



THOMSON REUTERS

# Model Tax Forms Workbook

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## User guide

System requirements  
Installation  
Getting started  
Finding your way around  
Accessing information  
Saving  
Printing  
Customer support  
Frequently asked questions

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## System requirements

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This product is supported on systems with the following minimum requirements:

- Microsoft Windows 2000 or above with the latest service packs. (Note: will not install on 64-bit versions of Windows.)
- Microsoft Office (Excel & Word) 97 or above with the latest service packs.
- The minimum hardware recommended for your versions of MS Windows and Office
- Adobe Acrobat Reader.

## Installation

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To install the product, place your CD into the appropriate drive.

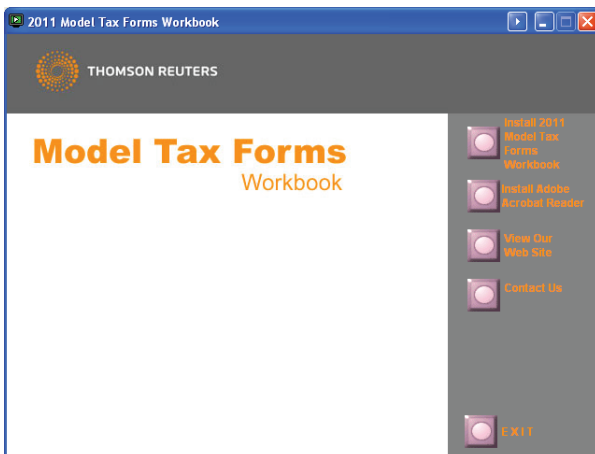
### Windows 2000 and above

From the **Start** menu select **Run** and enter the installation command:

*Driveletter:*\SETUP

The *Driveletter:* will be your CD drive identification, e.g. D:\SETUP.

This will open the screen below:



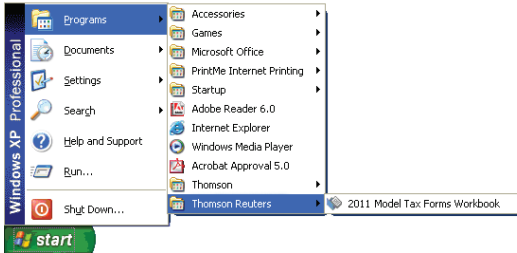
## Getting started

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In this section you will learn to open the product and become familiar with its layout. The product is installed in a program group named **CPD Business Tools**.

### Windows 2000 & XP

Click on the **Start** button and select **Programs, CPD Business Tools** and then the product name.



Once you have opened the program, the main menu will be displayed on screen.

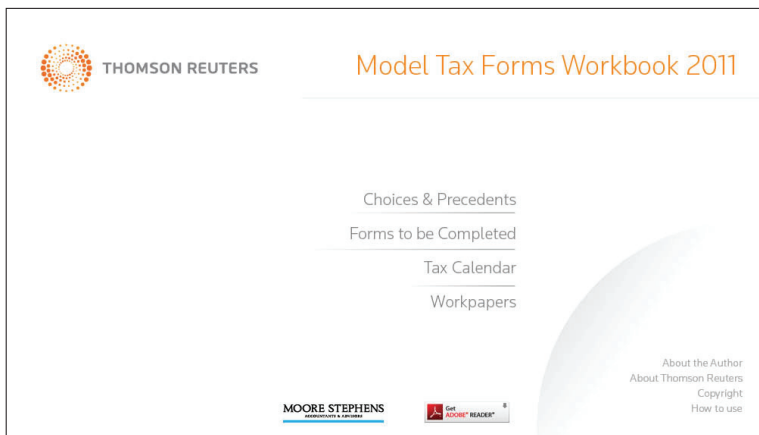
### Windows Vista

An illustrated version of these instructions is available at:  
[http://services.thomsonreuters.com.au/downloads/Folio\\_Views\\_with\\_Windows\\_Vista.pdf](http://services.thomsonreuters.com.au/downloads/Folio_Views_with_Windows_Vista.pdf)

