

# Creating Multiple "Form Sets" for a Single Client in IntelliForms™

A client's "form set" is the set of forms that have been saved for that particular client – either by opening the forms altogether or by adding additional forms to an existing saved client. IntelliForms will automatically group *all* the forms saved for a single client into a single form set. There may be times, however, when it makes sense to set up more than one form set for a particular client (e.g., if two different users need to work on forms for the same client at the same time).

There are two ways to create multiple form sets for a single client:

- Create two separate form sets when work on the client's forms is just beginning; or
- Duplicate an existing form set, and then remove unwanted forms from the original and duplicated form sets.

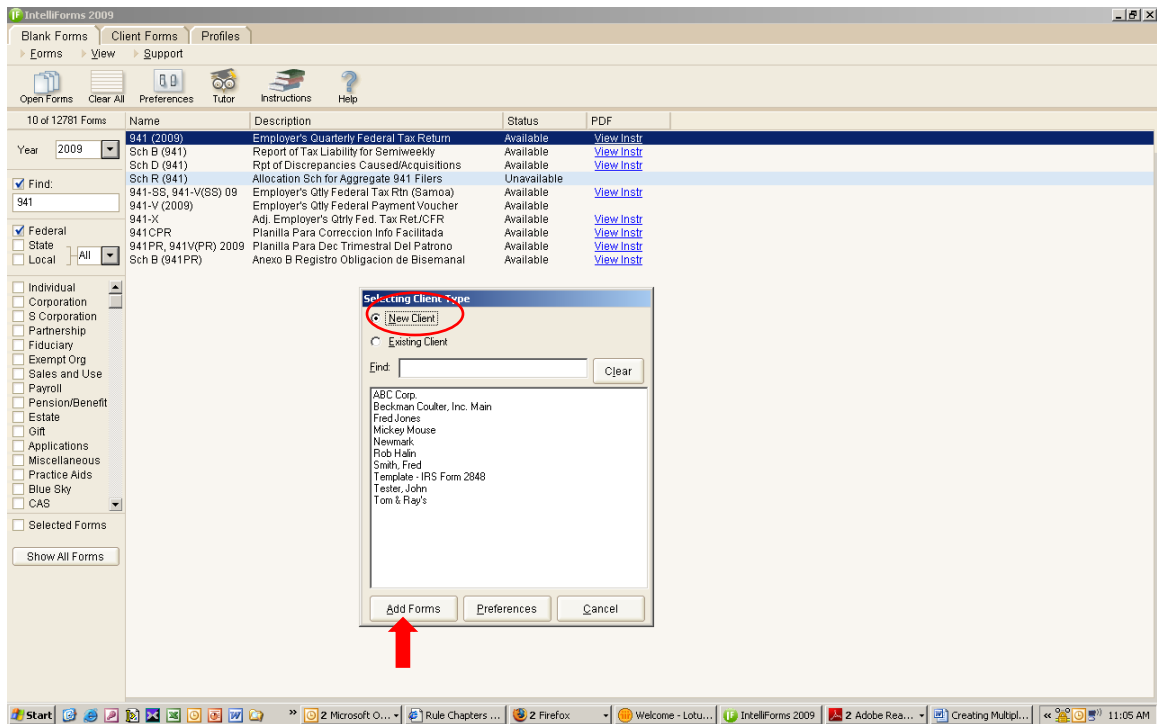
## Beginning With Multiple Form Sets

**Example 1:** XYZ Corp. must complete and file both its payroll and tax forms, and in this firm, separate departments handle payroll and tax work. An associate in the payroll department is going to have to work in IntelliForms on the corporation's federal Form 941 at the same time that another associate in the tax department is going to have to work on the its federal Form 1120 return. If one associate opens the form set for XYZ Corp., the other associate won't be able to open the form set until after the first associate is finished.

**Solution:** Create two separate form sets for XYZ Corp. – one for payroll forms and the other for tax forms. Have the payroll associate complete Steps 1 through 4, while the tax associate completes Steps 5 through 8.

