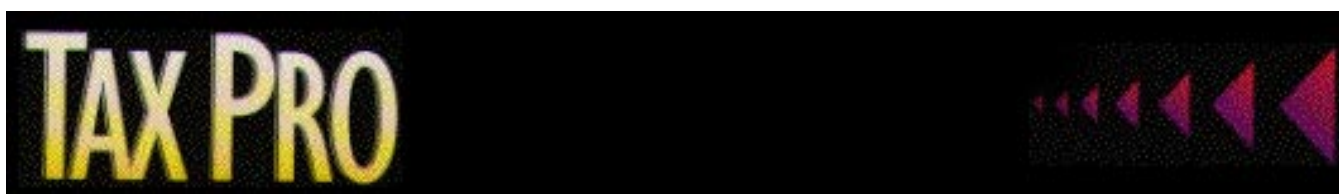


TAX

Estimates
Your Taxes
Instantly

PRO



Introduction

Welcome!

Thank you for choosing TaxPro'97 for Newton systems. Originally written in 1993, TaxPro was the first commercially available software application for the Newton PDA. Now updated for Newton OS 2.0 and for tax years 1996 and 1997, TaxPro continues to be a valuable tool for the mobile professional.

Features For Version 2.0, "Headstart"

- ▼ Tax calculations have been entered for 1997 insofar as the Internal Revenue Service (IRS) has released definitive information. This version gives you a headstart on figuring and planning your tax liability. As the IRS releases more information as to how it will apply the congressional changes to the Internal Revenue Code, especially the Capital Gains tax calculation, we will update TaxPro'97 in a timely manner. With 1996 calculation available, you can compare your anticipated liability with what it would have been last year.
- ▼ Newton OS 2.0 compatible. Look for faster calculations.
- ▼ A registration window has been added, enabling us to sell TaxPro'97 over the Internet. Also, documentation is now, as you have discovered, in Portable Document Format (PDF).

System Requirements

To use TaxPro'97, you must have the following:

- ▼ Newton device running Newton OS 2.0: MP120, MP130, MP2000, eMate 300.
- ▼ 107k free memory space.

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9. Governing Law. Except as otherwise restricted by law, this Agreement shall be governed by and interpreted in accordance with the laws of the State of Utah.

10. Entire License. This Agreement sets forth the entire understanding and license between you and Licensor and may be amended only in a writing signed by both parties. No vendor, distributor, dealer, retailer, sales person, or other person is authorized to modify this Agreement or make any warranty, representation, or promise that differs from or adds to the representations of this Agreement.

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14. Acceptance. By using this Program, you acknowledge that you have read and understood this Agreement and agree to be bound by its terms.

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TaxPro'97 was written by John Meier, David Haabestad, and Van C. Evans with help from Bryant Eastham. Thanks also to Andrea Evans and Jim Palzewicz.

Technical Support

Please read carefully the instructions in this guide. It was written to be straightforward and intuitive. If you experience any problems in the installation process or the normal use of the software that we have not explained, feel free to call. We are committed to supply telephone support free of charge, *provided* you return your completed registration card (Does not apply to telephone registrations). You may call Monday through Friday from 9:00 a.m. to 5:00 p.m. MT, at these numbers:

800-669-5191

801-278-7102

801-274-1294 Fax

Have your serial number handy and have the Newton PDA ready. We have found that we can help you best when we walk through the problem right on your Newton. It is not uncommon for us to take your name and number and then return your call, when someone is available to help you. If this is the case, please be patient with us, since we will return your call as soon as possible. You may also email at:

support@revelar.com

Installation

You can install the TaxPro.pkg on your Newton PDA by using one of the following:

