

DT Max T1_EN

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Welcome to the short video of DT Max T1. In this video, we'll show you how TT Max's unique approach and features can help you be more productive completing your customer's tax returns.

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Starting with the splash screen, DT Max only requires 1 installation for all the compliance products

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and all of the back years. No need to purchase archive programs with the TMAX. Your DT Max license will include ten years back from the current taxation year that you are buying.

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Once inside each Max, you are greeted by The Client List, which is a database inherent in the software that allows you to manage your customer's files.

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The Client List gives you a bird's eye view on all of your customers files, such As for example

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their age and their posting status or the progress within the file. You can also sort The Client List on anyone of the columns that are completely customizable and you could also filter The Client List to find specific clients that you are looking for.

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Enter your customer's tax information is done through Tmaxx unique data entry screen where all of your customers tax information are entered on one page, on one screen, on one tab. No need to navigate through multitude of tabs in order to complete your customer's return. All this information is entered in a centralized screen called the data entry screen. DT maxes one screen. Data entry is based on an interview based approach, meaning that the program asks you questions

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you simply answer through what we call the keywords. The keywords can be found very easily through either features like the smart start where you're picking the sections that are relevant to your customers return, or by simply entering the keywords directly in the data entry. For example, entering slip numbers

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or entering form numbers directly as your keywords.

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What makes DT Max's data entry approach also unique are some of the features that are offered within them, allowing you to be more productive in producing your customer's tax return. For example, there is the right hand side display that allows you to compare in real time the data you entered in the previous year with the data you are entering in the current year. Not only do you have this as a comparative, you also have this as a data input tool. You could actually have the Tmax copy

over or import the information from one year to the next. Or for example from Autofill my return from the CRA

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and if applicable for Mervyn Quebec.

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In a couple of short clicks, you can import information and have the team Max produce the data entry for you.

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DT Max Data entry also provides a tax filing module, allowing you to produce up to six distinct versions of your customer's file without altering the original file

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at the end. Once you produce these versions, the program will provide also a planning summary showing you the different results between each one of these scenarios.

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The Tmax Tax Turn screen takes the same approach as the data entry screen, where all the required forms for your customer's tax return are found within one central screen. Navigate through each one of the required forms by simply going through the centralized left hand menu, which has all the required forms needed for your customer's tax return.

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The TMAX tax turn screen also includes automated optimizations. No triggering to optimize a tax turn between a family. DT Max will automatically transfer any amounts that can be transferred between family members in order to optimize the combined tax return.

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