## Payroll Associate

1. On the blank forms tab of IntelliForms, search for federal Form 941. Open the form, select "New Client" in the Selecting Client Type window, and then click on the "Add Forms" button.



- When the form is saved (using the "Save" toolbar button), enter "XYZ Corp. – Payroll" as the client name and then click on the "Save" button in the Client Name window.

Note: If XYZ Corp. has a network installation of IntelliForms and the forms are stored on a network drive, the payroll associate can “password protect” the payroll form by filling in a “password” for that client. This will prohibit other departments from viewing the form unless they know the password. Similar rules would apply to the tax department (or anyone else in the firm using IntelliForms).

IntelliForms 2009 - [XYZ Corp.]

Blank Forms Client Forms Profiles XYZ Corp.

Client Edit Tools Navigate Forms Support

Form 941 for 2009: Employer's QUARTERLY Federal Tax Return (Rev. April 2009) Department of the Treasury - Internal Revenue Service

OMB No. 1545-0029

Report for this quarter of 2009 (check one):

☐ 1: January, February, March

☐ 2: April, May, June

☐ 3: July, August, September

Client Name

Please enter a client name:

XYZ Corp. -- Payroll

Password (leave blank for no password)

Save Cancel

Part 1: Answer these questions for this quarter.

1 Number of employees who received wages, tips, or other compensation for the pay period including: Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), Dec. 12 (Quarter 4)

2 Wages, tips, and other compensation

3 Income tax withheld from wages, tips, and other compensation

4 If no wages, tips, and other compensation are subject to social security or Medicare tax

5 Taxable social security and Medicare wages and tips:

5a Taxable social security wages 580,987.00 x .124 = 72,042.39

5b Taxable social security tips x .124 =

5c Taxable Medicare wages & tips 580,987.00 x .029 = 16,848.62

5d Total social security and Medicare taxes (Column 2, lines 5a + 5b + 5c = line 5d) 88,891.01

6 Total taxes before adjustments (lines 3 + 5d = line 6) 286,458.01

7 CURRENT QUARTER'S ADJUSTMENTS, for example, a fractions of cents adjustment.

7a Current quarter's fractions of cents 8,774.00

7b Current quarter's sick pay 52,567.00

Pages & Worksheets Filing Options Data 1 2 Ln 4 - No Wage Ln 7a - Tax Adj Ln 7b - Tax Adj Ln 7c - Tax Adj Ln 11 - Deposits Where to File

Start Microsoft Rule Chapters 2 Firefox Welcome - Lot... IntelliForms 20... 2 Adobe Rea... Creating Multip... 11:17 AM

3. This will create a form set for XYZ Corp.'s payroll forms. The form set will be displayed in the client list on the Client Forms tab. If you click on the client name ("XYZ Corp. -- Payroll") and highlight the list item, the forms in the form set will appear in the forms pane at the bottom of the screen.

IntelliForms 2009

Blank Forms Client Forms Profiles XYZ Corp. -- Payroll

Clients Options View Forms Reports Support

Open New Delete Client Delete Form Mark All Unmark All Easy View Preferences Tutor Help

12 of 12 Clients

Find:

Incomplete Complete Marked Clients Show All Clients

Client #	Client Name	Year	Complete	Created	Modified	Tax Preparer
	ABC Corp.	2009		2/16/2010	2/17/2010	
	Beckman Coulter, Inc. Main	2009		2/9/2010	2/18/2010	
	Fred Jones	2009		1/22/2010	1/22/2010	
	Mickey Mouse	2009		2/9/2010	2/9/2010	
	Newmark	2009		1/21/2010	1/25/2010	
	Rob Halin	2009		1/21/2010	1/21/2010	
	Rob Halin	2005		1/20/2010	1/21/2010	
	Smith, Fred	2009		1/11/2010	1/11/2010	Fred
	Template - IRS Form 2848	2009		1/11/2010	1/11/2010	John
	Tester, John	2009		1/21/2010	1/21/2010	
	Tom & Ray's	2009		1/19/2010	1/19/2010	
	XYZ Corp. -- Payroll	2009		2/19/2010	2/19/2010	