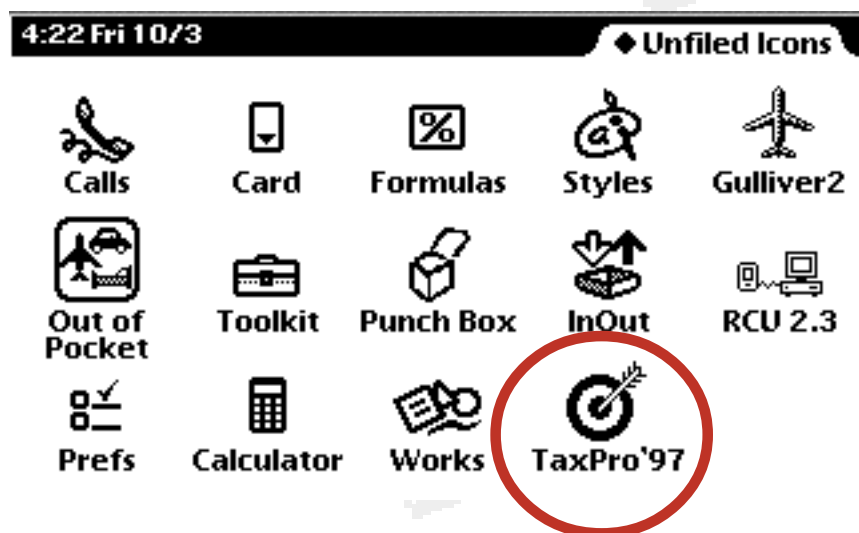
- ▼ Newton Backup Utility or Newton Connection Utility
- ▼ Newton Package Installer
- ▼ RCU (Revelar Connection Utility) 2.1 or greater

You should have a Newton serial cable. The cable that came with your MessagePad will do.

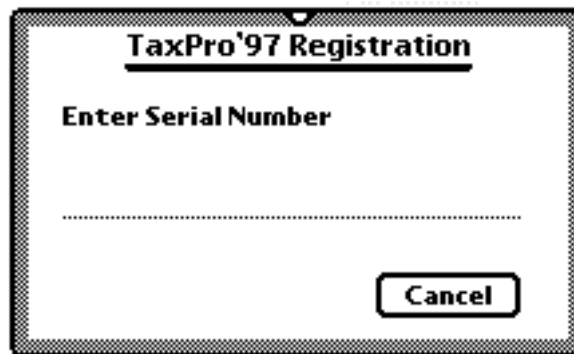
Registering TaxPro'97

To register your copy of TaxPro'97:

1. Install the TaxPro.pkg on your Newton PDA.
2. Launch it by tapping on its icon in the Extras drawer:



The following view appears:

A screenshot of a registration dialog box titled "TaxPro'97 Registration". Below the title is the instruction "Enter Serial Number". There is a single-line text input field with a dotted line indicating where to enter the serial number. At the bottom right of the dialog is a button labeled "Cancel".

TaxPro'97 Registration

Enter Serial Number

.....

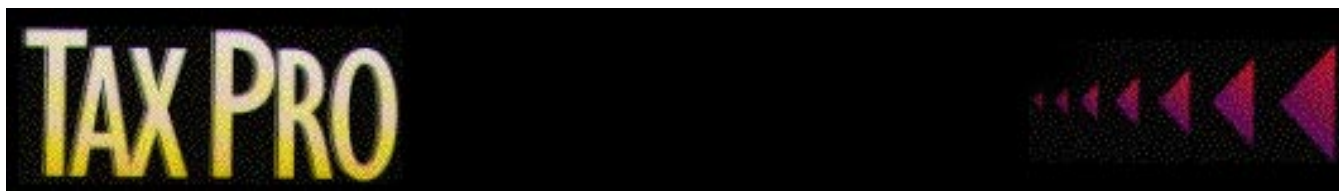
Cancel

3. Enter your serial number on the input line. Your serial number is case sensitive. Once a valid serial number has been entered, an "Accept" Button will appear. Then press Accept.

Your serial number is on your box, if this product was shipped to you, or on the Installation Card. If you do not have a serial number, you must press Cancel to continue using your Newton PDA. You may call, fax or, email Revelar to order a serial number over the phone.

