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EDI (Electronic Data Interchange)

Sales Tax User Guide



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II Introduction to the Sales and Use Tax User Guide

This user guide is intended to help familiarize and provide you with specific instructions for the Sales and Use Tax Electronic Data Interchange (EDI) free software, which is provided by the Comptroller's office.

❖ *What is needed before you begin*

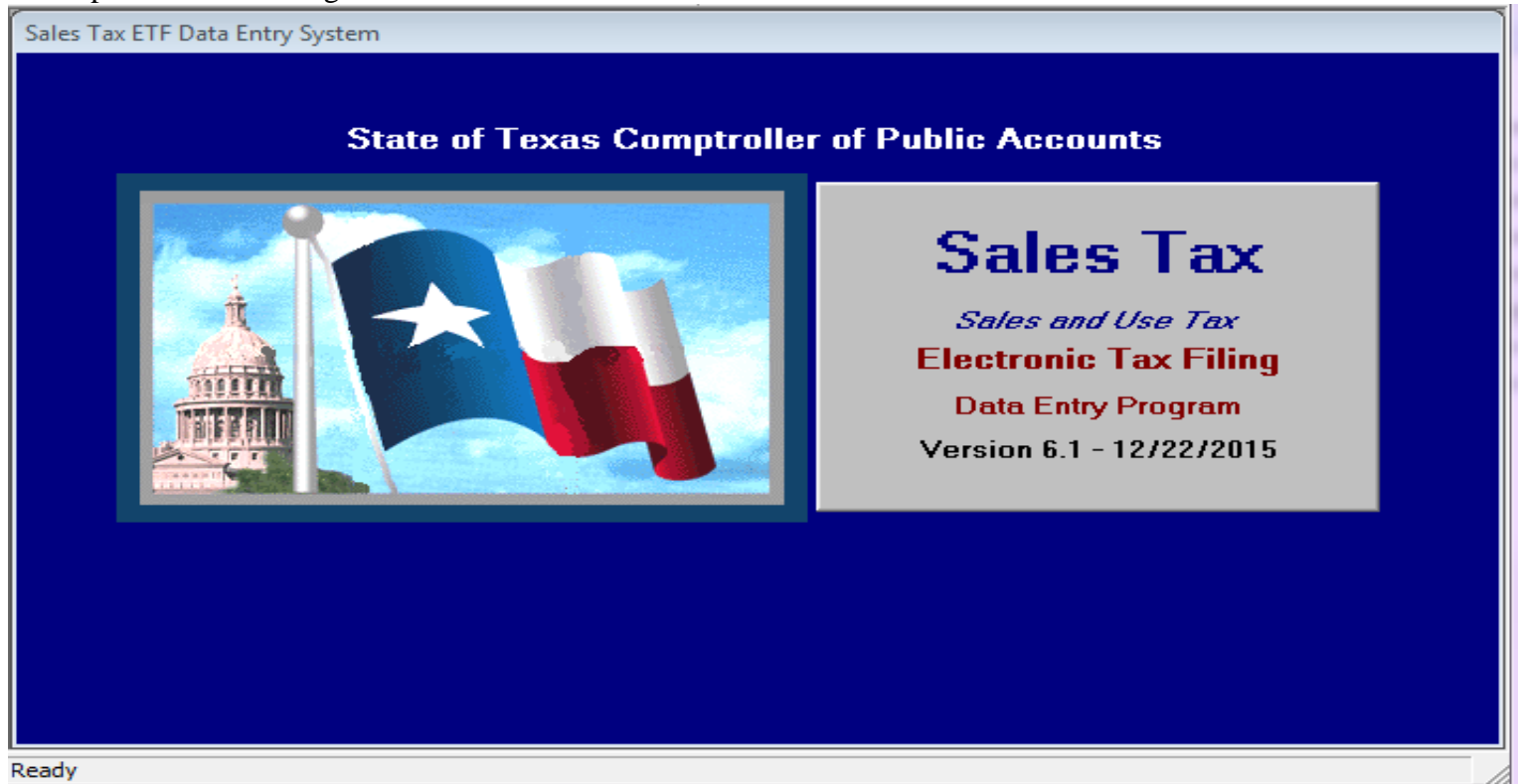
- Texas Sales and Use Tax Electronic Data Interchange (EDI) free software.
- WebFile Number
- Taxpayer Number
- Return Information
- Bank Information

❖ *About this User Guide*

- Button references are formatted in **bold** (strong) and blue.
- Screen names, field names or section names are in *italics* (emphasis) and blue.
- Important **warnings** are formatted in red and are underlined.
- Buttons and button images are explained in section *XIV Button and Button Legend*.

III Downloading, Installing and Updating Sales and Use Tax Software

This section provides instructions for downloading and installing the Sales and Use Tax Data Entry software for submitting EDI returns. **Warning!** If reinstalling the software, save the original database named Stax6.db to the desktop before continuing.



- 1 Go to <https://comptroller.texas.gov/taxes/file-pay/edi/>.
- 2 Under the *Download, Install and Update Free EDI Software*, Select the free software link which is highlighted in blue.
- 3 Save the file to your desktop.
- 4 Go to your desktop or download folder and double click on the **staxfull.exe** button.
- 5 Select the **Next** button on the *Sales and Use Tax Data Entry System Setup* screen.
- 6 Select the **Next** button on *Destination Directory* screen.
- 7 Select the **Finish** button.
- 8 Delete the **staxfull.exe** file.
- 9 Double click on the **Sales and Use Tax EDI** shortcut on your desktop.
- 10 If you have a previous version of the Sales and Use Tax data entry system you will be prompted to import the data from your prior version of the software.
- 11 Select the **Yes** button when asked if you want to copy information from your old database.
- 12 Select the **OK** button on the pop up when the data has been piped.
- 13 Continue to section *VI How to Add Taxpayer Information and, Banking Information*.
 - Buttons and button images are explained in section *XVI Button and Button Legend*.

IV Adding Taxpayer Information and Banking Information

This section provides instructions on adding and updating the basic information regarding your Sales and Use Tax taxpayer account including taxpayer information, banking information, and outlet and list information. When updating contact information please remember to update the contact information in the EDI registration.

Taxpayer Information

Business Information

Taxpayer Number: Change of Address

Taxpayer Name:

Address:

City:

State: TX Zipcode:

Tax Filing Information

Status:

Tax Type

Sales Tax Direct Pay

Filer Type

Monthly Quarterly

EFT Payment Information

Route/Transit #:

Bank Acct. Type:

Bank Acct. #:

Contact Information

Name: Transmitter #:

Phone: Ext.

E-Mail:

Mapper/Translator

Program: Excel File:

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❖ Adding Taxpayer Information

- 1 Select the **Setup** button.
- 2 Select the **New** button. New users will be prompted to add their first Taxpayer Profile.
- 3 Enter: *Taxpayer Number, Name, Address, City, State and Zip Code.*
- 4 Enter: *Tax Type: Sales Tax (default) or Direct Pay (must have prior Comptroller's office approval).*
- 5 Enter: *Filer Type: Monthly (default) or Quarterly.*
- 6 Enter contact information including: *First Name, Last Name, Phone Number, and Email Address.*
- 7 Enter mapper/translator information including: *Program and File name.*
 - This information only needs to be changed if you intend to use the mapping feature.
- 8 Once you have entered all the data in the appropriate fields, select the **Save** button.
- 9 Enter *Route/Transit Number, Account Type (Checking or Savings), and Bank Account Number.*
 - EFT payment information is optional. You must enter the banking information on this screen to include a payment with your return.
- 10 Select the **Save** button located on the menu bar.
- 11 Return to step 2 to add additional taxpayers.
- 12 Outlet Sales Tax filers continue to section *V Adding Outlet Information (Sales Tax Only).*
- 13 List Sales and Use Tax filers and Direct Pay filers continue to section *VI Adding List Information.*

❖ *Updating Taxpayer Information*

- 1 Select the **Setup** button.
- 2 If more than one taxpayer is set up select the taxpayer to update.
- 3 Select the field to be corrected.
- 4 Enter correct information.
- 5 Select the **Save** button.
- 6 To update other taxpayers select the **Previous** or **Next** button to view and correct other taxpayers.

V Adding Outlet Information (Sales Tax Only)

This section provides instructions for adding Outlet information to the EDI software. All taxpayers, except Direct Pay will have at least one outlet. Please visit our [Sales Taxpayer Search](#) to verify outlet numbers for existing locations. This data will be used to complete returns.

