforts to prevent fraud and tax related identity theft, UNLIMITED PRO - DESKTOP must verify the EFIN of each professional customer. The verification process must be completed for each EFIN in order to electronically file returns in 2020.

You will need to obtain your IRS EFIN Tracking Number from your IRS e-Services account and enter it into your UNLIMITED PRO - DESKTOP Account. The number will be either a 16 or 20-digit number and must be entered in the Company Information section of your My Account/Account Hub before electronically filing tax returns this tax season.

Video instructions for obtaining your EFIN tracking number from your IRS e-Services account can be viewed [here](#). Instructions can also be found in the [UNLIMITED PRO - DESKTOP Knowledgebase](#) by searching the keywords tracking number.

Multi Factor Authentication – For the third year, multi factor authentication (MFA) is required for all TaxSlayer cloud-based applications and account websites. MFA is a security system used to control program access. Accessing online TaxSlayer accounts will require two forms of authentication and must be completed for all devices and Internet browsers. One factor of authentication is your account password; the second is a six-digit code sent to your cell phone or e-mail address when you attempt to log in to your My Account/Account Hub. If entered correctly, your identity is considered verified and you will be granted access to the software or account.

The authentication process must be repeated periodically and must be completed per device and per internet browser.

EFIN Validation Code - The IRS has mandated that an EFIN Validation Code be entered in the software. The EFIN Validation Code is a 12-digit code unique to your EFIN. The EFIN Validation Code will be transmitted with each tax return that you e-File. The IRS will use the code to verify that returns transmitted using the EFIN are originating with the owner of the EFIN. Your EFIN Validation code can be found by logging in to your UNLIMITED PRO - DESKTOP My Account/Account Hub and selecting **Account History > Payment History > View**. Below your 2019 Software Purchase Order Number, your EFIN Validation Code will be displayed. You can manually enter the Validation Code or copy and paste it into the space provided in the Firm Information Menu.

ADMIN Account – The 2019 UNLIMITED PRO - DESKTOP program includes a set of predefined security roles. Roles will be used to set permissions for each preparer. The program includes a pre-defined default ADMIN Account Role which is used to manage permissions for preparers as well as manage preparer usernames and passwords. The ADMIN Account Role cannot be edited. **The ADMIN Account username is ADMIN.** During the initial configuration of the program, the you will be prompted to create a password and a security question and answer for the ADMIN account.

Usernames – Each preparer using the software must log into the program using a unique username and password. During the initial configuration of the program, you will be prompted to assign (or pull forward from the prior year's software) a unique username for each preparer entered in the Preparer's Menu.

Passwords – Each preparer associated with your firm must use their assigned username and a strong password to access the tax program. When a preparer logs into the software for the first time with their assigned username, they will be prompted to create a password and a security question and answer.

Passwords are required to expire periodically and must be reset every 180 days.



Technical and Customer Support Options

When it comes to needing answers, UNLIMITED PRO - DESKTOP has you covered. We are committed to providing you

the best technical and customer support in the industry. Our support team is ready and willing to help answer any questions you may have about the operation of the program. In addition to our award-winning support team, we have created several avenues of information that will help you easily find the answers to your questions.

Help Center – The Help Center can be accessed by selecting Help > Help Center from any menu within UNLIMITED PRO - DESKTOP. This is a great resource for locating important phone numbers, pertinent IRS websites, and UNLIMITED PRO - DESKTOP Support resources:

Help Center

X

Team Unlimited's Contact Information:
Tax Affiliate / ERO / Franchise Support
Office: (855) 949-8324
Support Email: support@unlimitedtaxes.com
(Software technical issues, software log-in issues, bank log-in issues, fee issues)

Payroll Support: payroll@unlimitedtaxes.com
(Bank account updates / charges commission form submission issues / payroll questions invoice payments & issues)

Contact Us
Tax Affiliate / ERO / Franchise Sales
Office: (912) 368-2963 or (912) 369-9592
Fax: (912) 877-3544 or (912) 369 9594
Email: info@unlimitedtaxes.com

Tax Refund Bank
TPG (Powered by Santa Barbara TPG)
Contact: (800) 779-72258

IRS Contacts

E- File Help Desk: (866) 255-0654

PTIN Support: (877) 613-7846

Practitioner Assistance: (866) 860-4259

Business Assistance: (800) 829-4933

Social Security Admit: (800) 722-1213

Taxpayer Assistance: (800) 829-1040

Financial Management
Services: (800) 304-3107

IRS Debt: (800) 808-4262

Identity Theft Hotline: (800) 908-4490

Report Tax Fraud: (800) 829-0433

Support Ticket – If you need Technical Support to assist you with setting up your network, troubleshooting a printer, data conversion to a new computer, or help with anything technical related to UNLIMITED PRO - DESKTOP, simply create a Support Ticket for one of our Tier II Technical Support Agents to call you back.

UNLIMITED PRO - DESKTOP Knowledge Base - The Knowledge Base contains hundreds of articles pertaining to the operation and navigation of UNLIMITED PRO - DESKTOP. If you have questions on how to perform certain tasks within the program, you will most likely find your answers here. In addition, the Knowledge Base will give you specific information about a menu you are currently viewing in the program. For example, if you are preparing a Schedule C and you have a question, you can select the Help icon at the top of the screen to view articles specific to the Schedule C.

Instructional Videos – Sometimes it's better to visualize a task; that's why we created our instructional support videos. The support videos can be found under 'Customer Resources > Educational Portal' on the UNLIMITED PRO - DESKTOP website. These videos cover the fundamentals of UNLIMITED PRO - DESKTOP. If you are new to UNLIMITED PRO - DESKTOP or if you have new preparers in your office, the support videos are a great place to start learning more about operating the program.

www.unlimitedtaxes.com

Email Support - If you have a question that is not covered in our available resources, send our customer support staff an email. Use the email link located in the Help Center section of the program. Enter the required information on the email form and describe your question in detail. Your email will be responded to as soon as possible. Our support email address is support@unlimitedtaxes.com.

The TaxBook Web Library – UNLIMITED PRO - DESKTOP has partnered with the best fast-answer tax reference solution – The TaxBook. All current customers of UNLIMITED PRO - DESKTOP are offered The TaxBook at a significant discount off the retail price. With the complexity of federal and state tax laws and the ever-changing tax code, having a reliable resource to help you find the answer to the tough tax questions is critical for your business. You can purchase The TaxBook Web Library by logging in to your My Account/AccountHub and selecting the Partner's Program tile. Once you purchase the program, your UNLIMITED PRO - DESKTOP software will automatically add the TaxBook Library to the toolbar at the top of the screen.

