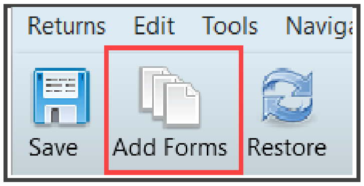
Adding Forms

ATX allows you to add forms to an open return at any time.

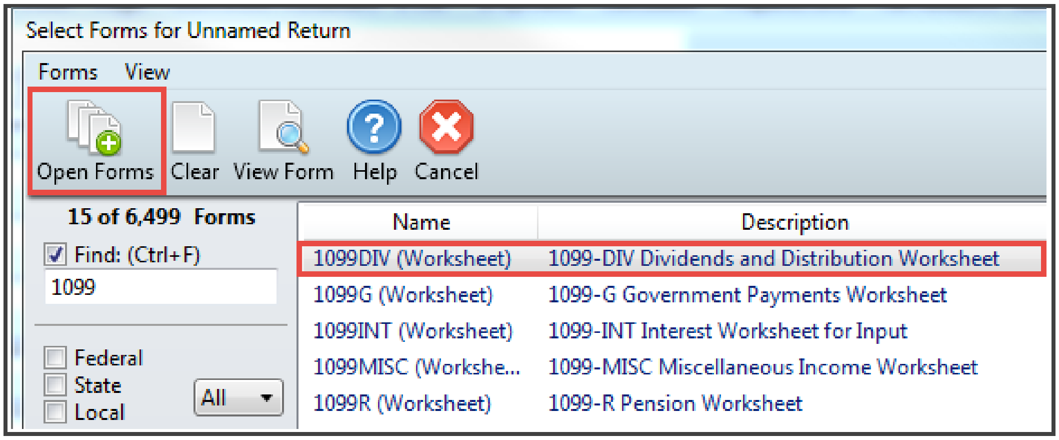
To add forms to a return:

