# *IntelliForms*

## QuickStart Guide

**2009**

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# INTRODUCTION

Welcome to the world of *IntelliForms*™, the most current, comprehensive and easy-to-use solution for interactive forms available to tax professionals today.

*IntelliForms* is CCH's new interactive forms product. It provides the forms you need, when and where you need them. Similar to CCH's *perform plus III* and ATX's *ZillionForms*, *IntelliForms* is a desk top application that contains tens of thousands of interactive forms.

The following are just a few of the features of *IntelliForms.*

- Intuitive and easy to use: *IntelliForms* is easy to learn and use with its simple, interface. *IntelliForms* always opens to the **Blank Forms manager** where you may open a blank form, add a new form for a client, print a blank form, or open the instructions to a form.
- Easy form searching: Use either (or both) Filters and Find to locate the form you need in the **Blank Forms manager**. The search begins to work as soon as you start typing.
- Tabs for easy organization of forms: *IntelliForms* provides several different tabs to organize your forms. The **Blank Forms manager** lists all the forms available in your subscription. The **Client Forms manager** lists all your saved forms—organized by client. The **Profiles manager** stores your client profiles.
- Client organized: *IntelliForms* organizes your data by client, the same way you approach your workflow. All client forms for a single year are stored together and can be accessed easily from the **Client Forms** tab.
- Real time updates: *IntelliForms* checks for the newest version of a form each time you open a form. You never have to worry that you are working with an out-of-date form.
- Archives: *IntelliForms* includes interactive versions of forms for 2005 to the present. Also included as part of your *IntelliForms* subscription is access to an online library of forms in PDF format going back to 1998.
- Links to *Tax Prep Partner*: *IntelliForms* includes links directly from certain commonly used Federal forms to explanatory, compliance-focused research content related to the active field.

Thank you for choosing *IntelliForms*™!

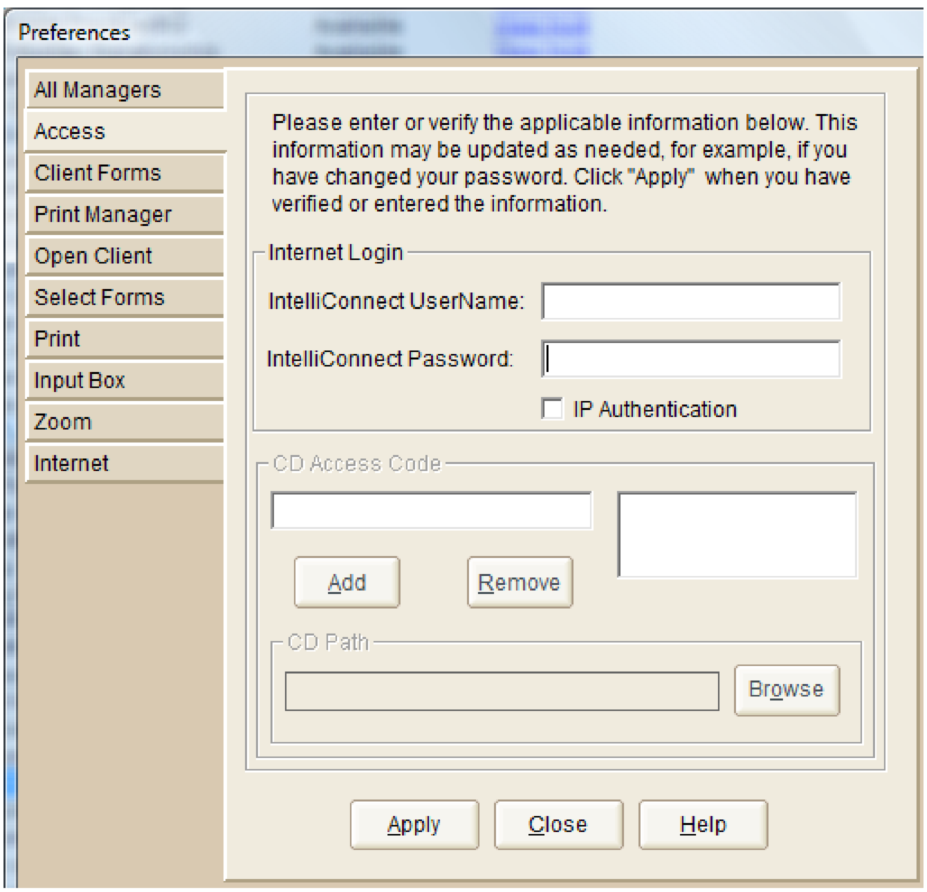
# I. Getting Started – First Time Use

All you need to get started is to install the *IntelliForms* software from *IntelliConnect*, by clicking the **Install** button for a standalone application or the **Download** button for the network installation software.

Once *IntelliForms* is downloaded, to open the application, click the *IntelliForms* **IF** icon on your desktop.

## A. Access and Authorization

The first time you open the program, *IntelliForms* takes you to the **Access** tab of the **Preferences** window. To begin using *IntelliForms*, you must enter your authorization information.




To enter your authorization information, do one of the following:

- If you are a CD user, enter your access code and click **Apply**, then **Close**.
- If you are an online user, enter your username and password and click **Apply**, then **Close**.

- If you are a networked online user you may be able to authenticate your subscriptions, by checking the **IP box**, and clicking **Apply**, then **Close**.

Once you have entered this information once, you do not have to enter it again unless and until your subscription information changes. You can return to the **Access** tab to change your subscription information by clicking the **Preferences** toolbar button.

If at any time, *IntelliForms* is unable to verify your subscription information, you can still access the program and any client forms you have previously saved. However, the **Blank Forms manager** (and the **Add Forms** dialog box) will appear to be empty and you will not be able to access any new forms.

## B. Display Settings

The *IntelliForms* application is optimized for a screen resolution of 800 by 600 pixels or better (Super VGA, using standard fonts). Higher resolutions display screen fonts more clearly and show the full width of our forms. If your current screen resolution is lower than this recommended setting, you should adjust the resolution.

**To change the screen resolution and color settings (Windows® XP)**

1. Right-click the background area of your desktop, and then click **Properties**.
2. Click the **Settings** tab.
3. Move the **screen resolution slider** to 800 by 600 pixels, or higher.
4. Under **Color quality**, select **High Color** (16 bit) or higher, if supported.
5. Click **Apply**. Your screen may turn black for a moment.
6. After your screen resolution changes, you have 15 seconds to confirm the change. Click **Yes** to confirm the change. Click **No** or do nothing to revert to your previous settings.
7. Click **OK** to close the **Display** window.

**To change the screen resolution and color settings (Windows® Vista)**

1. **Right-click** the background area of your desktop, and then click **Personalize**.
2. Click the **Display Settings** tab.
3. Move the **screen resolution slider** to 800 by 600 pixels or higher.
4. Under **Colors**, select **Medium** (16 bit) or higher, if supported.
5. Click **Apply**. Your screen may turn black for a moment.
6. After your screen resolution changes, you have 15 seconds to confirm the change. Click **Yes** to confirm the change, otherwise click **No** or do nothing to revert to your previous setting.
7. Click **OK** to close the **Display** dialog box.

Many video card manufacturers replace the standard *Windows* display options with customized boxes and menus. If your settings boxes do not resemble the examples used here, follow the instructions in the **Help** files provided by the manufacturer of your video card.

## C. Select State Jurisdictions

If your *IntelliForms* subscription includes only a limited number of state jurisdictions, the **Select States** dialog box prompts you to select the states you want to include in your subscription the first time you open *IntelliForms*.

**To choose the state jurisdictions to be included in your subscription**

1. Click **OK** in the **Select States** dialog box.
2. *IntelliForms* displays the **Select States** tab of the **Preferences** window
3. Check the boxes for each of the state jurisdictions you want to include as part of your subscription.
4. Click **Add States**.

> **Caution:** Once you have selected a state as part of your subscription, you cannot remove the state and select a new one in its place.

5. Click **Close**.
6. In the **Caution** box, confirm that you want to **Continue Add State(s)**.
7. *IntelliForms* displays only the states to which you have subscribed in both the **Blank Forms manager** and the **Add Forms** dialog box.

You do not need to make all of your state selections at one time. You can choose to make only one state selection at a time and return to the **Preferences** window to access the **Select States** tab when you are ready to make additional state selections.

You can also skip selecting states by clicking **Close** on the **Select States** dialog box. However, you will not be able to access any state forms until you make at least one state jurisdiction selection.

## D. Setting Preferences

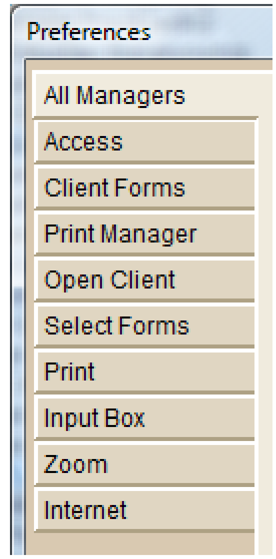
You can customize the way in which many *IntelliForms* features work by selecting options from the program **Preferences** list.

**To open the Preferences window**

- From the **Blank Forms manager**, click the **Preferences** toolbar button.
- From the **Client Forms manager**, click the **Preferences** toolbar button.
- From the **Profiles manager**, choose **Preferences** from the **Edit** menu.
- From the **Client View manager**, choose **Preferences** from the **Options** menu.

**To select Preference options**

1. Open the **Preferences** window (see above).
2. Click the appropriate tab.
3. Select your **Preferences**.
4. Click **Apply**.
5. Click **Close**, or click another tab to select additional **Preferences**.




For information about specific preference settings, click the **Help** button found under each **Preference** tab.

The following is a list of some of the **Preference** options available in *Intelliforms*. See the **Program Help** for a complete list and description of all **Preferences** options.

## *Select Forms*

The **Select Forms** tab of the **Preferences** window sets forth two preference options with respect to opening forms in the **Blank Forms manager**.

