PLANNER CS® TIPS version 2019.1.0
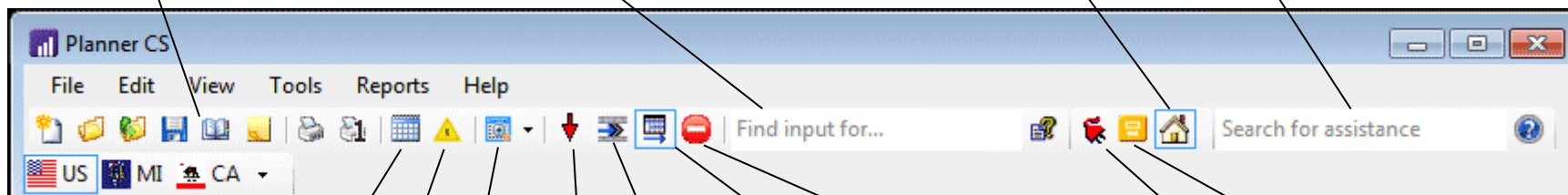
▶ For detailed information about using Planner CS, choose Help > Help & How-To to open our Help & How-To Center.
▶ For answers to common questions, choose Help > Additional Resources > Frequently Asked Questions.
▶ To view help specific to the data-entry field or window in which you are working, press F1.

Plan Information: View or change client information, states, preparers, and options for an open plan.

Find field: Search for a word or phrase that appears in data-entry field names in an open plan.

Planner CS Home Page: Access links to important application-related notices, recently opened plans, data locations, the *Planner CS Getting Started* guide, and more.

Help & How-To Center: Search on a word or phrase to find step-by-step procedures, descriptions of fields and windows, answers to frequently asked questions, and more.

Federal / States: Switch between federal, resident state, and nonresident state modules when a plan is open.

Watch Window Templates: Specify which fields appear in the Watch Window and select previously created Watch Window templates.

Show alerts: View whether this plan includes hidden years or alternatives.

View by Year / Alternative: View plan data grouped by year or alternative.

Smart Data Entry: Automatically bypass fields that are not required.

Cell Movement: Specify vertical or horizontal cursor movement when entering data.

Overrides: View a list of all overridden fields in a plan.

Auto-spread Annualized: Automatically distribute or copy (depending on field type) entered amounts to subsequent periods within the year (annualized plans only).

FileCabinet CS®: If licensed, store and retrieve data from CS Professional Suite® applications.

CS Connect™: Download product licenses and software updates.

Data-entry fields have white cells. Amounts in data-entry fields appear in three different colors:
- **Black:** Entered by you.
- **Blue:** Entered by Planner CS.
- **Maroon:** Imported from UltraTax CS® or GoSystem® Tax RS.

Projection -- Murphy	2013	2014	2015
BUSINESS USE ASSETS, LONG TERM			
Sec 1231/1245/1250 gain/loss	12,000	15,000	6,400
Gain/loss - passive activity		650	
Gain/loss - recharacterized	500		
Nonrecaptured Sec 1231 losses	800		
Net LT Section 1231 Gain	11,700	15,650	6,400
Net 28% Section 1231 gain	80	90	

Calculated fields have gray cells. Amounts in calculated fields appear in two different colors:
- **Blue:** Calculated by Planner CS.
- **Red:** Overridden by you.

Double-click a calculated field with a **green** field name to view the source of the calculated amount.

Carryover fields (not shown) are treated as data-entry fields in the first year of an alternative and calculated fields in subsequent years.

For additional information about any of the following subjects and more, choose Help > Help & How-To and search for a word or phrase.

Preparer preferences

When all plans are closed, click the Tools menu, choose Setup Preparers, and do one or more of the following tasks.
- **Create new preparers:** Click the Add button, enter a name, and click the Enter button.
- **Change new plan defaults:** Highlight a preparer in the list, click the Edit button, select the desired settings, and click the Enter button to save the changes.
- **Set print conditions:** Highlight a preparer in the list, click the Edit button, and click the Auto Select Conditions button. In the Print Conditions dialog, highlight a report name, and select a condition in the Print Condition group box. (Print conditions apply when the preparer prints with the Auto Select option.)

Alternatives and years

Add alternatives and years: In an open plan, click the Edit menu and choose Plan Alternatives or Plan Years > Add. Select the number of alternatives or years to add and the source of the new data. If adding a new alternative, enter a title.