1. Click **Add Forms**.

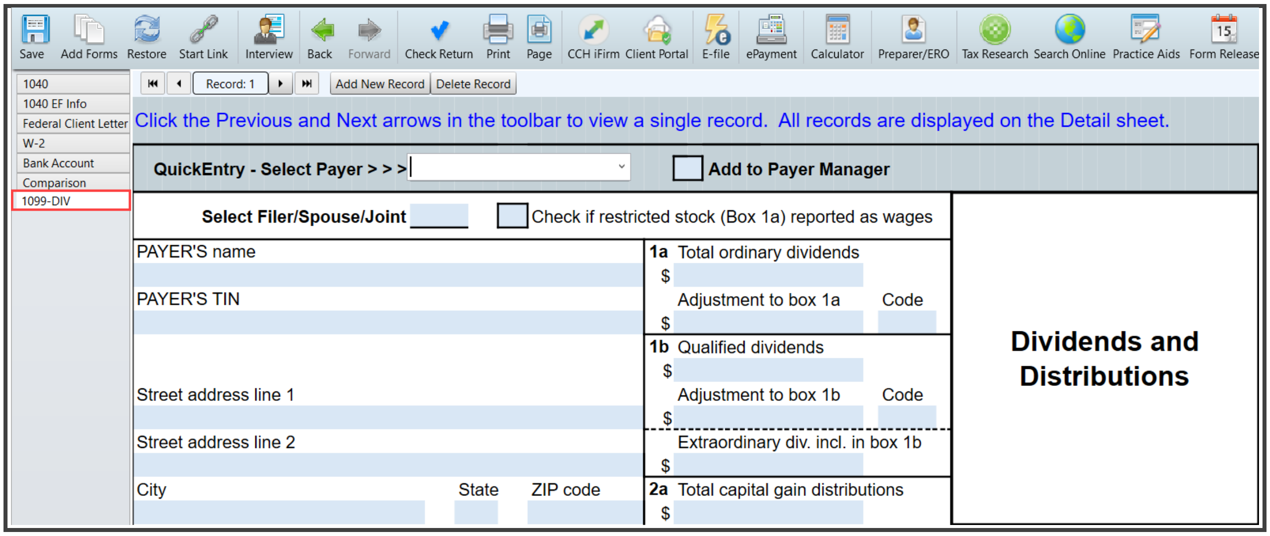


2. In the **Select Forms** dialog box, type the form name in the **Find** box.

3. Select the form in the list and click **Open Forms**.



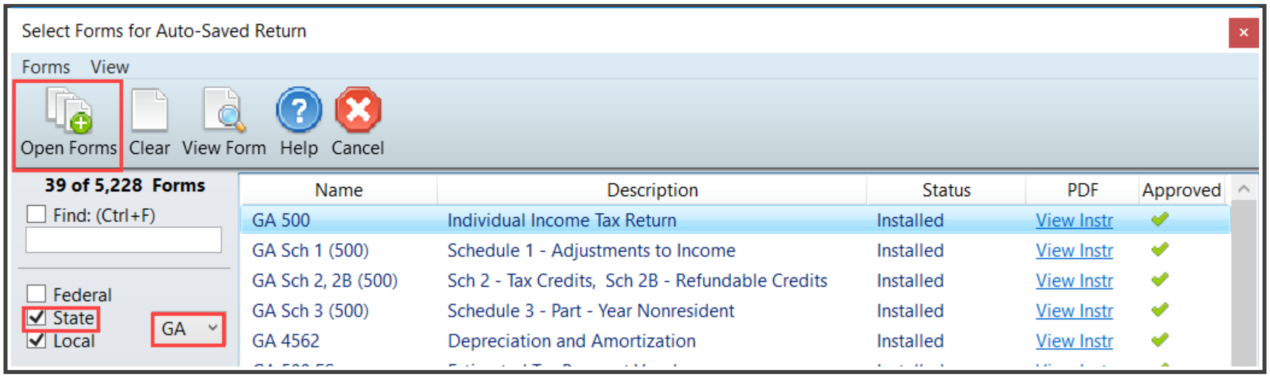
4. ATX adds the form to the return and lists the new form as a tab on the left.



Adding State Forms

To add state forms:

1. In the Select Forms window, select the **State** checkbox.
2. To filter to a specific state, select the state from the drop-down list.



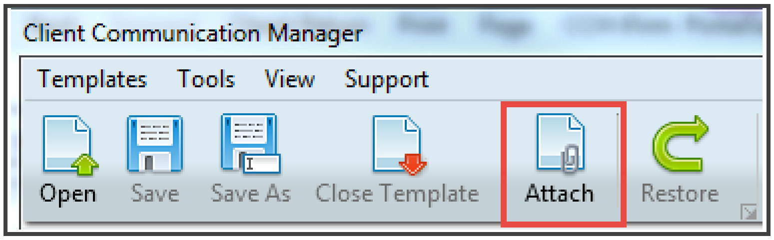
3. Select the forms and click **Open Forms**.

Adding a Client Letter

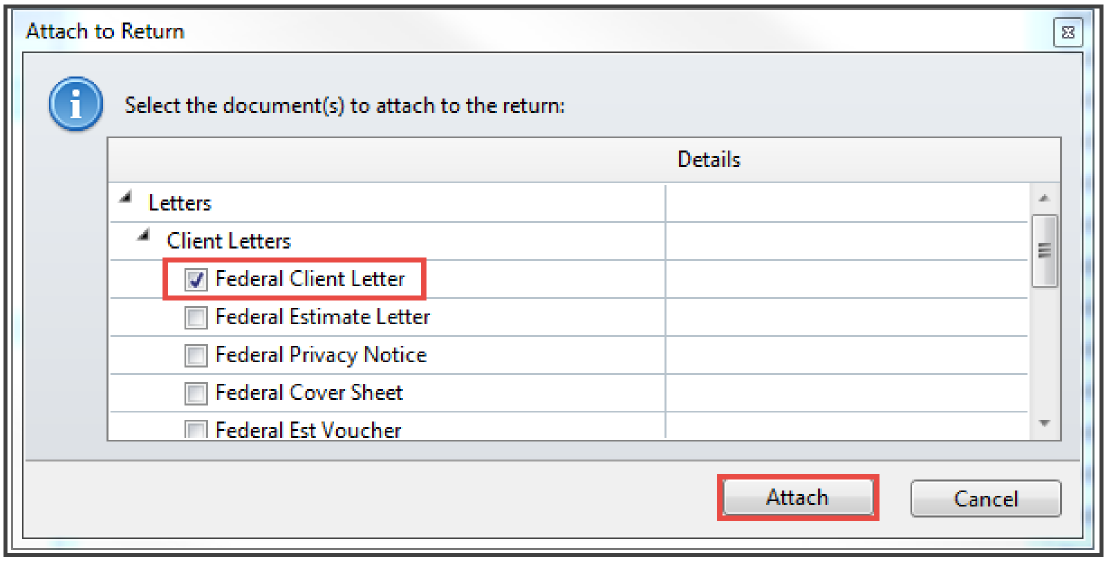
To add a letter to an open return:

