

Roadmap to CORPTAX® U.S. Compliance

Upgrade Made Easy

CORPTAX U.S. Compliance offers intuitive navigation, proven calculation methodology, and the in-depth tax management functionality you expect. Thanks to its ease of use and efficient features, clients are experiencing increased satisfaction and immediate productivity gains to accomplish critical tax functions in less time. Excel integration further expands productivity, while CORPTAX application integration reduces redundancies, increases efficiencies and supports a critical shift from non-tactical responsibilities to strategic, value-added tasks. The justification to upgrade is simply too compelling to postpone any longer.

The Roadmap to CORPTAX U.S. Compliance guides long-standing CORPTAX clients through a systematic upgrade process to our newest generation of software technology. The process is broken down into four easy steps of essential tasks. You can take advantage of these easy-to-follow guidelines and perform the upgrade in-house, or engage our Professional Services team to perform the upgrade for you if resources are limited. Either way, a high-value solution with fully integrated applications all sharing the same easy-to-use interface awaits you.

4 Easy Steps to CORPTAX U.S. Compliance Upgrade - Overview

To get you moving in the right direction, we've broken down the CORPTAX U.S. Compliance upgrade into four easy steps. The following summarizes these steps and provides an overview of associated tasks to give you an understanding of the upgrade process:

Step 1: Data Readiness

Decide on the scope of data you want to bring forward. You can bring over your data as it exists today or take this opportunity to remove any outdated data. Perform a backup* of your CORPTAX® FS or CORPTAX® CS database. CORPTAX FS clients should backup your CORPInternational® database as well. Next, carefully review the Backup Status file for items requiring attention like special characters, and make the necessary changes.

Step 2: Installation

Visit the Client Login section of www.corptax.com to download the CORPTAX U.S. Compliance software. Our installation guide provides you with detailed instructions to assist you with the installation. Or, opt for cost effective, maintenance-free hosting within our secure ASP environment.



4 Easy Steps to CORPTAX U.S. Compliance Upgrade - Overview (cont.)

Step 3: Data Conversion

Upload the final Backup file(s) you created in Step 1 into CORPTAX U.S. Compliance and process the conversion. Carefully examine the reject file to verify that the data didn't contain any special characters that did not get cleaned up prior to conversion.

Step 4: Take Advantage of New Features and Functionality

CORPTAX U.S. Compliance has additional fields and functionality that you can now take advantage of, such as customizable screens, automated tax collateral updates, Entity Groups, Detailed Entity Set-up and Automated Adjustments. You may also choose to optimize the set-up of your provision and compliance reporting for Federal, International and State during this phase. Partnership users can further take advantage of the new Advanced Partnership module, which allows special allocations at the account and adjustment level.

Finally, take advantage of the complimentary CPE-eligible eLearning sessions* that are available to help you get up and running on CORPTAX U.S. Compliance quickly and conveniently. These online sessions include:

- Introduction to CORPTAX U.S. Compliance
- CORPTAX U.S. Compliance Transition Series
- Introduction to CORPTAX International
- CORPTAX International Compliance Transition – International Fundamentals

Although CORPTAX recommends that you upgrade before the new tax season, it is possible to upgrade to U.S. Compliance mid-year – it's your choice.

** Up to three free training seats per company.*

"CORPTAX has delivered on their promise to make the transition to U.S. Compliance easy."

**Kathie Jacobson
Culligan International Company**

Follow the Path to CORPTAX U.S. Compliance

We strongly encourage you to take the necessary steps to upgrade to CORPTAX U.S. Compliance. Staying current with our technology protects your software investment, while allowing you to take advantage of more feature-rich products that are easier to use.

Plus, CORPTAX also offers an efficient upgrade path to this vastly improved compliance solution making your transition to new technology easier than ever before.

To learn how to upgrade to CORPTAX U.S. Compliance, please contact Kitty Gio at 800-966-1639.

** To expedite your upgrade, our Professional Services team is offering a Free Analysis of your backup database to help identify your upgrade process. Call today for this convenient service or visit <https://new.corptax.com/sites/upgrade>.*

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

"The CORPTAX U.S. Compliance upgrade was a pleasure. Now is a prime time for other CORPTAX FS/CS users to upgrade to U.S. Compliance because the transition is so easy."

**Miguel Ramirez
Health Net**