Wolters Kluwer
CCH

ProSystem *fx*® Tax
2014 Quick Reference Card

Call Routing Options:

1. Sales, Account Renewal, Product Information, Orders and Billing
2. Customer Training
3. Tax Preparation, System Support, Electronic Filing, Client Data Conversion and eSign
4. Engagement, Knowledge Coach, Knowledge Tools, ActiveData™ and CCH Titles
5. Practice Product Support
6. Document and Scan
7. Site Builder Support and Sales
8. Write-Up and Trial Balance Support
9. Portal Support

Select Option 3, then Option 1. Next, select from the following for Tax Preparation Assistance:

1. Individual (1040, I)
2. Consolidated Corporation (1120, C)
3. C Corp. (1120, C) or S Corp. (1120S, S)
4. Partnership (1065, P)
5. Fiduciary (1041, F)
6. Other Tax — 5500 (K), 709 (Y), 706 (Y), 990 (X)
7. Outsource Support
8. General Ledger or General Ledger Direct

Account Services / Technical Support Number: 800-PFX-9998 (800-739-9998)

MY ACCOUNT NUMBER:

Tax Preparation Icon Map — WORKSHEET View

FILE

	ICON
New	
Open	
Close Return	
Forward Return	
Save	
Print Preview	
Print	
Quiklink	
Fixed Assets	
Sage Fixed Assets Depreciation	
TaxScripts	

EDIT

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

VIEW

	ICON
Expand All	
Collapse All	
Zoom To	
Zoom In	
Zoom Out	

FORMS

	ICON
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

	ICON
Return	

REVIEW

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

MANAGE

	ICON
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	
In-Box	

OPTIONS

	ICON
Customize Toolbar	

HELP

	ICON
Instruction Guides	
This Field's Instructions	
Cross-Reference	
Government Form Instructions	
Step-by-Step	
U.S. Master Tax Guide®	
State Smart Charts™	
CCH Tax Prep Partner	
IntelliForms®	
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.
- ***In-Box*** — Activate In-Box 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 return types to be configured.
- ***No. of Copies*** — Set the default number of copies to print for each type of return.
- ***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.
- ***Statement*** — Select to have one statement print per page.
- ***Print to Portal*** — Transfer the file directly to Portal, if your firm is licensed.
- ***Print to Document*** — Transfer the file directly to Document if Smart Client is installed and if your firm is licensed.

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 > Start Up Screen Preferences

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

Interface Options

- ***Instruction Guides*** — Set a user level configuration to access Instruction Guides.
- ***IntelliConnect®*** — 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 DataXchange export file.
- ***ProSystem fx Engagement/CPADocument Manager*** — Create a return PDF file for a ProSystem *fx* Engagement binder.
- ***ProSystem fx Practice*** — Set the time clock.
- ***Document/Workstream*** — Save your login credentials for future access.
- ***ProSystem fx Portal*** — Save your login credentials for future access.

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

- Deletes all flags in override fields.

Clear All Estimates

- Clears all amounts in estimate fields.

Clear Tick Marks

- Deletes all tick marks.

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
  - Fixed Assets
  - K-1 Data from Spreadsheet
  - Foreign Entities Data from Spreadsheets
  - 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 Spreadsheets
  - Apportionment Data to Spreadsheet
  - Depletion Data to Spreadsheet
  - CCH Client DataXchange
  - TaxScripts®

Request Authorizations

- ***From Communications > Authorizations***

Authorization Audit Trail Reports

- ***From Office Manager > File > Print***

  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.
- ***Right arrow***
  Opens the current folder if not open; otherwise, goes to first subfolder.
- ***Left arrow***
  Closes the current folder if open; otherwise, goes to parent folder.

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 >

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12/14 2014-0523