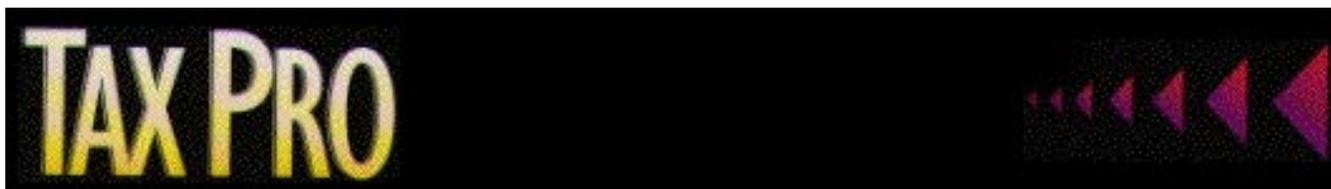


# TAX



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](mailto:support@revelar.com)

## Installation

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

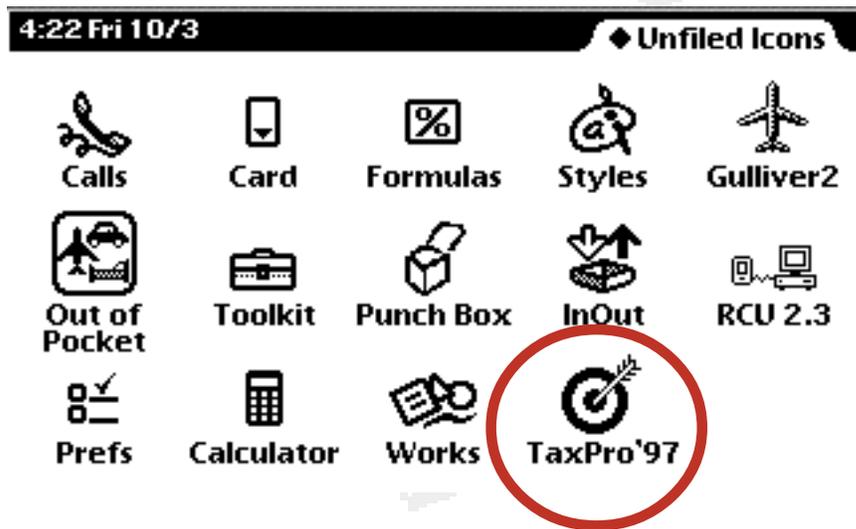
- ▼ Newton Backup Utility or Newton Connection Utility
- ▼ Newton Package Installer
- ▼ RCU (Revelar Connection Utility) 2.1 or greater

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

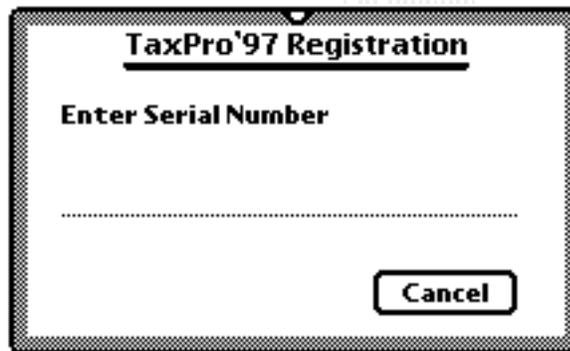
## Registering TaxPro'97

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:

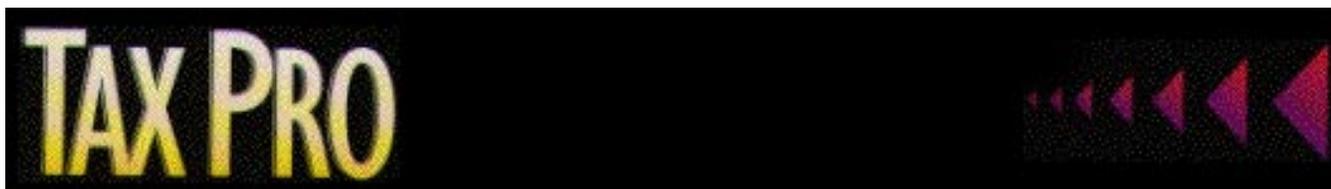
A screenshot of a registration dialog box titled "TaxPro'97 Registration". The dialog has a white background with a black border. At the top, the title "TaxPro'97 Registration" is underlined. Below the title, the text "Enter Serial Number" is displayed. Underneath this text is a horizontal dotted line representing an input field. In the bottom right corner of the dialog, there is a button labeled "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.