Pro Support Blog – The Pro Support team has launched a blog that can be accessed from the TaxSlayer Pro Website. Check the blog often for the latest news and pertinent information from the IRS, State Agencies and UNLIMITED PRO - DESKTOP. Subscribe to the blog to have all published posts delivered directly to your email inbox.

System Requirements

Recommended System Requirements:

Computer – Processor with a minimum PassMark score of 7500 for the transmitting computer or a minimum score of 5000 for a workstation

Operating System – Windows 8, 8.1, or 10 (Note: Windows 7 and Windows 10S are not supported)

Memory – 8 GB RAM

Disk Space – 1GB per tax year will be sufficient (*Additional disk space may be needed if you have a large client database and utilize the Paper Cut paperless office*)

USB or Flash Drive for backing up data (*USB 3.0 or higher strongly recommended*)

Printer – HP Compatible Laser Printer (*Inkjet printers are not recommended for check printing*)

Screen Resolution – 1024x768

Internet Connection – High Speed Internet Connection – Internet Explorer 11, or the latest version of Chrome or Firefox

Latest Version of Adobe Acrobat Reader

Latest version of Microsoft .NET Framework

Minimum System Requirements:

Computer – Processor with a minimum PassMark score of 3000 for the transmitting computer or a minimum score of 2500 for a workstation

Operating System – Windows 7 with the latest updates (Note: Windows 10 S is not supported)

Memory – 4 GB RAM

Disk Space – 750MB per tax year

Printer – HP Compatible Laser Printer (*Inkjet printers are not recommended for check printing*)

Screen Resolution – 1024x768

Internet Connection - High Speed Internet Connection - Internet Explorer 11, or the latest version of Chrome or Firefox

Latest Version of Adobe Acrobat Reader

Latest version of Microsoft .NET Framework

Requirements for Scanners:

Scanners used with the PaperCut program should be TWAIN and/or WIA compliant.

***Caution – UNLIMITED PRO - DESKTOP should not be installed on any computers running Windows 95, 98, ME, NT, 2000, or XP, Vista, 7 or Windows 10S.** Microsoft has ended all support for these operating systems and therefore the programming languages used to develop UNLIMITED PRO - DESKTOP are no longer compatible with these versions of Windows. In addition, UNLIMITED PRO - DESKTOP is not compatible with Mac computers. Windows 10S is designed to only run Microsoft Store applications; therefore, it cannot run UNLIMITED PRO - DESKTOP desktop.

Installing UNLIMITED PRO - DESKTOP

Step 1: Close all software applications. If you have anti-virus software running, you should temporarily disable it before installing UNLIMITED PRO - DESKTOP. To disable your anti-virus software, right-click on the anti-virus software icon – this will bring up a dialog box to temporarily “Disable” or “Exit” the anti-virus software. Your anti-virus software will reactivate when you restart your computer.

Step 2: Log in to your UNLIMITED PRO - DESKTOP My Account/Account Hub by going to www.unlimitedtaxes.com and selecting ‘Login’ from the main page. Enter your username and password. If prompted to authenticate, follow the onscreen process to access your Account. Select 2019 and click the **DOWNLOAD** button on the Software Options tile to download the program.

Step 3: Depending upon your browser, the download file will either be listed in the top right corner under the ‘Down Arrow’ icon (FireFox), bottom left corner (Chrome), at the bottom highlighted in yellow (Internet Explorer), or in a white box at the bottom of the screen (Edge). Once the download is complete, choose either ‘Open’ or ‘Install’ to begin the installation process.

Step 4: License Agreement – Please read the UNLIMITED PRO - DESKTOP software license agreement. If you agree to the terms set forth in the license agreement, choose “I accept the terms of the license agreement” and click ‘Next’. The license agreement can be printed by selecting the ‘Print’ button. If you do not agree to the terms set forth in the license agreement, select Cancel and do not install the software. Contact UNLIMITED PRO - DESKTOP Sales for further information.

Step 5: Select the Installation Drive – Select the drive that you would like to install the program on. UNLIMITED PRO - DESKTOP should be installed on your local hard drive, usually the ‘C’ drive in most cases. Select ‘Next’ after making your selection. The next menu will give you the option to continue with the installation of UNLIMITED PRO - DESKTOP by selecting ‘Install’.

Step 6: The program will begin the installation process which may take several minutes depending on the speed of your computer. Once the installation is complete, select ‘Finish’.

Step 7: After installation, a 2019 UNLIMITED PRO - DESKTOP icon will be placed on your desktop. Double-click the icon to begin the initial configuration of UNLIMITED PRO - DESKTOP. For step by step instructions on initial configuration of the program, click [here](#).

Initial Configuration

Step 1: Start the Program – Double-click the UNLIMITED PRO - DESKTOP Icon. You will be greeted with a UNLIMITED PRO – DESKTOP message advising you of the information that will be entered during the initial program configuration. (For additional information, click the "UNLIMITED PRO - DESKTOP Quick Start Manual" link.) Press Enter or select **OK**.

A summary of program security information displays next. Read each section carefully. When finished, press Enter or select **OK**.

Step 2: Network Setup What does it mean for UNLIMITED PRO - DESKTOP to be used in a network?

- ✓ If more than one computer in a location will be used to prepare tax returns, and you wish to allow a preparer to work on any return they have permission to access from any computer, you will be using a Network.
- ✓ If only one computer in a location will be preparing tax returns, or you will have more than one computer prepare returns but each computer and preparer will stand alone, creating and editing their own returns, you will NOT be using a Network.

If there is not a previous year's installation of UNLIMITED PRO - DESKTOP on this computer, you will be asked if you will be using a network. Select **YES** or **NO** as appropriate.

If UNLIMITED PRO - DESKTOP is already installed on this computer from the previous tax season, you will be asked if you would like to use the same network configuration as last year.

- ✓ If you are not using a network and didn't use one last year, select **YES**.
- ✓ If you are using a network and want to use the same settings as last year, select **YES**.
- ✓ If your office setup has changed from last year, either a change to using or not using a network, or if the transmitting computer — which is also typically the computer designated as the file server — has changed, select **NO** and refer to the **Network Setup** section below for more information.

Before moving along, you will be presented with the network configuration to confirm the settings chosen. One caveat: If "File Server?" = NO, the "File Server Address" information should not be the same as the "Local Computer Name" and "Local IP Address" information.

If you are using a network, note that if you are installing the program on a computer not designated as the File Server (aka "a Workstation"), many of the following questions will be skipped as the required information will be pulled from the File Server.

Step 3 – Firm Information – At this screen, simply fill in all of the required information.

Tip – When entering the name and address of your firm, do not enter characters such as apostrophes, commas, periods, etc. If you enter any of these characters by mistake, the program will prompt you to remove them before continuing.