### Setting a Default State Jurisdiction

The default state preference option assigns a specific state to the **State** filter in the **Blank Forms manager** (and the **Add Forms** dialog box). Even though you have selected a default state jurisdiction, you can search the complete list of state and local jurisdictions (included in your subscription) at any time, by clicking the state filter check-box and selecting a new jurisdiction. To clear a default sate selection altogether, return to the **Select Forms** tab in the **Preferences** window and select the **All** option.

### Show Selecting Client Type dialog box

In order to open blank forms for both new and existing clients in **Blank Forms manager**, the **Show Selecting Client Type** preference must be checked. If the preference is selected (the default), when you open a form in the **Blank Forms manager**, *IntelliForms* prompts you to assign the form to either a new client or an existing client.

If the preference is cleared, the **Select New or Existing client** dialog box is not displayed and forms are automatically opened as new clients. If the preference is cleared, you can only open new forms for an existing client when that client currently open in the **Client View**. ***See: Adding Forms to a Saved Client***, below.

## *Input Fields*

The Input Fields tab of the **Preferences** window gives you several options for changing the appearance of your data entry fields.

### Input Box Color

The **Input Box Color** preference option allows you to choose from several colors to be used to indicate the active input field.

### Autosizing

If necessary to avoid truncating data, *IntelliForms* auto-sizes a data field to accommodate the size of the figure by reducing the font (to a minimum of 6 pt) used in the field. You can check the **Disable Auto-sizing** preference if you would prefer that size of the font not be reduced. With the auto-sizing disabled, certain data entry figures may be truncated.

### Negative in Parentheses

*IntelliForms* generally displays negative values by using a negative sign (minus sign in front of the figure). If you would prefer to use parentheses around a figure to indicate a negative value, check the box for **Negative in Parentheses**.

### Bold Input Fields

Checking the **Bold input fields** in all new and open forms preference box allows you to use a bold font for all of your data input fields on a global basis.

> **Tip! Localized Bold Text Settings**
> You can choose to use bold text for input fields on a cell by cell or form by form basis. In the **Client View**, point to the **Edit** menu; select **Format Bold**; click **Current cell** or **Current form**.

## *Zoom*

The **Zoom** setting determines the magnification at which forms and worksheets are displayed on your screen. Zooming in or out on a form or worksheet does not affect the appearance of the printed form or worksheet. The **Zoom** setting is saved and applied globally.

> **Tip! Change Magnification Locally**
> To temporarily change the magnification setting for specific form pages only, use the **Enlarge Page** and **Reduce Page** commands under the **Tools** menu in the **Client View manager**.

## *All Managers*

**Show the Form Tabs on the Left** - displays the form tabs to the left (vertically) of the active form, rather than above the active form, in order to maximize workspace.

**The Show Pop-up Tool Tip Help** (in all managers and dialogs) - displays a small **Help** window whenever the cursor hovers over certain buttons and menus.

**Hide Clients Marked Complete -** automatically hides those client entries on the client grid that have been marked as **Complete**. Clear the **Incomplete** filter in the **Client Forms manager** to temporarily show your completed clients.

### *Client Forms*

**Reset Default Sorting on Startup** - resets the client list in the **Client Forms manager** to alphabetical order on startup.

### *Internet Preferences*

The Internet tab of the **Preferences** window offers you three choices for indicating your type of Internet connection.

**To set your Internet Preferences**

1. From the **Preferences** window, click the **Internet** tab.
2. Check the box for your desired **Internet** preference, the options are:
   - **Always Download** sets the preference to I have a continuous connection to the Web.
   - **Ask Me First** sets the preference to I have a standard modem connection to the Web.
   - **I do not have a connection to the Web at any time.**
3. After you make your selection, click **Apply**.
4. Click **Close**.

## F. Setting up Printers

Before you begin printing forms, ensure that your printer is set up properly by reviewing your printer settings. You can access your printer settings from both the **Blank Forms manager** and the **Client View manager**.

**To review (and change) printer settings from the Blank Forms manager**

1. Click the **Blank Forms** tab.
2. Do one of the following:
   - From the **Forms** menu, choose **Change Printer**; or
   - Press **Ctrl+P**.
3. In the **Print Setup** dialog box, review your printer settings and change them, if necessary.
4. Click **OK** to save your printer settings.

**To review (and change) printer settings from the Client View**

1. In an open client, click **Print** on the toolbar.

2. In the **Print manager**, click **Change Printer** in the upper right corner.
3. In the **Print Setup** dialog box, review your printer settings and change them, if necessary.
4. Click **OK** to save your printer settings.

## G. Customizing your Back-Up Scheme

When you first install *IntelliForms*, the **Backup** feature is set to automatically back up your client forms each time you close the program. To back up files on demand, use the **Backup/Restore Clients** feature, discussed in **Backing up Client Forms**, below.

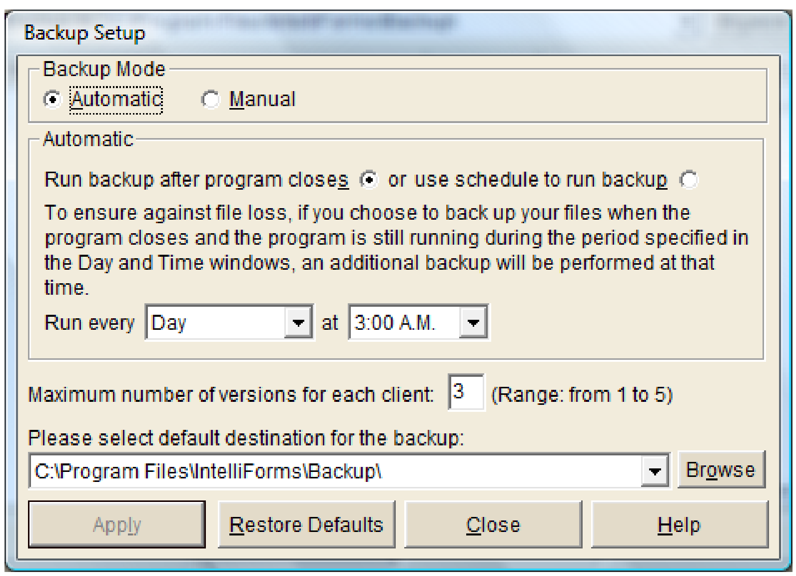
You can change the default back-up settings to customize your **Back-Up Scheme**. Select **Backup / Restore Clients** from the **Clients** menu in the **Client Forms manager**. The back-up schedule options differ for **Automatic** and **Manual** back-up schemes.

We recommend that you allow the program to back up automatically so you can be assured your data is backed up regularly. As the volume of forms you prepare increases, consider backing up more frequently. ***See: Backing Up Client Forms***, discussed below.

Follow the procedure below to customize an automatic back-up scheme. For specific directions for setting a manual backup scheme, see the **Program Help**.

**To customize automatic back-up schemes**

1. Click the **Client Forms** tab.
2. On the **Clients** menu, click **Backup/Restore Clients**.
3. Click **Setup**.
4. Under **Backup Mode**, select **Automatic**.
5. Specify whether you want to:
   - Run backup after program closes; or
   - Use schedule to run backup
6. Select the **Day** and **Time** you want backups to be created.
7. Enter the number of **Backup Versions** (1-5) you want to retain.
8. Specify the backup file destination.
9. Click **Apply** to save your selections.



**Tip! Additional Protection**
To provide additional protection against loss of data, back up to a removable disk and store off-site.

## H. Administration and Security

In multi-user offices, at least one user should be designated as an administrator. If no one user has been designated as an **Administrator**, *IntelliForms* treats all users as having administrative privileges until at least one user is so designated.

In general, **Administrators** have unlimited privileges when using the program. Among other things, **Administrators** can remove client passwords and designate administrator rights to other users. Subsequent administrators have the same rights as the initial administrator.

**To designate another user as an administrator**

1. Click the **Client Forms** tab.
2. From the **Options** menu, point to **Administration**, and click **User Maintenance**.
3. *IntelliForms* displays the **User Maintenance** dialog box.
4. Check the box for **Administrator** to the right of any name listed.
5. Click **Close.**

## II. THE *INTELLIFORMS* WORKSPACE – THE MANAGER VIEWS

When you open *IntelliForms*, you see the **Blank Forms manager**. At the top of the program window and next to the tab for the **Blank Forms manager**, there are additional tabs for **Client Forms**, and **Profiles**. These tabs, along with the **Client View manager** tab, which is visible whenever a client's forms are open, represent the four main user interfaces of *IntelliForms.*

