

Using Duplicate Client in IntelliForms™

The “Duplicate Client” feature in IntelliForms can assist a user’s workflow in creating and filling out commonly used forms. Specifically, “Duplicate Client” is ideal for:

- Leveraging previous versions of filled-in forms for use in future tax periods
- Creating a “template” set of forms that can be used for multiple clients

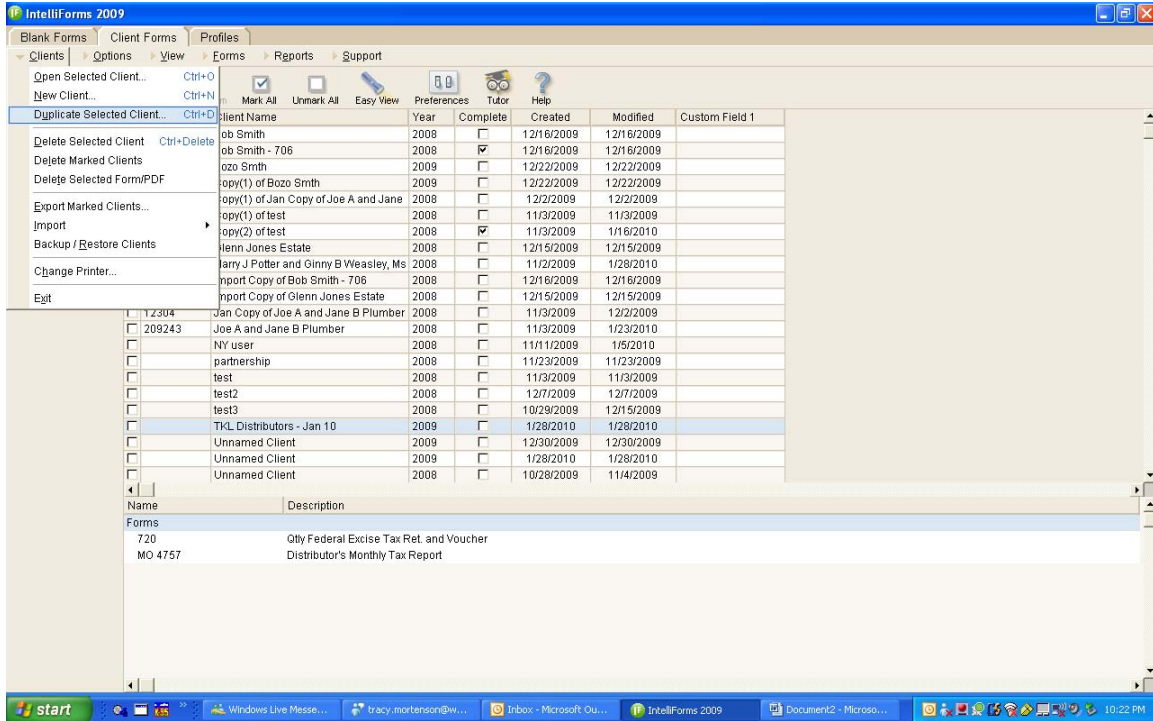
Leveraging Created Forms from a Prior Period

Example 1: Assume your client, TKL Distributors, must file the monthly MO Form 4797, Distributor’s Monthly Tax Report. You want to leverage data from month to month so you can efficiently fill out the form and move onto your next client’s return.

