

CORPTAX® Calendar

Managing and tracking time-sensitive information is a constant in all tax departments. And the greater the complexity of the tax structure, the greater the need comes for a single tax process automation solution.

CORPTAX® Calendar, the fully integrated calendar component of CORPTAX, allows you to schedule, organize and manage tax and non-tax obligations for unlimited entities within your organization. The system gives you the ability to track multiple obligations, including: tasks, due dates, payments, user-defined activities and refunds. Because Calendar is an integrated component of CORPTAX, you can eliminate duplicate data entry, which helps reduce errors and save time.

The CORPTAX family of integrated applications delivers the benefit of one, intuitive user interface, one database, and one-time entry of entities, data, profiles and adjustments, plus you get integration with Microsoft® Excel and other third party tools. The common user interface enables you to work faster and smarter in a manner to which you're accustomed.

Using CORPTAX Calendar, in conjunction with other CORPTAX products, enhances your productivity and your ability to manage, organize and schedule your company's tax and non-tax obligations—all with one integrated, Web-based system that can be accessed virtually anytime, anywhere.

Key Features

- Create and maintain separate entity calendars
- Automatically create obligations and due dates based on tax status and locations
- Track deliverable information: dates, payments, responsibilities and addresses
- Modify obligation due dates that fall on holidays
- Create user-defined fields
- Intuitive & Familiar Interface
 - ◆ Familiar Microsoft functionality
 - ◆ Copy/Paste, Undo/Redo and Drag/Drop
 - ◆ Personalized data views
 - ◆ Multiple tabbed/tiled windows
 - ◆ Side-by-side view of reports, forms and workpapers
 - ◆ E-mail reports
 - ◆ Print data view and reports to PDF
- Generate and print mailing labels, export mailing addresses for use with certified mailing labels
- Track electronic filings
- Import calendar data from other databases or spreadsheets
- Send e-mail notifications and reports with pertinent deliverable information, including if payments were made
- Avoid re-entering data by transferring payment amounts between CORPTAX Calendar and other CORPTAX components
- Control access to setup and manage events with role-based security setup
- Product updates are delivered automatically



Benefits

Save Time with Pre-Populated Dates

CORPTAX Calendar comes with pre-populated dates for fiscal year and calendar year filers; however, you can change dates, giving you greater control over when returns are due.

Track Obligations With Ease

You can track and maintain calendars for multiple years. The system also automatically adjusts due dates that fall on holidays. Using the Holiday Profile, recurring holidays can be set up yearly (e.g., returns with a Sunday due date are automatically adjusted to the following Monday).

File Smarter

Setting up separate entity calendars is easy with CORPTAX Calendar. You simply identify the tax status (e.g., C Corp) and the locations, and CORPTAX Calendar will help determine the obligations and due dates most likely to be filed in each jurisdiction for either fiscal or calendar year filers.

Meet Every Reporting Need

A robust set of standard reports, including deliverables, monthly calendars and payment summary reports, makes it easy to review and report information. The report writing feature using Access allows user-designed reports to be created. You can also modify the provided Access report templates.

Simplified Personalization

Our exclusive setup function will match obligations based on entity attributes, minimizing the number of screens created and reducing the amount of time spent navigating through the system. User-defined fields facilitate organization, and you can track and maintain information for management purposes.

Increases Automation

CORPTAX Calendar includes a wide array of standard calculations, methodologies and processes, dramatically reducing the need for your tax department to perform these manual, redundant tasks.

Integrates with Third-Party Tools

A unique feature of CORPTAX is its ability to integrate with third-party tools for easy access to data, including Enterprise Resource Planning (ERP). You can export to PostMaster Plus popular certified mailing address software and Microsoft® Excel.

Create Customizable Views

Quickly review all due dates for income tax returns, estimates or annual reports, using obligation and due date filters.

Integrated Technology to Meet Your Tax Strategy

For more than 30 years CORPTAX has remained at the forefront of corporate tax technology. CORPTAX is dedicated to continually improving the user experience and exceeding client expectations, bringing high-quality and innovative software solutions to our customers. Now CORPTAX leads the way with new products, a new level of application integration, a new look and intuitive interface, and the most complete approach to business process automation for today's tax department.

CORPTAX software solutions are fully integrated applications designed to meet the expanding needs of your tax strategy. From compliance, tax accounting and planning to document management, information sharing, collaboration, workflow and business analytics, all functionality resides in one dynamic platform, fully integrated with the entire CORPTAX line of tax applications.

For more information, please call 800-966-1639 or visit our website at www.corptax.com.