The IRS requires that your unique EFIN Validation Code be entered in the software. Your EFIN Validation code can be found by logging in to your **UNLIMITED PRO - DESKTOP Account Hub**:

- ✓ Log in to Account Hub.

- ✓ Click **Account History** in the left side menu.
- ✓ Under **Payment History**, click **View**
- ✓ Note the 12-character code beginning with "7Q" on the line for **this year's** software purchase:

Store Purchase - Order #1xxxxx | Receipt

EFIN validation code 7Qxxxxxxxxxx. You will need to enter this into your 2019 Software.

You can copy the code off the screen and paste it into the space provided, or you can manually key it in.

Once you have finished entering the firm information, select **Exit**.

Step 4: Create the Administrator Account Password

The Administrator account username is ADMIN. The ADMIN account is used to manage firm, ERO, and preparer information as well as preparer security roles. The ADMIN account does not prepare tax returns, and the username cannot be changed, nor can any of its security role or other settings be changed.

You will be prompted to create a password for the ADMIN account. The password must be between 8 and 30 characters in length, and it must contain:

- ✓ at least one uppercase letter,
- ✓ at least one lowercase letter,
- ✓ at least one number, and
- ✓ at least one special character, such as \$, @, !, #, etc.

(NOTE: These are the same password requirements for preparers.) You will also be prompted to create a security question and answer for the ADMIN account. The security question is used in the process of changing the ADMIN password to verify that the user attempting to change the password has permission to do so.

Step 5 – Step 5: Enter/Edit Preparers

If UNLIMITED PRO - DESKTOP 2018 is installed on your computer, you will be prompted with a question asking to *Pull Preparers from Prior Year*. If you would like to pull the preparers forward, select **YES**. Once the preparers have been pulled forward, you can edit the information pertaining to each preparer if needed, delete obsolete preparers, and add new preparers.

NOTE: Each preparer's username, password and assigned security role are pulled forward from the previous year. Any of these settings can be modified from the Preparer Setup Menu.

Adding New Preparers

If you do not pull forward preparers from the prior year, you will be given the option to enter preparers. To enter a preparer:

- ✓ Select **New**
- ✓ Enter a Preparer Code. A unique preparer code must be assigned to each preparer entered. You can use any number from 1 to 999999.
- ✓ Enter the preparer's SSN, PTIN, first name, middle initial, and last name.

- ✓ Enter a username that the preparer will use to log into the program. Each preparer has a unique username. The preparer will create their own password and security question when they log into the program for the first time.

Select **OK** to proceed to the Preparer Edit Menu. The Preparer Edit Menu gives you the option to add or change several other items:

- ✓ Preparer Practitioner PIN (the 5-digit PIN that populates to federal and state e-file signature forms);
- ✓ Preparer Hourly Rate (if you are using hourly billing);
- ✓ Preparer Prep Fee Commission % (if preparers earn a commission based on a return's tax prep fees);
- ✓ The preparer's power of attorney information (if the preparer is an Acceptance Agent);
- ✓ Indicate if the preparer is supervised, in which case their supervisor's information will appear on tax returns rather than the preparer's information;
- ✓ The preparer firm information, if it is different from your firm information;
- ✓ The preparer's security role and specific security settings, as well as clearing their password and security question to be recreated upon their first (or next) login.

Newly added preparers are assigned the default security role "Super User." A Super User has access to all tax returns and all areas of the program except firm, ERO, and preparer Information, and security roles settings. To change the preparer's default security role, select

- ✓ **Preparer Security**
- ✓ **Role**

Step 6 – Bank Setup

The following banks are affiliated with UNLIMITED PRO - DESKTOP:

- ✓ Refundo
- ✓ Santa Barbara TPG.

If you will be offering bank products, we encourage you to complete and submit a bank application in Account Hub as early as possible. For more information about these banks, click **here**.

If you are already approved with one or more banks, the bank(s) should appear in the Banks window. If you do not see your approved bank, please contact UNLIMITED PRO - DESKTOP Sales.

Once the bank has been selected, you will be shown a menu with bank product options such as advances, pre-ack advances, and the use of debit cards. If the bank has approved you for any of the options shown, select the option and when queried select **YES** so the option will be available to present to your client when finalizing their return. NOTE: A disbursement or advance option will not be available in a return if it hasn't been selected here.

Step 7 – Fee Setup Menu – The amounts specified in the Fees Menu are used to calculate the tax return preparation fee that appears on the Client Invoice. If you used UNLIMITED PRO - DESKTOP last year, or you entered fees in the UNLIMITED PRO - DESKTOP demo program, you can pull the fees forward by selecting the **Pull Prior Year Fees** button. To change a fee or to enter a new fee, select the line for the form and enter the fee.

If you charge by the hour, check the **Charge by the Hour** check box in the lower left-hand corner of the screen. Custom Fees and Custom Discounts can also be created from the Fees menu. Select the *Exit* button when you have finished configuring your fees.

Step 8 – Client Letters – You will be prompted to pull from the prior year each customizable client letter. If you made changes to any of the client letters, select **YES** to pull them forward, preserving the changes. Otherwise, select **NO** to use the default client letters.

Step 9 – Path Menu – The settings defined within the Path Menu tell the program where prior year data is located and the path to a secondary backup drive.

Prior Year - The prior year path will only need to be changed in unusual situations, and if it is incorrectly specified you will not be able to pull prior year client data forward into the current year's return. If your prior year data is stored on a drive other than the drive the current UNLIMITED PRO - DESKTOP program is installed on, the Prior Path location will need to be changed. To change the location, select **Prior Path** and enter the absolute DOS path, i.e., the drive letter followed by a colon plus the directory location on the drive with each directory separated by a backslash, e.g., E:\TAXSLAYER\2019NET\. If you need assistance, please call UNLIMITED PRO - DESKTOP Technical Support.

Secondary Backup Path - A secondary backup can be specified here if desired. This backup is generally to a removable drive, such as a thumb drive or external hard drive. (Secondary backup to a cloud location is not supported.) To set up a secondary backup path for your tax returns, do the following:

- ✓ Plug the drive into the computer
- ✓ Select Secondary Backup Path and select the drive letter for the drive.

Two caveats about the secondary backup drive if you have one specified here:

- ✓ The drive must be plugged into the computer when working on returns. If it is unplugged, you will receive an error message when exiting a return that the return could not be saved to it.
- ✓ Only return data is backed up. PDFs of the return as well as supporting documents, such as driver's license images, aren't saved.