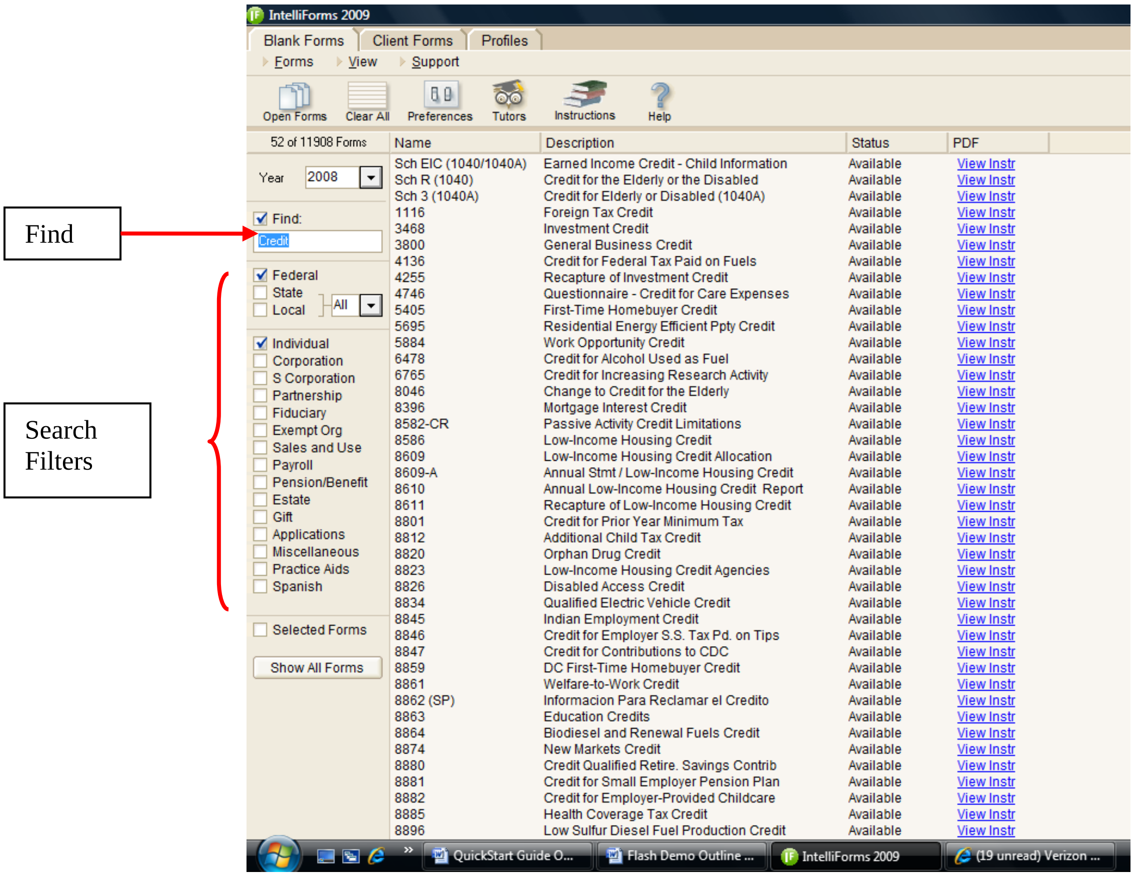

The managers help you organize your form and client management tasks.

Navigate to a specific manager at any time by clicking the appropriate tab.

- Use the **Blank Forms manager** to search for and open blank forms, add new forms to existing clients, print blank forms, or open the instructions to a form.
- Use the **Profiles manager** to create profiles for your clients and the professionals in your practice, import profiles created in other applications, such as CCH's *perform plus III,* ATX's *ZillionForms,* and *SuperForms,* edit saved profiles, and apply profiles to open forms.
- Use the **Client Forms manager** to access the forms you have saved for each of your clients, review the contents of a client's form set, quickly determine which clients' forms have been completed, and export and import client forms to and from other instances of *IntelliForms*.
- Use the **Client View manager** as the place to accomplish all of your work on your clients' forms.

# A. Using the Find Box and Filters in the Manager Views

Each of the three main manager views (**Blank Forms**, **Client Forms**, and **Profiles**) includes a **Find** box to help you quickly locate the form, client, or profile you want to open. In addition, the **Blank Forms** and **Client Forms manager** view also have search filters that can work in lieu of, or in conjunction with, the **Find** box to help you locate the form or client you want to open.




### To locate a form, client, or profile using Find

1. Begin entering the search text in the **Find** box.
2. As you enter characters in the **Find** box, the results list displays only those records that include the search text in one or more information fields.
3. To restore the full list of records (that is, forms, clients, or profiles) for the manager, click the **Show All [records]** button.

Below the **Find box** are filters relevant to the types of records found in that manager.

### To locate a form or client using the search filters

Use the filter check boxes on the filter pane to temporarily hide certain records. When one or more filters are selected, the forms or clients not meeting the filter criteria are removed from view and are not displayed in the results list. To display all the records of the manager, click the **Show All [records]** button.

## B. Sorting in the Manager Views

You can sort the records in the **Client Forms** and **Profiles** managers by clicking a column heading. For example, to display your clients in the **Client Forms manager** chronologically, according to the date on which they were last modified, click the **Modified** column heading. To reverse the order in which records are sorted, click the column heading a second time.

> **Tip! Resizing and moving columns in the manager grids.**
> You can adjust the columns in both the **Profiles** grid and the **Client Forms** grid. You can also show, hide, and create custom columns in **Client Forms manager**. You cannot re-size or move the columns in the **Blank Forms** grid. Resize columns by clicking and dragging the dividing line to the right of the column you want to resize. Move columns by positioning the cursor over the column heading, clicking and dragging the column to its new location. To reset columns to their original size and position, click **Reset Fields** on the **Options** menu. Reset fields restores the manager grid columns to their default field sequence, width, and visibility. It does not delete the fields or the data

## C. Blank Forms manager

Use the **Blank Forms manager** to search for, find, and open a wide array of federal, state, and local forms and instructions. After selecting a year, you can search for a form by:

- Jurisdiction – federal, state, or local;
- Category – individual, corporate, partnership, fiduciary, estate, tax-exempt, etc.;
- Description or number; or
- any combination of these search parameters.

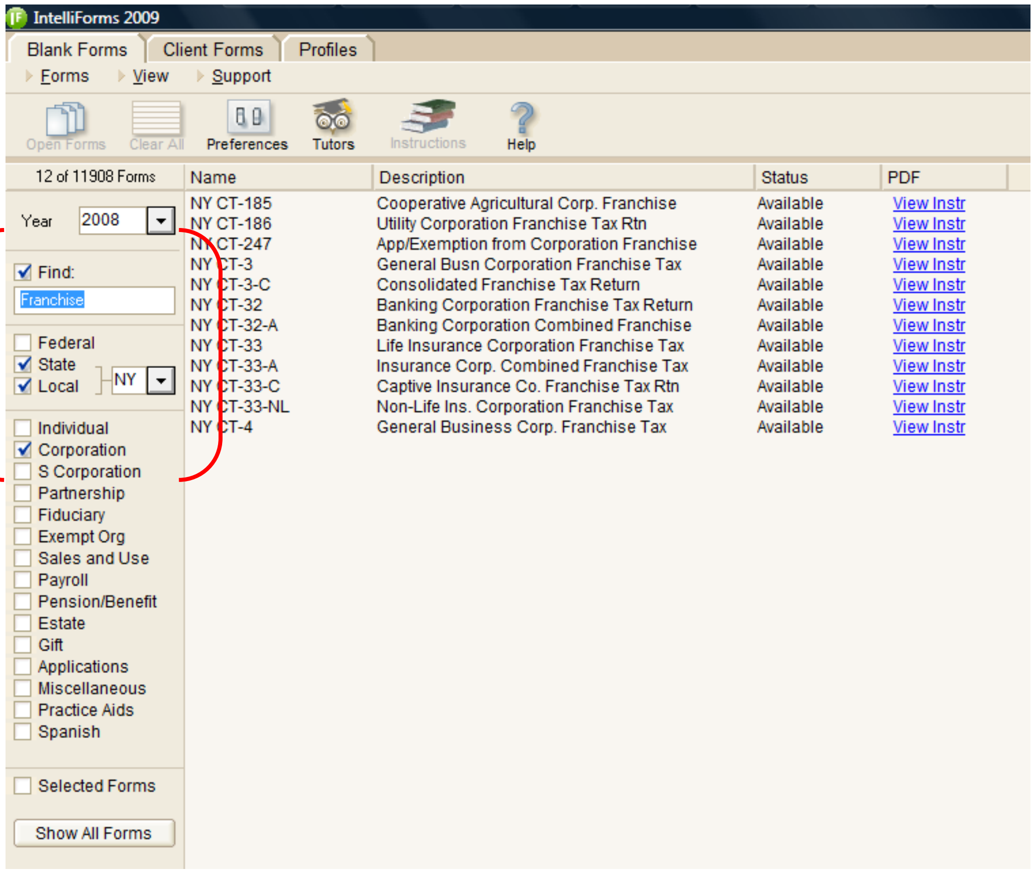
The right side of the **Blank Forms manager** displays a list of all of the forms within your subscription.

Use the **Find box** and the form filters (found on the filter panel on the left) to narrow your form selection choices and help you find the forms you need to open now. When you use these search tools, only those forms within your subscription that meet your search parameters are displayed in the forms grid on the right.

Click **Show All Forms** to clear your filter selections and return to view the full list of forms within your subscription.

## *Finding Forms*

The **Blank Forms manager** filters make it easy to find specific forms quickly. The forms filters can be combined to allow multi-level searching. For example, by using multiple filters you can isolate all New York corporation tax forms with titles that include the word "franchise."




After you find the forms you want, you can:

- open them to create a new client;
- add them to an existing client;
- print them without opening; or
- download the instructions.

### To use the forms search filters

1. Click the **Blank Forms** tab.
2. Select the **Year**, if different from the current default year.
3. Apply the following filters, as appropriate

- Select one or more of the desired jurisdictions (Federal, State, or Local).
- Select a specific state from the State/Local drop-down box, if desired.

**Note:** If you have selected a default state jurisdiction as a preference ***(see: Setting Preferences***, above) that state is automatically selected in the **State/Local** drop-down box. However, you can change this selection to any other state jurisdiction included in your subscription. ***See also*****:** ***Select State Jurisdictions.***

- Select one or more form category (such as Individual, Corporation, or Partnership).

4. Enter a keyword in the Find box, in addition to using the filters, or in lieu of using the filters.
5. *IntelliForms* displays the forms within your subscription that meet your selected search parameters.
6. After you have found the form, click the form's listing in the search results grid to select. You can select more than one form.
7. *IntelliForms* saves your form selections and you can move on to searching for additional forms, clearing your form filters (but not your year) settings, as necessary.
8. To clear all of your selected filters, click the **Show All Forms** button.

**Tip! Do multiple searches at one time.**
*IntelliForms* allows you to do several form searches and to make multiple form selections at one time – opening or printing the forms all together – so long as the forms are all for the same tax year, and are for the same client. The client can be a new client or an existing client.

## *Multiple Searches and Form Selections*

You can continue to search for, and select additional forms, as many as you need, so long as the forms are all for the same client and the same year. To start a new forms search, simply make new filter selections. *IntelliForms* keeps track of your prior form selections.

**Caution:** The only filter you cannot reset for your subsequent form searches is the **Year** selection. Only forms of the same tax year may be saved as part of a single client's form set. Forms from different tax years must be saved as a separate client. If you attempt to reset the **Year** as part of any subsequent search, *IntelliForms* will clear your prior form selections.