This serial number is a license to use TaxPro'97 on a single Newton PDA.

Hint: Tap twice on the Registration view's input line to bring up a keyboard.



Using TaxPro'97

Main View

The main view is organized like the Form 1040 U.S. Individual Income Tax Return. All of your income and deductions are summarized as Taxable Income. After entering data on separate views, TaxPro'97 instantly updates to show you the bottom line, whether tax is owed or a refund is expected. There is no "Calculate" button to press.

The Taxpayer data is optional. By default, the Newton Owner's name will appear in the Taxpayer field. If you expect to do tax planning for other individuals, entering their name in this field will identify the data once it has been transferred to the Notepad.

A screenshot of the TaxPro'97 software interface. The title bar at the top says 'TaxPro'97'. Below it, the 'Taxpayer' field is highlighted with a red oval and contains the name 'Pete Moss'. The interface is organized into sections: 'Income' (with a dotted line separator), 'Filing status' (Single), 'Deductions' (4,150), 'Exemptions (1)' (2,650), 'Taxable income' (0), 'Tax from rates' (0), 'Credits' (with a dotted line separator), 'Other taxes' (with a dotted line separator), 'Total tax' (0), 'Payments' (with a dotted line separator), and 'Tax owed' (0). At the bottom, there is a status bar with a clock icon, the text 'Worksheets', '1997 CG 20%', and two icons: a checkmark and an 'X'.

Hint: You can transfer TaxPro's results from the Notepad to your desktop computer using the Revelar Connection Utility (RCU). Contact Revelar at 800-669-5191 or on the internet at www.revelar.com.

Inputting With a Keypad

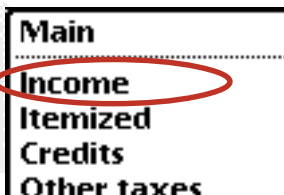
Since all of the input from here on is numerically based, you can speed up your input by tapping out the numbers on a numeric keypad like the one shown at right. To show this keypad, double-tap on any number input line.



Entering Income

You can enter a lump sum amount on the Income input line, or open the Income worksheet by tapping on the Worksheets button, then tapping the Income item.

Worksheets



Select the Income type from each picker as shown here to the right. Then enter the appropriate amounts next to each item.

Income Worksheet		Amount
◆ Wages	Income	
◆ Business income	Wages	
◆ Interest	Interest	
◆ Royalties	Dividends	
◆ State tax refund	State tax refund	
◆ Rents	Alimony	
◆ Capital gain/loss	Business income	
◆ Adjustments	Other gain/loss	
◆ Adjustments	IRA distribution	
	Pensions	
	Annuities	
	Rents	
	Royalties	
	Partnerships	
	S corporations	
	Estates	
	Trusts	
	Farm income/loss	
	..	
Total AGI		

Adjustments to Income

Specify and enter other adjustments to income in the two Adjustments Input fields below.

The image shows two overlapping 'Income Worksheet' forms. The left form is titled 'Income Worksheet' and has a column for 'Amount'. It lists the following items:

	Amount
◆ Wages	70,000
◆ Business income	10,000
◆ Interest	241
◆ Royalties	400
◆ State tax refund	
◆ Rents	2,000
Capital gain/loss	0
◆ Adjustments	
◆ Adjustments	
Total AGI	82,641

The right form is also titled 'Income Worksheet' and has a column for 'Amount'. It lists the following items:

	Amount
Wages	70,000
Business income	10,000
Interest	241
Royalties	
State tax refund	
Rents	
Capital gain/loss	
Adjustments	
◆ Adjustments	
Total AGI	82,241

A red circle highlights the 'Adjustments' list on the right form, which includes the following items:

- IRA deduction
- Moving expense
- SE tax
- SE health
- Keogh deduction
- SEP deduction
- Early withdrawal
- Alimony paid
- Other

A red line points from a red dot above the circle to the circle itself.

After you have finished entering Income, closing the view will return you to the Main view and the Total AGI will be displayed on the Income line of the Main view, replacing what was previously there.

