Tax & Accounting

CCH® ProSystem *fx*® Tax
Quick Reference Card

Online Resources: Support.CCH.com/Tax

- Search the Knowledge Base at Support.CCH.com/KB
- Chat with support at Support.CCH.com/Chat
- Submit a support case at Support.CCH.com/Ticket
- Customer Service/Technical Support: 800-739-9998

My Account Number:

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How To...

Back Up Clients

From Office Manager

1. Back Up Client Data
2. Create Client List
3. Select Clients for Backup

Import

From Tax Preparation > File > Import

Select one of the following:

- Quiklink
- G/L Bridge
- Dynalink
- CCH® ProSystem *fx*® Fixed Assets or Sage® Fixed Assets Depreciation
- K-1 Data from Spreadsheet
- Foreign Entities Data from Spreadsheet
- Apportionment Data from Spreadsheet
- Depletion Data from Spreadsheet
- GainsKeeper® Pro
- BasisPro
- CCH Client DataXchange

Export

From Tax Preparation > File > Export

Select one of the following:

- Planning Export
- BNA®
- Electronic Filing
- K-1 Export to Other Returns
- K-1 Data to Spreadsheet
- Foreign Entities Data to Spreadsheet
- Apportionment Data to Spreadsheet
- Depletion Data to Spreadsheet
- CCH Client DataXchange

Purchase Authorizations

From Communications > Authorizations

Select one of the following:

- Firm Authorizations
- Client Authorizations

Open/Close Folders

- Backspace
  Goes to parent folder.
- Numeric keypad +
  Opens highlighted folder.
- Numeric keypad -
  Closes highlighted folder.
- Numeric keypad *
  Opens highlighted folder and related subfolders.
- Shift + numeric keypad +
  Opens all folders.
- Shift + numeric keypad -
  Closes all folders.
- →
  Opens the current folder if not open; otherwise, goes to first subfolder.
- ←
  Closes the current folder if open; otherwise, goes to parent folder.

Tax Preparation Icon Map — Worksheet View

File

- New
- Open
- Close Return
- Forward Return
- Save
- Print Preview
- Print
- Quiklink
- Fixed Assets

Edit

- Cut
- Copy
- Paste
- Delete Record
- Override
- Estimate
- Lookup Value
- Search
- List
- Notes
- Global Note

View

- Expand All
- Collapse All
- Zoom To
- Zoom In
- Zoom Out

Forms

- Home State Forms
- Return to Link List
- Return to Government Form
- Link to Worksheets
- Expand
- Go Back
- Drill Down
- New Entity
- Next Form
- Previous Form
- Next Worksheet
- Previous Worksheet
- Attach Documents

Calc

- Return

Review

- This Form's Statements
- Letters
- Federal Elections
- Insert/Delete Tick Mark
- Navigation History
- Forward
- Back
- Return Summary
- Interactive Diagnostics
- Interactive Overrides
- Interactive Estimates
- Interactive Input Override
- Interactive Reversed Tick Marks

Manage

- View History
- View Open Items
- Set Status
- Log Activity
- Link to Workstream Project
- Open Route Sheet
- Secure Return
- Practice Client
- Practice Project
- Send Invoice Amount to Practice
- Practice Inquiry
- Electronic Filing Status
- To Do List
- Inbox

Options

- Customize Toolbar

Help

- This Field's Instructions
- Cross-Reference
- Government Form Instructions
- Step-by-Step
- U.S. Master Tax Guide®
- CCH® SmartCharts
- CCH® Tax Prep Partner
- CCH® IntelliForms®
- CCH® ProSystem *fx*® on the Web/Account Services

Options

Preferences > Tax Return Preferences

Miscellaneous
- **Activate AutoText Descriptions** — Select to create firm-level picklists.
- **Activate AutoComplete** — When entering AutoText descriptions.
- **Inbox** — Activate Inbox to open automatically when accessing Tax Preparation.
- **Create Engagement** — Automatically prompt to create an engagement for a new return.
- **Display Log Activity** — Automatically display log activity when a return is closed.
- **K-1 Export** — Select to create K-1 export files each time the return is calculated.
- **Release Information** — Select to automatically display information about the latest release.
- **Calc Complete** — Select to have Calc Complete message display after each calculation.
- **Disable Memory Check** — Not recommended.
- **Sequence Lists** — Select to have client and return lists sequenced by client ID or client name.
- **Open Specific Return By** — Select to open returns by client ID or client name.

AutoSave
- **Timer** — Set timer to periodically save the return.
- **Alert** — Select to display an alert when preparing to save.

