Managing Client Letters

Client Letters allow you to communicate with your clients about their tax returns. ATX has two types:

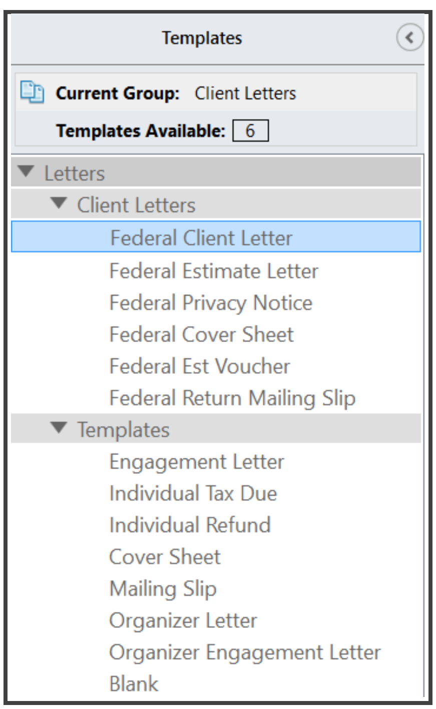
1. **Standard Client Letter** – ATX generates Standard Client Letter content based on your settings in the Client Communication tab of Preferences. You can choose to add letters to each new return when created, to combine Federal and State Letters and much more. You can customize the letter content once inside a return.

2. **Templates** – Templates contain default content but can be customized to meet your needs. There is a blank template that you can use to create completely customized letters of any type.

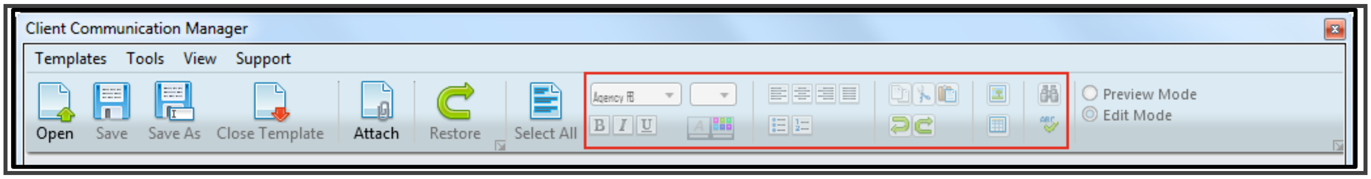
If you purchase the Client Letter Toolkit add-on, you can import these letters to the Blank template in ATX.

Client Communication Manager

Client Communication Manager allows you to modify letters and templates in ATX. In the Templates pane under **Client Letters**, you'll find various standard letters, and under the **Templates** section, you'll find templates you can customize to fit your needs, including a blank template.



Client Communication Manager also includes built-in formatting tools used in many word processing applications. Images, such as your company logo or digitized signature, can be added, as well as tables, text and numbered or bulleted lists. If you prefer, you can export a template to edit in another word processing application (such as Microsoft® Word or Microsoft® WordPad), and then import it into ATX.



To import files created or modified in another application, the files must be saved in Rich Text Format (.RTF files).

- In **Preview Mode**, ATX displays the letter as it will look when attached to a return. You cannot make changes in Preview Mode.

- In **Edit Mode**, variables and paragraph markers are visible and you can add or remove graphics or text.

There are two ways to access Client Communication Manager:

1. **Return Manager** – To open Client Communication Manager from Return Manager, click the **Tools** menu, and select **Client Communication Manager**.

When you open Client Communication Manager from Return Manager, Preview Mode and the Variables pane are unavailable, and you can edit templates only. Editing capabilities are limited to text and graphics and can be saved globally (for all future returns).

2. **Inside an Open Return** – To open Client Communication Manager while inside a return, click the **Forms** menu, and select **Client Letter**. When opened inside a return, Client Communication Manager can be used to add any Client Letter or template to the return. Select the desired letter or template and click **Attach**.

Standard Client Letters

On the Client Communication tab in Preferences, you can control which standard content to use in your Client Letters and how to present the content. To open, click **Preferences** on the toolbar from **Return Manager**. Click the **Client Communication** tab to make selections about your Standard Client Letters, such as:

- Whether to attach a particular letter or combination of letters automatically when new returns are created
- Whether to combine Client and Estimate Letters
- Whether to include a Privacy Notice with Client and Estimate Letters

- Whether to combine Federal and State/Local Letters
- Whether to include a Cover Sheet and/or Return Mailing Slip
- Desired pronoun usage (I/me versus we/us)
- Desired wording regarding e-file

To add, edit or remove graphics, tables, variables or the text within a Client Letter, click **Edit Formatting** and use the Client Communication Manager to make changes. When finished, click **Save** to apply the changes.

Upon saving, you have the option to save your changes locally (for just the current return) or globally (for all future returns).

Templates

Templates differ from Standard Client Letters in the following ways:

- Can be edited from inside or outside a return but can't be added automatically to new returns.
- Can be edited for content, but only the blank template allows you to create your own custom template from scratch.
- Can be exported and imported as .RTF files.

To export a template, open **Client Communication Manager**, and select the template to export. Click the **Templates** menu and select **Export**. In the **Browse** dialog box, select a location, and click **OK**.

To import a template, open **Client Communication Manager**. Click the **Templates** menu and select **Import**. In the **Import Template** dialog box, browse to the location of the template, and click **Open**.

What are Variables?

You can use variables in both letters and templates. They show the system what type of data should be specifically pulled from the return and where that data should be shown in the letter. As the name suggests, the data ATX pulls in varies based on data in the tax return.

When you view a letter or template in Edit Mode, variables are shown as blue text in blue brackets.

Add variables by dragging and dropping from the Variables pane to the location you want them to display in the letter. To remove a variable, highlight and delete.

You cannot edit variable content because it is pulled from data entered or calculated in the tax return.