DEFAULT FORMS SETTINGS

1. BRIEF DESCRIPTION

- This document contains details about the "Default Form Fields" feature provided by *IRSLOGICS* to the admin user .
- This feature enables the admin user to set certain default values for forms 2848/8821 for all his licensed users.

2. DEFAULT FORMS SETTINGS

- The "Default Form Fields" feature can be accessed by an admin user under the administration button / Forms as shown below.
- This feature will be available to only tax resolution clients
- This feature is divided into three parts namely "*2848 fields"* , "*8821 fields"* and "2848/8821 *common fields"*.
- The menu option will help the admin user to add default values to certain fields of 2848 and 8821 forms. Anytime a user creates a new case and uses either or both of 2848 and 8821 forms these values will come auto populated in the form.
- These values can be edited by the user also after auto population according to specific needs of the case analyst.

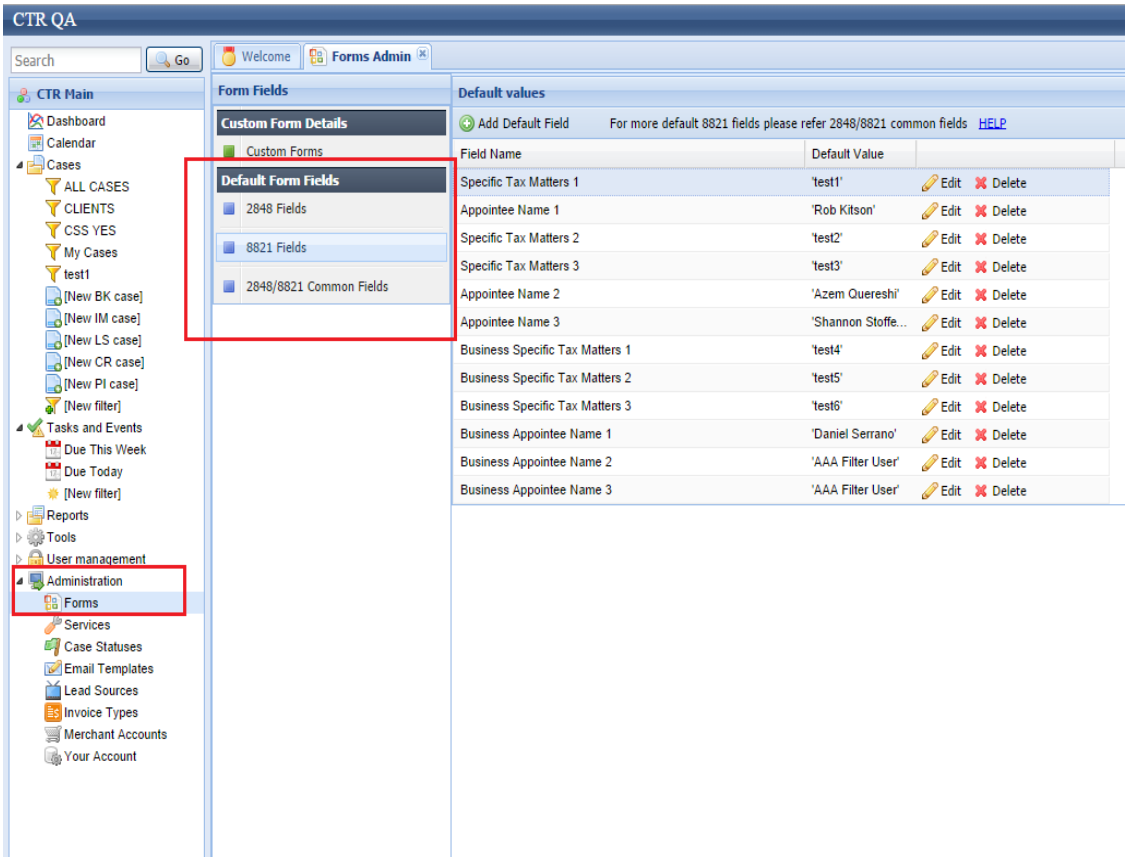
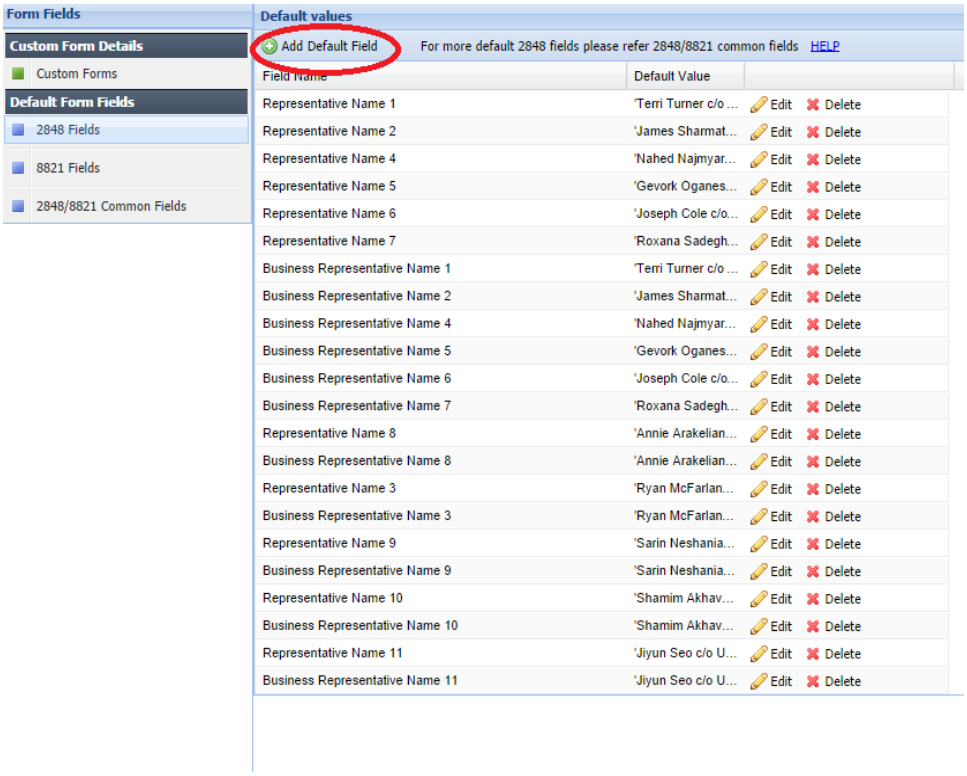