Outlet Setup

Taxpayer Number: _____ Taxpayer Name: _____

Outlet Number: _____ Store Number: _____ Location Status: Active

Outlet Name: _____ Location Type: Outlet
 List

Address: _____ New Outlet
1st Day of Business: 00/00/0000

City: _____ Out of Business
Last Day of Business: 00/00/0000

State: TX Zip: _____ Reactivate Outlet
Reactivation Date: 00/00/0000

TAX LIABILITY INFORMATION

Type	Pay Flag	Name	Code	Rate
.dd Jurisdiction				

Prev Next Index **Map** New Delete Save Preview Print Close

❖ Adding a New Outlet

- 1 Select the **Setup** button.
- 2 Select the **Outlet** button.
- 3 Select the **New Outlet** button.
- 4 Enter the 1st day of business.
- 5 Enter the *Outlet Number* (5 digit number assigned by the Comptroller's office), *Store Number* (optional), *Outlet Name*, *Address*, *City*, *State*, *Zip Code* and *Location Type*.
- 6 Verify the jurisdictions in the *Tax Liability Information* section.
- 7 Select **Save** button.
- 8 Complete the *New Outlet Questionnaire*, if needed.
 - The *New Outlet*, *Out of Business* and *Reactivate Outlet* fields should be used ONLY if the Comptroller's office needs to add or change outlet information on our system. When adding a new location please use the taxpayer search and select the next sequential outlet number. If you have already received a permit or informed our office of changes/additions in writing or by phone, you do not need to check any of these boxes.
- 9 Select **Save** button.

❖ *Assign Local Jurisdictions to an Outlet*

- 1 Select the **Setup** button.
- 2 Select the **Outlet** button.
- 3 Select the **Add Jurisdiction** button. This will allow for the manual addition of jurisdictions for locations that are in areas with multiple transit or special purpose districts (SPD) taxes. Total local tax rates may not total more than 2%.
- 4 Select SPD or Transit jurisdiction type.
- 5 Select the jurisdiction from the *Jurisdiction List*. Double click or select the **Right Arrow** button to move the jurisdiction to the *Assigned Jurisdiction* list.
- 6 Select the **OK** button at the bottom of the *Add Jurisdiction(s) to Outlet* screen.
- 7 Select the **Save** button and close the screen.

❖ *Closing an Outlet*

- 1 Select the **Setup** button.
- 2 Select the **Outlet** button.
- 3 Select the **Out of Business** button.
- 4 Enter the last day of business.
- 5 Select **Save** button.

❖ *Reactivating an Outlet*

- 1 Contact the Comptroller's Office at 1-800-252-5555 for further assistance.

VI Adding a List Information

This section provides instructions for adding local taxing jurisdictions. Sales Tax List filers must have at least one Outlet set up. Direct Pay filers are list ONLY and do not need to set up any outlets. This data will be used to complete return.

Master City List	Jurisdiction	Taxpayer City List
Abbott 2109064	City	
Abernathy 2095024		
Abilene 2221012		
Ackerly 2156020		
Addison 2057217		
Adrian 2180020		
Agua Dulce 2178051		
Alamo 2108092		
Alamo Heights 2015021		
Alba 2250043		

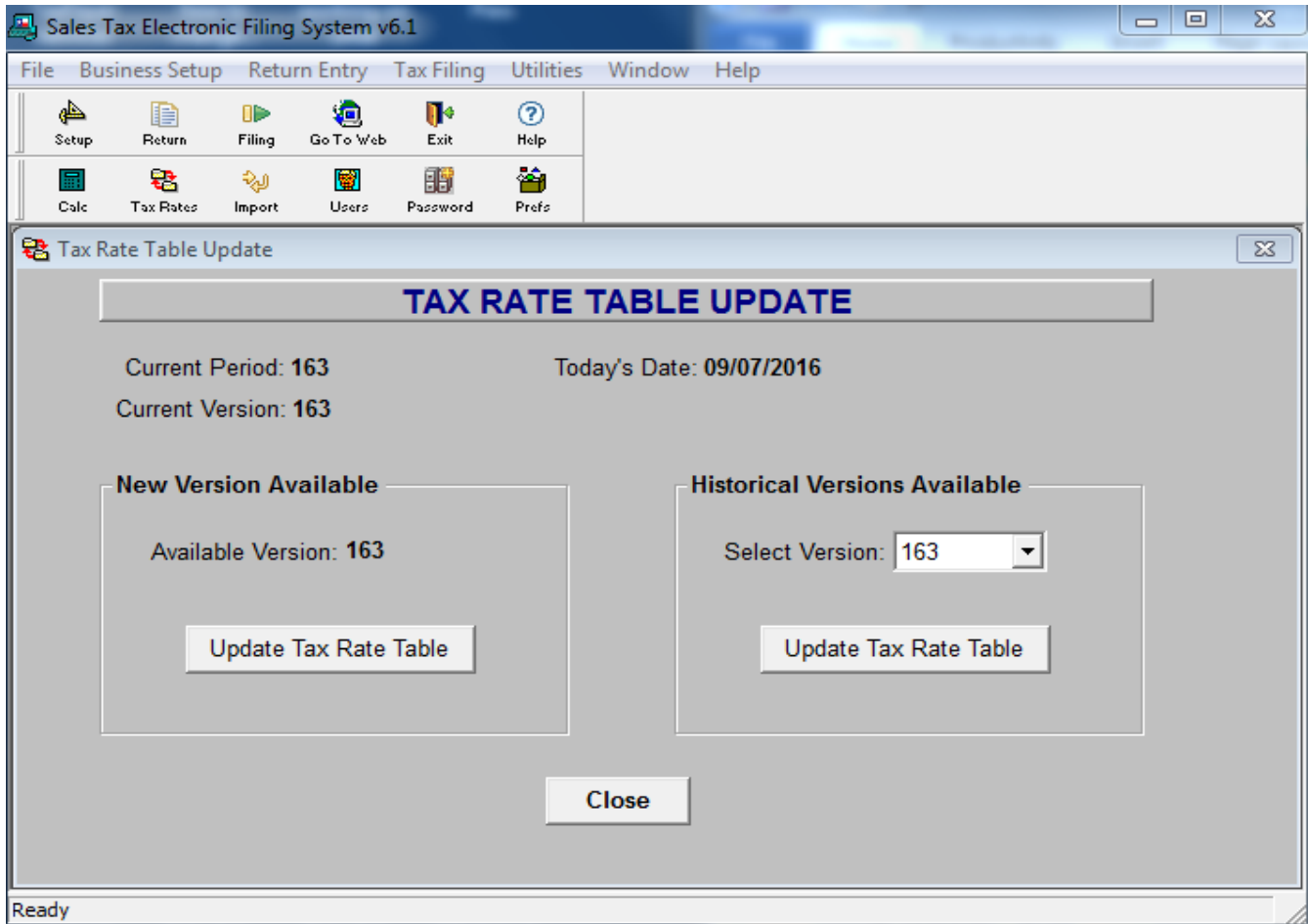
❖ Adding List Information

- 1 Select the **Setup** button.
- 2 If more than one Taxpayer is setup select the taxpayer to add jurisdictions.
- 3 Select the **List** button.
- 4 Select the Jurisdiction down arrow. A drop down list appears. Select City, Transit, County or SPD from the drop down list. All local jurisdictions in Texas are displayed in the pane entitled *Master List*. Your jurisdictions are displayed in the pane entitled *Taxpayer List*.
- 5 To add a jurisdiction to your *Taxpayer List*, select a jurisdiction in the Master List, and select the **Add** button. The jurisdiction will appear in the *Taxpayer List* and will disappear from the *Master List*.
 - Search for a jurisdiction by entering the name in the *Starting Point* field and selecting **Jur Search**.
 - To select more than one jurisdiction at a time, hold down the CTRL key and select all the jurisdictions wanted to add to *Taxpayer List*. When you are finished, select **Add**. All of the jurisdictions will appear on your list.
 - To add every jurisdiction, select **Add All**.
- 6 To remove a jurisdiction from your *Taxpayer List*, select a selection in the *Taxpayer List*, and select the **Remove** button. The jurisdiction will disappear from the *Taxpayer List* and will reappear on the *Master List*. To remove every jurisdiction, select the **Remove All** button.
- 7 After making all the selection needed for one Jurisdiction type, (City, County, Transit, SPD), choose another from the drop down list and make your changes for that type.
- 8 Select **Save** when all jurisdictions have been entered.