Name Description

Forms

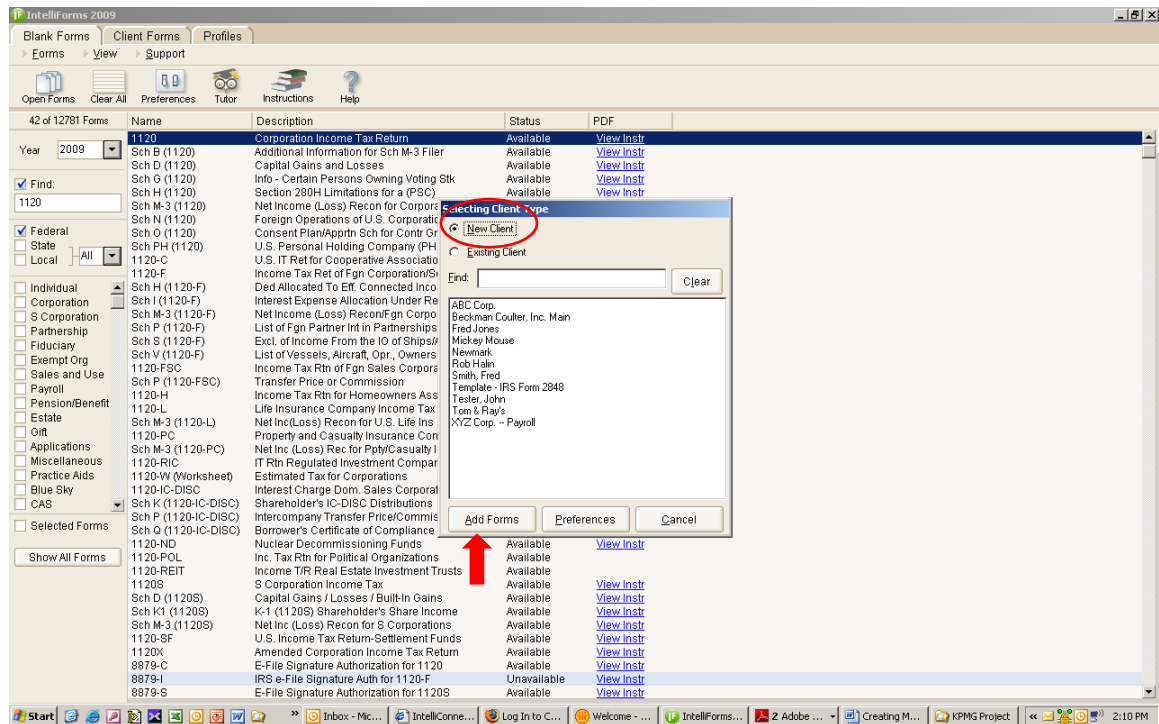
941 Employer's Quarterly Federal Tax Return

Start Microsoft Rule Chapters 2 Firefox Welcome - L... IntelliForm... 2 Adobe R... Creating Mu... KPMS Project 12:27 PM

4. Finish working on federal Form 941, save the form, and then close the Client View tab.

## Tax Associate

5. On the blank forms tab of IntelliForms, search for federal Form 1120. Open the form, select "New Client" in the Selecting Client Type window, and then click on the "Add Forms" button.



6. When the form is saved (using the "Save" toolbar button), enter "XYZ Corp. – Tax" as the client name and then click on the "Save" button in the Client Name window.

IntelliForms 2009 - [Unnamed Client]

Blank Forms Client Forms Profiles XYZ Corp.

Client Edit Tools Navigate Forms Support

Save Add Forms Restore Apply Profile Back Forward Check Forms Print Client Print Form Print Page Instructions Help

1120

Enter the amount of any backup withholding.

Enter the amount contributed to a Merchant Marine capital construction fund.

**1120 U.S. Corporation Income Tax Return**

For calendar year 2009 or tax year beginning ending 2009

OMB No. 1545-0123

Form 1120

Department of the Treasury Internal Revenue Service

A Check if:

1a Consolidated return (attach Form 990) ☐

b Life insurance consolidated return (attach Form 990) ☐

2 Personal holding co. (attach Sub. P) ☐

3 Personal service corp. (see instructions) ☐

4 Schedule M-1 attached ☐

Use IRS label. Otherwise, print or type.