Filing Status

Specify your filing status by tapping on the picker and selecting the appropriate item.

TaxPro'97

Taxpayer Pete Moss

Income 82,641

◆ **Filing status** Single

◆ **Deductions** ✓ Married joint

◆ **Exemptions** Married separate

Head household

Deductions

Specify whether or not you will itemize your deductions by tapping on the picker and selecting the appropriate item. If you select Standard, TaxPro'97 will enter the correct deduction amount. If you select Itemized..., the Itemized Deductions view will open.

TaxPro'97

Taxpayer Pete Moss

Income 82,641

◆ **Filing status** Married joint

◆ **Deductions** Standard 6,900

◆ **Exemptions** Itemized... 5,300

Itemized Deductions

	Amount
Medical	<u>502</u>
Taxes paid	<u>4,300</u>
Interest paid	<u>12,500</u>
Investment interest	<u></u>
Charitable	<u>8,200</u>
Casualty or Theft	<u></u>
Miscellaneous	<u>0</u>
Disallowed amount	<u>0</u>
Total itemized	<u>25,502</u>

☒

Hint: Enter the amounts in the appropriate fields; simply combining amounts into an arbitrary field can result in an incorrect tax result.

Medical, Dental, and Miscellaneous Deductions

After you enter your total medical expenses, TaxPro will calculate the allowable amounts based upon your income. While you need not enter your income first, doing so will permit you to instantly see the allowable amount.

Medical and Dental		Miscellaneous	
Total expenses	6,700	Subject to 2%	
After 7.5%	502	After 2% limit	0
		Not subject to 2%	
		Deduction	0

Exemptions

Specify the number of exemptions you will claim by tapping on the picker and selecting the appropriate item. You may select up to 14 exemptions. After doing so, TaxPro'97 will enter the correct deduction amount.

◆ Exemptions (5)	
Taxable income	1
Tax from rates	2
Credits	3
Other taxes	4
Total tax	5
Payments	6
Tax owed	7
	8
	9
	10
	11
	12
	13
	14

Taxable Income and Tax from Rates

The taxable income and resulting tax are calculated for you. These amounts are comparable to the Taxable Income and Tax from page 2 of Form 1040 U.S. Individual Income Tax Return.

Entering Credits

You can enter a lump sum amount on the Credits input line, or open the Credits worksheet by tapping on the Worksheets button, then tapping the Credits item.

Worksheets

Main
Income
Itemized
Credits
Other taxes
Payments

Enter your Credit amounts in the appropriate fields.

Credits Worksheet	
	Amount
Child/dependent care	.....
Elderly or disabled	.....
Foreign tax credit	500
Adoption credit	.....
Mortgage interest	.....
Electric vehicle	.....
Business credit	.....
Other credits	.....
Total credits	500

Foreign Tax Credit

Enter the Foreign tax credit from Form 1116 in this separate view.

After you have finished entering all Credits, closing the Credits Worksheet view will return you to the Main view and the Total credits amount will be displayed on the Credits line of the Main view, replacing what was previously there.

Foreign Tax Credit	
Foreign tax credit	500

Other Taxes Worksheet

You can enter a lump sum amount on the Other taxes input line, or open the Other Taxes worksheet by tapping on the Worksheets button, then tapping the Other Taxes item.

Worksheets

Main
Income
Itemized
Credits
Other taxes
Payments

Enter your Other Taxes amounts in the appropriate fields.

After you have finished entering all Other Taxes, closing the Other Taxes Worksheet view will return you to the Main view, and the Total Other Taxes amount on this worksheet will be displayed on the Other Taxes line of the Main view, replacing what was previously there.

Other Taxes Worksheet	
	Amount
Self-employment	1,530
Alternative minimum	0
Recapture tax	
Tax on tips	
IRA/Retirement	
Household employmt.	
Advance EIC payments	
Other taxes	
Total other taxes	1,530

Payments

You can enter a lump sum amount on the Payments input line, or open the Payments worksheet by tapping on the Worksheets button, then tapping the Payments item.