1. On the **Forms** menu, click **Client Letter**.

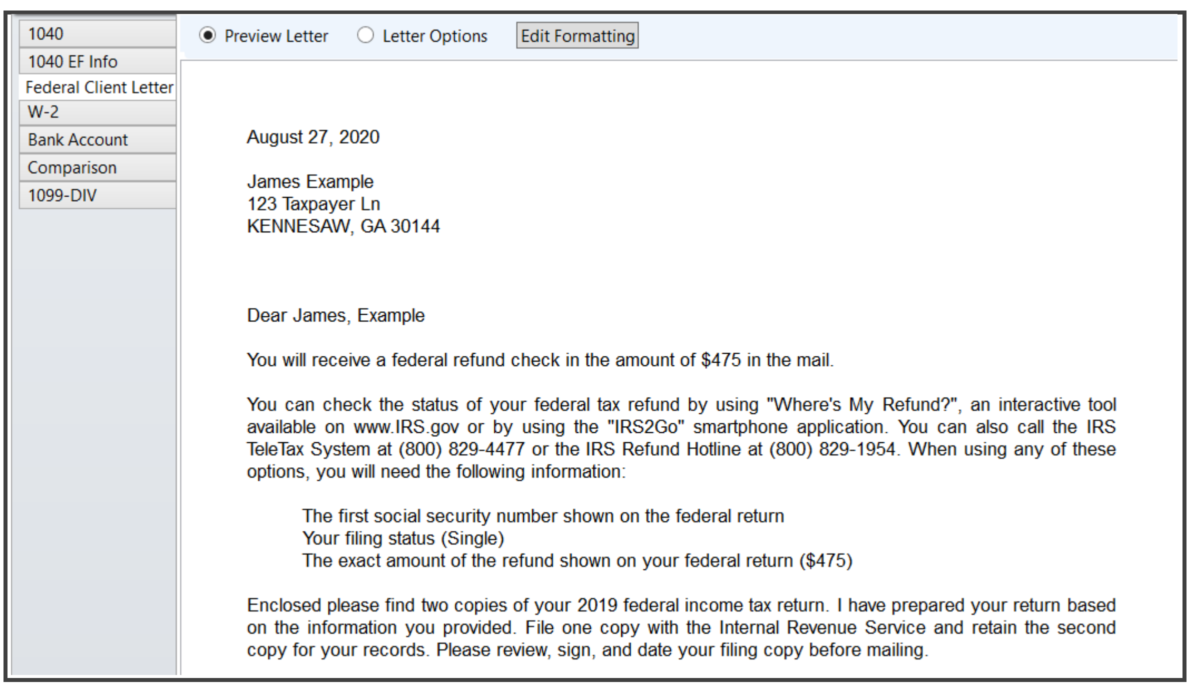
2. In the **Client Communication Manager** dialog box, click **Attach**.



3. In the **Attach to Return** dialog box, select the check box for the letter you want to add and click **Attach**.



4. Close **Client Communication Manager** to view the letter in the return. ATX completes the variable fields with the information from the return.



For more information on editing client letters, please review the *Managing Client Letters* lesson in the Admin Roles and Functions module.

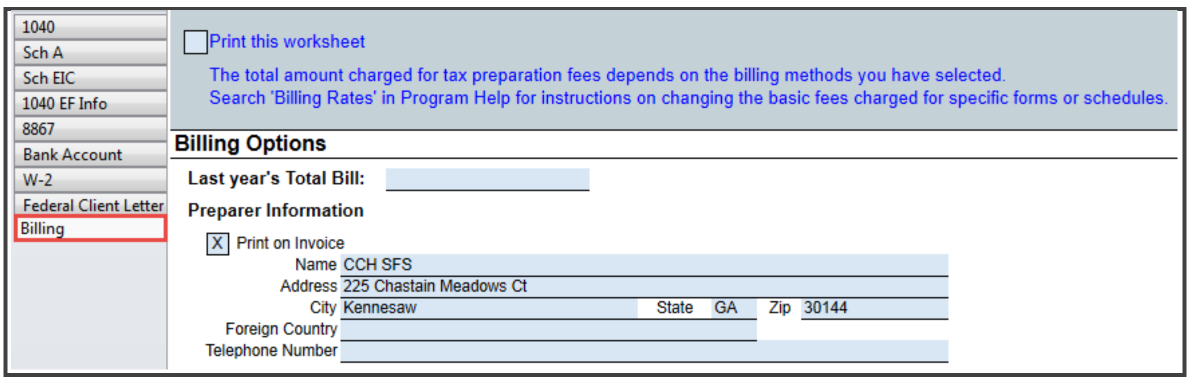
Adding a Billing Invoice

If you use the ATX billing invoice, you can add a client's invoice directly to the return.