Name XYZ Corp.

Number, street, and room or suite no. If a P.O. box, see instructions 98765 Corporate Drive

City or town State MA Zip 02101

Employer identification number 12-3987567

Please enter a client name: XYZ Corp. -- Tax

Password (leave blank for no password)

Save Cancel

1a Gross receipts or sales 9,876,542

2 Cost of goods sold (Schedule A, line 8)

3 Gross profit. Subtract line 2 from line 1a

4 Dividends (Schedule C, line 19)

5 Interest

6 Gross rents

7 Gross royalties

8 Capital gain net income (attach Schedule D (Form 1120))

9 Net gain or (loss) from Form 4797, Part II, line 17 (attach Form 4797)

10 Other income (see instructions—attach schedule)

11 Total income. Add lines 3 through 10

12 Compensation of officers (Schedule E, line 4)

13 Salaries and wages (less employment credits)

14 Repairs and maintenance

15 Bad debts

16 Rents

17 Taxes and licenses

18 Interest

19 Charitable contributions

20 Depreciation from Form 4562 not claimed on Schedule A or elsewhere on return (attach Form 4562)

21 Depletion

22 Advertising

Pages & Worksheets 1 2 3 4 5 Options Bus Codes Explanations Ln 5 - Interest Income Ln 10 - Oth Inc Lns 10 and 26 - Partner Inc Loss Ln 12 and Sch E - Officers Comp Ln 13 - Salaries Ln 17

7. This will create a second form set for XYZ Corp. The second form set is for tax forms. The form set will be displayed in the client list on the Client Forms tab. If you click on the client name ("XYZ Corp. – Tax") and highlight the list item, the forms in the form set will appear in the forms pane at the bottom of the screen.

IntelliForms 2009

Blank Forms Client Forms Profiles XYZ Corp. -- Tax

Clients Options View Forms Reports Support

Open New Delete Client Delete Form Mark All Unmark All Easy View Preferences Tutor Help

13 of 13 Clients

Find:

Incomplete Complete Marked Clients Show All Clients

Client #	Client Name	Year	Complete	Created	Modified	Tax Preparer
1	ABC Corp.	2009	<input type="checkbox"/>	2/16/2010	2/17/2010	
2	Beckman Coulter, Inc. Main	2009	<input type="checkbox"/>	2/9/2010	2/18/2010	
3	Fred Jones	2009	<input type="checkbox"/>	1/22/2010	1/22/2010	
4	Mickey Mouse	2009	<input type="checkbox"/>	2/9/2010	2/9/2010	
5	Newmark	2009	<input type="checkbox"/>	1/21/2010	1/25/2010	
6	Rob Halin	2009	<input type="checkbox"/>	1/21/2010	1/21/2010	
7	Rob Halin	2005	<input type="checkbox"/>	1/20/2010	1/21/2010	
8	Smith, Fred	2009	<input type="checkbox"/>	1/11/2010	1/11/2010	Fred
9	Template - IRS Form 2848	2009	<input type="checkbox"/>	1/21/2010	1/11/2010	John
10	Tester, John	2009	<input type="checkbox"/>	1/21/2010	1/21/2010	
11	Tom & Ray's	2009	<input type="checkbox"/>	1/19/2010	1/19/2010	
12	XYZ Corp. -- Payroll	2009	<input type="checkbox"/>	2/19/2010	2/19/2010	
13	XYZ Corp. -- Tax	2009	<input type="checkbox"/>	2/19/2010	2/19/2010	