Enter your payment amounts in the appropriate fields.

After you have finished entering all payments and other credits, closing the Payments Worksheet view will return you to the Main view, and the Total payments amount will be displayed on the Payments line of the Main view, replacing what was previously there.

Payments Worksheet	
	Amount
Federal withholding	4,300
Estimated tax qtr 1	
Estimated tax qtr 2	
Estimated tax qtr 3	
Estimated tax qtr 4	
Overpayment applied	
Earned income credit	
Excess FICA	
Total payments	4,300

☒

Capital Gains Tax

To calculate Capital Gains tax, open the Capital Gains worksheet by tapping on the Worksheets button, then tapping the Capital Gains item.

Worksheets

Main
Income
Itemized
Credits
Other taxes
Payments
Capital gains tax
Alt minimum tax

Enter your short term or mid/ long term gains in the appropriate fields.

Your Capital Gains total is then sent to the Income worksheet and your tax is calculated. If you have Capital Gains taxes due, the Main view will list "Capital gains tax" in lieu of "Tax from rates."

Capital Gains Tax

Enter net capital gains and losses:

Short term

Mid/Long term

To Income Worksheet:

Capital gain 0

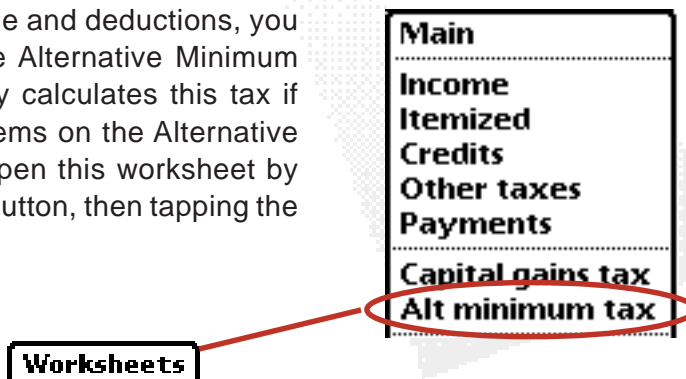
Capital gains tax 0

Tax from rates 6,933

☐

Alternative Minimum Tax

Depending upon your income and deductions, you may be required to pay the Alternative Minimum tax. TaxPro'97 automatically calculates this tax if you enter the Preference items on the Alternative Minimum Tax worksheet. Open this worksheet by tapping on the Worksheets button, then tapping the Alt minimum item.



Alt Minimum Tax

- **Alternative minimum tax**
- **Alt minimum taxable income**
- **Total adjustments and preferences**
- **Adj/preferences from TaxPro**
- **Adj/preferences from taxpayer**
- **Related adjustments**
- **Optional data**
- **Special instructions**

This worksheet is divided into sections. You may tap on any of the bullet titles to take you to that section of the worksheet.

While in this worksheet, tapping the dot returns you to this title list. You may also tap the up or down arrows to navigate as well.



The AMT (Alternative Minimum Tax) is sent to the Other Taxes worksheet

The Total adj/preferences is the sum of adjustments made by TaxPro'97 and the preferences you enter in the two sections below it.

Hint: Highly technical tax knowledge is required to determine preferences and adjustments to the Alt. Min tax. See your tax advisor for help.

Alt Minimum Tax

Alternative minimum tax	
AMT, to Other Taxes	0
Alt minimum taxable income	
Total AMTI	80,000
Total adjustments and preferences	
Total adj/preferences	-13,650
Adj/preferences from TaxPro	
From TaxPro worksheets:	
Standard deduction	6,350
Taxes	0
Misc itemized 2%	0
Refund of taxes	0

Select the Adjustment/Preference (Adj/pref) type from each picker as shown here below and to the right. Then enter the appropriate amounts next to each item.