Figure1

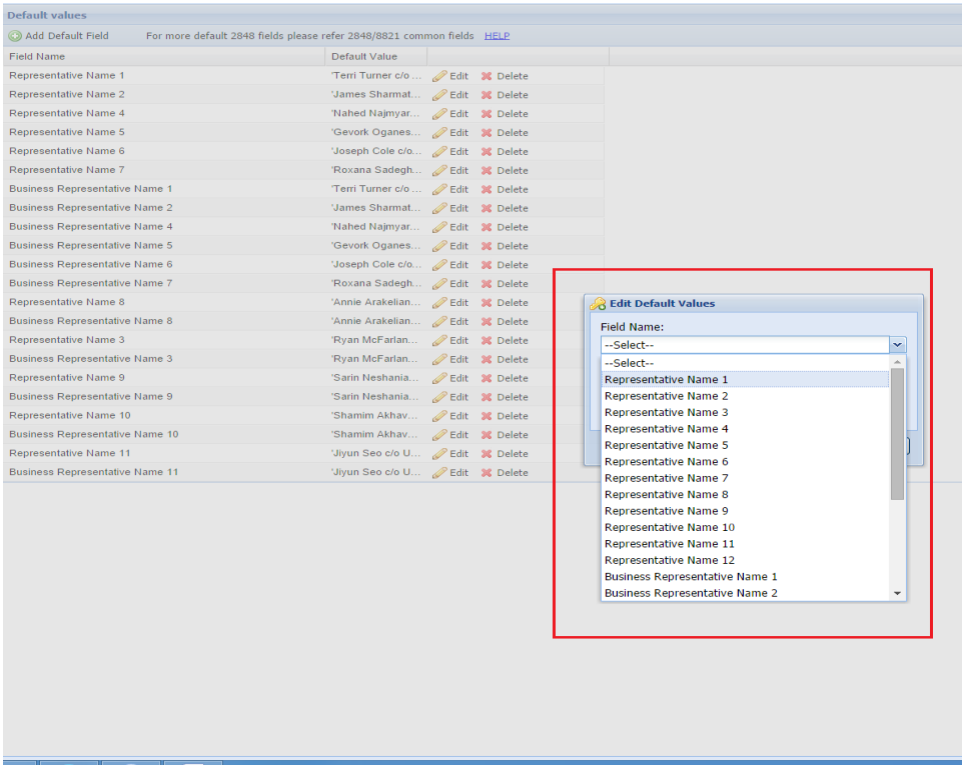
3. 2848 Fields

- There are two types of forms that are covered under this section namely 2848 default/Spouse and 2848 business forms.
- The user can set up to 12 representative names for both default and business 2848 forms using the add default field button as explained as STEP1 and STEP2 in figures below .
- The admin can edit, delete or add these default values as per his convenience anytime in the application as explained in STEP3.
- An example 2848 form mapping of default values is shown below in STEP4.