Grid Export
- **Data Grid Default File Location** — Set the default location to export from grid.
- **Sample Grid Default File Location** — Set the default file location to export a blank template of the grid.

Print Entire Return
- **Enable user level print defaults** — Select to make changes to the print defaults.
- **Copy Type** — Set the copy types to be printed.
- **Number of Copies** — Set the default number of copies to print for each copy type.
- **Destination** — Select to print to printer, file, PDF, or PDF and printer.
- **Watermark** — Select watermark to be added to PDF print.
- **Mask** — Select to mask specific fields, such as SSN, EIN and Bank information.
- **e-file PDF Attachments** — Select for each copy type, copy that should print the PDFs attached to the return.
- **Produce Separate K-1 PDF Files** (Partnership, Fiduciary and S-Corp only) — Select this option to print separate K-1 packages grouped as follows: by partner for Partnership, by beneficiary for Fiduciary, by shareholder for S Corporation.
- **Create Bookmark PDFs** — Select to create PDFs with bookmarks.
- **One Statement per Page** — Select to have one statement print per page.
- **Produce Separate PDF Files** — When printing more than one return copy to PDF, select this option to generate separate PDF files.
- **Print Only Open Diagnostics** — Select this option to only print open diagnostics with the return.
- **Print to Document** — Transfer the file directly to Document if Smart Client is installed and if your firm is licensed.

Options

Preferences > Tax Return Preferences continued

Worksheets
- Open worksheets with first section expanded (Default).
- Open worksheets with sections containing data expanded.
- Open worksheets with all sections expanded.
- Open worksheets with all sections collapsed.
- Move to next expanded section (Default).
- Move to next section and expand if collapsed.
- **Highlight Bar** — Select to turn off yellow highlight in the active field.
- **Enter Key** — Pressing enter moves cursor to next field of same record.

ELFSignPrint
- Changes printing defaults for electronic filing forms on export.

Preferences > Startup Screen Preferences

Set the attributes displayed in the return selection lists. Change the default list of returns within the startup screen.

Preferences > Multi-Monitor Preferences

Set configuration and Remote Desktop options for use with multi-monitors.

Interface Options

Set interface configurations.

- **CCH® Research** — Save your User ID for research.
- **BNA®** — Set a user level BNA® program or data path configuration.
- **Accounting Bridges** — Set a user level configuration for your accounting system.
- **CCH® Client DataXchange** — Create a CCH Client DataXchange export file.
- **CCH® ProSystem *fx*® Engagement/CPADocument Manager** — Create a return PDF file for a CCH ProSystem *fx* Engagement binder.
- **CCH® ProSystem *fx*® Practice** — Set the time clock.

Customize Toolbar

Add, remove and reorder toolbar buttons.

Define as Keyword

Define DataScan Plus keywords.

Default Returns

Configure default returns for any tax product.

Clear All Overrides

Removes all flags in override fields.

Clear All Estimates

Removes all amounts in estimate fields.

Clear Tick Marks

Removes all tick marks.

Keyboard Shortcuts

Worksheet View

Expand Sections in Descending Order	Ctrl + Tab
Expand Sections in Ascending Order	Shift + Ctrl + Tab
Expand All Sections of a Worksheet	Shift + +
Collapse All Sections of a Worksheet	Shift + -
Move from the Last Field of a Section to the First Field of the Next Section	Tab
Move from the First Field of a Section to the Last Field of a Previous Section	Shift + Tab
Open and Pin the Navigation Panel in Place	F6
Retract the Panel if it is Currently Locked in Place	Alt + F6
Opens Calculator	Ctrl + A
Select a Taxing Authority from the Drop-Down List	Ctrl + G
Highlight the First Item in the Sections List	Ctrl + B
Link to Field	Ctrl + K
Move to the Entities List	Ctrl + E
Select the Government Forms Tab	Alt + G

List	Ctrl + L
Select the Worksheet Tab	Alt + K
Activate the Category Menu	F5
Move Left to Right through the Category Headings	Tab
Selects the Cell to the Left of the Currently Active Cell	Shift + Tab
Move Up or Down the Menu Drop-Down List	↑ or ↓
Open Highlighted Worksheet	Enter
Enable Extended Category Shortcuts	Alt + F5
Disable Extended Category Shortcuts	Esc
Move Right or Left through the Category Menu	← or →
First WS Grid Occurrence	Shift + Alt + < ,
Last WS Grid Occurrence	Shift + Alt + > .
Previous WS Grid Occurrence	Alt + < ,
Next WS Grid Occurrence	Alt + > .

Product Support Support.CCH.com →
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