You can review a list of your form selections at any time by checking the **Selected Forms box**. Clicking any form removes it from the **Selected Forms** list.

Once you have made all the form selections you want, you can open the forms, print a list of the forms, or print the actual forms.

## *Opening Blank Forms*

**To open Blank Forms, you can:**

- Use the **Blank Forms manager** to find and open forms for both new and existing clients.
- Use the **Add Forms** function in the **Client View manager** to find and open forms for existing clients.

To use the **Blank Forms manager** to open new forms for both new and existing clients, the **Show Selecting Client Type** preference (under the Select Forms tab in the **Preferences** window) must be checked.

> **Caution:** Although the **Select New or Existing Client** dialog box gives you the choice of assigning a new blank form to a new or an existing client when you first open the form, you do not get this choice at any other time. Once you have opened a form, you cannot transfer it to different client.

**To open a blank form for a new client**

1. Click the **Blank Forms** tab.
2. Use the **Find** box and the form filters to find the form(s) you need.
3. Click to select the form(s) in the search results grid.
4. Do one of the following:
   - Click your form selection again (that is, double-click).
   - Click **Open Forms** on the toolbar.
   - On the Forms menu, click **Open Selected Forms**.
   - Press **Ctl+O.**
5. In the **Select New or Existing Client** dialog box, click **Add Forms**. Note that the **New Client** radio button is already selected.
6. *IntelliForms* opens the new form(s) in the **Client View**, under a tab entitled ‘Unnamed Client.’ The first time you save the forms, you will be prompted to name the client.

**To open a blank form for an existing client**

1. Ensure that the **Show Selecting Client Type** preference under the **Select Forms** tab in the **Preferences** window is checked.
2. Click the **Blank Forms** tab.
3. Use the **Find** box and the form filters to find the form(s) you need.
4. Click to select the form(s) in the search results grid.
5. Do one of the following:
   - Click your form selection again (that is, double-click).
   - Click **Open Forms** on the toolbar.
   - On the **Forms** menu, click **Open Selected Forms**.
   - Press **Ctl+O**.
6. In the **Select New or Existing Client** dialog box, select the **Existing Client** radio button.

7. *IntelliForms* populates the dialog box with a list of your clients from the **Client Forms manager**.
8. Use the **Find** box or scroll through the list to locate the client to which you want to add the form.
9. Click to select the client.
10. Click **Add Forms**.
11. *IntelliForms* opens the new form as part of the client's previously saved form set in the **Client View**.

You can also add new blank forms to an existing client whenever the client is open in the **Client View**. ***See: Adding Forms to a Saved Client,*** below.

## *Opening Forms already saved for Clients*

Forms you have previously opened and saved for a client are not opened in the **Blank Forms manager**. Instead, click the **Client Forms** tab to see a full list of all the clients for whom you have previously saved forms. Using the **Find** box, client filters, the scroll bar, or some combination of these, find the client. Click to select the client in the grid and click **Open** on the **Client Forms'** toolbar. All of the forms you have saved for this client open in the **Client View manager.** ***See also: Opening Client Forms****,* below.

## *Opening Non-Reproducible Forms*

For non-reproducible forms, the process of opening the form is similar to that of any other type of form – except that it includes an additional step.

Specifically, just as it does when opening a regular form, when selected, *IntelliForms* opens the non-reproducible form in the **Client View**. However, unlike regular forms, the non-reproducible form displays a link that opens a pdf version of the form from the Web.

## *Opening Form Instructions*

*IntelliForms* gives you several ways to access the **Instructions** to forms. Each time you open instructions to any form, the program automatically downloads the most current version of those instructions. There is no need to manually update your forms or your form instructions.

In the **Blank Forms manager** you can open the **Instructions** to a form without first opening the form.

**To access the instructions to a form without opening the form**

1. Click the **Blank Forms** tab.
2. Find and select the form with respect to which you want to view the instructions.
3. Do one of the following:
   - Click the **Instructions** toolbar button;

- Select **Open Instruction or Publication** from the Forms menu; or
- Click the **View Instr** link for the form under the **PDF column** of the forms grid.

4. *IntelliForms* displays Support Explorer.
5. If you clicked the pdf link in Step 3, *IntelliForms* opens the Instructions as a pdf file without first displaying the **Support Explorer** window.
6. Click **Instructions** on the **Support Explorer** navigation panel, *IntelliForms* displays the **Instruction List** dialog box.
7. Select the appropriate jurisdiction (Federal or state).
8. Highlight the instruction you want to open.
9. Click **Open.**
10. *IntelliForms* displays the **Instructions** as a pdf file.

**Tip! Open Instructions from any manager view**
You can open form instructions from any *IntelliForms* manager view.
In the **Client Forms** and **Profiles** managers, choose **Instructions** from the **Support** menu and follow the directions for Steps 4 through 10 above. In the **Client View manager**, click Instructions on the **Client View** toolbar and *IntelliForms* displays the instructions to the active form as a pdf file.

### *Opening Prior Year Forms & Publications*

Use the **Year** filter (under the **Blank Forms** tab) to find forms for tax years 2005 and later.

You can also access forms and publications for 1998 to the present using the **Online Library**. The **Online Library** is a searchable database that provides you with immediate access to pdf versions of both current forms and an archive of more than 20,000 federal or state forms, instruction booklets, and IRS publications.

**To access the Online Library from any manager**

1. On the Support menu, point to Websites.
2. Select Current and Archive PDF files.
3. *IntelliForms* links you directly the **Online Library**.

### *Updating Forms*

With *IntelliForms*, there is no reason to worry about form (or program) updates. Every time you open a new form, *IntelliForms* ensures that you receive the most up to date form available anywhere. Moreover, unless you have marked your client as Complete, every time you open an existing client's saved forms *IntelliForms* automatically updates the forms in that client's form set and transfers the client's data to the most recent versions of the forms. ***See: Updating Client Forms**, below.*

## D. Client Forms Manager

After you have used *IntelliForms* to create and save forms for a client, you can access your client's saved documents using the **Client Forms manager**. The **Client**

**Forms manager** is more than just a list, as it features several tools to assist you with managing your workflow.

In addition to providing easy access to your clients' forms and documents, the **Client Forms manager** allows you to review the contents of a client's form set without opening the client, to quickly determine which of your clients' have been completed, and to transfer client forms.

Among the tasks you can accomplish in the **Client Forms manager**, are the following:

- Open saved client forms
- Rename clients
- Duplicate a client's form set
- Delete a client's form set
- Mark a client as Complete
- Import and Export client forms
- Backup and Restore client forms
- Print a client list
- Export a client list

Some of these features are covered briefly below. Please see the **Program Help** for comprehensive discussions on all of the functions of the **Client Forms manager**.

> **Tip! Adding Forms to an Existing Client**
> You do not use the **Client Forms manager** to add forms to a saved client. Instead, you can add forms to an existing client's form set by opening a blank form in the **Blank Forms manager** and assigning to the client, or by first opening the client in the **Client View** and clicking the **Add Forms** toolbar button.

The **Client Forms manager** is divided into three sections – the client filters, the **client grid**, and the **Forms Pane.**

The **client grid** displays a list of all the clients for whom you have saved at least one form. You can customize this view. ***See: Customizing the Client Forms Grid,*** below.

Select any client listed in the **client grid** and a list of all the forms and pdf files you have saved for the client is displayed in the **Forms Pane.**

Use the **Complete**, **Incomplete**, and **Marked Clients** check box filters to sort the list of your saved clients. Checking any of these filters hides the client records that do not meet the search criteria from view on the **client grid**. Click **Show All Clients** to clear the filters and display the full list of clients in the grid.

> **Tip! Marking versus Selecting**
> In order to perform a command on more than one client at a time – a batch operation – you can mark the clients in the **Client Forms manager**. You can also mark **Profiles** in the **Profiles manager** in order to accomplish a task on more than one profile at a time. To mark a client in the **Client Forms manager** or a profile in the **Profiles manager**, click the check box to the left of the record. Selecting, as opposed to marking, refers to the process of choosing a client or a profile so that you can perform a command or accomplish a task with respect to only that client or profile.

## *Opening Client Forms*

Forms you have previously opened and saved for a client are opened in the **Client Forms manager**. Click the **Client Forms** tab to see a full list of all the clients for whom you have previously saved forms.

**To open forms you have already saved for a client**

1. Click the **Client Forms** tab.
2. Find the client you want to open by doing one (or more) of the following:
   - enter the client's name in the **Find** box;
   - use the scroll bar to scroll through the list of clients on the grid;
   - use the **Complete** / **Incomplete** filters, and/or the **Find** box,
   - click on a column heading to sort the **client grid**.
3. After you have located the client, click the entry on the client grid to select, and do any one of the following to open:
   - click again (that is, double-click);
   - click **Open** on the toolbar;
   - choose **Open Selected Client** on the **Clients** menu; or
   - Press **Crtl+O**.
4. If you used the **Password** feature when you saved the client, enter the password, and click **OK**.

## *Opening Forms for Multiple Clients and/or Multiple Years*

With *IntelliForms* you can work on multiple clients' forms at one time.

The ability to work on up to five client's forms at one time is especially helpful when comparing data for related taxpayers. This feature also allows you to view multiple years of the same client at one time.

> **TIP! Forms for different years – even when for the same person or entity – are different clients**
> You can open different years for the same client, as the program treats form sets for different years as separate clients. However, you cannot open multiple

instances of the same client's form set. When a client's form set is opened by a user, it is automatically locked and cannot be accessed by another user.

**To open an additional client**

1. Click the **Client Forms** tab.
2. Find and select the additional client you want to open.
3. Click **Open** and *IntelliForms* displays the **Open Client** dialog box.
4. You can choose to:
   - **Swap** the current client for the new client – this automatically closes your current client; or
   - **Open** the additional client in a new window.
5. Click the **New Window** button in the **Open Client** dialog box.
6. *IntelliForms* displays a second instance of the program without affecting anything in the original window.
7. You can continue to open additional – up to a maximum of five – client form sets.