Step 10 – MACRO Setup – A macro, by definition, is a shortcut to a task you do repeatedly. In TaxSlayer Pro, macros reduce the number of keystrokes by allowing you to select an entity from a list or to complete name and address fields simply by entering the EIN. UNLIMITED PRO - DESKTOP maintains six macros:

- ✓ W-2 employers and 1099 payers
- ✓ K-1 entities
- ✓ Child Care Providers
- ✓ Interest and dividend payers
- ✓ Charitable organizations
- ✓ Banks

To pull forward prior year macros, or enter new ones, select **YES** when queried. You will be asked about pulling forward each of the six macros and will be given the opportunity to add to or edit each list if desired. Select **Exit** at the bottom of each list to proceed to the next macro list. All of these lists can be revisited after the program has been installed.

Step 11 – UNLIMITED PRO - DESKTOP Premium – If you purchased UNLIMITED PRO - DESKTOP Premium, enter the activation code.

The activation code can be found by logging in to your **UNLIMITED PRO - DESKTOP Account Hub**:

- ✓ Once you have logged in, click **Pro Premium** in the left side menu.
- ✓ Copy and paste the 9-digit activation code into the program, or type it in.

The program will guide you through the process of configuring premium features. If prompted to use prior year settings for PaperCut e-mail, select **YES**. Otherwise enter your email address when prompted. The email method will default to UNLIMITED PRO - DESKTOP and should not be changed unless required for your particular office network. For a description of other email options, visit the UNLIMITED PRO - DESKTOP Knowledgebase and search for keywords “Premium Options.”

Several other premium options can be configured from the Premium Configuration Menu. Visit the UNLIMITED PRO - DESKTOP Knowledgebase and search for keywords “Premium Options” for detailed information on all the Premium features. If you would like to upgrade to UNLIMITED PRO - DESKTOP Premium and take advantage of the Taxes to Go Mobile App, online client status, text messaging, and PaperCut, contact UNLIMITED PRO - DESKTOP Sales at 1.888.420.1040.

NOTE: If you upgrade to UNLIMITED PRO - DESKTOP Premium subsequent to installing the program, activate it within UNLIMITED PRO - DESKTOP by selecting from the Main Menu:

- ✓ **Configuration**
- ✓ **Configure Premium Options** and enter the activation code.

To activate Paper Cut, change “Use Paper Cut Paperless Office Option” to **YES**. To activate the Text Messaging feature, change “Send Text Message to Clients” to **YES**.

Step 12: Exit Configuration

Before exiting the final window headed "Software Installed!", check the date, time, and time zone on your computer to ensure they are correct. If the date and time are not correct, the program will not be able to communicate with our server. Adjust the date by clicking the time and date display in the Windows taskbar, typically at the bottom right-hand corner of the screen.

Network Setup

Setting up the UNLIMITED PRO - DESKTOP network takes only a few minutes if your office network is already working properly.

IMPORTANT – If your office network is not set up or is not functioning properly, our UNLIMITED PRO - DESKTOP technicians will not be able to assist you in setting up the UNLIMITED PRO - DESKTOP network. Contact your local network technician for assistance.

Here are a few items to consider when setting up the UNLIMITED PRO - DESKTOP network:

- ✓ The UNLIMITED PRO - DESKTOP Network operates in a peer-to-peer environment. This means that the TaxSlayer Pro program must be installed on each computer in your office. The program cannot be installed on a central file server and distributed across the network.
- ✓ Make sure that File and Printer Sharing is enabled within your anti-virus program. Some newer anti-virus programs will block file sharing on networks.

If you are not familiar with the information listed above or are encountering problems, we suggest contacting a local network or computer technician to assist with the network setup.

In UNLIMITED PRO - DESKTOP, only one computer is designated as the File Server and only one computer should be designated as the Transmitting Computer. The simplest and easiest to manage setup is for the same computer to handle both functions.

During initial configuration of the program, you will be asked if this computer is the File Server. Select **YES** or **NO** as appropriate. You will then be asked if this is the Transmitting Computer. Select **YES** or **NO** as appropriate.

To return to the network settings menu after initial configuration, from the Main Menu of the TaxSlayer Pro select

- ✓ **Configuration**
- ✓ **System/Network Configuration Menu**

Logging In

ADMIN Account – The Administrator account username is ADMIN. The ADMIN account is used to manage firm, ERO, and preparer information as well as preparer security roles. The ADMIN account does not prepare tax returns, and the username cannot be changed, nor can any of its security role or other settings be changed.

During the initial configuration of the program, you are prompted to create a password and a security question and answer for the ADMIN account. Store this information securely as it may be necessary to log in as ADMIN at a subsequent point in time.

Usernames – Each preparer using the software logs into the program using a unique username and a password. During the initial configuration of the program, you will be prompted to assign (or pull forward from the prior year's software) a username for each preparer entered in the Preparer's Menu.

Passwords – Each preparer associated with your firm must use their assigned username and a strong password to access the tax program. A preparer's password and security question and answer aren't

assigned in the Preparer Security menu. Rather, when a preparer logs into the software for the first time with their assigned username, they will be prompted at that time to create a password and a security question and answer.

Passwords will expire and need to be reset every 180 days.

NOTE: If you are not prompted to log in when you start the program, the program is experiencing a problem and we recommend that you contact support immediately.

Security Roles

The UNLIMITED PRO - DESKTOP program includes a set of predefined security roles. Roles are used to set permissions for each preparer. Newly added preparers are defaulted to the security role "Super User." A Super User has access to all tax returns and all areas of the program except firm, ERO, and preparer information, and the security roles settings. To change a preparer's security role, from the Main Menu of UNLIMITED PRO - DESKTOP select:

- ✓ **Configuration**
- ✓ **Firm/ERO/Preparer Setup**
- ✓ **Preparer(s) Menu**
- ✓ Select Preparer
- ✓ **Preparer Security**
- ✓ **Role**
- ✓ Choose the desired Role



UNLIMITED PRO - DESKTOP Main Menu

Navigating through the UNLIMITED PRO - DESKTOP Main Menu is relatively easy. The center of the screen displays your list of clients. The Quick Menu options to the right of the client list take you directly to the most common tasks performed within UNLIMITED PRO - DESKTOP. The ten Quick Menu options are described below:

The screenshot shows the main menu of the UNLIMITED PRO - DESKTOP software. At the top, there is a search bar and a button labeled "Edit or start a new return". Below this is a table with columns: SSN, First Name, Last Name, Suf, Spouse SSN, Spouse First, and Telephone. The first row of data shows "400-00-0505", "BOB", "TESTING", and "(803) 65". Below the table is a scroll bar. To the right of the table is a "Quick Menu" list with 10 options: 1. Start New Return, 2. E-file, 3. Print, 4. Business, 5. Client Status, 6. View Returns, 7. Configuration, 8. Utilities, 9. Reports, 10. Updates. Below the Quick Menu is an "Enter Option" input field. At the bottom left, there is a checkbox labeled "Mask SSN" and a button labeled "Clear Filters". At the bottom right, it says "Total: 1".