1. In the Windows **Start Menu**, select **Programs**, then **CPD Business Tools** (or **Thomson**) and right-click on the product.
2. Select **Properties**.
3. Select **Show settings for all users**.
4. Tick the box for **Run this program as an administrator** and select **OK**.
5. Windows Vista may ask for permission from an Administrator to carry out this action. Click **Continue** and if required, enter an Administrator username and password.
6. Tick the box for **Run this program as an administrator** and select **OK**.
7. Run the product and check that links to documents (e.g. templates) open those documents successfully.

## Finding your way around

This CD should be used in conjunction with your hardcopy *Model Tax Forms Workbook*.



The main menu provides links to the various components of the *Model Tax Forms Workbook*.

The **Tax Calendar** button accesses a calendar listing the relevant tax dates.

The **home** and **back** buttons on the lefthand side of the screen in the various components assist with navigation. The **home** button returns to the main menu and the **back** button returns to the previous screen.

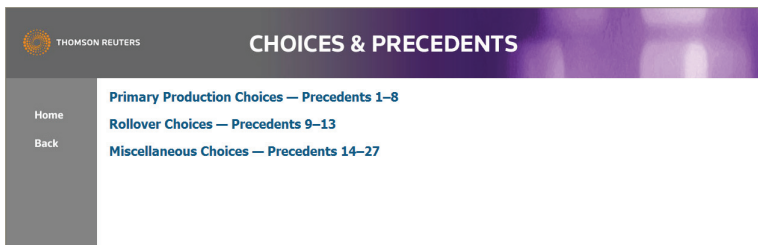
## Accessing information

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This information is divided into three topic areas – **Choices & Precedents**, **Forms to be Completed** and **Workpapers**. Each topic area is accessed from the main menu.

**Choices & Precedents** are word templates which may be modified, saved and printed.

The templates are grouped under sub-topics for ease of access (see below).



The screenshot shows a web interface for 'CHOICES & PRECEDENTS'. At the top left is the Thomson Reuters logo. The main header is 'CHOICES & PRECEDENTS'. On the left side, there is a dark grey sidebar with 'Home' and 'Back' links. The main content area lists three categories: 'Primary Production Choices — Precedents 1–8', 'Rollover Choices — Precedents 9–13', and 'Miscellaneous Choices — Precedents 14–27'.

**Forms to be Completed** are Adobe pdf Acrobat files which may be completed and printed but not saved.

The forms are grouped under sub-topics for ease of access.



The screenshot shows a web interface for 'FORMS TO BE COMPLETED'. At the top left is the Thomson Reuters logo. The main header is 'FORMS TO BE COMPLETED'. On the left side, there is a dark grey sidebar with 'Home' and 'Back' links. The main content area lists several categories: 'Codes' (with sub-items 'Industry Codes for Business Industry' and 'Salary and Wage Occupation Codes'), 'Company', 'Individual', 'Other Forms', 'Partnership Tax Returns', and 'Trusts'.

**Workpapers** are a combination of Word and Excel templates which are able to be modified and/or completed, saved and printed.



## Saving

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To save Microsoft Word and Excel files either select **Save** from the file menu or **Ctrl + S** and rename.

Adobe Acrobat forms can not be saved unless you have the full Adobe Acrobat already on your PC.

## Customer support

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### Thomson Reuters Helpdesk

Thomson Reuters Customer Service Team will be pleased to assist you with any questions about installing or using this product. Phone **1300 304 195** Monday to Friday between 8.45 am and 5.30 pm Eastern Standard Time.

## Frequently asked questions

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For Frequently Asked Questions on this product or other Thomson Reuters electronic products, please visit our website at [www.thomsonreuters.com.au](http://www.thomsonreuters.com.au) and select Support/Digital Support, then FAQs.