| TaxPro'97                |           |
|--------------------------|-----------|
| Taxpayer                 | Pete Moss |
| <b>Income</b> .....      |           |
| ◆ Filing status          | Single    |
| ◆ Deductions             | 4,150     |
| ◆ Exemptions (1)         | 2,650     |
| Taxable income           | 0         |
| <b>Tax from rates</b>    | 0         |
| <b>Credits</b> .....     |           |
| <b>Other taxes</b> ..... |           |
| Total tax                | 0         |
| <b>Payments</b> .....    |           |
| Tax owed                 | 0         |

Worksheets 1997 CG 20%

*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](http://www.revelar.com).*

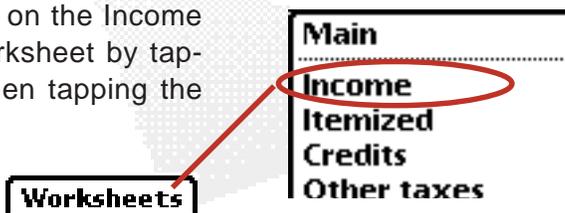
## Inputting With a Keypad

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.

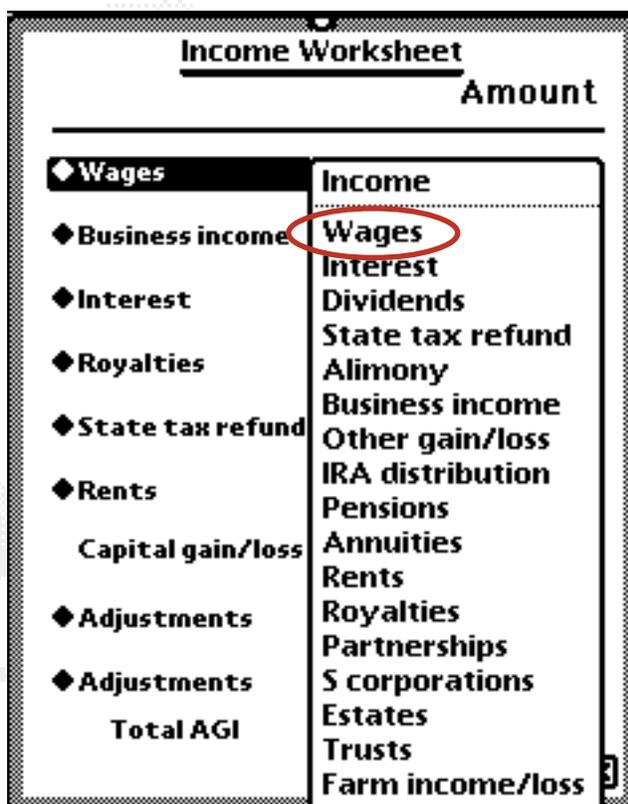


## Entering Income

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.



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



## 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 partially obscured by the right one. A red circle highlights the 'Adjustments' list in the right form, and a red line points from a red dot above to this circle.