Name Description

1120 Corporation Income Tax Return

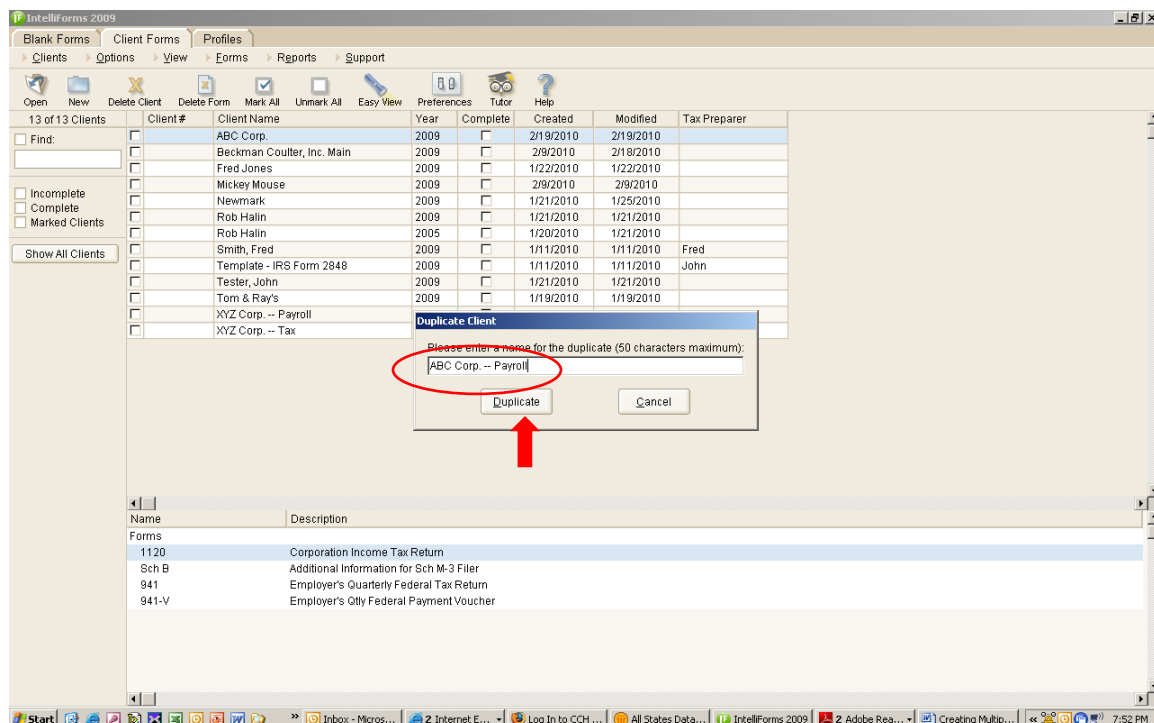
8. Finish working on federal Form 1120, save the form, and then close the Client View tab.

## Duplicating an Existing Form Set

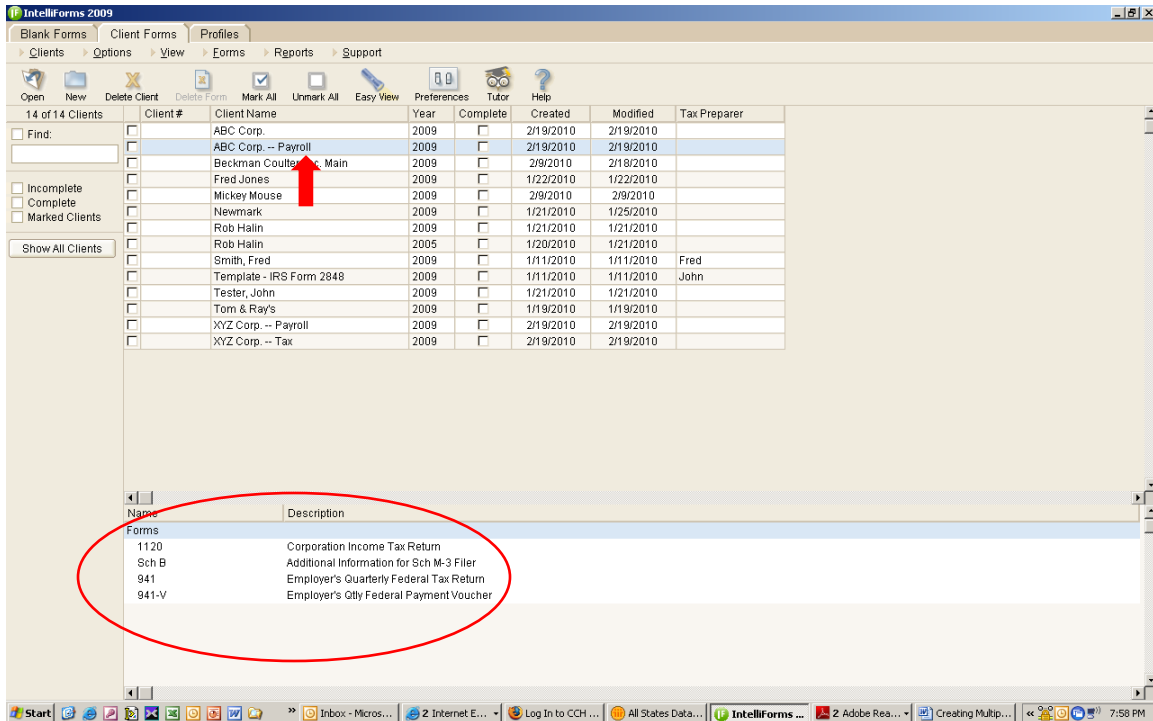
**Example 2:** Assume your practice has separate departments to handle payroll and tax work. You already have a form set for ABC Corp. (one of your clients) that contains both payroll and tax forms. However, an associate in the payroll department opens ABC Corp.'s form set and begins working on a payroll form. Five minutes later, a tax department associate tries to open ABC Corp.'s form set to work on a tax form; however, he cannot access the form set until after the payroll associate is finished.