Adj/pref
Medical/dental
Certain home int
Investment int
Post 86 deprec
Adj gain/loss
ISO's
Passive activity
<input checked="" type="checkbox"/> K-1's
Private bonds
Charitable
Circulation
Depletion

Alt Minimum Tax	
Adj/preferences from taxpayer	
◆ K-1's	.....
◆ Certain home int	.....
◆ Adj/pref	.....
◆ Charitable	-20,000
◆ Post 86 deprec	.....
◆ Adj/pref	.....
◆ Adj/pref	.....

Next, for adjustments to your Adjusted Gross Income, select the related adjustment (ATAGI) type from each picker as shown to the right. Then enter the appropriate amounts next to each item.

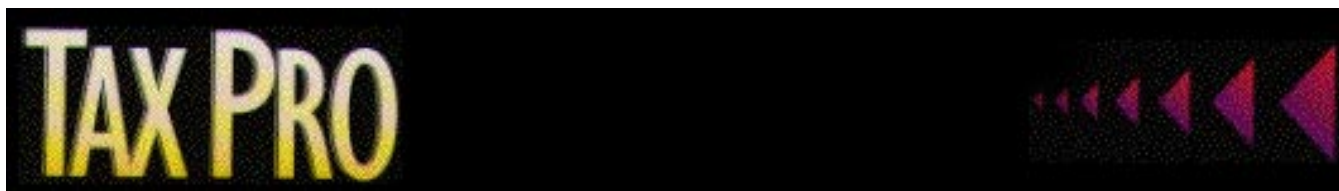
These amounts are figured into the Total adjustments and preferences section.

Alt Minimum Tax	
Related adjustments	
◆ ATAGI	.....
◆ ATAGI	.....
◆ ATAGI	.....
◆ ATAGI	.....
◆ ATAGI	.....
◆ ATAGI	.....
◆ ATAGI	.....

√ ATAGI
Section 179
Home bus/rental
Conservation
IRA distributions
SE health ins
SEP deductions
Social security
Savings bonds
IRA deductions
Casualty/theft

Alt Minimum Tax	
Optional data	
Enter positive amounts	
For AMTI calculation:	
Net operating loss	.....
Alt tax NOL	.....
For AMT calculation:	
Foreign tax credit	500
Alt min FTC	.....

Finally, enter applicable Net Operating Loss or Foreign tax credits.



Extras

Copying Taxes to the Notepad

After you have calculated your taxes, you may copy all of the data to the Notepad as a new note. Do so by tapping on the routing button, then tapping the Copy to Notepad item.

The screenshot shows the TaxPro'97 Main Worksheet with the following data:

Taxpayer	Pete Moss
Income	82,641
Filing status	Married joint
Deductions	25,502
Exemptions	13,250
Taxable income	43,889
Tax	6,933
Credits	-500
Other taxes	1,530
Total tax	7,963
Payments	-4,300
Tax owed	3,663

Below this is the Income Worksheet:

Wages	70,000
Business income	10,000
Interest	241
Rents	400
State tax refund	0
Annuities	2,000
Capital gain/loss	0
Adjustments	0
Adjustments	0
Total AGI	82,641

A routing menu is open, showing options: Copy to Notepad (selected), Delete, and a mail icon. A red dot points to the 'Copy to Notepad' option.

After selecting the item, the alert below notifies you when the operation is complete. Then launch the Notepad. The new note will be the last unfiled note.

The alert box reads: **① TaxPro'97**
Your tax data has been successfully copied to the Notepad.

Getting TaxPro'97 Notes to the Desktop

After you have sent your data to the Notepad as a new note, you can send this note to the desktop using the Revelar Connection Utility (RCU) for Macintosh and Windows systems. If you do not have RCU, contact Revelar at 800-669-5191 or on the internet at www.revelar.com

This section does not describe the usage of RCU, but shows RCU users how to get the notes to the desktop.

