

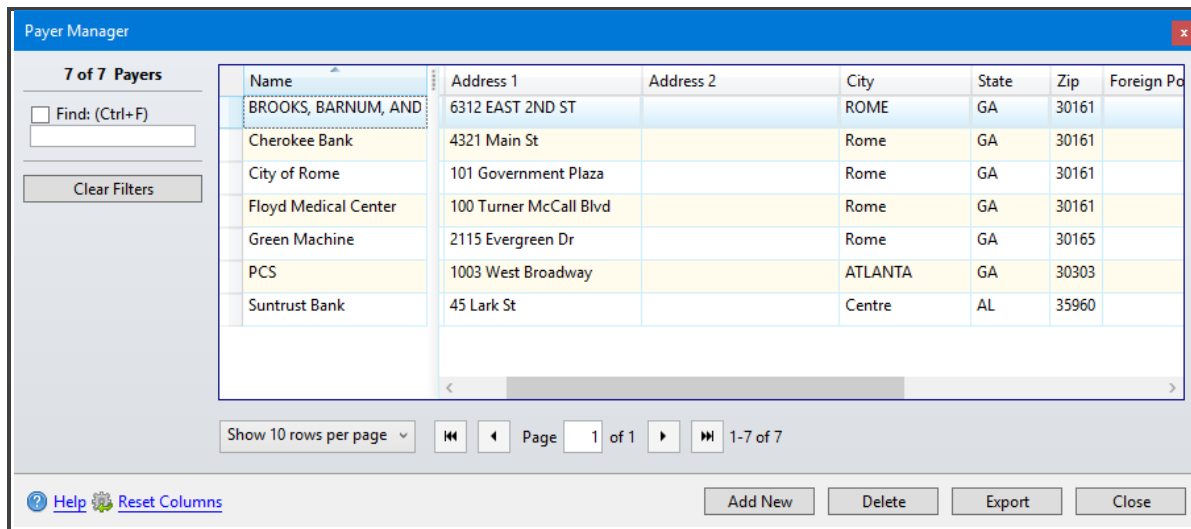
ATX™ Learning Portal

Quick Entry

Quick Entry allows you to enter data in payer forms, such as the W-2 and 1099-R, more efficiently.

ATX allows you to save payer information, including names, addresses and phone numbers, in a database using the Payer Manager. Once you add the payer to your database, you can select that payer on your forms to automatically enter that information in your returns.

1. To access, from the Tools menu, click **Payer Manager** to display the Payer Manager dialog box.



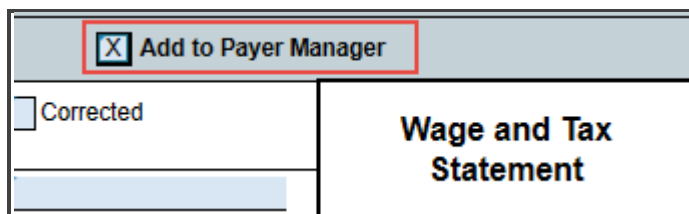
The Payer Manager dialog box displays a table with the following data:

Name	Address 1	Address 2	City	State	Zip	Foreign Po
BROOKS, BARNUM, AND	6312 EAST 2ND ST		ROME	GA	30161	
Cherokee Bank	4321 Main St		Rome	GA	30161	
City of Rome	101 Government Plaza		Rome	GA	30161	
Floyd Medical Center	100 Turner McCall Blvd		Rome	GA	30161	
Green Machine	2115 Evergreen Dr		Rome	GA	30165	
PCS	1003 West Broadway		ATLANTA	GA	30303	
Suntrust Bank	45 Lark St		Centre	AL	35960	

Additional features include a search bar (Find: (Ctrl+F)), a Clear Filters button, a table with 7 of 7 Payers, a pagination bar (Page 1 of 1), and buttons for Add New, Delete, Export, and Close.

Here, you can add new payers to use on future returns, edit existing payers or delete payers you no longer need. You can also add payers in an open return. To do this:

2. In the open return, navigate to your form, such as the W-2.
3. Select the **Add to Payer Manager** check box.



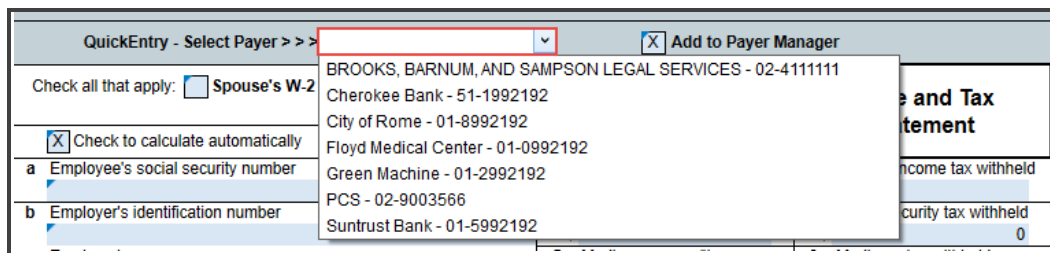
The screenshot shows a form titled "Wage and Tax Statement". A checkbox labeled "Add to Payer Manager" is checked and highlighted with a red box. Other visible elements include a "Corrected" checkbox and a blue bar at the bottom.

4. Type the payer information in the form, as you normally would.

5. ATX saves the information to your database for future use.

Using Quick Entry

1. Once you add payers, use the **Quick Entry** drop-down list to select a payer to use in a return.



The screenshot shows a software interface for selecting a payer. At the top, there is a header bar with the text "QuickEntry - Select Payer >>" on the left and a button labeled "Add to Payer Manager" on the right. Below the header, there is a dropdown menu that is currently open, displaying a list of payer names and their associated IDs. The list includes: "BROOKS, BARNUM, AND SAMPSON LEGAL SERVICES - 02-4111111", "Cherokee Bank - 51-1992192", "City of Rome - 01-8992192", "Floyd Medical Center - 01-0992192", "Green Machine - 01-2992192", "PCS - 02-9003566", and "Suntrust Bank - 01-5992192". To the left of the dropdown menu, there are several checkboxes and labels: "Check all that apply: Spouse's W-2", " Check to calculate automatically", "a Employee's social security number", and "b Employer's identification number". To the right of the dropdown menu, there is a table with the following visible text: "e and Tax", "atement", "Income tax withheld", "Security tax withheld", and "0".

2. ATX populates the payer information on the form.

- i** ATX provides a similar function for business returns. Use **Company Manager** instead of Payer Manager to add companies for business returns.