VII Preparing a Return

This section provides instructions for creating a new return and updating Tax Rate Tables in the EDI software.

❖ *Changing and updating Tax Rate Tables Return Summary*



- 1 Select the **Utilities** button on the tool bar.
- 2 Select the **Import Tax Rates** button.
- 3 Current Period and Current Version will be displayed on the upper left of screen.
- 4 Press the **Update Tax Rate Table** to download the current version if needed.
- 5 The *Historical Versions Available* drop down allows older Tax Rates to be selected if needed. Historical tax rates will be helpful on past due returns and amended returns.

❖ Starting a Return

Return Summary

Taxpayer: _____ Process Status: Unprocessed

Filing Period: _____ Return Type: Original Filer Type: Monthly Tax Type: Sales Tax

No Sales

	State Tax	Local Tax	
Tax Due:	\$ _____	\$ _____	= \$ _____
Prepayment credit: -	\$ 0.00	\$ 0.00	
Adjusted tax due: =	\$ _____	\$ _____	
<input checked="" type="checkbox"/> Timely Filing Discount: -	\$ _____	\$ 0.00	
Prior payments: -	\$ 0.00	\$ 0.00	
Net tax due: =	\$ _____	\$ 0.00	
Penalty and Interest: +	\$ 0.00	\$ 0.00	
Total Amount Due: =	\$ _____	\$ 0.00	= \$ 0.00
EFT Payment: =	\$ 0.00	\$ 0.00	= \$ 0.00

EFT Payment Date
00/00/0000

Total Amount Paid
\$ 0.00

Credits Taken
Credits Taken? _____ Date: 00/00/0000 Amount: \$ 0.00

Export Sales
Credit for Export Sales? _____ Amount: \$ 0.00

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- 1 Select the **Report** Button on the menu bar. (If you file multiple taxpayers, first select the Taxpayer number under the **Setup** Button, then select **Index** button to see all taxpayers. Highlight the taxpayer to file).
- 2 Enter the *Filing Period*, in YYMM or YYQ format (for example, 1608 for monthly or 163 for quarterly).
- 3 Answer Yes or No on the *Credits Taken* and *Export Sales*.
- 4 If you are filing a zero return, select the **No Sales indicator**.
- 5 Select the **Save** button on the menu bar.
 - Direct Pay will enter the Filing Period in format listed above. The *Credits Taken* question will need to be answered. Answer the *Amount Subject to Tax*, *Penalty and Interest* and *Total amounts* paid. Select the **Save** button. Proceed to the *List Entry* section for further directions.

❖ *Outlet Entry (Sales Tax Only)*

The screenshot shows a software window titled "Outlet Return" with standard window controls (minimize, maximize, close) in the top right corner. The window is divided into several sections:

- Header:** "Taxpayer:" on the left and "Process Status: Unprocessed" on the right.
- Metadata:** "Filing Period: 1606", "Return Type: Original 0", "Filer Type: Monthly", and "Tax Type: Sales Tax".
- Outlet Information:** "Outlet Number: 00002", "Store Number:" (empty), "Outlet Name: Example", "123 Main St", "Austin, TX 77010", "Location Type: Outlet", and a checked checkbox for "Dup. Mode".
- Tax Calculation Table:** A table with columns for "Amount Subject to Tax", "Tax Rate", and "Tax Amount". It lists "Total Sales", "Taxable Sales", and "Taxable Purchases" with input boxes. It also shows "State Tax" and "Local Tax" with their respective rates and "Total Tax Due".
- Navigation Buttons:** "Prev", "Next", "Index", "Map", "Extract", "Save", and "Close".

	Amount Subject to Tax	Tax Rate	Tax Amount
Total Sales: \$	<input type="text"/>		
Taxable Sales: \$	<input type="text"/>	X .062500	= \$
Taxable Purchases: \$	<input type="text"/>	X .020000	= \$
			Total Tax Due: \$

- 1 Select the **Return** button.
- 2 Select the **Outlet** button.
- 3 Enter your *Totals Sales, Taxable Sales and Taxable Purchases* in the box provided.
- 4 Use the tab key to move through the boxes.
- 5 Select the **Save** Button.

❖ *List Entry (if applicable)*

Jurisdiction Name	Jurisdiction Code	Amount Subject to Tax	City Tax Rate	Tax Amount
Abbott	2109064		.015000	
Abernathy	2095024		.015000	
Abilene	2221012		.020000	
Ackerly	2156020		.010000	
Addison	2057217		.010000	
Adrian	2180020		.010000	
Agua Dulce	2178051		.010000	

- 1 Select the **Setup** button.
- 2 Select the **List** Button
- 3 The *List Return* screen will open.
- 4 The *Jurisdiction* field defaults to City. To choose another *jurisdiction* type, select the dropdown arrow next to the field, then select the desired jurisdiction.
- 5 When finished with reporting cities, follow steps 2 and 3 until you have entered data for all jurisdictions (cities, transits, counties, and SPD's).
- 6 Select **Save**.
- 7 Select **Close** (If the Outlet Return screen reappears, select **Close**).
 - The **Plus** and **Minus** function buttons on the *List Return* screen allow to add or subtract from previously entered data. Use the feature to do cumulative totals.

Return Summary

Taxpayer: Filing Period: 1607 Return Type: Original 0 Filer Type: Monthly Tax Type: Direct Pay

Process Status:

	State Tax	Local Tax
Amount Subject to Tax:	\$ 10,000	\$ 0.00
	X 0.06250	
Tax Due:	625.00	0.00
Prior payments: -	\$ 0.00	\$ 0.00
Net tax due: =	\$ 625.00	\$ 0.00
Penalty and Interest: +	\$ 0.00	\$ 0.00
Total Amount Due: =	\$ 625.00	\$ 0.00
EFT Payment: =	\$ 0.00	\$ 0.00

EFT Payment Date
00/00/0000

Total Amount Paid
\$ 625.00

Credits Taken
Credits Taken? No Date: 00/00/0000 Amount: \$ 0.00

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- 1 Since Direct Pay accounts have no outlets to report, the Return Summary screen for these accounts is different. Follow these steps to complete the return:
- 2 Select the **Return** button.
- 3 If you have more than one taxpayer account setup in the software, click on the account you are filing, and then select **OK**.
- 4 The *Return Summary* screen appears.
- 5 Enter the *Filing Period*, in YYMM format (for example, 1209).
- 6 Enter the *Amount Subject to State Tax*.
- 7 Select **Save**. A dialog box appears, stating, Return record has been updated.
- 8 Select the **List** button. The *List Return* screen appears.
 - An amount must be entered in at least one local jurisdiction even if no local tax is due.
- 9 Select a Jurisdiction type from the *Jurisdiction* field by clicking on the dropdown arrow next to the field, then clicking on City, Transit, County, or SPD.
- 10 Enter amounts for each jurisdiction in the *Amount Subject to Tax* field. The system calculates totals of the *amount subject to tax* and *local tax* due. These amounts are displayed in the two *Totals* boxes at the bottom of the screen.
- 11 After you enter amounts for all of your jurisdictions, select **Save**.
- 12 Select **Close**.
- 13 The *Return Summary* screen reappears, with totals based on the amounts you entered on the *List Return* screen. Check these totals against your own. To make corrections, access the *List Return* screen again and enter the correct numbers.

- 14 Enter any *Prior Payments* (credits from other periods). Call the Comptroller's office at 1-800-531-5441 ext. 34559 for verification of credits.
- 15 Enter an amount in the Penalty and Interest field if you are filing the return late. Call the Comptroller's office at 1-800-252-5555 for assistance in calculating penalty and interest.
- 16 Enter the amount you are paying into the *Total Amount Paid* field.
 - The system first calculates the total of the State Tax and Local Tax; this number appears in the Tax Due row at the top of the screen. A separate calculation of *Total Amount Due* appears in the bottom right-hand corner.
- 17 If you have taken credits, answer **Yes** to the Credits Taken question and enter the earliest date and the amount of the credit taken. If not answer **No**.
- 18 Select **Save**.
- 19 A dialogue box appears, stating, Return Summary record has been updated.
- 20 Select **Close**.

