

ATX 2015

Integrated Research Tools

ATX 2015 expands the number of research tools available from inside returns. New toolbar icons, a full Tax Research menu and access to IRS publications allow you to find the answers you need quickly.

Toolbar Icons

Three toolbar icons provide access to research tools while inside a return.



- **Tax Research:** Opens the IntelliConnect home page, so you can browse
- **Search Online:** Opens a Google Chrome search bar inside the return for quick Internet searches
- **Practice Aids:** Opens IntelliConnect, displaying a list of aids for returns, including checklists, client letters and flowcharts

i To make using these tools even simpler, enter your IntelliConnect login credentials in Preferences.

IntelliConnect Browser Plug-in

If you download the IntelliConnect Browser plug-in, you can search in your default Internet browser and still receive results from IntelliConnect.

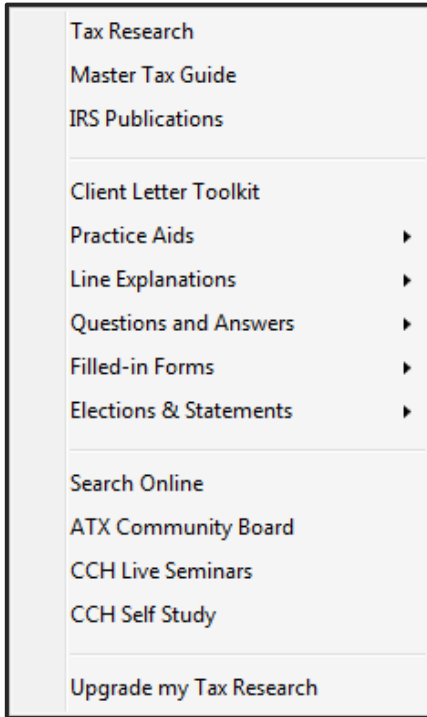
i Install the plug-in when you install ATX 2015, or download from [here](#).

When you perform searches, you will see IntelliConnect results along with your other results:



Tax Research Menu

A full tax research menu provides access to the same tools as the toolbar icons, as well as many other specific types of research.



IRS Publications

This year, all tax and research packages include access to IRS publications directly from inside a return.

Select the option on the **Tax Research** menu to access.

Client Letter Toolkit

Use the Client Letter toolkit to access over 400 pre-written letters you can send to your clients.

You can also import these letters in Client Communication Manager, using the Blank template, to add the letters directly to a client's return.

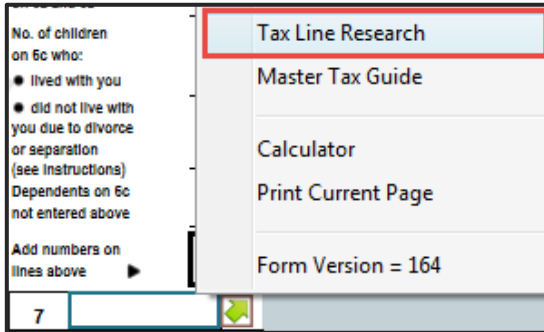
Tax Line Research

Depending on your research package, you have the ability to locate resources and information on a line-by-line basis.

For most Federal tax forms, Tax Line Research provides explanations and information about the specific line you are working on in a return.

To use this feature:

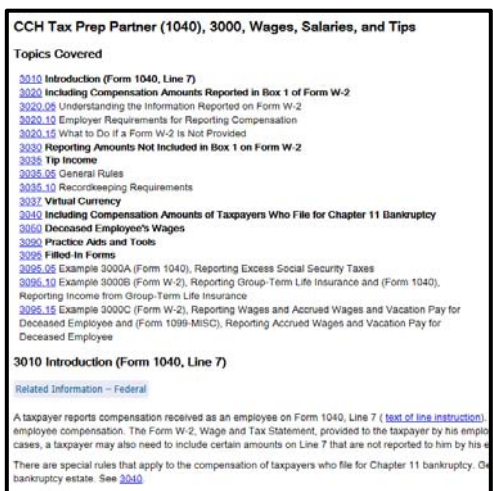
1. In the return, right click on the line you want to research.
2. Click **Tax Line Research**.



i With some packages, IntelliConnect opens, displaying the available information.



i With some packages, you must select the form and line you want to research, and then access the IntelliConnect results.



i If you need to upgrade your research package at any time, click **Upgrade My Tax Research** on the Tax Research menu.