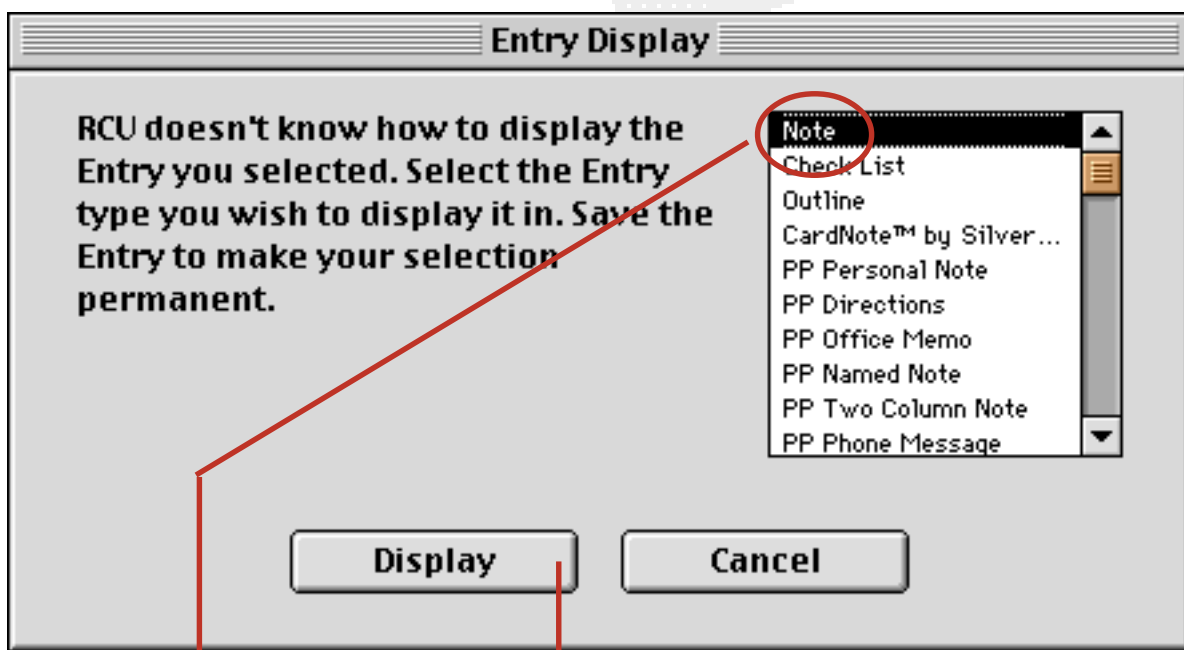


1. Make a connection to RCU as explained in the RCU User Guide.

2. Select the Notes under the application menu.

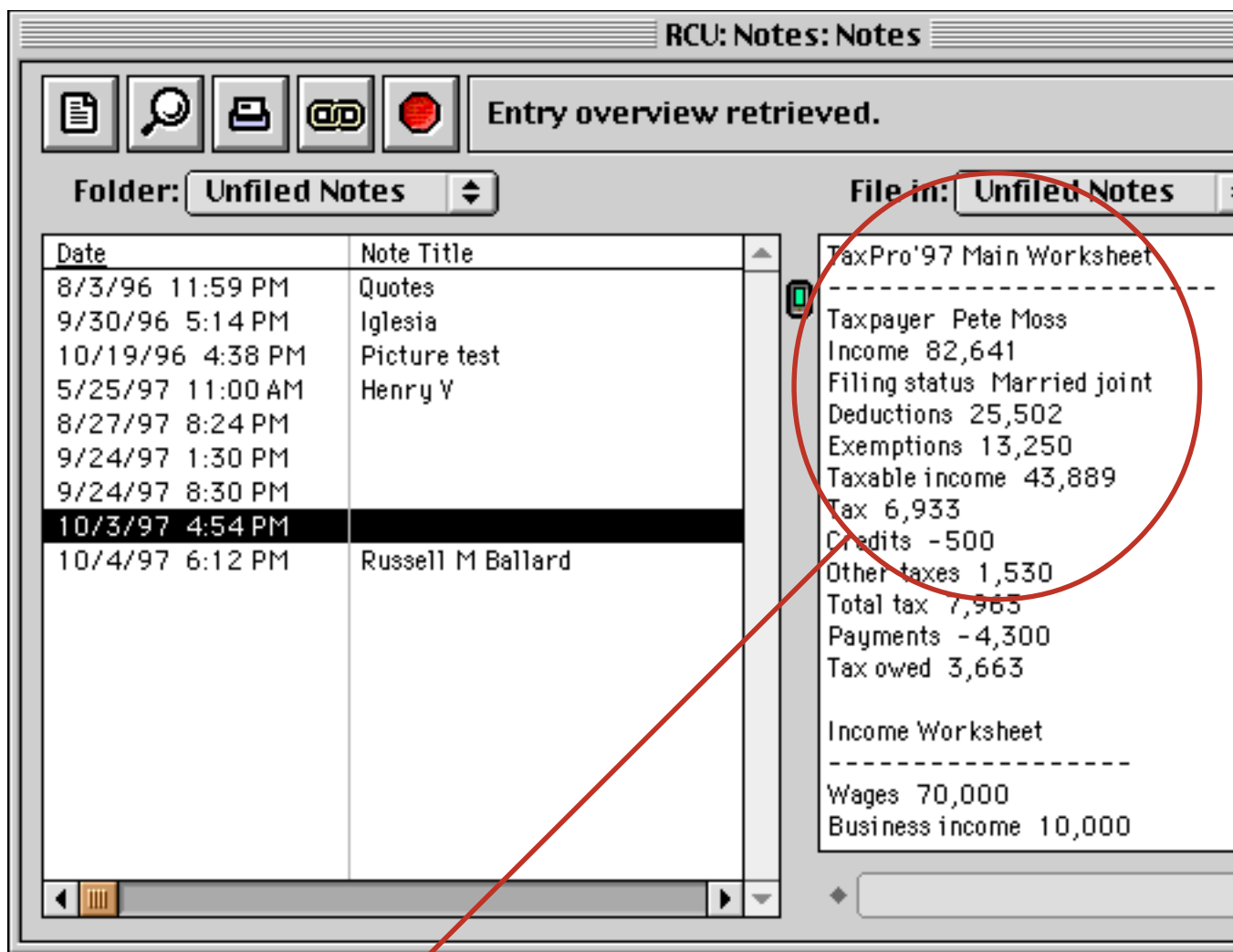
3. Find the TaxPro'97 note in the overview and click on it.

The following window will appear.



4. Click on "Note" and then press the Display button.

The TaxPro'97 note shows up in the entry as shown on the following page. From here you can copy and paste the data to a spreadsheet, word processor, etc., or you can export it to the desktop as a text file using the export window.



The TaxPro'97 note shows up in RCU's note entry field. From here you can copy and paste this data to other programs.

Deleting Tax Data

At any time you can delete the data from the worksheets by tapping on the routing button, then tapping the Delete item.

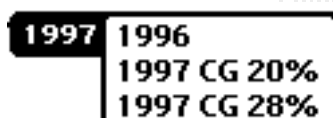


Doing so clears all of the fields and resets them to their default state.

WARNING: YOU CANNOT UNDO THIS ACTION!

Changing Tax Years

At any time you can change the tax year by simply tapping the Year button and selecting the desired year (and in this headstart version, the desired Capital Gains percentage of 20 or 28%). As you change years, TaxPro'97 automatically recalculates the tax due based upon current worksheet inputs.



In this headstart version, the Year button contains two 1997 year items/calculations: "1997 CG 20%" (Capital Gains at 20%) and "1997 CG 28%" (Capital Gains at 28%). If you **ARE NOT** affected by Capital Gains during 1997, it does not matter which year you choose to figure your 1997 taxes, everything else is identical. If you **ARE** affected by Capital Gains, select the year and percentage that will apply to you. If you are uncertain which applies to you, contact your tax advisor for help in determining the tax bracket.