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

| Income Worksheet  |               |
|-------------------|---------------|
|                   | Amount        |
| Wages             | 70,000        |
| Business income   | 10,000        |
| Interest          | 241           |
| Royalties         |               |
| State tax refund  |               |
| Rents             |               |
| Capital gain/loss |               |
| Adjustments       |               |
| ◆ Adjustments     |               |
| <b>Total AGI</b>  | <b>82,241</b> |

**Adjustments**

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

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

◆ Exemptions

Single  
 Married joint  
 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        |
|-----------------------|---------------|
| <b>Medical</b>        | 502           |
| Taxes paid            | <b>4,300</b>  |
| Interest paid         | <b>12,500</b> |
| Investment interest   |               |
| Charitable            | <b>8,200</b>  |
| Casualty or Theft     |               |
| <b>Miscellaneous</b>  | 0             |
| Disallowed amount     | 0             |
| <b>Total itemized</b> | <b>25,502</b> |

*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.

| <u>Medical and Dental</u> |       | <u>Miscellaneous</u> |       |
|---------------------------|-------|----------------------|-------|
| 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.

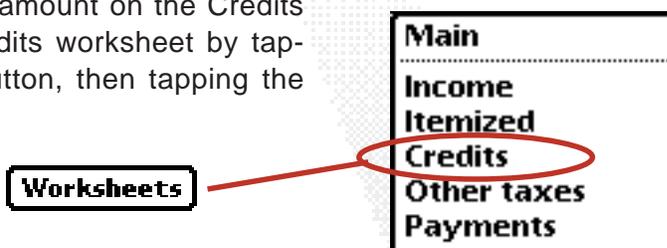
| ◆ Exemptions (5) |    |
|------------------|----|
| Taxable income   | 1  |
| Tax from rates   | 2  |
| Credits          | 3  |
| Other taxes      | 4  |
| Total tax        | 5  |
| Payments         | 6  |
| Tax owed         | 7  |
|                  | 8  |
|                  | 9  |
|                  | 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.



Enter your Credit amounts in the appropriate fields.

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

## Foreign Tax Credit

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

| <u>Foreign Tax Credit</u> |     |
|---------------------------|-----|
| Foreign tax credit .....  | 500 |

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.

## 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**

|                    |
|--------------------|
| <b>Main</b>        |
| <b>Income</b>      |
| <b>Itemized</b>    |
| <b>Credits</b>     |
| <b>Other taxes</b> |
| <b>Payments</b>    |

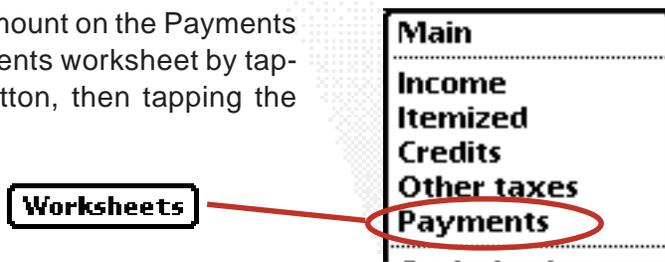
Enter your Other Taxes amounts in the appropriate fields.

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.

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

| <u>Payments Worksheet</u>   |        |
|-----------------------------|--------|
|                             | Amount |
| <b>Federal withholding</b>  | 4,300  |
| <b>Estimated tax qtr 1</b>  | .....  |
| <b>Estimated tax qtr 2</b>  | .....  |
| <b>Estimated tax qtr 3</b>  | .....  |
| <b>Estimated tax qtr 4</b>  | .....  |
| <b>Overpayment applied</b>  | .....  |
| <b>Earned income credit</b> | .....  |
| <b>Excess FICA</b>          | .....  |
| <b>Total payments</b>       | 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**

|                          |
|--------------------------|
| <b>Main</b>              |
| Income                   |
| Itemized                 |
| Credits                  |
| Other taxes              |
| Payments                 |
| <b>Capital gains tax</b> |
| 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 :