## *Marking Completed Clients*

When you complete all of the forms you want to prepare for a client, you can mark the client as complete by checking the **Complete** check box for that client in the **client grid**.

Marking a client as complete prevents *IntelliForms* from updating those forms each time the client is opened. ***See: Updating Client Forms***, below.

Marking a client as complete also allows you to quickly determine which your clients still need your attention. Use the **Complete** and **Incomplete** check box filters in the **Client Forms manager** to sort your clients accordingly.

> **Tip! Making Changes to a Completed Client**
> Although a client marked as **Complete** may be modified, you cannot save those modifications until the **Complete** status is cleared from the check box.

## *Customizing the Client Forms Grid*

*IntelliForms* allows you to customize the **client grid** to display the information you find most useful. Not only can you resize and move the columns on the gird, but you can create custom fields to be included on the grid. You can also hide any field (custom or standard) on the grid.

**To create custom fields**

1. Click the **Client Forms** tab.
2. On the **Options** menu, click **Customize Fields**.
3. In the **Customize Fields** utility, check the box next to the custom field you want to add.
4. Click **Rename**.
5. Enter the new field name and click **Rename** in the **Rename Field** dialog box.

6. Check another box if you want to add a second custom field, or click **Close**.

**To reset columns to their original size and position**

1. On the **Options** menu, click **Reset Fields**.
2. Click **Reset** when prompted to confirm your decision.

The **Reset fields** command restores the client grid columns to the default field sequence, width, and visibility. It does not delete the fields or the data. Resetting the fields to their default settings only hides custom fields, it does not delete them. To restore your custom fields to the grid after using the **Reset** command, return to the **Customize Fields** utility and check the box of the custom field you want to be displayed as part of the **client grid** once again.

## *Transferring Client Forms*

Use the **Export** and **Import** functions under the **Client Forms** tab to transfer client forms and documents from one computer to another. This feature makes it easy to transfer work between your office computer and your home computer.

When used with the **Mark Client** function, the **Export / Import** client forms feature allows you to simultaneously transfer data for several clients.

> **Caution:** The **Export** feature does not save critical information and it is not suitable for permanently archiving client forms. To permanently archive your clients' forms use the **Backup** feature found on the **Clients** menu under the **Client Forms manager**. ***See: Backing up Client Forms***, below.

**To export client forms**

1. Click the **Client Forms** tab.
2. **Mark** the client or clients you want to export by checking their respective boxes on the client grid.
3. On the **Clients** menu, click **Export Marked Clients**.
4. Select the destination drive and folder, and click **OK**.
5. The file names of exported clients will resemble JohnandJaneDoe.csv.

**To import client forms**

1. Click the **Client Forms** tab.
2. On the **Clients** menu, point to **Import**, and click **Single Client** or **Batch Client**.
3. In the Import Client window, navigate to the appropriate drive and folder.
4. Select the **Client Forms** files (*.csv) you want to import.
5. Click **Open**.
6. Confirm that you want to **Import the Client Forms**.

### *Backing- Up Client Forms*
It is recommended that you allow the program to back up automatically so you can be assured your data is backed up regularly. ***See: Setting a Backup Scheme***, above.

As the volume of forms you prepare increases, consider backing up more frequently.

**To back up Client Forms**
1. Click the **Client Forms** tab.
2. On the **Clients** menu, click **BackUp/Restore Clients**.
3. In the **Backup** window, click **Select All** to select all clients, or search for a specific client by entering the name in the **Find** box.
4. Click a client to toggle its selection status. Selected clients are highlighted in dark blue.
5. In the **Backup** to dialog box, specify the desired backup folder.
6. Click **Start**.
7. When the backup is complete, click **Close**.

Ideally, backup files should be stored off-site. If you choose to do so, you can customize your backup scheme by specifying destinations, such as network drives or removable storage devices.

### *Restoring Client Forms*
You can restore only those client forms that have been archived using the *IntelliForms* **Backup** feature.

> **Caution:** Do not use **Restore** to retrieve an exported client. Instead, to retrieve an exported client's form set, use the **Import** command on the **Clients** menu.

**To restore backed-up Client Forms**
1. Click the Client Forms tab.
2. On the Clients menu, click **BackUp/Restore Clients**.
3. In the **Restore** window, click **Select All** to select all clients, or search for a specific client by entering its name in the Find box.
4. Click a client to toggle its selection status. Selected clients are highlighted in dark blue.
5. Click **Start**.
6. When the restoration is complete, click **Close.**

## E. Profiles Manager
*IntelliForms* allows you to create and store **Profiles** for your clients and for you, and the other professionals in your office, as preparers.

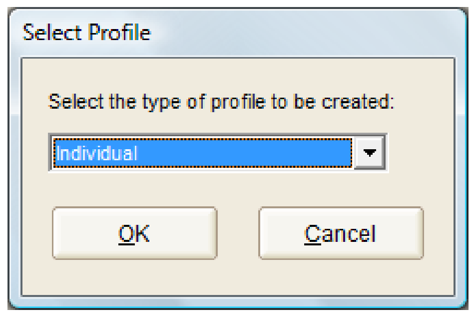
These **Profiles** contain personal data that can be easily transferred to forms again and again – streamlining your workflow and saving you significant amounts of time.

You can apply multiple profiles to a form and each profile can be applied to an unlimited number of forms.

Use the **Profiles manager** to:

- create new **Profiles**;
- edit existing **Profiles**;
- apply **Profiles** to open forms; and
- transfer **Profiles**.

You can also import profile data that you have created in other applications, such as CCH’s ***perform plus III*** and ATX's **ZillionForms**.




## *Profile types*

The **Profiles manager** displays sub-tabs for each type of profile available within your subscription. *IntelliForms* offers the following profile types.

- Individual
- Business
- Preparer
- Broker/Dealer
- Investment Advisor
- Registration/Exemption and
- Government Contracts.

**Profiles** that you have created and saved and those that you have imported from other CCH/ATX applications can be found under their respective profile tabs. Click the **Profiles** sub-tabs to display and access the **Profiles** that have been saved for each profile type.

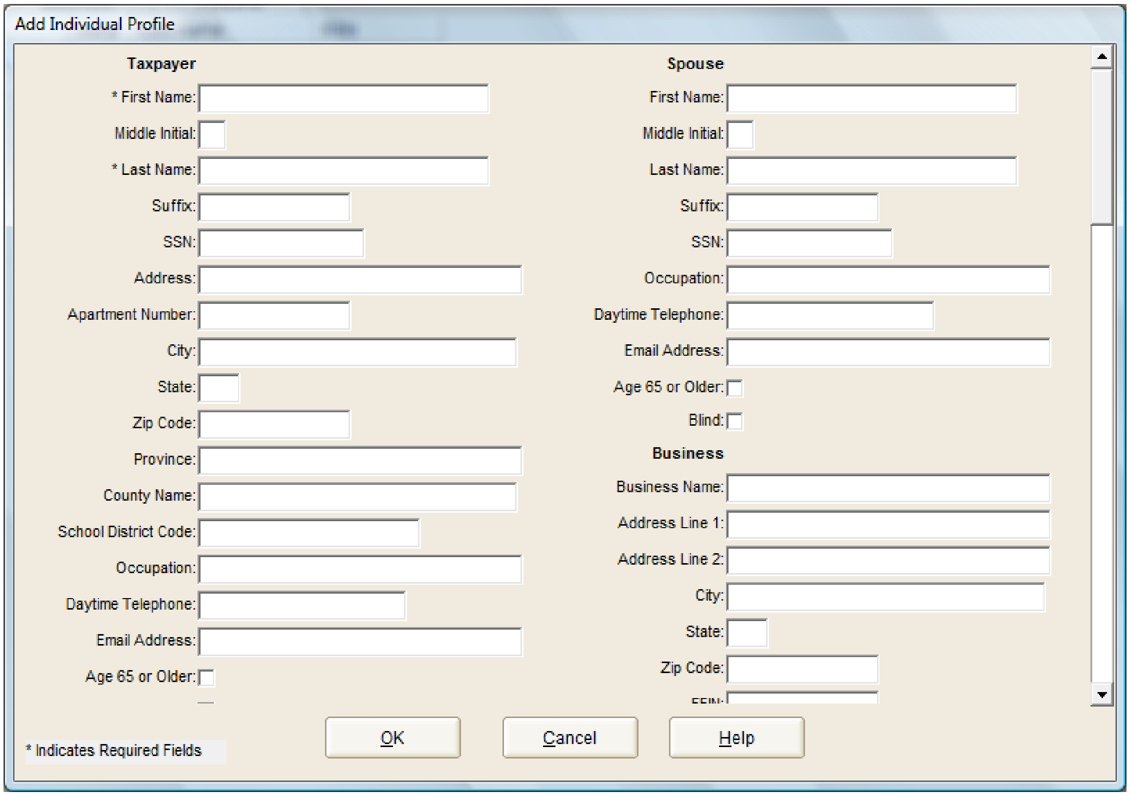
> **Tip! Payroll profile information**
> Payroll profile information saved in other CCH/ATX applications and imported to *IntelliForms* is segregated between the Business (employer information) and the Individual (employee information) profile tabs.

## *Creating& Editing Profiles*

You can create **Profiles** to store both client and preparer information. You can edit your saved **Profiles** any time the **Profiles** tab is the active view. Apply the **Profiles** to your client's forms to automate repetitive data entry tasks. Each profile can be applied to an unlimited number of forms. You can apply multiple **Profiles** to a form.

### To create a new profile

1. Click the **Profiles** tab.
2. Click the **Add New** toolbar button.
3. Select the profile type you want to create from the **Select Profile** type dialog box.
4. The **Add Profile type data entry** worksheet is displayed.