**Solution:** Duplicate the existing form set for ABC Corp., clean out any unwanted forms from both the original and duplicate form sets, and rename the original form set if necessary.

1. Highlight the existing form set in the client list on the Client Forms tab, click on the "Clients" toolbar menu, and click on "Duplicate Selected Client" from the drop-down menu. Enter "ABC Corp. -- Payroll" as the client name and then click on the "Duplicate" button in the Duplicate Client window.



2. The duplicated form set will be displayed in the client list on the Client Forms tab. All the forms from the original form set (and all the information previously entered on those forms) will be carried over to the duplicate form set.



3. Open the duplicated form set ("ABC Corp. – Payroll") and delete the unwanted forms (*i.e.*, tax forms) by right-clicking on the tab for each unwanted form and then clicking on the "Delete" option on the drop-down menu. Click on the "Save" toolbar button and then close the Client View tab. Open the original form set ("ABC Corp."), delete the unwanted forms from that form set (*i.e.*, the payroll forms), click on the "Save" toolbar button. *Do not close the Client View tab for the original form set yet.*

IntelliForms 2009 - [ABC Corp. -- Payroll]

Blank Forms Client Forms Profiles ABC Corp. -- Payroll

Client Edit Tools Navigate Forms Support

Save Add Forms Restore Apply Profile Back Forward Check Forms Print Client Print Form Print Page Instructions Help

1120 941 941-V 1120 Sch B

Enter the amount of any backup withholding.

Enter the amount contributed to a Merchant Marine capital construction fund.

1120 U.S. Corporation Income Tax Return

For calendar year 2009 or tax year beginning ending 2009

Form 1120

Department of the Treasury Internal Revenue Service

A Check if:

1a Consolidated return (attach Form 990) ☐

b Life insurance consolidated return ☐

2 Personal holding company (attach Sch. PH) ☐

3 Personal service corporation (see instructions) ☐

4 Schedule M-1 attached ☐

Use IRS label. Otherwise, print or type.

Name ABC Corp.

Number, street, and room or suite no. If a P.O. box, see instructions. 12345 Main Street

City or town State ZIP code Pleasantville VA 22356

Employer identification number 98-7654321

Date incorporated Before 1900, see Options tab.