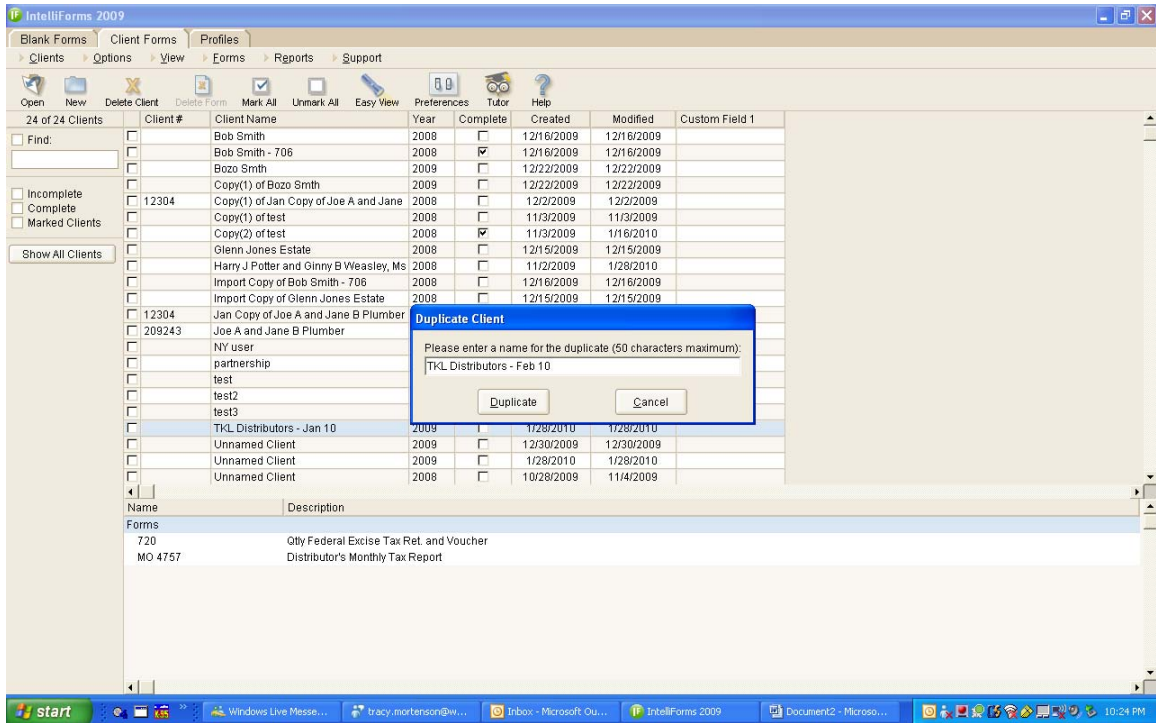
Solution: Use the “Duplicate Client” feature along with a convenient naming convention in IntelliForms as follows:

1. On the blank forms tab of IntelliForms, search for MO Form 4797. Open the form and create a new client for TKL Distributors. Fill out the form (apply a profile to save key strokes) and save the client as “TKL Distributors – Jan 10”.
2. The following tax period, go to the “Client Forms” tab of IntelliForms and highlight the client “TKL Distributors – Jan 2010”.

3. Go to the “Client” menu and click “Duplicate Selected Client”:



4. In the dialogue box, name the duplicate client (e.g., TKL Distributors – Feb 2010), and click on “Duplicate”.



5. The client file has been duplicated, all the information from the previously filled-in version of the form has been carried over to the duplicated version, and you only need to change those items on the Form applicable to the tax period at issue.