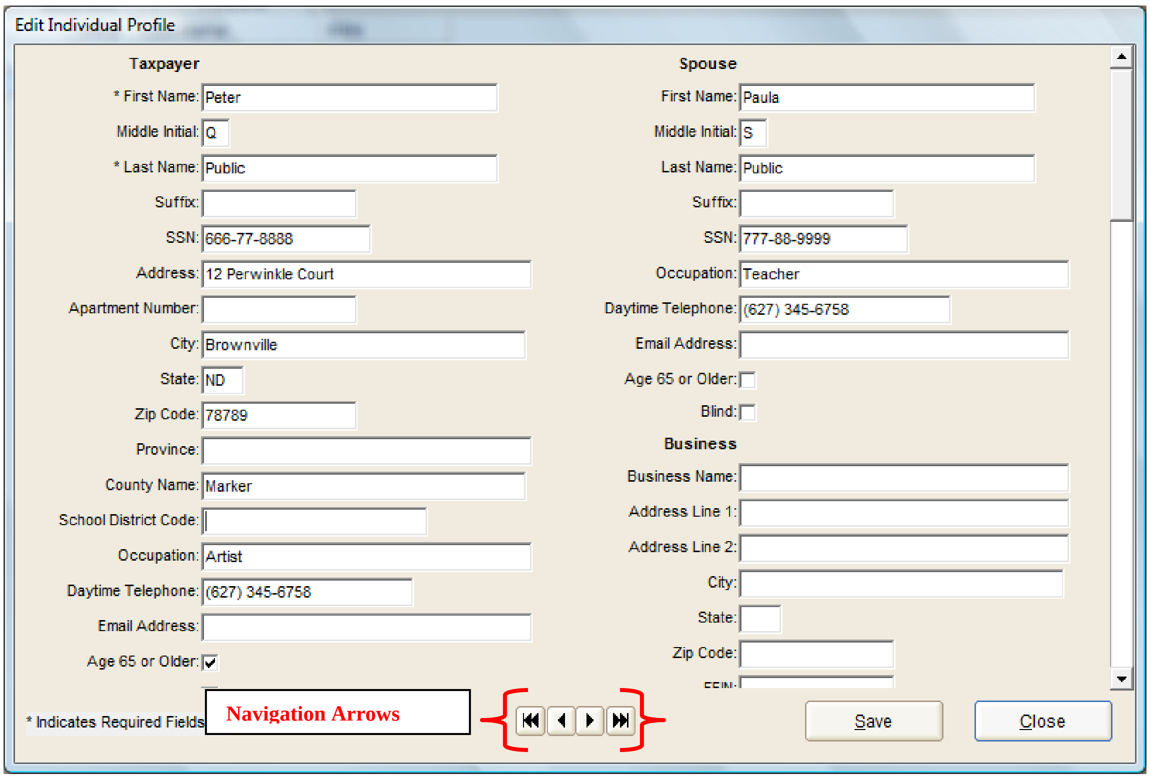

5. Enter the appropriate information.
6. Ensure that you have entered data in each required field; required fields are marked with an asterisk.
7. When you have finished, click **OK.**

### To edit a profile

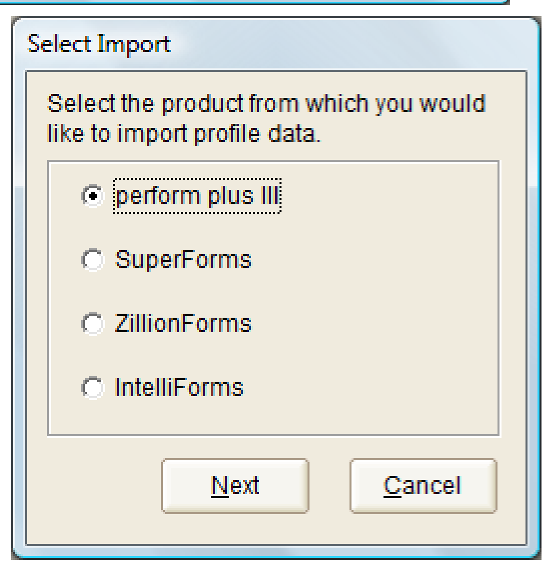
1. Click the **Profiles** tab.
2. Using the **Profiles** sub-tabs (such as, Individual, Business, and Preparer) navigate to the type of profile you want to edit.
3. Use the scroll bar or the **Find** box to locate the specific profile you want to edit from among those saved as the same profile type.
4. Click to select the profile you want to edit.
5. Do one of the following to open the profile for editing:
   - Click the profile again (that is, double-click).

- Click Edit on the toolbar.
- From the **Profiles** menu, choose **Edit Selected Profile**.

6. *IntelliForms* displays the **Edit <Profile type>** worksheet.
7. Make your changes to the profile worksheet.
8. Ensure that you have not deleted a required field; required fields are marked with an asterisk.
9. Click **Save**.
10. Use the navigation arrows at the bottom of the worksheet to move to additional **Profiles** of the same type that you want to edit, or click **Close**.




11. Make the changes to additional profiles, if desired, and click **Save**.
12. When you have finished, click **Close**.




## *Importing Profiles*

You can import profile information from other applications. You can also import profile information from *IntelliForms*, as a way of transferring profile data between non-networked computers.

### To import profile data

1. Click the **Profiles** tab.
2. On the **Profiles** menu, click Import

Profile Data.
3. In the **Select Import** dialog box, select the program from which you would like to import profile data.
4. Click **Next**.
5. Depending on the program data you would like to import, *IntelliForms* displays the **Import** dialog box for that program or *Windows Explorer*.
6. If the **Import** dialog box is displayed, select the **Profiles** you want to import (or check **Select All**) and click **Import**.
7. If *Windows Explorer* is displayed, navigate to the location of the profile data you want to import, and click **Import**.
8. *IntelliForms* displays the **Import Status Report**.
9. Click **Done** to dismiss the **Import Status Report** and return to the **Profiles manager**.
10. You can review the imported data for completeness by navigating to the appropriate profile-type tabs, where *IntelliForms* has automatically saved the imported profiles.

**To review imported profile data**
1. Navigate to the tab for the profile type you want to review.
2. Find and select the profile you want to review.
3. Click **Edit** on the toolbar.
4. *IntelliForms* displays the data worksheet for the profile. Review the imported data, make changes, and/or add additional information, as needed. Click **Save**. Use the navigation arrows at the bottom of the worksheet to move to additional profile you want to review, or click **Close**.

## *Transferring Profile Data*

As discussed above, you can use the **Import Profiles** function to transfer profile data between computers, so long as both computers have *IntelliForms* installed. In order to import *IntelliForms* profile data, the profiles must have been exported using *IntelliForms*.

You can export a single profile, all saved profiles, or mark a select group of profiles to export in a single operation.

**To export profile data**
1. Click the **Profiles** tab.
2. Navigate to the profile sub-tabs for the profile types you want to export.
3. Check the box to mark each of the profile(s) you want to export. You can navigate between the profile type sub-tabs to mark different types of profiles for export in a single operation.
4. From the **Profiles** menu, choose **Export Marked Profiles**.

You do not need to mark all of your saved profiles if you want to export them all at one time. Instead, use the **Export All Profiles** function.

**To export all saved profile data**

1. Click the **Profiles** tab.
2. From the **Profiles** menu, choose **Export All Profiles**.

### *Applying Profiles to Forms*

Once you have saved a profile for any client or preparer, it is very easy to apply the profile to an open form.

**To apply a profile to an open form**

1. Click **Apply Profile** on the **Client View** toolbar.
2. *IntelliForms* displays the **Profiles manager**.
3. Click the profile tab for the profile type you want to apply to the form.
4. Use the scroll bar to locate the specific profile you want to enter on the form.
5. Select the profile by either clicking the profile or checking the box.
6. The profile is highlighted.
7. Click **Enter on Form** on the **Profiles** toolbar.
8. *IntelliForms* automatically returns you to the active form where the profile data has been entered in the appropriate fields.

You can repeat this process to add additional **Profiles** to the same form. For example, after applying your client's profile to a form, you may want to add the preparer information to the same form.

## F. Client View Manager

After you have opened a form for a client, *IntelliForms* displays the form – along with any other forms you have saved for this client (the client form set) – in the **Client View manager**. The **Client View** is where you accomplish all of your work on your clients' forms.

### *The Client Form Set*

A client's form set is the set of forms that you have saved for that particular client – either by opening the forms altogether or by adding forms one at a time to those you have originally saved for the client.

You can save forms of any type together as part of a client's form set, but you cannot save forms of different years together – even if they are the same type. Thus, for example, a client's form set could include such diverse forms an individual income tax return on Form 1040, the income tax return for the client's business on Form 1120S, the business' payroll tax return on Form 941, and the client's personal gift tax return on Form 709, so long as the returns were all for the same year. But, a form set could not be made up of the client's 2009 and a 2008 Form 1040 – even if these were to be the only two forms in the set.

Note, too, that *IntelliForms* refers all to tax forms, information returns, schedules, and statements as *forms*. Thus, not only is an individual tax return, such as a Form 1040A, included within any reference to a *form*, but so, too, is a Schedule 2 (Form 1040A) considered to be a *form*. All forms are listed and accessed separately under the **Blank Forms** tab.

Any worksheet that opens automatically along with a form is not considered to be a *form, per se*. Instead, such worksheets are more akin to the individual pages of a form. Specifically:

- worksheets are attached to, and open with, the parent form;
- worksheets are saved as part of the parent form and are accessed under the parent form's tab; and
- data entered or calculated on a worksheet transfers to the appropriate places on the parent form.

## *How Data Transfers in the Client View*

*IntelliForms* carries data between a form and its supporting worksheets. Supporting worksheets are those worksheets and schedules which open automatically when the form is opened. Data entered or calculated on a distinct form does not transfer to another form, even when both forms are part of the same client form set.

Any form or schedule that must be opened as a separate and distinct form does not carry data to, or from, another form within the client's form set.

> For example, when a blank Form 1040 is opened, the 'Line 6c – Dependents' worksheet is automatically opened. Data entered on the 'Line 6c – Dependents' worksheet transfers to the applicable lines of the Form 1040. However, if a blank Schedule C (1040) is opened and added to the set of this client's forms, any data entered on the Schedule C does not transfer to the Form 1040. Although they are ultimately filed together as part of the same return, they are separate forms – each with their own tab – within the client's form set.