Total assets (see instructions) \$ 0

E Check if: (1) ☒ Initial return (2) ☐ Final return (3) ☐ Name change (4) ☐ Address change

1a Gross receipts or sales 2 Cost of goods sold (Schedule A, line 8) 3 Gross profit. Subtract line 2 from line 1c. 4 Dividends (Schedule C, line 19) 5 Interest 6 Gross rents 7 Gross royalties 8 Capital gain net income (attach Schedule D (Form 1120)) 9 Net gain or (loss) from Form 4797, Part II, line 17 (attach Form 4797) 10 Other income (see instructions—attach schedule) 11 Total income. Add lines 3 through 10. 12 Compensation of officers (Schedule E, line 4) 13 Salaries and wages (less employment credits) 14 Repairs and maintenance 15 Bad debts 16 Rents 17 Taxes and licenses 18 Interest 19 Charitable contributions 20 Depreciation from Form 4562 not claimed on Schedule A or elsewhere on return (attach Form 4562) 21 Depletion 22 Advertising

Pages & Worksheets 1 2 3 4 5 Options Bus Codes Explanations Ln 5 - Interest Income Ln 10 - Oth Inc Lns 10 and 26 - Partner Inc Loss Ln 12 and Sch E - Officers Comp Ln 13 - Salaries Ln 17

Start Inboxes - Micros... Z Internet E... Log In to CCH... All States Data... IntelliForms... Z Adobe Rea... Creating Multip... 8:06 PM

4. If you wish to change the client name for the original form set, click on the "Clients" toolbar menu, and click on "Rename Client" from the drop-down menu. Enter "ABC Corp. – Tax" as the client name and then click on the "Rename" button in the Rename Client window. Click on the "Save" toolbar button and then close the Client View tab.

IntelliForms 2009 - [ABC Corp.]

Blank Forms Client Forms Profiles ABC Corp.

Client Edit Tools Navigate Forms Support

Save Add Forms Restore Apply Profile Back Forward Check Forms Print Client Print Form Print Page Instructions Help

1120 Sch B

Enter the amount of any backup withholding.

Enter the amount contributed to a Merchant Marine capital construction fund.

1120 U.S. Corporation Income Tax Return

For calendar year 2009 or tax year beginning ending 2009

Form 1120

Department of the Treasury Internal Revenue Service

A Check if:

1a Consolidated return (attach Form 990) ☐

b Life insurance consolidated return ☐

2 Personal holding company (attach Sch. PH) ☐

3 Personal service corporation (see instructions) ☐

4 Schedule M-1 attached ☐

Use IRS label. Otherwise, print or type.

Name ABC Corp.

Number, street, and room or suite no. If a P.O. box, see instructions. 12345 Main Street

City or town State ZIP code Pleasantville VA 22356

Employer identification number 98-7654321

Date incorporated Before 1900, see Options tab.

Total assets (see instructions) \$ 0

E Check if: (1) ☒ Initial return (2) ☐ Final return (3) ☐ Name change (4) ☐ Address change

1a Gross receipts or sales 2 Cost of goods sold (Schedule A, line 8) 3 Gross profit. Subtract line 2 from line 1c. 4 Dividends (Schedule C, line 19) 5 Interest 6 Gross rents 7 Gross royalties 8 Capital gain net income (attach Schedule D (Form 1120)) 9 Net gain or (loss) from Form 4797, Part II, line 17 (attach Form 4797) 10 Other income (see instructions—attach schedule) 11 Total income. Add lines 3 through 10. 12 Compensation of officers (Schedule E, line 4) 13 Salaries and wages (less employment credits) 14 Repairs and maintenance 15 Bad debts 16 Rents 17 Taxes and licenses 18 Interest 19 Charitable contributions 20 Depreciation from Form 4562 not claimed on Schedule A or elsewhere on return (attach Form 4562) 21 Depletion 22 Advertising

Pages & Worksheets 1 2 3 4 5 Options Bus Codes Explanations Ln 5 - Interest Income Ln 10 - Oth Inc Lns 10 and 26 - Partner Inc Loss Ln 12 and Sch E - Officers Comp Ln 13 - Salaries Ln 17

Start Inboxes - Micros... Z Internet E... Log In to CCH... All States Data... IntelliForms... Z Adobe Rea... Creating Multip... 8:22 PM

Rename Client

Enter a new name for client (50 characters maximum):

ABC Corp. -- Tax

Rename Cancel Help