❖ Return Summary

Return Summary

Taxpayer: _____ Process Status

Filing Period: 1608 Return Type: Original 0 Filer Type: Monthly Tax Type: Sales Tax

No Sales

	State Tax	Local Tax	
Tax Due:	\$ 1,671.88	\$ 129.58	= \$ 1,801.46
Prepayment credit: -	\$ 0.00	\$ 0.00	
Adjusted tax due: =	\$ 1,671.88	\$ 129.58	
<input checked="" type="checkbox"/> Timely Filing Discount: -	\$ 8.36	\$ 0.65	
Prior payments: -	\$ 0.00	\$ 0.00	
Net tax due: =	\$ 1,663.52	\$ 128.93	
Penalty and Interest: +	\$ 0.00	\$ 0.00	
Total Amount Due: =	\$ 1,663.52	\$ 128.93	= \$ 1,792.45
EFT Payment: =	\$ 0.00	\$ 0.00	= \$ 0.00

EFT Payment Date
00/00/0000

Total Amount Paid
\$ [redacted]

Credits Taken
Credits Taken? No Date: 00/00/0000 Amount: \$ 0.00

Export Sales
Credit for Export Sales? No Amount: \$ 0.00

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Ready

- 1 Once data has been entered on the *Outlet Return* and/or *List Return* screens, the Return Summary screen will show the *Taxes Due* at the top of the screen. Check these numbers against your own. To make corrections, go back to the *Outlet Return* and/or *List Return* screens.
- 2 The system calculates the total of the *State Tax* and *Local Tax* and displays it in the *Tax Due* row at the top of the screen. A separate calculation of *Total Amount Due*, which includes, credits, prepayments, discounts, and penalty and interest, appears in the bottom right-hand corner of the screen.

❖ Prepayment

- 1 If you have prepayment credits or credits from other periods, do the following:
 - Enter the amounts in the Prepayment Credit or Prior Payments fields. Call the Comptroller's office (1-800-531-5441 ext. 34559) for verification of credit.
 - Select in the Timely Filing Discount box to deselect. Calculate the discount manually and enter it in the Prepayment Credit field.
 - Enter an amount in the Penalty and Interest Field if you filing the return late. Remember to turn the Timely Filing Discount indicator. Call the Comptroller's office (1-800-531-5441 ext. 34559) for assistance in calculating penalty and interest.

❖ *Electronic Funds Transfer (EFT)*

Sales Tax Electronic Filing System v6.1

File Business Setup Return Entry Tax Filing Utilities Window Help

Setup Return Filing Go To Web Exit Help

Taxpayer Information

Business Information

Taxpayer Number: Change of Address

Taxpayer Name:

Address:

City:

State: TX Zipcode:

Tax Filing Information

Status:

Tax Type: Sales Tax Direct Pay

Filer Type: Monthly Quarterly

EFT Payment Information

Route/Transit #:

Bank Acct. Type:

Bank Acct. #:

Contact Information

Name: Transmitter #:

Phone: Ext.

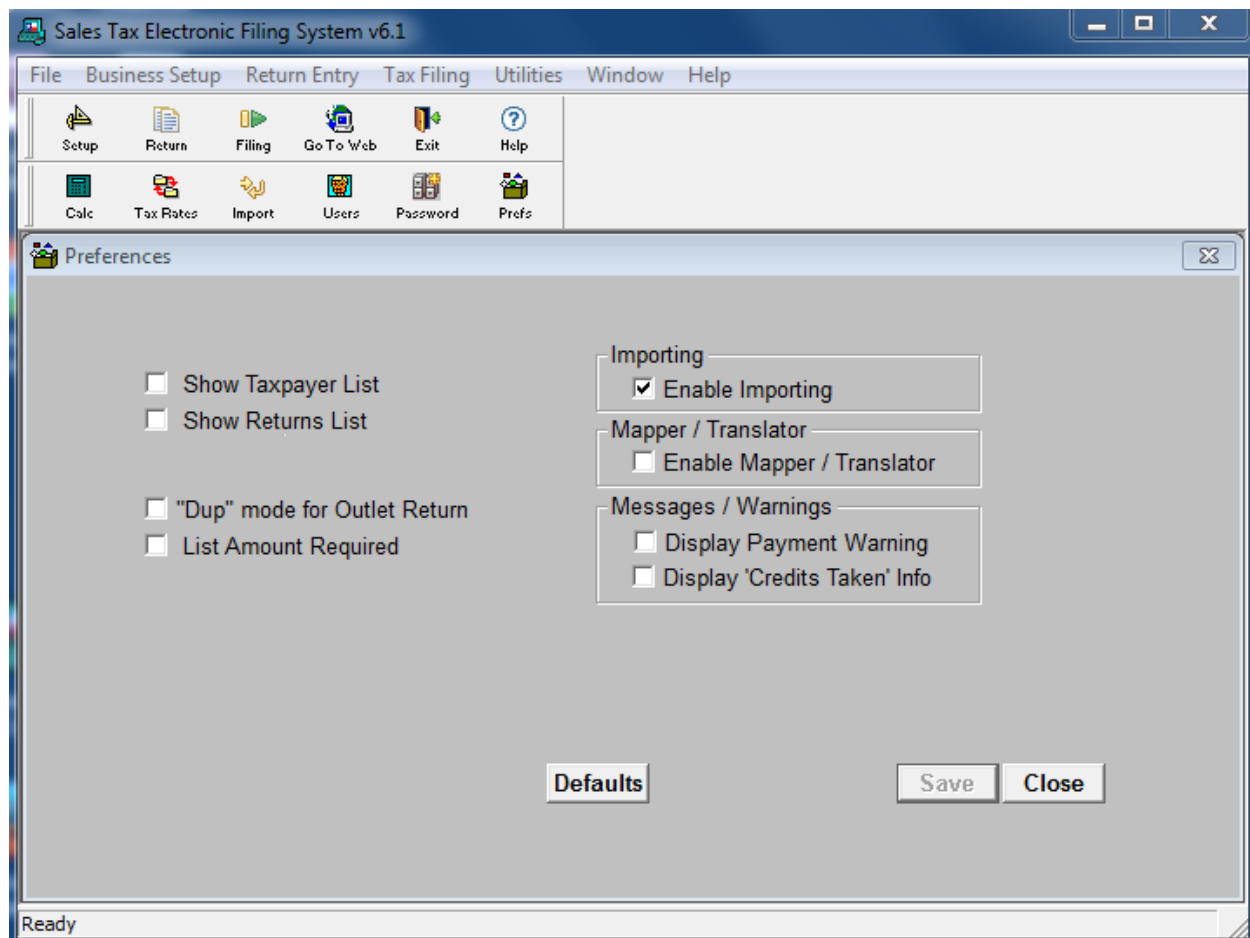
E-Mail:

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Ready

- 1 If you are using Electronic Funds Transfer (EFT) to pay taxes, complete the following:
 - You must enter bank account data on the *Taxpayer Information* screen in order to use this feature.
 - Enter the payment for *State Taxes* in the first EFT payment field.
 - Enter the payment for *Local Taxes* in the second EFT payment field.
 - Enter the data on which the money is to be withdrawn from your account in the *EFT Payment Date* field. This date must be at least 1 day in the future, but no more than 30 days.
 - Filing Deadline - Timeliness of Payment
 - i. In order for a tax return with a payment to be considered timely, it must be transmitted to the Comptroller and then processed successfully by 2:30pm (CT) the bank business day before the due date. When a due date falls on a weekend or holiday, it is important to transmit your return no later than the bank business day before the weekend or holiday. For example, if the due date falls on a Monday (or Tuesday, if Monday is a banking holiday), the return must be transmitted no later than 2:30pm (CT) the previous Friday. If your payment is received after 2:30pm (CT) it will not be processed until the following bank business day and will be considered late.

❖ *Enabling Importing and Mapping*



- 1 Select the **Utilities** button.
- 2 Select the **Preferences** button.
- 3 Check the box *Enable Importing*.
- 4 Select **Save** button.

❖ *Importing and Mapping Instructions*

- 1 Data external to the software can be moved into the system using one of two different methods. The first method, called Mapping, maps cell locations of a spreadsheet to specific fields in the software, such as Taxable Sales or Amount Subject to Tax. The second method, called Importing, imports data from a specially formatted tab-delimited text file into specific fields in the software. Both methods avoid labor intensive, manual entry of data, saving you time and money.
- 2 Which Method Should You Use?
 - The Mapper function is useful if you already use a spreadsheet to calculate your taxes. Certain cells within the spreadsheet can be extracted to certain fields in the software so you don't have to manually enter the data. However, any future changes to the spreadsheet will require changes in the application to account for any cell location changes. For example, if you add a new outlet to the end of the spreadsheet, then the outlet must be added to the software and mapped. If you insert the new outlet into the middle of the spreadsheet, then the outlet must be added to the software and mapped, and all outlets after the new outlet require re-mapping, because their cell locations will have changed.
 - The Import method is useful if your tax return data is created in another system or application. If the other application can create a tab-delimited text file (in the specified format), you can import the text file and avoid manual entry of the data. However, if the file deviates from the specified format in any way the import will fail. The Import method allows the insertion of a new outlet anywhere in the file as long as the original format is maintained.
- 3 Method 1: Mapping
 - The Mapper option is designed specifically for taxpayers who use Excel®, Lotus 1-2-3®, or Quattro Pro®. You will map your spreadsheet data, changing little if anything in your spreadsheet layout, by simply entering the cell location of the information to be moved.