## *Navigation in the Client View*

### Navigating - Form to Form

To navigate between the forms in a client's form set, click the form tabs. The form tabs are located above the active form and below the **Client View** toolbar.

### Navigating - Page to Page of a single form

The navigation bar, which appears below the active form, consists of the **Pages & Worksheets** button and a series of tabs. Each of these tabs is associated with a numbered form page, schedule, or worksheet that is part of the active form.

To navigate through multiple pages of an active form, do one of the following:

- Using the navigation bar, click the tab for the page or worksheet you want to access.
- Use the tools on the **Navigate** menu.
- Click the **Pages & Worksheets** button to the left of the navigation bar; from the list displayed, select the page or worksheet you want to access.
- Press **Ctrl+W** to display a **Pages & Worksheets** list.

**TIP! Navigating to Page 1 of the active form.**
To navigate to page 1 of the active form, in addition to the usual navigation methods, you can also Right-click anywhere on the form, and then select <Form Name>, page 1.

### Navigating within a single page

To navigate through a single page of a form, do one of the following:

- Press **Enter** or **Tab** to move from the current field to the next field. To reverse direction, press **Shift+Tab**.
- Click in a field or use the arrow keys to move the cursor to a specific field.
- Press **Page Up** and **Page Down** to scroll through a page quickly.

### Navigating using the Jump To command

When the value in a green (calculated) field is derived from a linked source, typically a worksheet, you can use the **JumpTo** command to move to the worksheet. *IntelliForms* displays the **Jump To** icon (a small bunny) when you click in a linked field. Click the **Jump to** bunny and the source of the calculated field entry is displayed.

If the calculated field is derived from multiple sources, use the **Jump To** command to display a list of sources contributing to this value, and then click the list to navigate directly to the desired source.

### Navigate using the Back and Forward buttons

Use the **Back** and **Forward** buttons on the toolbar to move back and forth between a form and worksheets and between separate forms, in the order in which you last viewed them.

The program records a limited history of your movements through a client's form set during a work session. When you close the client, the history is gone, but the program begins recording a history again when you reopen the client.

## *Data Entry*

Data fields are color-coded according to the type of information they contain. Fields that accept user input without overrides have blue backgrounds. In general, you should only enter data in blue fields. The following list describes field colors.

- **Blue** – An input field that accepts user entries. With very few exceptions, all information should be entered in blue fields.
- **Light Yellow** – The currently active data entry field. You can change this to a different color by accessing the preference for **Input Fields**.
- **Green** – A field that contains links or calculations referred to by the program. The program displays a warning message whenever you attempt to enter information directly in a green field.
- **Pink** – A calculated field that you've overwritten. To restore the original links and calculations of a pink field, select the field, and then click the Restore toolbar button.
- **Purple** – Indicates that the field has been marked as an estimate.

### Overriding calculated fields

Calculated fields contain links or formulas that the program references. You can enter data or formulas in a calculated field by overriding the current link or formula. Calculated fields, which normally display with a green background, display with a pink background when overwritten. To remove an override and restore program calculations for a field, use the **Restore** command on the Client View toolbar. *IntelliForms* tracks overwritten fields and information is reported when you use the **Check Forms** feature. ***See: Checking Forms**, below.*

### To override a calculated field

1. Select a calculated field.
2. Begin entering a value or other data.
1. The **Calculated Field** message box cautions you that you are overwriting the contents of the field.
2. Click **Override** to continue.
3. Press **Enter** when you are finished entering the data.

### Restoring overwritten fields

The **Restore** command restores the original contents of an overwritten field.

### To restore a field to its original content

1. Select the field to be restored; the background color of the field is pink to indicate that it is an overwritten field.
2. Click the **Restore** button on the **Client View** toolbar.
3. The original link or calculation is restored, and the background color changes to green, indicating a calculated field.

### Marking a field as an Estimate

You can mark the amount reported in a field as estimated, leaving a trail for you to come back and finalize the estimated amount.

**To mark a field as estimated**

1. Select the field to be marked.
2. **Right-click** and select **Mark as Estimate**.
3. The background color of the active field is now purple; to indicate that the amount reported there has been marked as an estimate.

**To restore the field to its normal state, do one of the following:**

1. Select the field to be cleared; click **Restore** on the toolbar; or
2. **Right-click** in the field and select **Mark as Estimate**, again, to toggle off the estimate notation.

To quickly locate all fields marked estimated, click **Check Forms** on the toolbar. The **Check Forms Report** details all fields marked as estimates (as well as any notes made to the form and all overwritten fields). ***See: Checking Forms**, below.*

### Using the Right-click Menu

The **Right-click** menu in the **Client View manager** provides you with additional options with respect to the data entry fields on your client forms. You can use the **Right-click** menu features in both calculated (green) and general data entry (blue) fields. Use the **Right-click** menu to do any of the following:

- mark an entry as an **Estimate**;
- remove an ‘estimate’ notation;
- attach an **Itemized List** to a data entry field;
- insert, edit, and remove a **Note** to a field;
- **Insert text** on a form;
- use the **Cut**, **Copy**, and **Paste** functions;
- **Restore** the active field;
- **Link to Page 1** of the active form;
- display **Instructions** to the active form;
- display the **Form version number** for the active form.

**To access the Right-click menu**

1. Click in any data entry field and Right-click your mouse.
2. The **Right-click** menu is displayed.

## *Adding Forms to a Saved Client*

You can use the **Add Forms** function in the **Client View** to add forms to a saved client's form set. The functionality of the **Add Forms** dialog box mirrors that of the **Blank Forms manager**.

**To add forms to saved client using the Client View manager**

1. Open the client.
2. On the toolbar, click **Add Forms.**
3. *IntelliForms* displays the **Add Forms** dialog box.
4. Use the **Find** box and the form filters to find the form(s) you need.
5. Select the form(s) you want to open from the forms listed in the search results grid.
6. Do one of the following:
   - Click your form selection again (that is, double-click).
   - Click **Open Forms** on the toolbar.
   - On the **Forms** menu, click **Open Selected Forms**.
   - Press **Ctl+O**.

## *Working with the Client Form Set*

### Checking Forms

The **Check Forms** feature checks a client's form for certain field entry notations you have made while you were working on the form. Specifically, the **Check Forms** feature reports any fields with respect to which you:

- Marked the amount reported therein as an estimate
- Overwrote the amount of a calculated field; or
- Attached a note.

**To use the Check Forms feature**

1. On the toolbar, click **Check Forms**.
2. When the **Check Forms** window opens at the bottom of the screen, click the reported estimate, override, or note to navigate to the field that triggered it.
3. Select a filter at the top of the **Check Forms** window to choose the type of diagnostics to show in the list.
4. Temporarily hide specific diagnostics from view by checking the boxes next to those items, and then clicking **Hide Marked**. Click **Show All Items** to display diagnostics you previously hid.
5. Examine the field generating the reported item and make any necessary changes.
6. Click **Recheck** after you have made the appropriate changes.
7. If desired, click **Print** to print the **Check Forms Report**.

**Password Protecting Client Forms**

Passwords prevent unauthorized users from accessing your client's forms and sensitive data.

*IntelliForms* prompts you to select an optional password the first time you save forms for a new client. ***See: Saving Client Forms***, below.

You may also add or change a password any time the client's form set is open in the **Client View manager**.

> **Caution:** When a client's forms are open, any user with access to the open forms may change or remove the password.

**To add or change client passwords**

1. Open the client.
2. On the **Edit** menu, click **Client Password**.
3. Enter a new password and click **OK**.
   **Note:** Passwords are case-sensitive.
4. If you leave this box blank, clicking **OK** removes the client's password protection.
5. Verify the password by re-entering it, and then click **OK**.

**Form Alerts**

The **Form Alert** button in the upper right corner of the **Client View** screen is enabled anytime the active form is subject specific filing requirements imposed by the federal agency or state jurisdiction with which the form is filed. Click the **Form Alert** button to review the specific filing requirements.

## *Saving Client Forms*

To prevent loss of data, save your work frequently.

**To save open client forms**

Do one of the following:

- Press **Ctrl+S.**
- On the Clients menu, click **Save Client**.
- On the toolbar, click the **Save** icon.

**Saving forms for a new client**

The first time you save a form for a new client, the **Client Name** window appears, prompting you to enter the following information:

- The name of the client;
- A client number (optional);
- A case-sensitive password (optional). The text you enter in this field is hidden. If you enter a password, make a note of it and store it in a safe place.

## *Saving Client Forms as PDF Files*

*IntelliForms* allows you to save any part of a client's form set as a pdf file, including all forms, worksheets, statements, and reports.

**To save client forms as a pdf file**

1. With the client open in the **Client View manager**; click the **Print Client** button.
2. *IntelliForms* displays the **Print Manager**.
3. Initially, the print list includes, in the pdf file, all **Forms, Worksheets,** and **Statements**.
4. Use the filters (on the left) and the specific document check boxes (on the right) to limit the documents you want to include in the pdf file.
5. Click the **Preview** button to view a filtered list of the contents of your pdf file, if desired. Click **Close** to return to the **Print manager**.
6. Click the **PDF** button on the **Print Manager** toolbar.
7. *IntelliForms* displays the **Save as PDF file** dialog box and automatically uses the client's name as both the folder name in the **Save in** box and as the file name for the pdf.
8. You can modify these names to better describe the specific contents of your client's pdf file.
9. Click **Save** and *IntelliForms* returns you to the **Print manager**.
10. Click **Close** to return to the active client.

> **Tip! Use descriptive names for pdf files.**
> Using descriptive names is especially helpful if you intend to save separate forms as distinct pdf files for any particular client. For example, if you save both John Doe's 1040 and his Maryland income tax return as separate pdf files, giving the files distinct names, such as "JohnDoe1040.pdf" and "JohnDoeMD502.pdf," can make accessing these files in the future easier.

## *Updating Saved Client Forms*

With *IntelliForms*, there is no reason to worry about updating any form – even the forms that you have previously saved for a client are automatically updated by *IntelliForms.*

Every time you open an incomplete client in the **Client View**, *IntelliForms* automatically updates the forms in the client's form set and transfers the client's data to the most recent versions of the forms.
This means that you can use a draft version of any form and know that the data will be automatically transferred to the final version of the form - the first time you open that client following the form's release as final.