SSN	First Name	Last Name	Suf	Spouse SSN	Spouse First	Telephone
400-00-0505	BOB	TESTING				(803) 65

Right click on a client row to access return notes.

☐ Mask SSN

Clear Filters Total: 1

Quick Menu

1. Start New Return
2. E-file
3. Print
4. Business
5. Client Status
6. View Returns
7. Configuration
8. Utilities
9. Reports
10. Updates

Enter Option

1: Start New Return – Start a new tax return or select an existing return to edit.

2: E-File – Transmit tax returns, receive acknowledgements, and print bank checks.

3: Print – Print copies of Individual Returns and Individual Extensions. Print organizers for the current year or a prior year. Print blank forms.

4: Business – Start a new business return or edit an existing business return. E-File Business Returns and Extensions, Receive Business Acknowledgements, Print Business Returns and Organizers.

5: Client Status – Check the current e-File and refund status for your clients. Information in the Client Status module includes when the return was accepted or rejected, bank approval status, check status, fees paid, and basic return information.

6: View Returns – View client returns. Select a client and pick a form to view from the list of completed forms and schedules.

7: Configuration – Customize UNLIMITED PRO - DESKTOP to include print setup and preferred settings, network settings, firm and preparer information, program security, fee setup, bank setup, etc. To view a list of all configuration settings, visit the UNLIMITED PRO - DESKTOP Knowledgebase and search for keywords *"Configuration Menu"*.

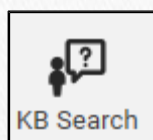
8: Utilities – Items in the Utilities Menu include the backup and recall returns utility, Quick MFJ Calculator, delete a tax return, and ScreenConnect. To view a list of all items contained in the Utilities Menu, visit the UNLIMITED PRO - DESKTOP Knowledgebase and search for keywords “*Utilities Menu*”.

9: Reports – Keep track of the performance of your office by running various types of reports such as Master Report, Client Reports, and Returns / Extensions Not Accepted Reports. To view descriptions for all reports contained in the Reports Menu, visit the UNLIMITED PRO - DESKTOP Knowledgebase and search for keyword “*Reports*”.

10: Updates – Download and install updates to the program. If you have configured automatic updates in the Update Manager, your selected updates will download and install automatically when you open the program for the first time each day. Updates and state programs can also be downloaded manually through the Updates Menu.

Toolbar Icons

The icons located at the top of each screen are called the toolbar icons. Below is a brief description of each icon and the benefits they provide.

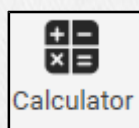


Knowledge Base – The knowledge base icon is a direct link to the UNLIMITED PRO - DESKTOP database

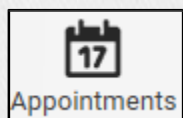
of program related articles. The knowledge base is searchable using key words and phrases. The knowledge base can also be accessed from anywhere in the program by pressing the F1 key on your keyboard.



The Tax Book – We have partnered with the best tax resource site available, The Tax Book. You can purchase a discounted online version of The Tax Book by logging in to your My Account/AccountHub. After purchasing, you will have access to The Tax Book within the UNLIMITED PRO - DESKTOP software. The Tax Book can also be accessed by pressing the F3 key on your keyboard from within the program.



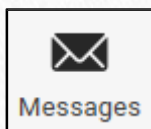
Calculator – At any time you can select the calculator icon to display a calculator which includes a tape like feature to keep track of your entries. The calculator can also be accessed by pressing the F6 key on your keyboard from within the program.



Appointments – The Appointment Calendar allows you to enter new appointments, create notes, and print reports to view a breakdown of the day's events.



Client Status – Check on the e-File and refund status of a client's return no matter where you are in the program.

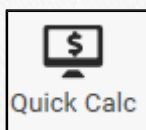


Messages – Throughout tax season, UNLIMITED PRO - DESKTOP will release messages to keep you

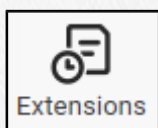
informed. When a red exclamation point appears over the icon, you have a new message from TaxSlayer Pro to read. Click the icon to read your messages.



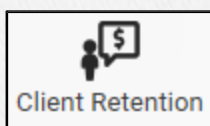
Publications – We have compiled the most widely used IRS Publications, Instructions and Fill-In Forms and made them readily available to you through the Publications icon.



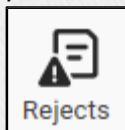
Quick Calc – The Quick Calc is a refund calculator designed to give your customer an estimate of his or her expected refund.



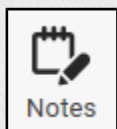
Extensions – Create a new individual extension or edit an existing extension.



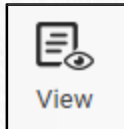
Client Retention – Client Retention can be used to generate two types of reports: A Prior Year Client List and a Call/Thank You List. If you used UNLIMITED PRO - DESKTOP in 2018, you can generate a report of all clients that have not returned for 2019. The prior year client data is accessed by preparer number and can be password protected to prevent unauthorized access. A *Call / Thank You* list can be generated to show a list of clients who have had their returns completed for the current year.



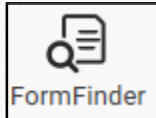
Rejected Returns – Any returns that come back from the IRS or state as rejected will be listed in the *Rejects Utility*. Double-click on a client in the list to open the return. The list can be sorted based on federal or state rejects and reject codes.



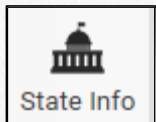
Notes – Selecting the notes icon from inside a client's tax return will allow you to enter notes specific for the client. The notes can be marked to be displayed when entering the tax return and/or when exiting the tax return. Return notes will also pull forward in future year returns.



View Form – The View Form feature allows you to review the form from the current menu. This feature is available for federal forms and schedules as well as state forms and schedules.



Form Finder – The Form Finder icon will appear in any state return to help you locate a particular form in the state return you are preparing. The Form Finder will allow you to search for a form by name or by form number.

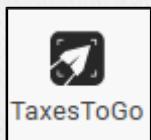


State Tax Info – Within each state program is a State Tax Info icon. The icon links to information that is relevant to the state you are working in. Information includes contact information, a Where's My Refund link, state forms and instructions and mailing addresses.

UNLIMITED PRO - DESKTOP Premium Icons:



The **PaperCut** icon is only visible for UNLIMITED PRO - DESKTOP Premium users. Paper Cut stores PDF copies of all tax returns, management reports, and e-File reports that have been printed to PDF. The Email tax returns option is also available through the PaperCut Icon.