4 Activating the Mapper - Import Feature

- After the software is installed, the Mapper - Import feature must be activated.
- Open the software and from the menu select **Utilities**.
- Select **Preferences**.
- On the *Preferences* screen, select the *Enable Mapper/Translator* option so that it is checked.
- Select **Save**.
- Select **OK** in the dialog box that appears.
- Select **Close**.
 - Mapping Taxpayer Information.
 - i. All of your taxpayer, outlet, and list information must already be setup in the software.
 - ii. Select the **Setup** button.
 - iii. If you have more than one taxpayer account setup in the software, select the **Index** button, select the taxpayer, then select the **Detail** button.
 - iv. On the *Taxpayer Information* screen, select your spreadsheet application in the *Mapper/Translator Program* field.
 - v. Enter the file name of your spreadsheet in the *File* field. You must include the drive, the path, and the file name. The path name must have eight or fewer characters; the file name must have eight or fewer characters before the extension. If you have too many characters in either the path or file name, the software cannot extract your data.
 - vi. If your spreadsheet's file name changes from filing period to filing period, make the change here. The file name change will be reflected for both outlet and list setups.

5 Mapping Outlet Data

- Select the **Setup** button.
- If you have more than one taxpayer account setup in the software, select the **Index** button, select the taxpayer, and then select the **Detail** button.
- Select the **Outlet** button.
- Select the **Map** button and the *Mapping* screen for the current outlet appears.
- Using the tab key to move from field to field, enter data in the following fields. (It may be helpful to refer to a printout of your current spreadsheet when entering the outlet data locations. Be sure to print the column and row headings for referencing cell locations).
 - Program
 - i. The default is the previously selected program name. Enter a new name **ONLY** to override the previously selected program name.
 - File
 - i. The default is the previously entered file name. Again, enter a value **ONLY** to override the file name you entered on the Taxpayer Information screen. The path name must have eight or fewer characters; the file name must have eight or fewer characters before the extension. If you have too many characters in either the path or file name, the software cannot extract your data.
 - The fields that follow are the *Data Mapping* fields:
 - Total Sales
 - i. Enter the cell location for the *total sales* figure on your spreadsheet (for example, B15). The beginning letter in the cell number must be capitalized.
 - Taxable Sales
 - i. Enter the cell location for the *taxable sales* figure on your spreadsheet (for example, B15). The beginning letter in the cell number must be capitalized.
 - Taxable Purchases
 - i. Enter the cell location for the *taxable purchases* figure on your spreadsheet (for example, B15). The beginning letter in the cell number must be capitalized.
 - Amount Subject to Local Tax
 - i. Enter the cell location for the *amount subject to local tax* only if the Dup preference is disabled. The beginning letter in the cell number must be capitalized.
 - Select **OK**.
 - Select **Save**.
 - Select **Next**, for the next outlet. Repeat above steps to map all outlet locations.

6 Mapping List Data

- If you have more than one taxpayer account setup in the software, select the **Index** button, select the taxpayer, then select the **Detail** button.
- Select the **List** button.
- Select the **Map** button, and the mapping screen for the list detail appears.
- The previously selected program name defaults in the *Program* field. Enter a new name ONLY to override the previously selected program name.
- The previously entered file name defaults in the *File* field. Again, enter a value ONLY to override the file name you entered on the Taxpayer Information screen. The path name must have eight or fewer characters; the file name must have eight or fewer characters before the extension. If you have too many characters in either the path or file name, the software cannot extract your data.
- Select **OK**.
- In the *Mapping* field to the right of each jurisdiction in your *taxpayer list*, enter the spreadsheet cell location that contains the amount subject to tax for that jurisdiction. The beginning letter in the cell number must be capitalized (for example, B15).
- Repeat the above steps to map each jurisdiction.
- Select **Save**.
- Select **Close**.

7 From a Mapped File

- To prepare a return from a mapped spreadsheet file, the spreadsheet application must be running, and the spreadsheet must be open. If your spreadsheet contains multiple worksheets, then the worksheet containing the data to extract must be the first worksheet in the tab order. (In Excel, you can rearrange the order of the worksheets by dragging the worksheet tabs.) If you attempt to extract data from an unopened spreadsheet or from a worksheet that is not first in the tab order, then the extract will fail or extract the wrong data.
- Create a new return. See Starting the *Return Summary* screen.
- Open the spreadsheet containing the outlet data.
- Switch back to the Sales Tax application and select the **Outlet** button.
- Select the **Extract** button.
- An *option* screen appears, asking:
 - Do you want to extract for the **current** outlet, or extract for **ALL** outlets?
 - Select either **Current** or **All**.
- If you select **Current**, do the following after the software is finished extracting your data for the current outlet:
 - Select **Save**.
 - Select **Next**.
 - Repeat steps 4 and 5 for each outlet.
 - After data has extracted for your last outlet, select **Close**.
- If you select **All** in step 5 and are a *list filer*, skip to the next step.
- If you are not a list filer, select **Close**. The *Return Summary* screen appears. See *Completing the Return Summary* screen.
- If you are a list filer, select the **List** button.
- Select the **Map** button. Verify that the cell locations shown in the *Mapping column* are correct for the jurisdictions. Be sure to verify this information for all the jurisdiction types, City, Transit, County, and SPD.
 - You can override cell locations by entering a new cell address. However, this works for this return only. To permanently change cell locations, change them on the *List Setup* screen.
- Select the **Extract** button. This will retrieve the data from the spreadsheet and place it on the *List Return* screen.
- Select another jurisdiction type and select **Extract**. Repeat this process until all jurisdiction types have been selected.
- Select **Save**.
- Select **Close**.

- If the amount subject to tax for a jurisdiction is not required to be reported for the return filing period, leave your spreadsheet cell blank. The blank space or null value will be extracted. When the return is processed, the software will not process this jurisdiction and it will go unreported. But if a 0 appears, 0 is read as a value, creating unnecessary data in your electronic return file, with the following exception:
 - i. Cities marked with a double-asterisk (**) to the right of the city name on your preprinted return require an entry; enter 0 in such a case when you have no data to report.
 - ii. Go to *Completing the Return Summary* Screen.

8 Method 2: Importing

- Importing data from a tab-delimited text file is relatively easy for the software application; however, it is impossible if the tab-delimited text file is not in the proper format. The easiest way to create a properly formatted file is to create a spreadsheet and then save the spreadsheet as a tab-delimited file. You must design a spreadsheet based upon the following format.
- Designing Your Spreadsheets
 - If filing by both outlet and list, you must create two spreadsheets, one for outlets, and one for lists.
- Outlet Return Spreadsheet Design
 - The spreadsheet design for an outlet return looks like this:

Period	Outlet	Total Sales	Taxable Sales	Taxable Purchases	Subject to State Tax	Subject to Local Tax
201209	1	2000	1500	0	1500	1500
201209	2	3000	2500	0	2500	2500
201209	4	4000	3500	500	4000	4000
201209	6	5000	4500	0	4500	4500
201209	7	6000	5500	0	5500	5500
201209	13	7000	6500	0	6500	6500
201209	14	8000	7500	0	7500	7500
201209	18	9000	8500	0	8500	8500
201209	19	10000	9500	0	9500	9500
201209	20	11000	10500	0	10500	10500
201209	21	12000	11500	0	11500	11500
201209	23	13000	12500	0	12500	12500
201209	24	14000	13500	0	13500	13500
201209	25	15000	14500	0	14500	14500
201209	27	16000	15500	0	15500	15500
201209	28	17000	16500	2500	19000	19000

- Follow these instructions to create a properly formatted file:
 - i. Create a new spreadsheet.
 - ii. Create columns headings which match the headings above.
 - iii. Enter return data in the cells.
 - iv. Delete the row containing the column headings. This row was only used to help you input your data. If you do not remove this row, the import will fail.
 - v. Use the feature in your spreadsheet software to save the data as a tab-delimited text file. In Excel, select File, Save As from the menu, then select Text (tab delimited) (*.txt) from the Save as type drop down.