To add an invoice:

1. On the **Forms** menu, click **Billing Invoice**.

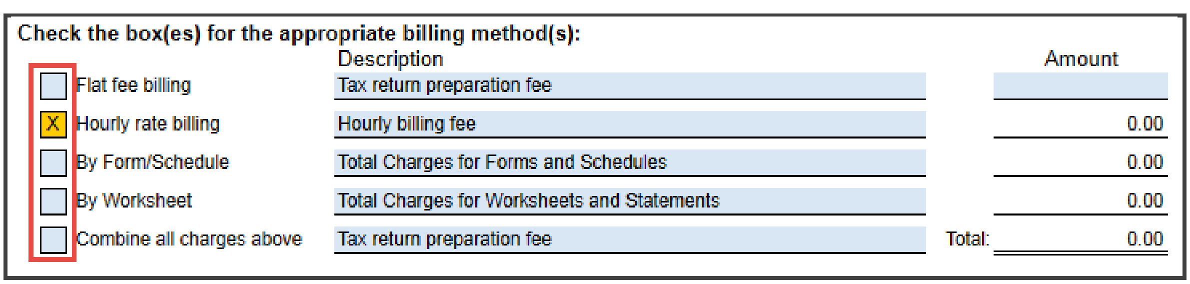
2. ATX displays the billing invoice in the return.



3. You can choose one or more methods for billing, choose to combine all charges into one line item, or create a detailed billing statement.

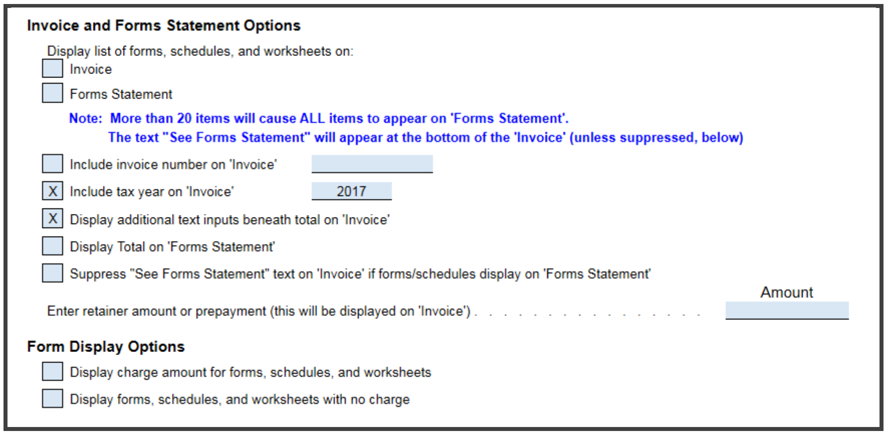
To select a billing method:

1. Select the check box(es) for the billing methods you want to use.



2. ATX calculates the bill amount based on rates you set in Billing Manager.

3. Select any display options you want to apply.



Invoice and Forms Statement Options

Display list of forms, schedules, and worksheets on:

- [ ] Invoice
- [ ] Forms Statement

Note: More than 20 items will cause ALL items to appear on 'Forms Statement'.
The text "See Forms Statement" will appear at the bottom of the 'Invoice' (unless suppressed, below)

- [ ] Include invoice number on 'Invoice'
- [X] Include tax year on 'Invoice' 2017
- [X] Display additional text inputs beneath total on 'Invoice'
- [ ] Display Total on 'Forms Statement'
- [ ] Suppress "See Forms Statement" text on 'Invoice' if forms/schedules display on 'Forms Statement'

