



## OVERVIEW

**Installing DT Max** – To install DT Max, simply insert the compact disk into your CD-ROM drive and follow the instructions on the screen.

**Viewing the QuickStart Tutorials** – Our QuickStart tutorials will ease you into the process of using DT Max to prepare tax returns for individuals (T1) and corporations (T2) by providing a brief overview of the basic steps involved.

**Running DT Max** – To run DT Max, double-click the DT Max icon on your desktop. The logon splash screen will appear with the options selected in the previous DT Max session already ticked or highlighted. If you are running DT Max for the first time, you will have to choose a user ID (your name or initials).

**Navigating in DT Max** – Moving around in DT Max requires you to select either one of the first three tabs on the toolbar, as needed, and to use your mouse to operate inside these windows.

**Client database** – When running DT Max, the first window displayed is your client list. In the T1 program, you may group clients by family for easy toggling between family members.

**Finding a client** – In the client list, simply type the client's name or number anywhere on the screen. A window will appear prompting you to confirm your search request.

**Entering a first client** – To enter your first client, press **F3** or click the **Add new client** icon, make the applicable selection and click OK. This will bring you to the second window, the **SmartStart** client outline screen. Tick the relevant options and click Continue. This will bring you to the data entry screen. Repeat this step to add a spouse or dependant.

**Accessing client data** – Access a client's data by placing your selector bar on the client's name and pressing [Enter] or clicking the **Data entry** icon. Alternatively, you can simply double-click the client's name.

**Data entry** – When you create a new file, you are taken to the **SmartStart** input assistant where you simply tick the sections (tax topics) that are relevant to your client, and then work through the data entry keywords displayed in each of these sections.

**Saving data** – DT Max automatically saves your data when you are calculating or exiting a client's file. Alternatively, you can click the **Save data** icon in the data entry window. When saving your data, DT Max checks for logical errors or missing information. If an error is detected, you may return to correct the error or accept the data as is.

**Displaying a tax return** – Click the **Tax return** tab. The program will automatically save the data and perform all the calculations.

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# FUNCTION KEYS

## Function keys that can be used anywhere in the program

<b>F1</b>	Context-sensitive help
<b>F3</b>	Add a new client to the database
<b>F7</b>	Guide to DT Max (knowledge base)
<b>Page up</b>	Move one screen up
<b>Page down</b>	Move one screen down
<b>Alt+F1</b>	Text macros setup
<b>Alt+F2</b>	User's defaults
<b>Alt+F9</b>	Recalculate the tax return
<b>Alt+F12</b>	Switch to file of spouse (T1)
<b>Ctrl+Home</b>	Move up to the beginning of the client list, current file or tax return
<b>Ctrl+End</b>	Move down to the end of the client list, current file or tax return
<b>Ctrl+L</b>	Switch languages
<b>Ctrl+P</b>	Print the tax return
<b>Ctrl+Q</b>	Save data and exit DT Max
<b>Ctrl+-</b>	Zoom out
<b>Ctrl++</b>	Zoom in

## Function keys to be used in the *Client list* screen

<b>F4</b>	Delete the selected client from the database
<b>Ctrl+F</b>	Find a client

## Function keys to be used in both the *Client list* and *Data entry* screens

<b>F5</b>	Mark the beginning / end of a range of lines
<b>Alt+F5</b>	Clear marking

## Functions keys to be used in the *Data entry* screen

<b>F6</b>	Expand/contract the current keyword group
<b>F8</b>	Display the keyword index
<b>F11</b>	Add a new keyword
<b>"</b>	Repeat the last entry (on English keyboards)
<b>=</b>	Mark this keyword as checked
<b>Alt+C</b>	Copy from the right to the left-hand side
<b>Alt+F7</b>	Find a keyword in the client's data
<b>Alt+J</b>	Enter a different jurisdiction amount
<b>Alt+K</b>	Show this keyword in the alternate language
<b>Alt+M</b>	Select a text macro
<b>Ctrl+C</b>	Copy selected data
<b>Ctrl+N</b>	Attach / edit a keyword note
<b>Ctrl+V</b>	Paste selected data
<b>Ctrl+X</b>	Cut selected data
<b>Ctrl+F8</b>	Display keyword help
<b>Ctrl+Backspace</b>	Delete the selected keyword
<b>Shift+F6</b>	Contract the current keyword group
<b>Shift+2</b>	Repeat the last entry (on French keyboards)