- The tab-delimited file for an outlet return looks like this:

201209 1	2000	1500	0	1500	1500
201209 2	3000	2500	0	2500	2500
201209 4	4000	3500	500	4000	4000
201209 6	5000	4500	0	4500	4500
201209 7	6000	5500	0	5500	5500
201209 13	7000	6500	0	6500	6500
201209 14	8000	7500	0	7500	7500
201209 18	9000	8500	0	8500	8500
201209 19	10000	9500	0	9500	9500
201209 20	11000	10500	0	10500	10500
201209 21	12000	11500	0	11500	11500
201209 23	13000	12500	0	12500	12500
201209 24	14000	13500	0	13500	13500
201209 25	15000	14500	0	14500	14500
201209 27	16000	15500	0	15500	15500
201209 28	17000	16500	2500	19000	19000

- i. Notice that the column headings do not appear in the tab-delimited file. You must delete the entire row containing the column headings, "Period" , "Outlet", "Total Sales", "Taxable Sales", etc., in order for the import to work. Row 1 should start with the actual sales tax data, not column headings or blank cells.

➤ List Return Spreadsheet Design.

- The spreadsheet design for a list return looks like this:

Period	Jurisdiction Name (max 22 characters	Jur. Code	Amount Subject to Tax
201209	Abbott	2109064	100
201209	Abernathy	2095024	1100
201209	Abilene	2221012	2100
201209	Addison	2057217	3100
201209	Adrian	2180020	4100
201209	Borger	2117019	13100
201209	Austin MTA	3227999	11100
201209	Corpus Christi MTA	3178998	14100
201209	Dallas MTA	3057994	15100
201209	Anderson	4001009	5100
201209	Angelina	4003007	6100
201209	Aransas	4004006	7100
201209	Archer	4005005	9100
201209	Atascosa	4007003	10100
201209	Aransas Co. Health Serv	5004505	8100
201209	Baylor Co. Hospital Dis	5012505	12100
201209	Delta Co. Emerg. Serv	5060506	16100
201209	Eastland Memorial Hosp	5067509	17100
201209	Ector Co. Hospital Dist	5068508	18100

- Follow these instructions to create a properly formatted file:
 - i. Create a new spreadsheet.
 - ii. Create column headings which match the headings above.
 - iii. Enter return data in the cells.
 - iv. Delete the row containing the column headings. This row was only used to help you input your data. If you do not remove this row, the import will fail.
 - v. Use the feature in your spreadsheet software to save the data as a tab-delimited text file. In Excel, select File, Save As from the menu, then select Text (tab delimited) (*.txt) from the Save as type drop down.

- The tab-delimited file for a list return looks like this:

201209 Abbott	2109064 100
201209 Abernathy	2095024 1100
201209 Abilene	2221012 2100
201209 Addison	2057217 3100
201209 Adrian	2180020 4100
201209 Borger	2117019 13100
201209 Austin MTA3	227999 11100
201209 Corpus Christi MTA	3178998 14100
201209 Dallas MTA	3057994 15100
201209 Anderson	4001009 5100
201209 Angelina	4003007 6100
201209 Aransas	4004006 7100
201209 Archer	4005005 9100
201209 Atascosa	4007003 10100
201209 Aransas Co. Health Serv	5004505 8100
201209 Baylor Co. Hospital Dis	5012505 12100
201209 Delta Co. Emerg. Serv	5060506 16100
201209 Eastland Memorial Hosp	5067509 17100
201209 Ector Co. Hospital Dist	5068508 18100

- i. Notice that the column headings do not appear in the tab-delimited file. You must delete the entire row containing the column headings, "Period", "Jurisdiction Name", "Jur. Code", "Amount Subject to Tax", in order for the import to work. Row 1 should start with the actual sales tax data, not column headings or blank cells.

➤ Preparing Your Return from an Imported File

- To prepare your return from an imported file, the outlet data and the list data must be in separate tab-delimited files. If you attempt to import data from a single file containing outlet and list data, the import will fail. Also, if you attempt to import data from a spreadsheet file instead of a tab-delimited file, the import will fail.
- Create a new return. See *Starting the Return Summary* screen.
- After the summary information is saved, you are ready to import your outlet and/or list data. Select on the **Outlet** or **List** button.
- On the *Outlet Return* screen, select the **Import** button.
- In the screen that appears, select the file to import, and select **Save**.

- During the import, you may see a dialog box stating:
 - i. Item validation error on IMPORT. Continue IMPORT?
- Select **No** and close all of the return screens, (*Return Summary, Outlet Return, and List Return*), without saving. Check your spreadsheet to make sure all of the data is correct and in the correct columns. Do not edit the tab-delimited file. Make any needed changes to the spreadsheet, save it as a tab-delimited file, and try the import again.
- When the software is finished importing, a dialog box stating, Outlet Return import successful appears. Select **OK**. The software will calculate the amount of tax due for each outlet and display it.
- Select **Save**.
- Select the **List** button.
- On the *List Return* screen, select the **Import** button.
- In the screen that appears, select the file to import, and select **Save**.
- During the import, you may see a dialog box stating:
 - i. Item validation error on IMPORT. Continue IMPORT?
- Select **No** and close all of the return screens, (*Return Summary, Outlet Return, and List Return*), without saving. Check your spreadsheet to make sure all of the data is correct and in the correct columns. Do not edit the tab-delimited file. Make any needed changes to the spreadsheet, save it as a tab-delimited file, and try the import again.
- When the software is finished importing, a dialog box stating, List Return import successful appears. Select **OK**.
- Select **Save** to save your data.
- Select **Close**.
 - i. If the amount subject to tax for a jurisdiction is not required to be reported for the return filing period, leave your spreadsheet cell blank. The blank space or null value will be extracted. When the return is processed, the software will not process this jurisdiction and it will go unreported. But if a 0 appears, 0 is read as a value, creating unnecessary data in your electronic return file, with the following exception:
 1. Cities marked with a double-asterisk (**) to the right of the city name on your preprinted return require an entry; enter 0 in such a case when you have no data to report.

VIII Amending Submitted Returns

This section provides instructions for amending returns. An amended return correct data previously submitted on previous returns. An amended return does not affect payments. Only make a payment for the additional amount owed due to your amended return. If the amended return results in a credit a refund will be generated.

❖ Amending Data

The screenshot shows the 'Return Summary' window in the 'Sales Tax Electronic Filing System v6.1'. The window title is 'Return Summary' and it has standard window controls. The main content area displays the following information:

Taxpayer: _____ Process Status: Processed
Filing Period: 1607 Return Type: Original 0 Filer Type: Monthly Tax Type: Sales Tax

	State Tax	Local Tax	
<input type="checkbox"/> No Sales			
Tax Due:	\$ 1,187.50	\$ 4,110.75	= \$ 5,298.25
Prepayment credit: -	\$ 0.00	\$ 0.00	
Adjusted tax due: =	\$ 1,187.50	\$ 4,110.75	
<input checked="" type="checkbox"/> Timely Filing Discount: -	\$ 5.94	\$ 20.55	
Prior payments: -	\$ 0.00	\$ 0.00	
Net tax due: =	\$ 1,181.56	\$ 4,090.20	
Penalty and Interest: +	\$ 0.00	\$ 0.00	
Total Amount Due: =	\$ 1,181.56	\$ 4,090.20	= \$ 5,271.76
EFT Payment: =	\$ 0.00	\$ 0.00	= \$ 0.00