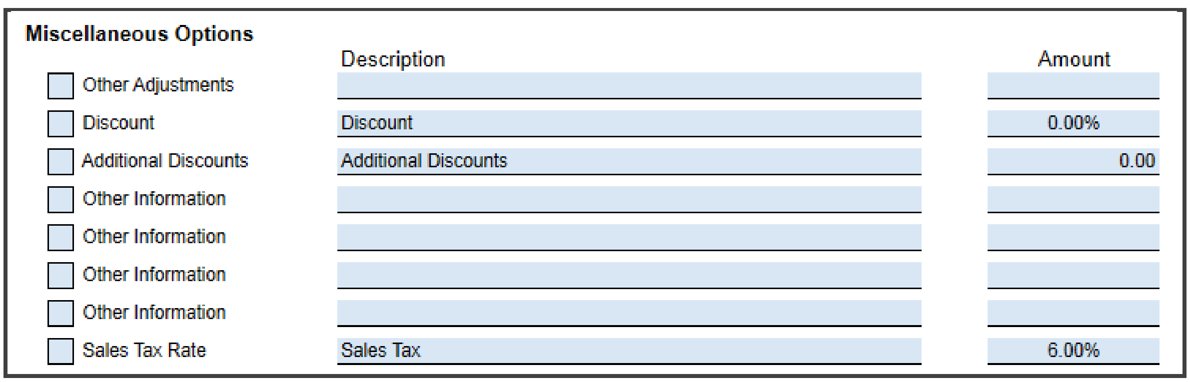
Enter retainer amount or prepayment (this will be displayed on 'Invoice') . . . . Amount

Form Display Options

- [ ] Display charge amount for forms, schedules, and worksheets
- [ ] Display forms, schedules, and worksheets with no charge

4. Select any additional charges to add for this return.

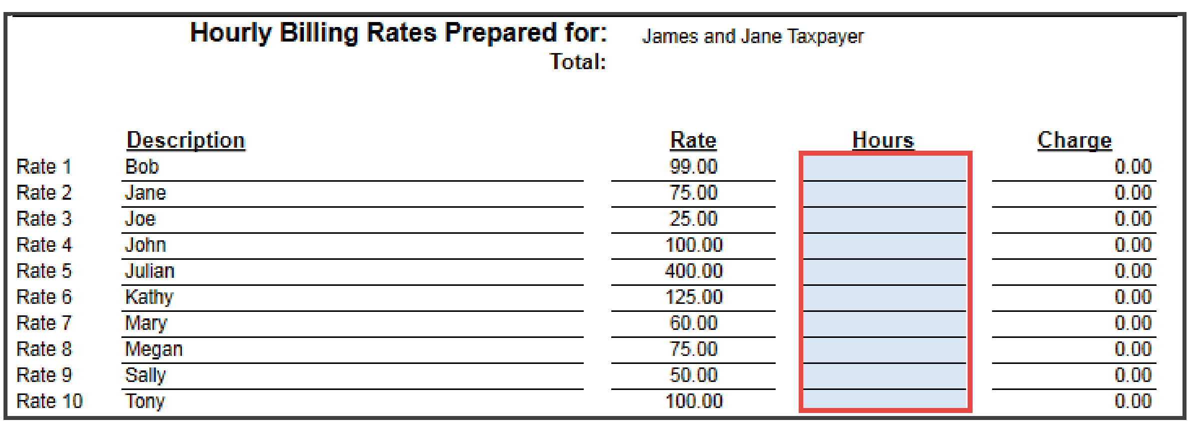
5. Type any discounts and adjustments not offered in the other options using the **Miscellaneous Options** section.



Miscellaneous Options

	Description	Amount
Other Adjustments		
Discount	Discount	0.00%
Additional Discounts	Additional Discounts	0.00
Other Information		
Other Information		
Other Information		
Other Information		
Sales Tax Rate	Sales Tax	6.00%

If you choose **Hourly rate billing**, you must enter the total time spent on the return using the **Hourly Billing Rates** worksheet tab to calculate the total amount due.



Hourly Billing Rates Prepared for: James and Jane Taxpayer
Total:

	Description	Rate	Hours	Charge
Rate 1	Bob	99.00		0.00
Rate 2	Jane	75.00		0.00
Rate 3	Joe	25.00		0.00
Rate 4	John	100.00		0.00
Rate 5	Julian	400.00		0.00
Rate 6	Kathy	125.00		0.00
Rate 7	Mary	60.00		0.00
Rate 8	Megan	75.00		0.00
Rate 9	Sally	50.00		0.00
Rate 10	Tony	100.00		0.00

For more information on setting up billing rates by hour or by form, please review the lesson on *Billing Manager* in the Admin Roles and Functions module.

Discarding Forms

If you need to remove forms from a return, right-click on the form and choose to discard either one or multiple forms.