

ATX™ Learning Portal

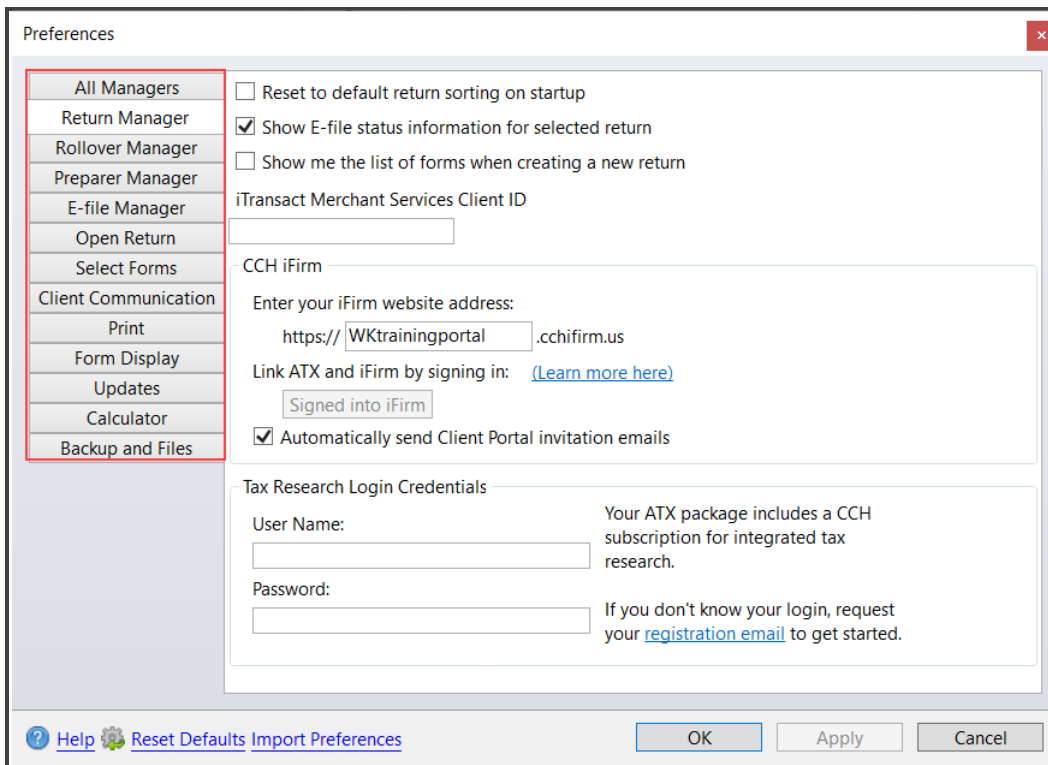
Preferences

ATX offers multiple options to customize your program in the **Preferences** tool.

1. To access these options, click **Preferences**.



2. Use the tabs on the left to access each set of options.




3. After making changes, click **Apply** to save and continue setting preferences, or **OK** to save and close the window.

Review the chart below for descriptions of available Preferences:

Tab Name	Option	Description
All Managers	Hide returns marked Complete in Return Manager, E-file Manager and Bank Manager	Once you mark a return Complete, it no longer displays in the Return List.
Return Manager	Reset to default return sorting on startup	Display returns in the default sort order each time you open ATX.
	Show e-file status information for selected return	Display current e-file status for selected return in Return Manager.
	iTransact Merchant Services Client ID	Type your Client ID, if applicable. You can connect to iTransact in ATX without logging in each time.
	CCH iFirm	Type your CCH iFirm address and authorization, if applicable. This allows you to connect to CCH iFirm without logging in each time. You can also choose to automatically send invitations to use CCH iFirm Client Portal here.
	Tax Research Login Credentials	Type your email address and password for CCH® Answer Connect. You can use your tax research tools in ATX without logging in each time.
Rollover Manager	Delete sold assets	Automatically delete any assets sold in the prior year when you roll over the return.
	Rollover Itemized, Text and Custom Lists	Roll over lists from prior year returns.
	Enter current year default preparer on rolled-over returns	Update rolled over returns with the current year default preparer information.
	Enter current year default ERO on rolled-over returns	Update rolled over returns with the current year default ERO information.
	Always check for form updates when opening rolled-over returns	Check for form updates each time you open a rolled-over return.
Preparer Manager	Enter this preparer's information on all new returns.	Select preparer to enter on new returns.
	Enter this ERO's information on all new returns.	Select ERO to enter on new returns.
E-file Manager	Automatically include Individual E-File Info Form(s)	Automatically add E-file Information forms to individual returns.
	Automatically include Business E-File Info Form(s)	Automatically add E-file Information forms to business returns.

Tab Name	Option	Description
	Automatically hold and release state e-files for states that prefer prior federal e-file acceptance	Automatically add E-file Information forms to individual returns.
Open Return	Open associated forms automatically as needed	As you type information in a return, ATX determines what forms you need and opens automatically.
	Show tax due/refund information	Display refund or amount due based on information typed in the return.
	Auto-Save returns after ___ minutes.	Automatically save your returns at a specific time interval.
	Display validation errors.	Check for common validation and e-filing errors.
	Enable Payer Manager	Keep track of EINs and information using Payer Manager. Enable Payer Manager to automatically enter names, addresses and other employer information.
	Sort payers by:	Sort payers by EIN or name in Payer Manager.
	Display Tax Research Tool Tips	Display tooltips regarding tax help available on that form line.
	Default Check Return Filters	Determine information to display in Check Return.
Select Forms	Open Information Worksheet automatically	Add a blank information form to returns when you do not select a signature form.
	Use Comprehensive Organizer	Add a comprehensive organizer instead of a standard one when you create organizers.
	Include the following when adding an organizer:	Add an Organizer letter and/or an Organizer Engagement letter when you add the organizer to a return.
Client Communication	Include the following when creating a new return	Specify which letters to add to new federal or state returns.
	Combine client and estimate letters	Combine client and estimate letters for federal or state returns.
	Include privacy notice	Include a privacy notice on federal or state returns.
	Preferred pronoun text	Use plural or singular pronouns on client letters.
	Other information	Select default wording regarding e-file status for client letters.

Tab Name	Option	Description
	Paragraph selection	Clear any check boxes for paragraphs you do not want to include in client letters.
Print	General Settings	Select options for the general print options.
	Default Print Copies	Select the check boxes for which forms to print depending on the copy of the return.
	Print Letters	Select the check boxes for which letter or cover sheet to print with each print copy.
	Mailing Slip orientation	Choose whether to print in portrait or landscape view, and where to align return address.
	Check Return Reports	Select the check boxes for which sections to print on a Check Return report.
	Print Packets	Click View/Edit Print Packets to access the Print Packets dialog box and make changes to your default print packets.
Updates	Program Updates	ATX defaults to update your program each time you open ATX. Select Update Program At to choose a specific time for updates.
	Form Updates	ATX defaults to update your forms each time you open ATX. Select Update Form At to choose a specific time to update forms.
	Select Forms	Select jurisdictions and states to include in each update.
Backup and Files	Automatic Backup	ATX defaults this selection to automatically back up your data when you close a return, the program or one of the main managers.
	Backup Location	Click Browse to select location to store your automatic backups.
	File Storage	Click Browse to select location to store your files, such as return data, e-files and asset information.

 For a complete list and description of all available preferences, review **ATX Help**.