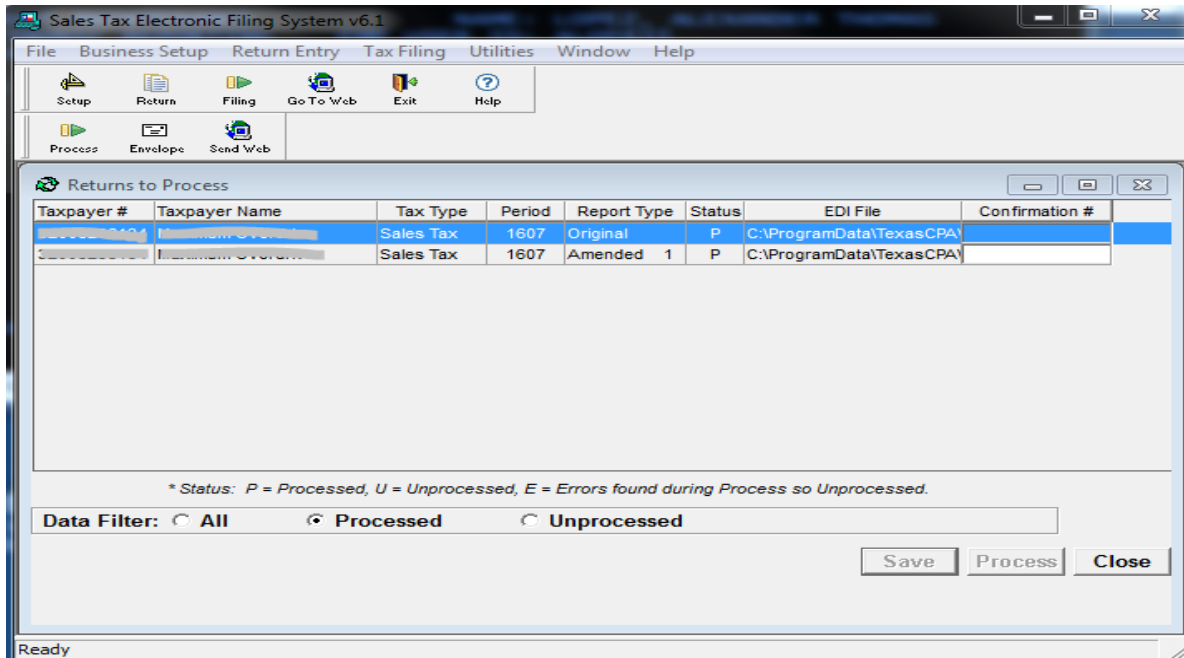
Below the table, there are sections for 'Credits Taken' and 'Export Sales', each with a dropdown menu set to 'No' and an 'Amount' field set to '\$.00'. At the bottom of the window, there is a row of buttons: 'Prev', 'Next', 'Index', 'Amend' (highlighted in yellow), 'New', 'Delete', 'Save', 'Coupon', 'Preview', 'Print', and 'Close'.

- 1 Select the **Return** button.
- 2 Double click the return that needs to be amended. Only previously processed returns can be amended.
- 3 The *Return Summary Information* screen will display.
- 4 Select the **Amend** button. A message screen will pop up that says “Prepare this Return to Amend. Select the **OK** button. This Return is now ready to be amended”.
- 5 Select the **OK** button on the screen notifying you that the amendment process was successful.
- 6 Enter changes to the report. Including the **Outlet** and **List** adjustments if needed.
- 7 Select the **Save** button.
- 8 Close the *Report* screen.
- 9 The return is now ready to be processed and uploaded.
- 10 Continue to section *IX Processing (Saving) Returns for Submission*.

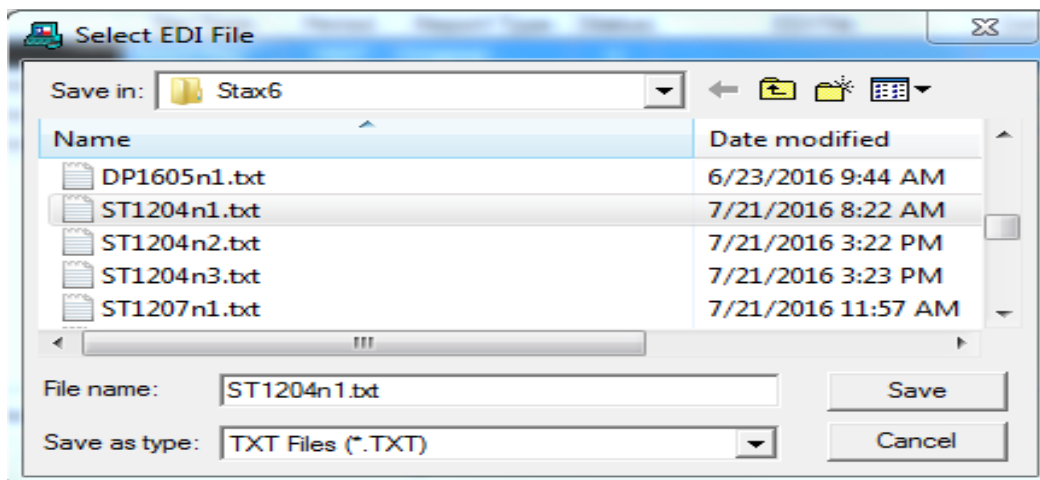
IX Processing (Saving) Returns for Submission

This section provides instructions for saving (processing) a return to send to the Comptroller's office. **Warning!** You are not finished until you receive a confirmation email from the Comptroller's office validating your return has been accepted. *See section XII Transmitting a Production File.*

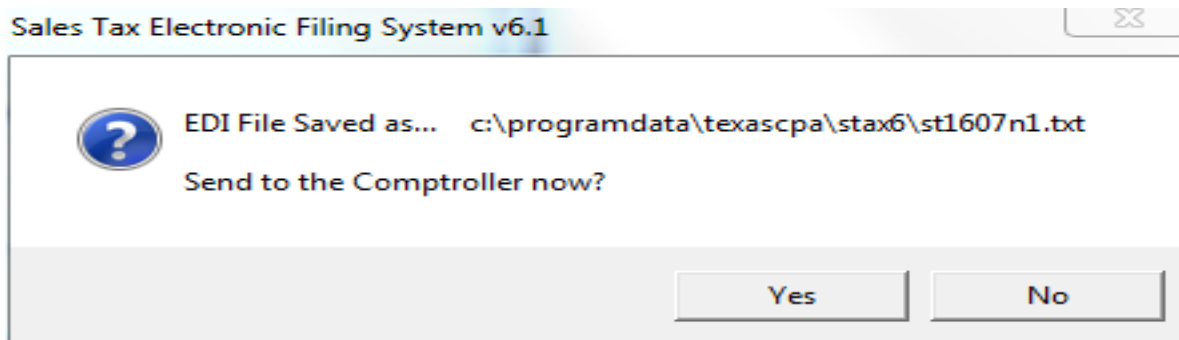
❖ Processing Return



- 1 Select the **Filing** button.
- 2 At the *Returns to Process* screen, select the return to be processed. If you are filing an amended return, select the amended return to be processed.
- 3 Select the rectangular **Process** button.
- 4 If the return is for a taxpayer for whom Electronic Funds Transfer (EFT) information has been entered and the EFT Payment information has been entered on the return, the Processing Payment Verification screen will appear.
 - Read the instructions on the screen carefully.
 - Double check the taxpayer number, period, account information, payment amounts, and payment date to make sure they are correct.
 - If everything is correct, select **Yes** button and continue with the next step. Otherwise select **No** button and you will be returned to the *Returns to Process* screen.



- 5 The *Select EDI File* box will appear, with a highlighted system-generated file name as follows:
 - Yearly mYYMMn#.txt (YY represents the year, MM the month and # the number of returns processed for that period).
 - Quarterly: mYYYQn#.txt (YY represents the year, Q the quarter and # the number of returns processed for that period.)
 - You can change the name of the file. The file must remain a Text Document (.txt) file type.
- 6 Select the **Save** button.
- 7 The following message will appear: “EDI file saved as”...and the location the file was saved. The location the file is saved is based on your operating system or where you selected:



- The path above is for Windows Vista, 7 & 8.
 - The path can also be found on the Returns to Process screen under EDI File.
- 8 Select the **Yes** button to send to the Comptroller now.

X Combining Processed Returns Into a Single File-Enveloping. (Optional)

In order to upload more than one EDI file at a time you can put a group of processed returns together. This process is called enveloping. This feature is optional. You may upload individual file.

❖ *Combining Returns*

- 1 Select on the **Process** button. This will open the *Report Processing* screen.
- 2 Select the **Processed** radio button in the *Data Filter* section.
- 3 Highlight all returns you want to envelope by holding down the Control (Ctrl) key on your keyboard and selecting on each file to be enveloped.
- 4 Select the **Envelope** button.
- 5 Select **Save** on the *Select Envelope EDI* file screen.
- 6 Select the **OK** button. The file name will appear in the *Envelope Filename* column.
- 7 Continue to *XII Transmit a Production File to the Comptroller's Office* or section *XI Registering and Enrolling to File EDI Returns*.