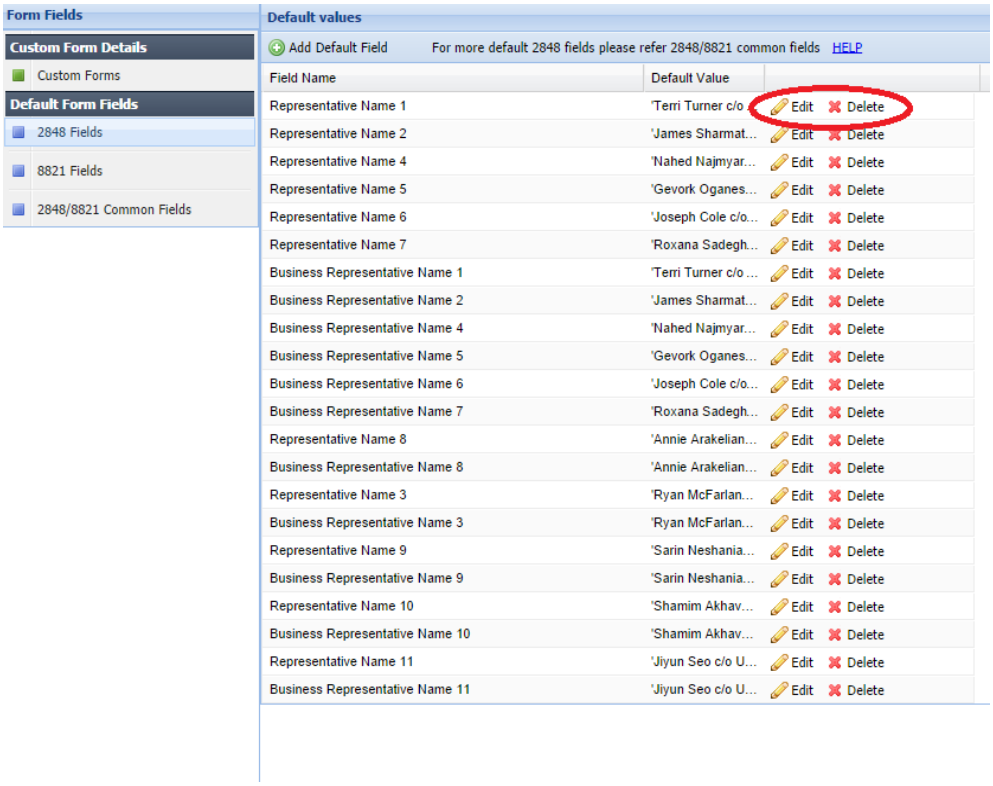
STEP1 => Click on the add default field



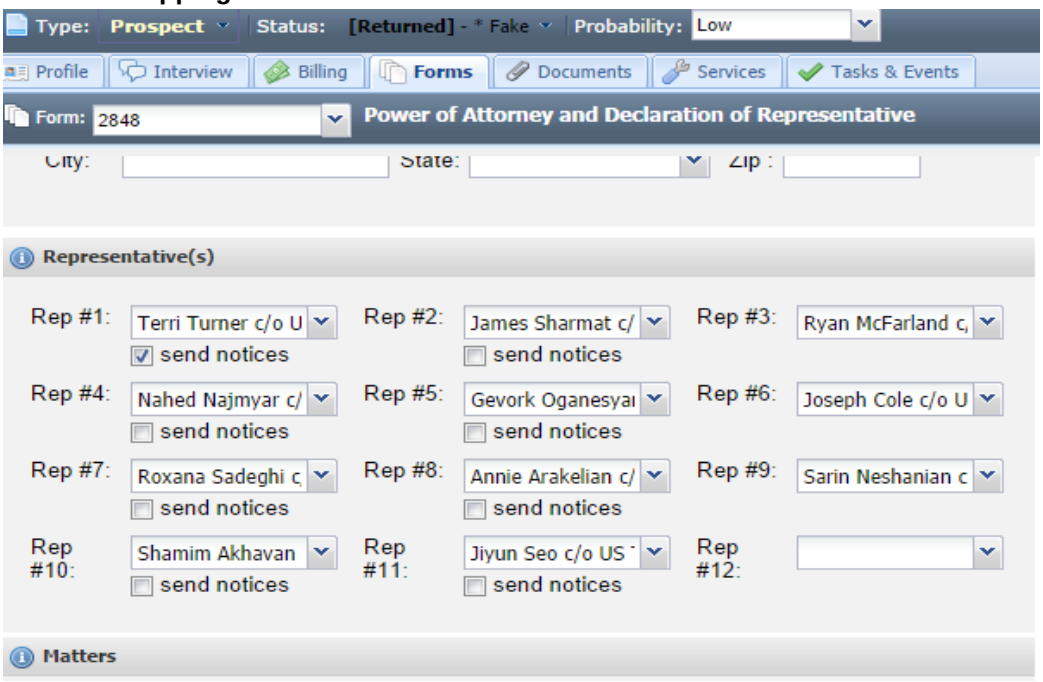
STEP2 => select field from dropdown and add default value