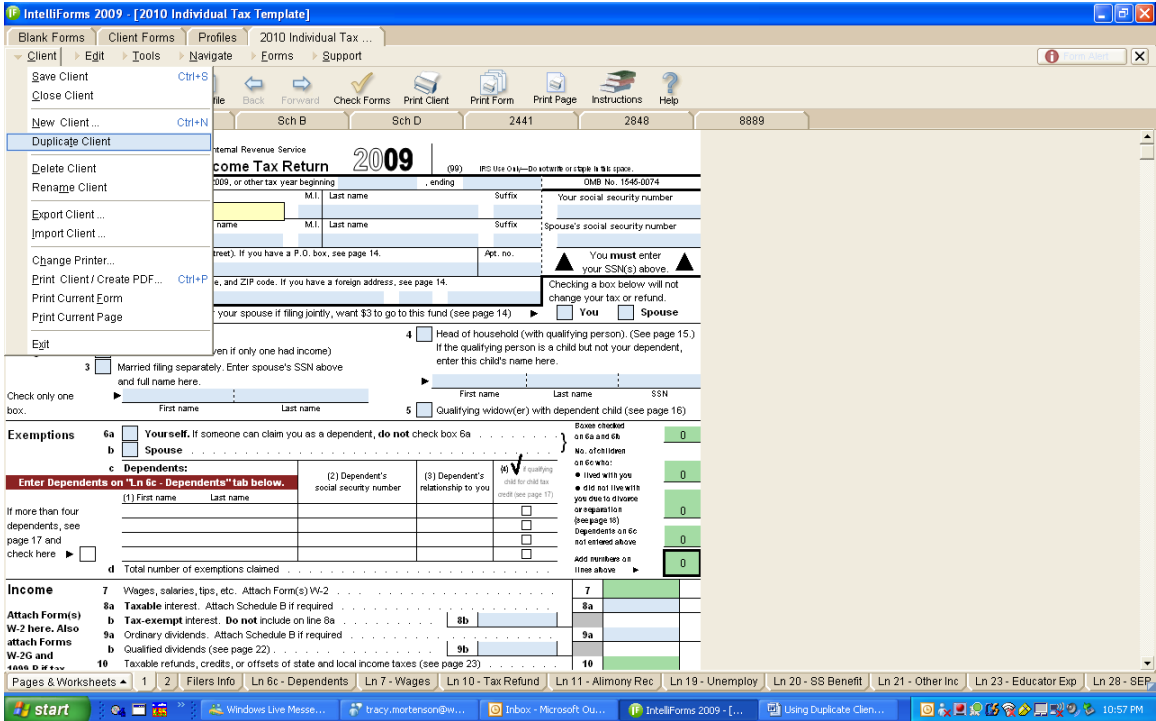
Creating a Template Set of Forms

Example 2: Assume your practice focuses on individual tax returns for families with minor children in the mid-to-upper tax brackets. You find that you often use the same forms over and over again for this demographic – Forms 1040, Schedule A, Schedule B, Schedule D, 2441, 2848, and 8889. You want to minimize your preparation time so you can dive right into clients' returns.

Solution: Use the “Duplicate Client” feature to create a “template” of commonly used forms that can be leveraged for multiple clients as follows:

1. On the blank forms tab of IntelliForms, search for the forms to include in the “template.” Highlight each form to be included, and click “Open Forms”. Save the forms under a handy name (e.g., “2010 Individual Tax Template”). [Note that you might want to apply a preparer profile to these forms so that this information is filled out on your template set of forms to save time later as you replicate this set of forms over and over again.]
2. To use the template for individual clients, go to the Client Forms tab and open up the template set of forms (e.g., 2010 Individual Tax Template).

3. Go to the "Client" menu and click "Duplicate Client":



- In the dialogue box, name the duplicate client for the particular individual whose return is being prepared (e.g., Fields, Jim & Bonnie) and click “Duplicate”:

The screenshot shows the IntelliForms 2009 software interface. The main window displays the 'U.S. Individual Income Tax Return 2009' form. The 'Duplicate Client' dialog box is open, prompting the user to enter a name for the duplicate (50 characters maximum). The name 'Fields, Jim & Bonnie' is entered in the text field. The dialog box has 'Duplicate', 'Cancel', and 'Help' buttons.

- The template set of forms has now been saved under the appropriate client name (e.g., Fields, Jim & Bonnie), and the forms can be filled out for that particular client.
- If you do not need one of the forms in the template set, simply tab to the unnecessary form, click on “Forms” and “Delete Form” to remove it for the particular client.
- If you need to add additional form(s) to a particular client, click on the “Add Forms” tool bar button and search for the form(s) to be added. Once found, click on the “Open Forms” tool bar button and the additional form(s) will be added to the client.