Hide, unhide, and rearrange columns: In an open plan, click the View menu and choose Hide/Rearrange Columns > Hide/Rearrange More. In the View group box, select the view to be changed. Highlight an alternative or year in the available panes, then click the Select or Clear button to change the view. Click the Up or Down arrow to change the order of items.

Note: Gray items in the left pane are included in the view.

Reports

Create reports: Click the Reports menu, choose Custom Reports, click the Add button, and enter a report name. Select items in the Module and Buttons / Tabs panes to focus the data in the Available Rows pane, then select the rows to include in the report. Click the Enter button to save the report.

Create report sets: Click the Reports menu, choose Define Report Sets, click the Add button, and enter a report set name. With the name of a report set highlighted, click an option in the Show Available group box to limit the list of reports in the Available Reports/Graphs pane, then select one or more reports to include in the set. Click the Enter button to save the report set.

Create report layouts: Click the Reports menu, choose Report Layouts, click the Add button, and enter a report layout name. Use the options in the various tabs to specify the appearance of all reports. Click the Preview button to preview the report layout. Click the Enter button to save the report layout.

Print reports: In an open plan, perform the following steps.
1. Click the File menu and choose Print Reports.
2. In the Reports group box, select one of the following options.
   - *Auto Select* — Prints reports based on the print conditions set for the assigned preparer (see Preparer preferences above).
   - *Tax Projection report* — Prints a federal tax projection report and, if applicable, state summary reports.
   - *Report set* — Prints the report set selected in the drop-down list (see Creating report sets above).
   - *Last printed selection* (available after the plan's first printing).
3. In the Report layout drop-down list, select a layout.
4. In the Alternatives/Years to print group box, select an option to specify which alternatives and years to print.
5. Click the Print Selection button to view or modify the list of reports that will print based on the selected options.

Data entry

Search for fields and tabs
- **Fields — Search data-entry field names:** Enter a search term in the *Find* field in the toolbar and press ENTER. Select a search result and click the Go To button to view that field.
- **Fields — Search data-entry or calculated field names, or field-specific help:** Click the Find Data Entry Field button in the toolbar. In the dialog that opens, enter a search term, select options to focus the search, and click the Find button. Select a search result and click the Go To button to view that field.
- **Tabs — Search tab names:** Click the Edit menu, choose Find > Tab, enter a search term, and click the Find button. Select a search result and click the Go To button to view that tab.

Allocate amounts
Double-click any data-entry field to open a window in which you can enter multiple items and, if applicable, allocate amounts to a taxpayer, spouse, or state.

Copy data between alternatives and years
Right-click a data-entry field and choose one of the following commands.
- Auto Copy > Within Alternative to copy data to all subsequent years in an alternative.
- Auto Copy > Same Year to copy data to the same year in subsequent alternatives.
- Auto Copy > All Columns to copy data to the same and subsequent years in the same and subsequent alternatives.
- Auto Increase to copy increased amounts to subsequent years in an alternative or the same year in subsequent alternatives.
- Copy Column > Current Tab Only to copy amounts from one column to another column in the current tab.
- Copy Column > Entire Plan to copy amounts from one column to another column throughout the entire plan.

Note: The Auto Copy and Auto Increase commands are not available for data in the base year of a single base year plan.

Override and reinstate calculated amounts
- To override a calculated amount, enter any number, including zero, in a calculated field.
- To reinstate a calculated amount, highlight the overriding amount and press DELETE.
- To locate all overridden fields in a plan, click the Overrides button on the toolbar.

Import data
You can import data from the following applications, if licensed.
- **UltraTax/1040:** In UltraTax/1040, open the desired return, click the Utilities menu, choose Planner CS (Export) (which is only available when the Planner CS installation location is accurately entered in Setup > User Preferences > File Locations), and import the data into a new or existing plan.
- **GoSystem Tax RS:** In GoSystem Tax RS, export the return data to an *.IT file. Then, in Planner CS, click the Tools menu and choose Import Plan to import the file. (For details, in Planner CS, choose Help > Help & How-To and search on **importing data**.)

Note: The import / export features are not enabled in the initial releases for a given tax year, but are available by installing Planner CS updates that are typically released in February for UltraTax/1040 and March for GoSystem Tax RS.

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