XI Registering and Enrolling to File EDI Returns

This section provides instructions for registering and enrolling for EDI filing. To receive approval to file electronically an initial test return must be submitted for each taxpayer you are filing for. After processing your return and creating the EDI file follow the instructions below. **Warning!** Submitting a Test file is not considered submission of your return/payment. You must upload a Production file for a return to process to your account. See section *XI How to Transmit a Production File to the Comptroller's Office*.

Registration Information

Please enter the following registration information to access the Electronic Data Interchange System.

Taxpayer Number: (11 digits, no hyphens)
Tax Type:
WebFile Number: (8-13 Alphanumeric characters)
Contact Last Name:
Contact First Name:
Daytime telephone:) - Ext. (option)
E-mail Address:

(Confirmation emails will be sent to this address)

- 1 Select **Send via Web** button. Your browser will open to the EDI Website.
- 2 Select the **No, register** button.
- 3 Select the **Continue** button.
- 4 Enter data in the following fields:
 - *Taxpayer Number*: Enter the 11 digit Texas taxpayer number with no hyphens.
 - *Tax Type*: Select the drop down arrow to the right of the Tax Type field and choose the appropriate tax type.
 - *WebFile Number*: Enter the 8 digit WebFile number starting with RT.
 - *Contact Last Name*: Enter the primary contact's last name.
 - *Contact First Name*: Confirmation Enter the primary contact's first name.
 - *Daytime Telephone*: Confirmation Enter the primary contact's phone number.
 - *E-mail Address*: Enter the primary contact's email address. Confirmation emails will be sent to this email address.
- 5 Select the **Continue** button.
- 6 Create an alpha-numeric Personal Identification Number (PIN) from 8 to 13 characters in length.
- 7 Re-enter your PIN for verification.
- 8 Create a Reminder Phrase.
- 9 Select the **Continue** button. The *Client Information* screen will appear.

- 10 Enter data in the following fields for the taxpayer you are submitting a test file for:
 - Taxpayer Number: Enter the 11 digit Texas taxpayer number with no hyphens.
 - WebFile Number: Enter the 8 digit WebFile number starting with RT.
- 11 Select the **Add** button.
- 12 Highlight the taxpayer number in the *Taxpayer List* field.
- 13 Select the **Continue** button. If you are testing for more than one account, you must add the additional taxpayer numbers and WebFile numbers.
- 14 The *Test File Upload* dialogue box will appear. Select the **Browse** button.

HELP INDEX CONTACT US EXIT Electronic Data Interchange

File your Texas Tax Return online!

Test File Upload

Browse and choose the file to upload: Browse...

Click the submit button only once and wait to receive a confirmation message before exiting the application.

Submit

- 15 Navigate to the return that was processed previously. The location the file is located is based on your operating system.
 - Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6
 - Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6
- 16 Select the **Submit** button. Your confirmation number will appear on the *Test Upload Confirmation Page*.
 - Fail: Read the attachment, correct errors and resubmit file
 - Pass: Test file was submitted successfully; you may submit a production file.
- 17 Select the **Exit Electronic Data Interchange** button on the webpage. You must log back in once you have received the email indicating your Test file has passed status.
- 18 Check your email for a confirmation of enrollment. The status must say “Passed”.
- 19 Continue to the section *XII Transmitting a Production File to the Comptroller’s Office*.

XII Transmitting a Production File to the Comptroller's Office

This section covers transmitting a Production file. A Production file may only be submitted after you register and enrolled to file electronically through EDI.

HELP INDEX CONTACT US EXIT Electronic Data Interchange

File your Texas Tax Return online! Page Help

Login Information

Electronic Data Interchange (EDI) meets the mandatory reporting requirement for Texas sales, direct pay, crude oil, natural gas, IFTA and motor fuels taxes.

Important Message

Taxpayers using the Comptroller's EDI software to file reports must use the current versions listed below. Previous versions are not supported.

To check the version of the software you are running, look on the first screen of the software for the version number. To download the most current version click on the links below:

- [Sales Tax Download](#)
- [Motor Fuels Tax Download](#)
- [Natural Gas/Crude Oil Download](#)
- [IFTA Download](#)

Taxpayer Number: (11 digits, no hyphens)

Tax Type:

Personal Identification Number(PIN): (8-13 Alphanumeric characters)

- 1 After processing a return you will be asked you will be asked Send to the Comptroller now? If you select **Yes** your browser will open. Proceed to step 4.
- 2 If you did not transmit the return at the time it was processed, select the **Process** button. This will open the *Returns to Process* screen.
- 3 Select **Process** button in the software. This will open the *Report Processing* screen.
- 4 Select **Send via Web** button. Your web browser will open to the EDI website.
- 5 Select **Yes, login** button. If you have not already registered please see the section *X How to Register and Enroll to File EDI Returns*.
- 6 Enter *Taxpayer Number* and *Personal Identification Number (PIN)*.
- 7 Select the *Sales and Use Tax* type.
- 8 Select the **Continue** button.
- 9 Select the **Continue** button if taxpayer information is correct.
- 10 Select the **Production File** radio button.
- 11 Select the **Continue** button.
- 12 Select the **Browse** button.
- 13 Navigate to the return that was processed previously. The default location the file is located is based on your operating system or where you chose:
 - Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6
 - Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6
- 14 Select the **Open** button.
- 15 Select the **Submit** button.
- 16 Record your confirmation number on the *Report Processing* screen. A confirmation email will be sent with details of Pass/Fail status of the file:
 - Pass: No action required.
 - Fail: Read the attachment, correct errors, and resubmit the file.

This section provides instructions to transfer the information entered in the Sales and Use Tax software from one computer to another computer. This section's covers upgrading a database from a prior version of the software and moving a database. Please save a copy of your database to your desktop before upgrading the software. The file type should be DB file or Database file. The default location of the database is based on your operating system:

❖ *Upgrading Before Moving a Database*

- 1 Download and install Sales and Use Tax version on both computers using the instructions from section *III How to Download and Install Sales and Use Tax Software*.
- 2 Double click on the **Sales and Use Tax EDI** shortcut on your desktop.
- 3 Continue to the next section *Moving a Database*. If you are unable to upgrade please email EDI.Help@cpa.texas.gov for further assistance.

❖ *Moving a Database*

- 1 Close the Sales and Use Tax EDI software on both computers.
- 2 Locate your current database. The file name is Stax6.db. If you do not see the extensions types look at the file type. The file type should be DB file or Database file.
- 3 Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6
- 4 Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6
- 5 Locate your archived databases. This step is only for those that use the archive functionality.
- 6 Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6\archive
- 7 Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6\archive
- 8 Copy all databases from the Archive folder and Stax6 folder.
- 9 Change the name of the Stax6.db on the new computer to something different (example Stax6original.db). This allows the program to only read the Stax6.db file from the older/other computer.
- 10 Transfer the databases to correct folder for the new computer.
- 11 Current Database:
- 12 Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6
- 13 Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6
- 14 Archive Database
- 15 Windows Vista, 7, and 8 saves in C:\ProgramData\TexasCPA\Stax6\archive
- 16 Windows XP saves in C:\Documents and Settings\All Users\TexasCPA\Stax6\archive
- 17 Open the Sales and Use Tax software on your new computer.
- 18 Review the software for the data that existed in your old computer.

XIV Button Legend

This section includes legend of each button referred to in this user guide for reference.

Button Name	Button Description	Button Picture
Help	Use this button to open the software help	
Staxfull.exe file icon	Use this icon to install the Sales and Use Tax Software	
Next	Use this button to go the next step	
Finish	Use this button to finish the current process	
Sales Tax Data Entry System Shortcut	Use this desktop shortcut to open the Sales Tax Software from the computer desktop	
Setup	Used to open the Taxpayer Information Window	
Return	Use to go to the Return List Window	
Filing	Used to open Returns to Process Window	
Go to Web	Opens the Go To Web Page	
Taxpayer	Used to open the Taxpayer window	
Outlet	Used to open Outlet Setup	
List	Used to open List Setup	
Save	Used to save progress	
OK	Used to approve the prompt	
Delete	Used to Delete a record	
Yes	Selects Yes	
No	Selects No	
Envelope	Combines different processed returns into one file for submission	
Process	Used to process the a return	
Yes, login	Used to Login	
No, register	Used to Register	
Continue	Used to Continue	
Browse	Used to browse	
Open	Used to open a file	
Submit	Used to submit a file	
Add	Used to add	
Exit	Used to Exit	
Close	Used to Close the Convert Database window	