STEP3=>edit or delete values



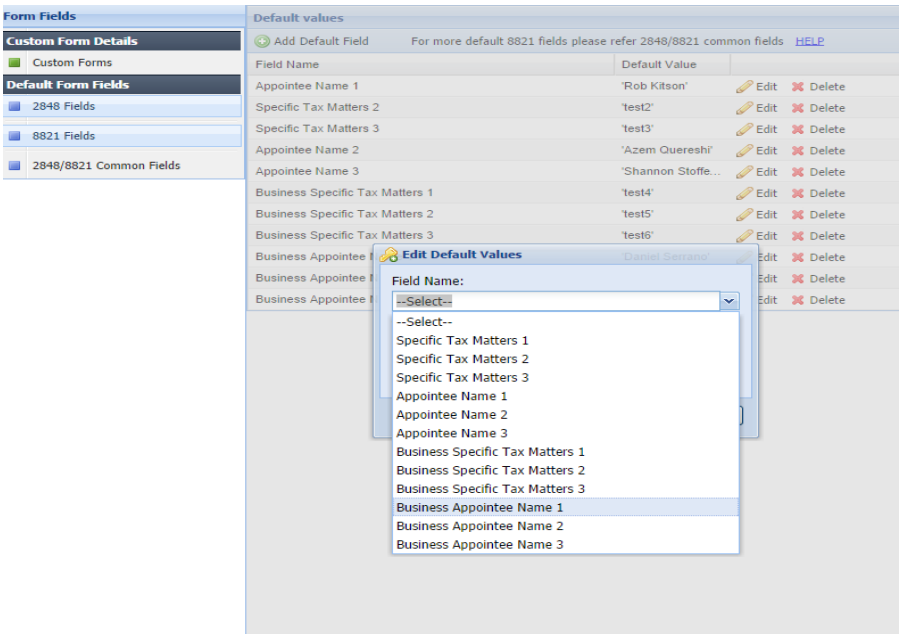
STEP4 =>Mapping



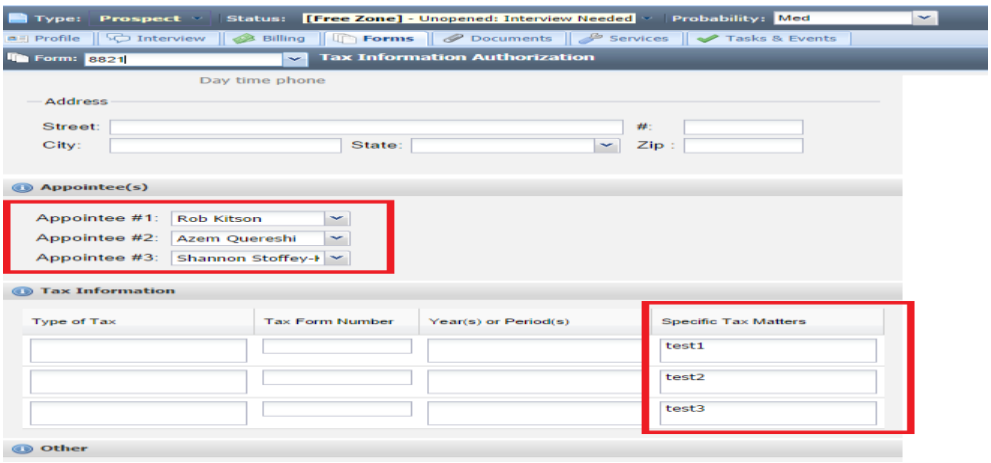
4. 8821 Fields

- There are two types of forms that are covered under this section namely 8821 default/Spouse and 8821 business forms.
- The user can set up to 3 appointee names and 3 specific tax fields for both default and business 8821 forms using the add default field button as explained as STEP1.
- The admin can edit ,delete or add these default values as per his convenience anytime in the application similarly as for 2848 explained above.
- An example 8821 form mapping of default values is shown below in STEP2.

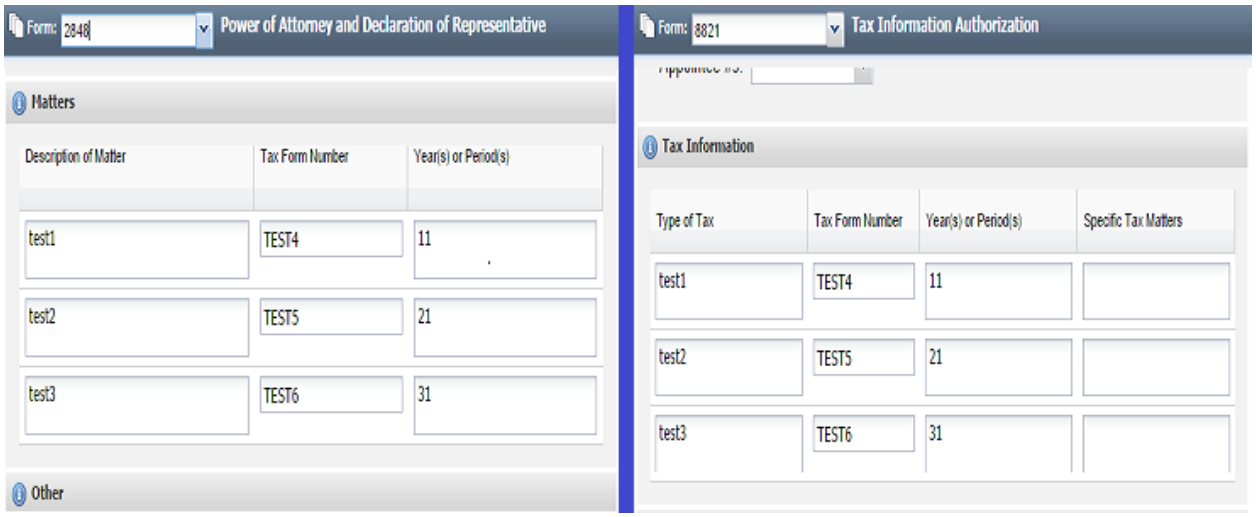
STEP1 => Fields



STEP2 => Mapping



5. 2848/8821 Common Fields

- There are 4 types of forms that are covered under this section namely 8821 and 2848 default/Spouse and 8821and 2848 business forms.
- As 2848 and 8821 forms are similarly linked hence the user can set tax form number ,year of periods and tax description matters (which is named as type of tax in 8821 form) for both 2848/8821 simultaneously only.
- The user can set up to 3 "tax form numbers" , 3 "years of periods" and 3 "tax description" fields for 4 forms , default and business 8821and 2848 forms.
- The admin can edit ,delete or add these default values as per his convenience anytime in the application similarly as for 2848 explained above.
- An example of interlinking mapping of 8821and 2848 form fields is shown below in STEP1.

STEP1 = > interlinked default value mapping