Taxes to Go Queued App Returns – Clients who have uploaded their tax return information from the Taxes to Go Mobile App will appear in the queued app returns menu until the return is started.



Taxes to Go Mobile App Chat – The Taxes to Go Chat feature allows the tax preparer and mobile app clients to send messages back and forth.

Creating a Tax Return

Creating a tax return in UNLIMITED PRO - DESKTOP is simple. Follow the steps below to begin a basic tax return.

Step 1 – Select *Tax Returns* from the Main Menu of UNLIMITED PRO - DESKTOP. After reviewing the IRC 7216 regulations, select Yes to print the consent form. (Note: If you do not offer bank products, a consent form will not print).

Step 2 – Enter the SSN of the Primary taxpayer and press the Enter key. A question will appear asking if you want to create a new return; select Yes.

Step 3 – Select the appropriate filing status. Note – If this is a 1040NR return, you must make that selection from this menu.

Step 4 – Personal Information Entry Menu – Enter the taxpayer's personal information. You will be prompted to enter the taxpayer's SSN for a second time to check for accuracy.

Step 5 – After entering personal information, the program takes you to a review menu to look over the personal information that you entered. From this menu you can mark that the taxpayer is blind, deceased, or a student. The taxpayer's email address, dependent on another return designation and military information is also entered in this menu.

Step 6 – Dependent Information – If the return you are preparing includes dependents, select 'Yes' to begin entering the dependent information. Select New and enter the personal information of the first dependent. Select OK once finished. If the taxpayer paid qualifying dependent care expenses, enter the amount when prompted. Review the dependent information on the screen and make any necessary changes. To enter additional dependents, select New and enter the information for the next dependent.

Note – If you entered an amount paid for qualifying dependent care expenses, you will be prompted to enter the childcare provider information. If you choose not to enter the provider information now, the program will remind you later that this information has not been entered.

Step 7 – Health Care Coverage – The program will prompt you to answer questions about the taxpayer's health care coverage for the year.

Step 8 – Next you will be prompted to enter W-2s. To enter a W-2 select New. Enter the information from the taxpayer's W-2 into the W-2 menu. Once complete, press the Enter key to exit. Select 'New' to enter a second W-2 or select Exit to continue. When you exit the W-2 menu, you will be directed to the Income Menu. If the taxpayer has additional forms of income, select the applicable menu and enter the required information.

Step 9 – When all items of income have been entered, exit the menu. If the taxpayer is eligible for EIC, the program will prompt you to answer due diligence questions from the EIC checklist. If the questions are answered correctly, and the taxpayer qualifies, the program will calculate EIC.

Step 10 – After completing the EIC checklist, you will be directed to the 1040 Main Menu. At the 1040 Main Menu, you have multiple ways to navigate through the tax return. You can select one of the

menus from the left-hand side of the screen to jump to a particular category, you can use the Form Finder to locate a certain form, or you can click directly on to the 1040 menu.

Step 11 – When all entries have been made on the tax return, you can mark the return for electronic filing. For details on electronic filing, read the electronic filing section of the Quick Reference Guide following Step 13. To exit the return without marking the return for electronic filing, press enter or select the Exit button.

Step 12 – The Receipt Menu displays an overview of the calculated fees. You have the option to view and edit the invoice, enter a payment, and show the client a breakdown of their estimated first check if the client applied for a bank product. Select Exit. You will be asked *Are You Ready to Mark the Return Completed and Ready for Transmission?* Answer **No** if the return is not complete. Answer **Yes** to mark the return complete and exit back to the UNLIMITED PRO - DESKTOP Main Menu.

Electronic Filing

Before a return can be electronically filed, you must first mark it for electronic filing. From the main 1040 screen of the return, select *Mark Return Electronic*. Select the type of return to e-file by choosing a refund disbursement method. The client can choose to receive their refund by Direct Deposit, Electronic Mailed Check, or Bank Product. If there is an amount due, you can enter an electronic payment (direct debit).

After selecting the type of return, you will be directed to the Practitioner PIN Menu. The Practitioner PIN Menu will generate Form 8879. Note - The ERO must keep Form 8879 on file for 3 years; do not mail the Form to the IRS. The taxpayer's PIN, spouse's PIN and the ERO's PIN will automatically be generated. You must verify the Signature Date. Once all information has been entered, exit the Practitioner PIN Menu. You will be given the option to print Form 8879. You **MUST** have the taxpayer (and if applicable) have the spouse sign Form 8879 prior to electronically filing the tax return.

Review the information on the E-File Menu. If all entries are correct, exit to the client's 1040 menu and then exit to the Receipt Menu. Verify the information on the Receipt Menu and then exit the return. You will be asked *Are You Ready to Mark the Return as Complete and Ready for Transmission?* Select **Yes** and the return will be sent to the E-File Transmission Table.

E-Filing a Tax Return

To e-File your returns through UNLIMITED PRO - DESKTOP, follow the steps below:

Step 1 – From the Main Menu of UNLIMITED PRO - DESKTOP Select *E-File*.

Step 2 – Select *Transmit Electronic Return(s)*. This will display the Transmission Table. Returns that have been marked for electronic filing and marked “Ready to Transmit” are automatically pulled onto the Transmission Table.

The screenshot shows a software window titled "UNLIMITED PRO DESKTOP SUPPORT" with a close button (X) in the top right corner. Below the title bar, there is a status bar that reads "Number of Returns to Send: 1" and "State Only E-Filing will be enabled on 1/22/2020". The main area contains a table with the following columns: SSN, First Name, Last Name, Federal Ty, S, S, State Only, Prepa, EFIN, Fees, EFile, and Sent. The first row of data shows: 400-00-0505, DEMO, RETURN, Dir Deposit, an unchecked checkbox, 1, 121121, 0.00, and 0. Below the table, there is a row of buttons: Add Client, Clear Filters, Print, Export, Remove Client, Cancel, and Transmit.

SSN	First Name	Last Name	Federal Ty	S	S	State Only	Prepa	EFIN	Fees	EFile	Sent
400-00-0505	DEMO	RETURN	Dir Deposit	☐			1	121121	0.00		0

Buttons: Add Client, Clear Filters, Print, Export, Remove Client, Cancel, Transmit

The buttons at the bottom of the transmission table are defined below:

Add Client – This function allows you to add returns to the transmission table. As an example, when you have corrected an IRS reject on a return you must manually add the return to the transmission table to resubmit the return. Select ‘Add Client’ and then enter the taxpayer’s SSN. If you receive a message stating, “The Client Was Not Found”, the return has not been marked for electronic filing or the return has not been marked complete.

Clear Filters – If any filters have been applied to the list of clients in the transmission table, use this function to remove them.

