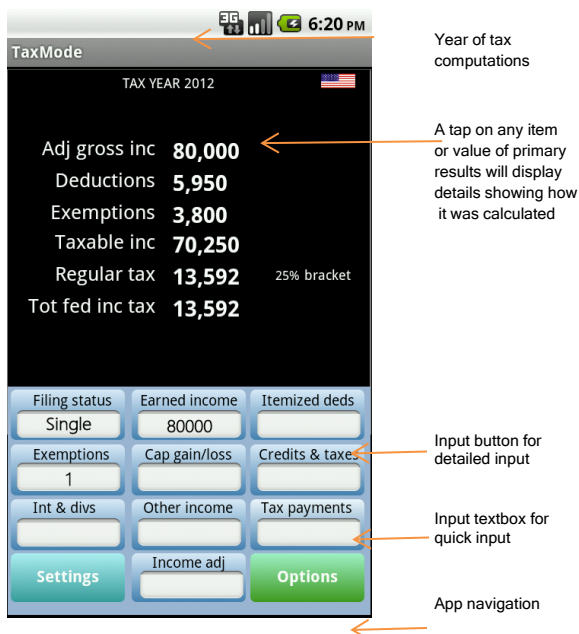## TaxMode App

Using the program

TaxMode could be used in 3 different settings: Quick, Full & Flex modes. You can set the app up for any of these modes based on your usage needs. The mode can be changed by tapping this option under Settings. In its simplest form TaxMode can be used in Quick mode. In this mode you can enter the gross value of any input category to in the textbox of the category to get instant tax results.

If Quick mode is not what you want you can change your input option to Full mode. In this input mode you can itemize items applicable to each category (button area above the text box). There is also a Flex mode that gives you the capabilities of the Quick as well as Full input modes that could be varied from one button to the next. The app is initially set at the Flex mode.

Year of tax computations

A tap on any item or value of primary results will display details showing how it was calculated

Input button for detailed input

Input textbox for quick input

App navigation

Virtual keypad

Data entry:

To make a single entry for a button *tap on its textbox* and enter the value

To make multiple/detailed entries for a button *tap on the button*. An input grid will allow you to make your entries. Note that in order to make a detailed input you must be in the Full or Flex input mode. To view or change your current input mode tap on Settings.

Filing status can be modified in any input mode. Tap on the button or textbox and select new filing status from the dropdown menu.

Change TaxMode settings

To change program settings tap on the settings button. More details available below.

<u>Operational control</u>

There are two ways to navigate TaxMode operations:
1. Tap on the Options button and then tap on desired option, or
2. Use the conventional top menu bar of the calculator. To display this bar *tap Settings* and then *tap Show Menus* option and then tap *Ok*.

Tax computation results are displayed here. The placement of displayed items is kept around the center of this display panel. Among

<u>Result screen</u>

Tax computation results are displayed here. The placement of displayed items is kept around the center of this display panel. Among the items displayed here are-
   • Instant tax computation results (you can tap on any result to display its calculations from applicable IRS Forms)
      • Comparison column when activated
      • Main income and tax report
      • Detailed input and calculations
      • Info as applied to select tax forms

While the result screen is displaying instant tax computation results, placing mouse pointer over each value displayed or the associated caption will provide basic information for each item.

To return to the instant tax computation result display, simply tap anywhere on the display when it is viewing a report or any tax form information.

Status dots – The bottom right of the result screen displays dots that represent current status of various functions. These dots can be ignored in the normal use of TaxMode. These dots are used for diagnostics purposes. They represent the type of installation, user mode, computation option, input mode, and the status of data file,

<u>Printing reports</u>

Reports provided on the result screen can be emailed for printing. The following reports can be emailed for printing-

      • Main report
      • Full report
      • Details of an item shown on the result screen
      • Data corresponding to IRS tax forms involved in current tax calculations
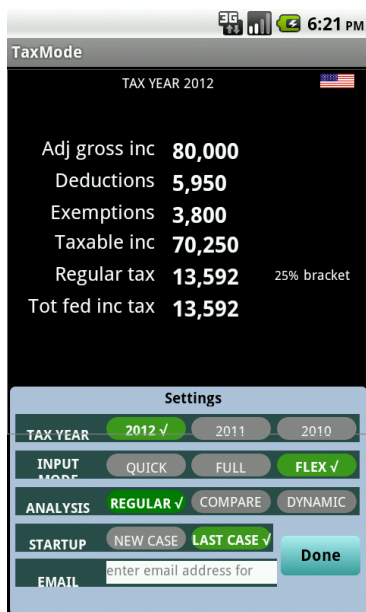
<u>Year of tax calculations</u>

The active year for calculations can be selected using the Settings button. You can also toggle between the active and alternate tax year for instant comparison by pressing function key F3.

Settings

Tap on the Settings button to view or change settings. The following settings can be changed at any time during your use of TaxMode. New settings are applied from this point on until they are changed. Settings are saved upon normal exit from the program (using the Exit option) and turned on the next time you start TaxMode.

Settings for each case data are saved individually and reapplied when you reload that case.

Tax Year

Tap on the button to select the year for which tax calculations are to be performed

Input mode

There are two ways to input data in the program - summary totals or detailed individual items for a category. Although you could enter data either way this option is provided to help you tailor the program as it suits you best. The Quick mode is best suited to input summary totals and the Full mode allows you to input itemized details for the category represented by the button.

Note: Quick input is made directly to the textbox of the button. Full input is made on the input grid that opens up when you tap on the button.

Quick – The virtual key pad is locked into the quick mode. You can tap any button or textbox to enter a direct value for that category. This option can be useful while analyzing a financial situation that may require frequent ballpark tax calculations.

Full - The virtual key pad is locked into the detail mode of input. A tap on any button or textbox requiring numeric input will open an input grid allowing itemized input of corresponding data. This mode allows you to appropriately input data according to its characteristics or its type with regards to applicable tax laws.
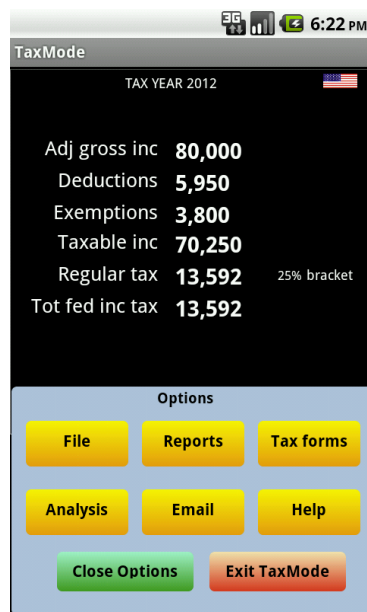
Flex - The virtual key pad is unlocked allowing input in Quick or Full mode depending on where you tap. If you tap on the textbox you can make an overall data entry for this category. To input itemized data using the input grid tap on the button.

Note: Once data has been entered via the textbox for a category the program will automatically switch this category to Full mode while placing the earlier value in the input grid as value of the default item for this category.

Startup case

This setting can be used to set up the initial action of the program each time it is run. The program automatically saves all settings and data when you exit it normally (using the Exit option). The *New* option will make the program ignore the last run and give you a clean slate to start with. *Last run* will make the program start at the point the previous run was exited.

Options

All operational options as shown above are menu driven.