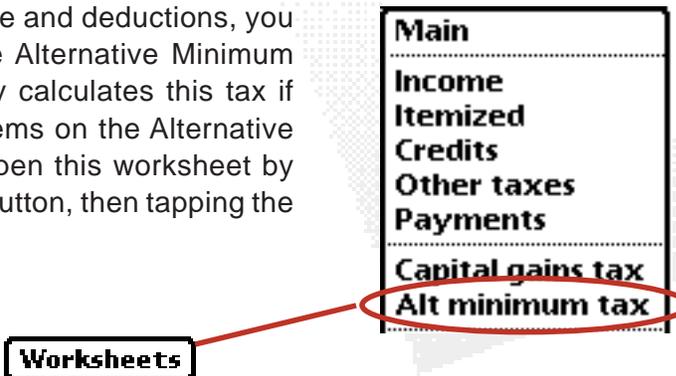
**Capital gain** 0

**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.

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

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





## 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.

**Copy to Notepad**  
Delete

5:01 Fri 10/3 All Notes  
Fri 10/3

TaxPro'97 Main Worksheet

|                |               |
|----------------|---------------|
| 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         |

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 |

Received Deductions

**TaxPro'97**  
Your tax data has been successfully copied to the Notepad.

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.

## 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](http://www.revelar.com)

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

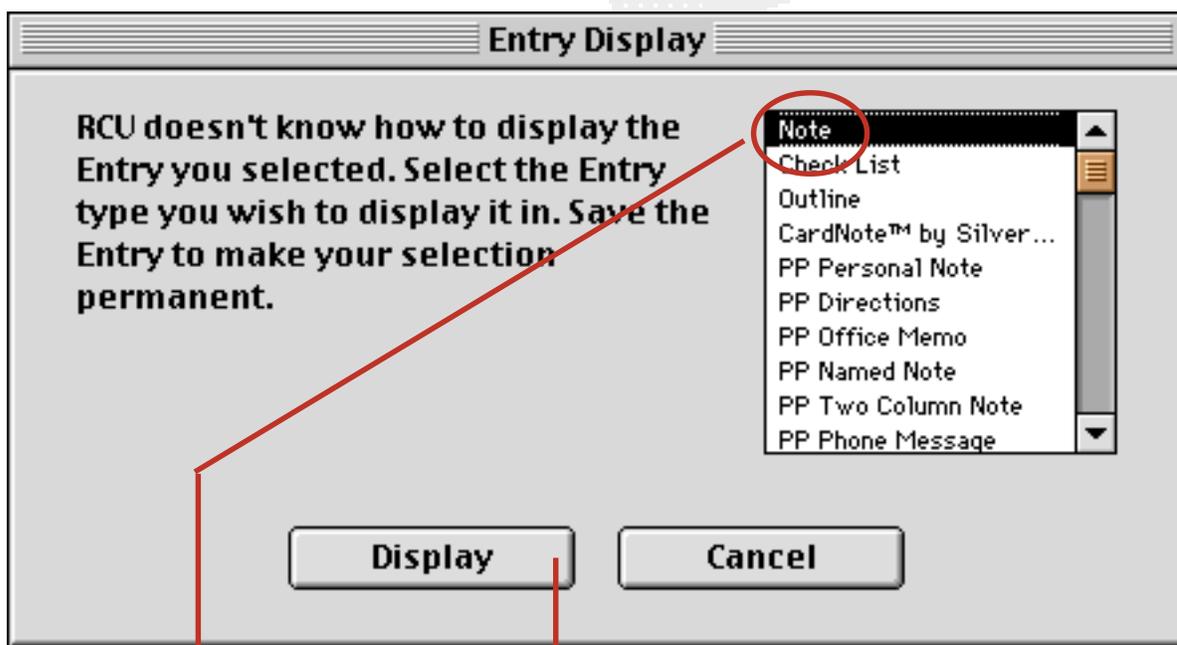


**1. Make a connection to RCU as explained in the RCU User Guide.**

**2. Select the Notes under the application menu.**

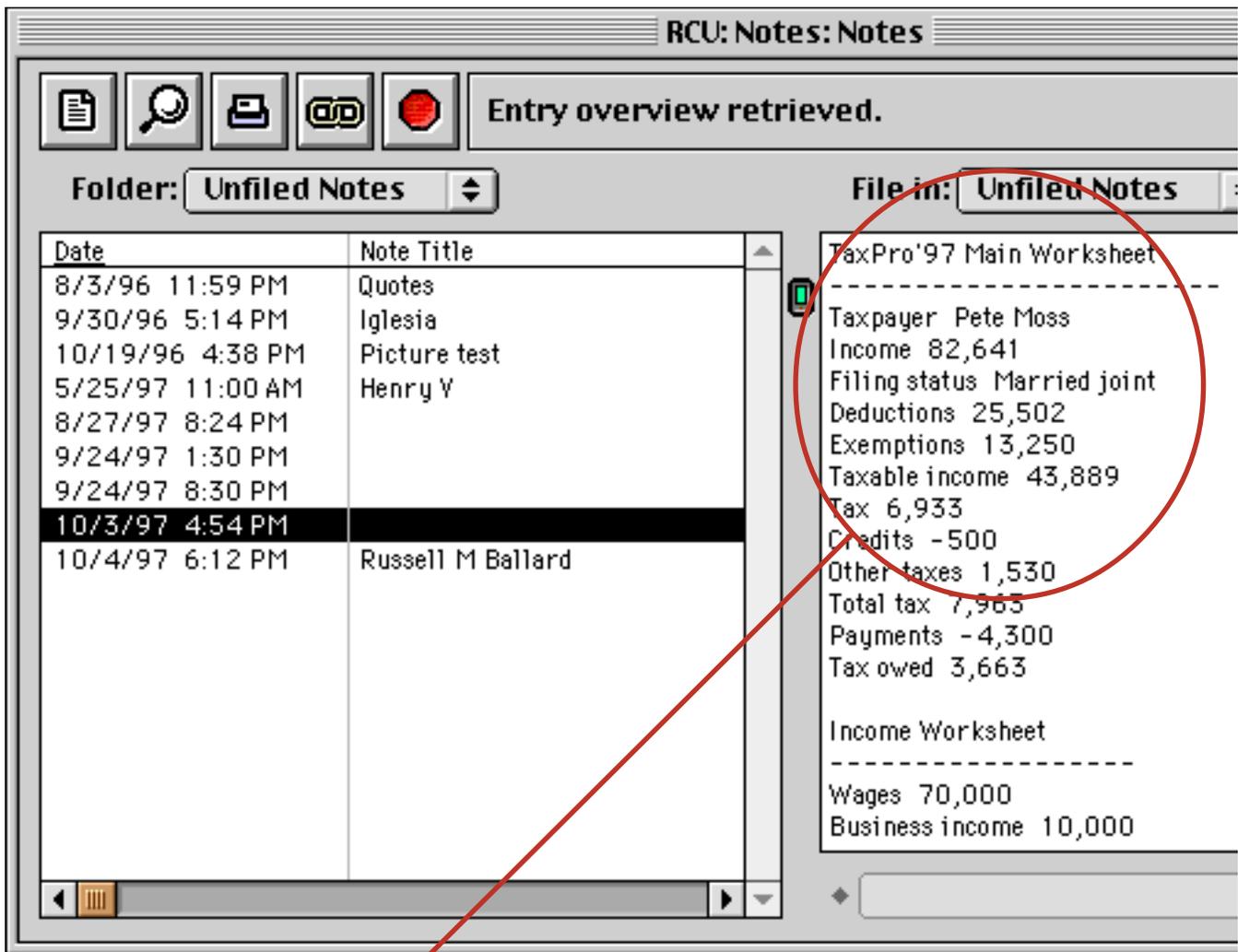
**3. Find the TaxPro'97 note in the overview and click on it.**

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.

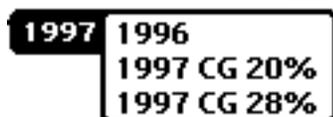


Doing so clears all of the fields and resets them to their default state.

**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.