Print – This function allows you to print the list of clients shown in the Transmission Table. When you click Print, you will be given a list of the available columns to print. Select the columns you wish to be displayed on your report and click OK.

Export – This function allows you to export the list of clients shown in the Transmission Table to a comma-separated values (CSV) file. This file may then be opened in other programs such as Excel. When you click Export, you will be given a list of the available columns to export. Select the columns to be included in the file and click OK.

Remove Client – This function allows you to remove returns from the transmission table. Deleting the return from the Transmission Table will prevent the return from being e-Filed at this time.

Cancel – To abort the transmission process, select the cancel button.

Transmit – When you are satisfied with the transmission table, select ‘Transmit’ to proceed with e-filing the return(s).

Step 3 – After selecting *Transmit* the following screen will ask, “Do You Want a Printed List of Clients to Send?” We recommend that you always print the list so you will know what will be transmitted and when the transmission occurred. You will be asked if the printed information is correct. If it is correct, select **Yes**. If you select **No**, you will be returned to the E-File Main Menu.

Step 4 – The *Transmit/Receive from UNLIMITED PRO - DESKTOP* window will be displayed. Click the *Connect* button. In the box, you will see a description of each action during the transmission process. When prompted, click on the *Exit* button.

Step 5 –From the E-File Main Menu, select *Print Reports*. Each report ready to print will be marked with an arrow next to the menu number. At a minimum, you will have a Transmission Confirmation Report.

This report will list the last name and SSN of the taxpayers who were transmitted. Keep this with your List of Clients to Send report.

****IMPORTANT – The List of Clients to Send only shows that you created a Transmission Table. It does not mean you actually made a transmission. If you DO NOT receive a Transmission Confirmation Report, the returns DID NOT get sent to UNLIMITED PRO - DESKTOP.***

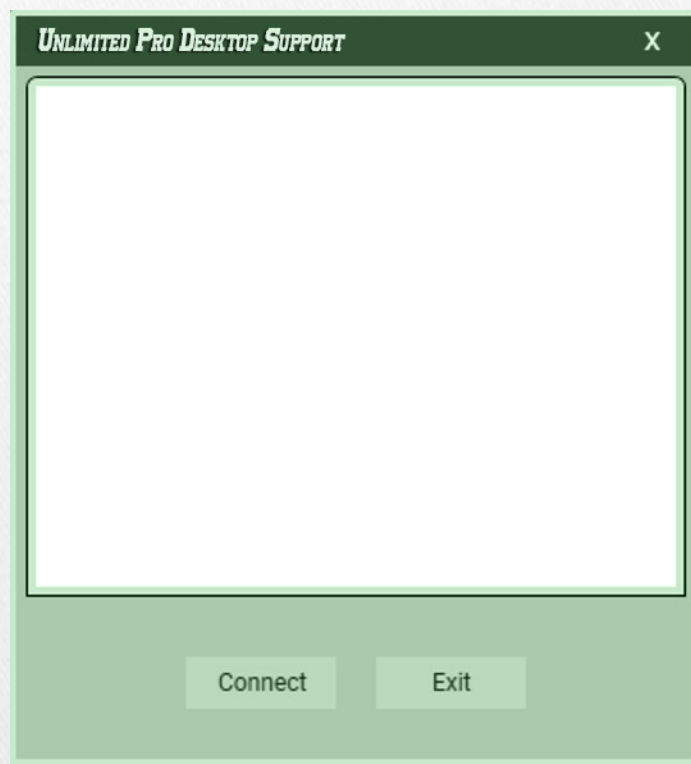
The returns will be processed and acknowledged by the IRS within 24 hours. The IRS does reserve the right to wait 48 hours before giving an acknowledgement for any return.

Receiving Acknowledgements

The IRS and states release acknowledgements continuously throughout the day. You will automatically receive any available acknowledgements each time you transmit tax returns. To manually check for acknowledgements, follow the steps below:

Step 1 – From the Transmitting computer, select *E-File*. From the E-File Main Menu, choose *Receive Acknowledgements Only*.

Step 2 – The UNLIMITED PRO - DESKTOP Communications screen will be displayed. Click the Connect button. In the box, you will see a description of each action during the retrieval process. When prompted, click on the Exit button.



Step 3 –From the E-File Main Menu, select *Print Reports*. Each report available to print will be marked with an arrow next to the menu number. The IRS and State Acknowledgement report will display an acceptance or rejection code. In most cases, an explanation of the reject code will also be displayed.

Printing a Tax return

There are two ways to print a return in UNLIMITED PRO - DESKTOP. Returns can be printed from the Print Menu and the View Results Menu.

Print Menu – From the Main Menu of UNLIMITED PRO - DESKTOP select *Print Returns* and select *Print Individual Returns*. A list of your clients will appear in a pick-list. Enter the SSN of the tax return you would like to print or select the client from the list. A box will appear with a list of print options. Choose the print option you prefer and select OK. Once you have made your print selections, press the *Print Selected* button. The return will be sent to your printer.

Selected	SSN	First Name	Last Name	Suffix	Spouse	Complete
☐	400-00-0505	DEMO	RETURN			☒

Total: 1

View Results – From inside the tax return, select *View Results*. Select *Print Return*. A box will appear with a list of print options. Choose the print option you prefer and select OK. The return will be sent to your printer. You can also print a single form from the View Results menu by highlighting the form and selecting OK. The form will display on the screen. To print the form, select *File* and then *Print*.

Program Updates

UNLIMITED PRO - DESKTOP has a built-in utility to download and install program updates as they are released throughout the year. When the program is opened for the first time each day, the update utility will check for any available updates and automatically download and install the updates for you. If you need to manually download and install an update during the day, follow the steps below.

To manually download and install updates:

Step 1 – Select Updates from the Main Menu of UNLIMITED PRO - DESKTOP.

Step 2 – Select *Download / Install Updates*.

There are three colors displayed on the page:

Red – A new update is ready to download

Gray – Update has been selected for download

White – The latest update is installed on your computer

Individual Business Transfer

Federal Individual

Individual1040 11/05

Miscellaneous

No Updates Available

State Individual

AL 11/05	ID 11/05	MS 11/05	PA 11/05
AR 11/05	IL 11/05	MT 11/05	RI 11/05
AZ 11/05	IN 11/05	NC 11/05	SC 11/05
CA 11/05	KS 11/05	ND 11/05	TN 11/05
CO 11/05	KY 11/05	NE 11/05	UT 11/05
CT 11/05	LA 11/05	NH 11/05	VA 11/05
DC 11/05	MA 11/05	NJ 11/05	VT 11/05
DE 11/05	MD 11/05	NM 11/05	WI 11/05
FL 11/05	ME 11/05	NY 11/05	WV 11/05
GA 11/05	MI 11/05	OH 11/05	
HI 11/05	MN 11/05	OK 11/05	
IA 11/05	MO 11/05	OR 11/05	

Hover Mouse Over an Update to View Version Number

☐ Update necessary.
☒ Up to date.