> **Caution:** *IntelliForms* does not update forms saved for clients that have been marked as **Complete** in the **Client Forms manager**.

# III. PRINTING

*IntelliForms* offers you several printing options. Among these choices are the following.

From the **Blank Forms manager**, you can print:

- a blank form;
- several blank forms at one time; or
- a list of blank forms you have selected.

From the **Client Forms manager**, you can print:

- a complete list of your clients;
- a list of clients marked complete; or
- a list of clients you have created based on your own criteria.

From the **Client View manager**, you can print:

- You can choose to print a client's entire form set;
- You can print just the **Current Form** (active form) or schedule for the open client in the **Client View manager**; or
- You can print just the **Current Page** (active page) of the active form.
- You can print any part or all of the **Check Forms Report**.

## A. Printing Blank Forms

Under the **Blank Forms** tab, you can print **Blank Forms** without first opening the forms.

**To print a blank form without first opening**

1. Click the **Blank Forms** tab
2. Use the Find box and form filters to locate the form(s) you want to print.
3. Once found, click to select the form(s) to be printed.
4. Continue to do searches and make multiple form selections to print (or open) altogether.

   **Caution:** Once you have selected a form, you can continue to clear your form filters and search for additional forms – so long as you do not change the year. *IntelliForms* clears your form selections whenever you change the year.

5. To review your form selections before printing, check the **Selected Forms** box on the filter pane, or choose **Selected Forms** from the **View** menu.

6. Click **Show All Forms** to return the display to the full list of forms within your subscription.
7. Choose **Print Selected Forms** from the **Forms** menu.

**Tip! Printing Form Lists**
You can choose **Print Form List** from the **Forms** menu to print a list of your form selections, rather than the actual forms.

## B. Printing Client Forms

Use the **Print manager** to print a client's form set, or any part thereof. You can also use the **Print manager** or to save any part (or all) of the client's form set as a pdf file.

**To print a client's form set**

1. Open the **Print manager** by clicking **Print Client** on the toolbar.
2. The **Print manager** automatically includes the client's entire form set (that is, all **Forms**, **Worksheets**, and **Statements**) in the print list. Use the check boxes on the left to hide one or more of these categories from the print list.
3. Click the **Expand** toolbar button to display the remaining items on the print list. To view a particular section of the Print List, click its + (plus sign). To collapse the entire Print List, click Collapse. To collapse a particular section, click its - (minus sign).
4. Use the individualized print check boxes in the print list on the right to further limit the print job to include only the specific forms, worksheets, or statements you want to print now.
5. Use the **Override**, **Estimate Report**, and **Notes Report** check boxes to include these items in the print job.
6. To view a filtered list of the print job, click the **Preview** toolbar button. Click **Close Preview** to return to the **Print manager**.
7. Enter the number of copies to print, if more than one.
8. Click the Print Client button on the **Print manager** toolbar to send to the printer.

**Tip! Save forms as pdf files**
Alternatively, you can click the **PDF** button to save the documents selected for this print job as a pdf file.

9. If the focus stays on the **Print manager** after you send the job to the printer, click Close to return to the active client's forms. ***See: Closing the Print Manager,*** below.

### *Printing Specific Client Forms*

You can print a specific form for any client the same way you print the client's entire form set - by opening the **Print manager** and using the individualized print check boxes in the Print List to limit the print job to include only the specific form, worksheet, or statement you want to print. You can also print a specific form for any client without opening the **Print manager**.

**To print a client form without opening the Print manager**

1. Open the client.
2. Use the **Form tabs** (just above the active form) to navigate to the form you want to print.
3. Do one of the following:
   - Click the **Print Form** toolbar button; or
   - Choose **Print Current Form** from the **Client** menu.

### *Printing the Current Page*

You can print a specific page of any form, schedule, or worksheet.

**To print a single page**

1. Open a client.
2. Use the Form Tabs (just above the active form) to navigate to the form with the page you want to print.
3. Use the Pages & Worksheets tabs (at the bottom of the screen) to navigate to the page you want to print.
4. Do one of the following:
   - Right-click on the form, select **Print Current Page**.
   - Click the **Print Page** toolbar button.
   - From the **Client** menu, choose **Print Current Page**.
5. The page is immediately sent to your default printer without launching the **Print manager**.

## C. Printing Information Reporting Forms

The IRS and SSA machine-read paper forms. These forms must be printed with paper and ink that meet IRS standards. If you plan to file paper forms with the IRS or the SSA, read IRS Publications 1141, 1167, and 1179 for specific details about IRS requirements for substitute forms, including print characteristics. The IRS updates these publications as its standards change.

You can print recipient copies of these forms in IRS-approved formats. If you choose to print the forms yourself, test a form for proper printer alignment. Use the **Print Alignment** feature to align text on preprinted or approved substitute forms.

**To align W-2 and 1099 data to print on substitute forms**

1. Open a W-2 or 1099 form.
2. Click the **Print Alignment** button.
3. Select the appropriate paper type.
4. Adjust the margins and row spacing.
5. Click **Print**.

6. To revert to the default margin and row settings at any time, click **Reset**.

To test printer alignment for your forms, print on blank paper and then compare the results to the substitute form to make sure the data is aligned properly.

## D. Closing the Print manager

You can check the box under the **Print manager** tab of the **Preferences** window to have the **Print manager** automatically close and return the focus to the active form after each time you send a job to the printer. To view this preference, click the **Preferences** toolbar button and select the **Print manager** tab.

## E. Change Printer and Print Properties

1. From the **Print manager**, click the **Change Printer** button in the upper right corner.
2. In the **Print Setup** dialog box, review your printer settings and change them, if necessary.
3. Click **OK** to save your printer settings.
4. Click the **Close arrow** to close the **Print manager** and return to your client's active form.

# IV. Getting Help

## A. Accessing Research

Commonly used federal forms are linked to supporting CCH research material that explains the form or field in detail. These links are designed to take you to a highly-relevant and compliance-oriented explanation with respect to both the form and active field.

Each time you are working in a field that is supported by an explanation in the CCH *Tax Prep Partner* series, *IntelliForms* enables the **Access Research** command on both the **Navigate** menu and the **Right-click** menu. If the field is not linked to supporting documentation, these commands are not enabled.

**To access the CCH *Tax Prep Partner* explanation**

5. Click in a linked field.
6. Do one of the following:
   - **Right-click** and select **Access Research**.
   - On the **Navigate** menu, click **Access Research**.
7. *IntelliForms* links you directly to the relevant *Tax Prep Partner* document in the *IntelliConnect* database.

## B. Help Modules

The following program resources (and more!) are available through the **Support** menu of any manager and **Support Explorer**.

### *Support Explorer*

Click the **Help** toolbar button from any manager and *IntelliForms* displays **Support Explorer**, a browser-like help system used by the program to organize and present a variety of program resources.


Program resources that can be accessed using **Support Explorer** include the **Program Help**, **Instructions**, and **Frequently Asked Questions (FAQs)**.

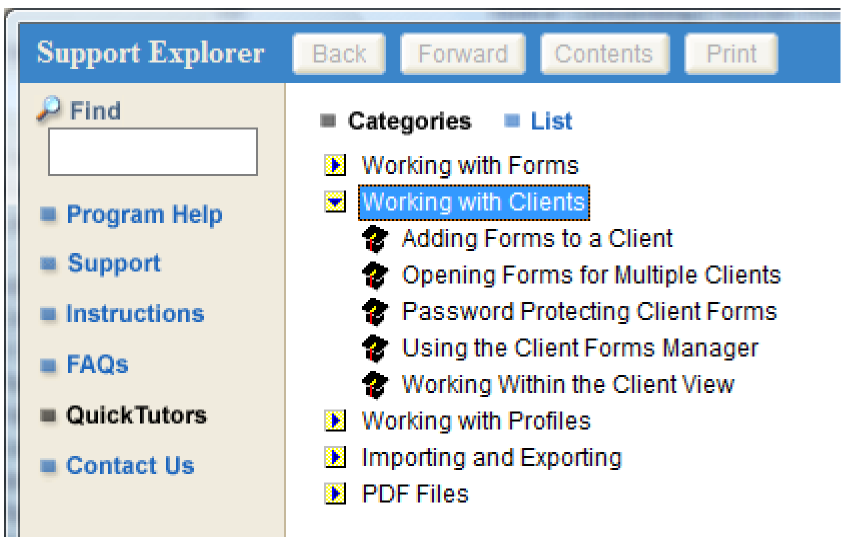
## *Program Help*

**Program Help** contains instructions for program features and menu commands. The contents of the **Help** window depend on the conditions under which it was opened. You can display the **Program Help** from any manager by choosing **Program Help** from the **Support** menu.

To browse **Program Help**, click the **Contents** button on the title bar of **Support Explorer** window. Click any book button or subject title to open the topics list for the subject, then select the subject you want to review.

## *QuickTutors*

**QuickTutors** are short, easy-to-follow demonstrations of specific program features and functions.  After you click **QuickTutors** from **Support Explorer**, click the name of a category, and then choose a **QuickTutor** to view.




## *QuickStart Tour*

The **QuickStart Tour** is a self-paced introduction to the program's features.

**To take the QuickStart Tour**

1. From the **Support** menu of any manager,
2. Click **QuickStart Tour**.
3. The **QuickStart Tour** begins automatically.
4. Use the controls at the upper right to pause, skip ahead, or go back.
5. To navigate to the Tour's menu, click **Main Menu**.
6. To exit, close your Web browser by clicking the close **(X)** button at the top right corner of the window.

## C. Online Support

To find **Customer Support** information, do one of the following:

- Click the **Websites** command on the **Support** menu of any manager;
- Select **Support** from the **Support Explorer** window; or
- Choose **Contact Us** from the **Support** menu of any manager.

## D. Product Information

Click **About** on the **Support** menu of any manager to find the program's release number, and version, update, and license information.