☐ Check All Needed

Download Exit

Step 3 – Select each update you want to download and click the Download button. A status window will appear displaying the progress of the download. This may take a few minutes depending on the speed of your Internet connection. When all the updates have downloaded, the program will proceed to install each update. Once the installation is complete and each update turns white, the update process is complete.

If you wish to install ALL available updates, click the check box 'Check All Needed' and then click the Download button.

Installing Updates Across a Network

Once you download an update on the transmitting computer, the workstations will be able to use the downloaded file. The available updates from the Transmitting Computer will be automatically installed on the workstations the first time the program is opened on the workstation each day.

To manually update a workstation, select Updates. Updates will begin to sync between the workstation and transmitting computer.

Tax Office Checklists

IRS

- ✓ Apply for new EFIN(s)* (if applicable, i.e. Adding additional locations, new to the tax preparation business)
- ✓ Obtain or Renew PTIN – This is an IRS annual requirement
- ✓ Obtain IRS Tracking Number from IRS e-Services

*If you are changing your EFIN, please fax the new EFIN letter from the IRS to (877) 328-8544. Also, please follow up with a quick email to info@unlimitedtaxes.com, informing us of the change. Make sure to include the former EFIN, the new EFIN, and a reason for the change.

State

Familiarize yourself with:

- ✓ State e-Filing mandates
- ✓ Your state's requirements for bank products
- ✓ Requirements for filing extensions
- ✓ Requirements for filing business returns
- ✓ State Tax Law Changes for 2019

UNLIMITED PRO - DESKTOP Software

- ✓ Purchase UNLIMITED PRO - DESKTOP Software for 2019
- ✓ Update My Account/Account Hub at <http://www.unlimitedtaxes.com>
- ✓ Contact Sales to complete conversion agreement (1st year customers only)
- ✓ Contact UNLIMITED PRO - DESKTOP technical support to convert prior year data (1st year customers only)
- ✓ Install UNLIMITED PRO - DESKTOP 2019 on all computers (available for download in mid to late November)
- ✓ Purchase the [TaxBook Web Library](#) for use with the 2019 UNLIMITED PRO - DESKTOP software. Call TaxSlayer Pro Sales to get a discounted rate.

My Account/Account Hub

- ✓ Complete Bank Application
- ✓ Order Check/Card Stock from your bank
- ✓ Familiarize yourself with all bank products and related bank fees
- ✓ Complete Bank Compliance Requirement (varies by bank)

Office and Computer Equipment

- ✓ Create a backup – Copy the entire TaxSlayer folder to a removable storage device
 - ✓ A program backup utility is available in the Utilities Menu
- ✓ Review [Recommended System Requirements](#) for UNLIMITED PRO - DESKTOP 2019 Software
- ✓ Upgrade computers and software as needed:
 - ✓ Contact UNLIMITED PRO - DESKTOP for assistance migrating data to any new computers.
- ✓ Perform routine maintenance on computers (this should be done by an IT professional) to include:
 - ✓ Defragment all hard drives
 - ✓ Remove old / unwanted programs
 - ✓ Clean up start up programs
- ✓ Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers
- ✓ Test printers for use with UNLIMITED PRO - DESKTOP
- ✓ Order office supplies to include paper and toner
- ✓ Update / install Adobe Reader on all computers (Adobe Reader DC is recommended)
- ✓ Test [document scanners](#), [barcode scanners](#) and [signature pads](#) for use with UNLIMITED PRO - DESKTOP
- ✓ Test Internet Connection. A Cable or DSL modem is required to run UNLIMITED PRO - DESKTOP. Wireless connections are not recommended.
- ✓ Download and install updates for prior year programs

For network users:

* Your office network should be set up PRIOR to downloading the software. This should be completed by your local IT Technician/Professional.

- ✓ Hardwire all computers to the network to ensure stable and secure connection
- ✓ Contact UNLIMITED PRO - DESKTOP Technical Support for assistance with setting up your software on your network. You do not have to wait for your 2019 software to get prior year UNLIMITED PRO - DESKTOP programs installed and networked
- ✓ Test network printers for use with UNLIMITED PRO - DESKTOP

For additional information, visit the [UNLIMITED PRO - DESKTOP Knowledgebase](#) and search for the keyword 'Network'.

IRS

- ✓ Familiarize yourself with tax law changes
- ✓ Review current phase out limits
- ✓ Know the EITC Compliance Requirements
- ✓ Review Tax Implications of the Tax Cuts and Jobs Act

Bank

- ✓ Contact Bank to check on Bank Approval
- ✓ Follow up on Check/Card Stock order from your bank
- ✓ Configure your bank product provider in UNLIMITED PRO - DESKTOP
- ✓ Print a Test Check, Align Printer if necessary
 - ✓ This year all banks will print checks at their respective web sites

UNLIMITED PRO - DESKTOP Software

- ✓ Configure UNLIMITED PRO - DESKTOP software
- ✓ Review fee structure in the Fee Setup Menu
- ✓ Configure Preparer Security
- ✓ Configure Premium Options – Premium Package Only
 - ✓ PaperCut Paperless Office
 - ✓ Text Messaging
 - ✓ Secure Email configuration
- ✓ Explore the Knowledgebase and the Tax Book
- ✓ Train employees to navigate/use UNLIMITED PRO - DESKTOP Software
- ✓ Create practice returns
 - ✓ Transmit practice returns to ensure your computer is communicating with the UNLIMITED PRO server

Clients

- ✓ Prepare and mail organizers for prior year clients
- ✓ Begin preseason scheduling
- ✓ Implement your Marketing Strategy

Office and Computer Equipment

- ✓ Renew subscriptions to anti-virus/firewall software.
 - ✓ Exclusions for UNLIMITED PRO - DESKTOP may need to be set.
- ✓ Run Windows Updates to ensure all operating system security updates and service packs are installed on all computers.
- ✓ Train employees on computer policies and equipment use
- ✓ Test document scanners, barcode scanners and signature pads for use with UNLIMITED PRO – DESKTOP (Premium Only)

Thank you for purchasing UNLIMITED PRO - DESKTOP!

If you need further assistance in setting up UNLIMITED PRO - DESKTOP or you have additional questions, check out our Online Knowledge Base at www.unlimitedtaxes.com. Or contact UNLIMITED PRO - DESKTOP Support at (855) 949- 8324. Emails can be sent to support@unlimitedtaxes.com