## Function keys to be used in the *Tax return* screen

<b>F12</b>	Jump to a specific page of the tax return. Alternatively, this can also be done using your mouse's right button.
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## The following function keys will bring you to the specified screens:

<b>F2</b>	Data entry
<b>F9</b>	Tax return
<b>F10</b>	Client list

## T1 KEYWORDS

Below is a list of commonly used T1 keywords. Most keywords are presented in groups to remind you to input related information, or to connect data from a common source. A group will open up automatically whenever a keyword from the group is used. You will know that a group is open when a dotted line appears to the left of the keywords. The group is closed when a vertical line appears to the left of the keywords. Press **F6** to expand or contract a keyword group.

**T-SLIP** List of information slips in DT Max. Use it to select the relevant slip.

**T4** Any information appearing on a T4 slip.

**BUSINESS** Any type of business income or expenses, including rental income. Use this keyword to prepare a statement of business income and expenses.

**EMPLOY-EXP** Any type of employment expenses. Use this keyword to prepare a statement of employment expenses and to claim a GST rebate.

**FOREIGN-INC** Any type of foreign income. DT Max will automatically perform foreign income currency conversions as well as foreign tax credit and/or foreign employment tax credit calculations.

**CAPITAL-GAIN** Information related to capital dispositions. DT Max will calculate the possible exemptions in the current year based on the information entered in this group and historical information appearing in the client's data.

**RRSP** All information relating to RRSP's.

**DONATIONS** List of donations to charitable organizations.

**TUITION-EDU** All information relating to tuition and education. Enter in the student's file.

**MEDICAL** Medical expenses for any 12-month period ending in the tax year.

**CHILDCARE** Child care expenses. Enter in the child's file. DT Max will automatically apply the child care deduction or credit to the appropriate parent's data, in compliance with tax law.

**CHILD-WEEKS** Number of weeks a dependent child was supported by the higher earner (related to child care expenses). Enter in the file of the financial supporter.

**OPTIMIZE** Control the optimizations done automatically by DT Max.

**TRANSFER-OV** Override automatic transfers, if need be. Use in the dependant's file.

**EFILE** An electronic copy of this return is to be generated for paperless transmission to the CRA or the Minister of Revenue of Quebec. The efile module is required.

**INCOME-HIST** Historical information from prior tax years.

**NOTES** Leave notes and comments in a client's file.

**BLOCK** Prevent processing of a client's file.

## T2 KEYWORDS

Below is a list of commonly used T2 keywords. Most keywords are presented in groups to remind you to input related information, or to connect data from a common source. A group will open up automatically whenever a keyword from the group is used. You will know that a group is open when a dotted line appears to the left of the keywords. The group is closed when a vertical line appears to the left of the keywords. Press **F6** to expand or contract a keyword group.

**YEAREND** The corporation's fiscal year-end. DT Max can list your clients according to year-end date in order to help with work scheduling.

**CORPTYPE** Type of corporation at year-end for identification and calculation purposes.

**JURISDICTION** Provincial and other: account numbers and allocation bases.

**GIFI** GIFI source (whether DT Max or import).

**GIFI-FORM** Use to select the GIFI form that will be filled out.

**NETINCOME** Net income according to the financial statements. If adjustments to the net income entered exist due to items entered in this group or other groups, DT Max will calculate the net income for tax purposes on schedule 1.

**TAXONCAPITAL** Taxable paid-up capital, provisions, eligible investments and assets.

**INCOMESOURCE** Foreign and partnership business income, farming income, dividends, specified investment business income, personal services business income, business income from a trust, other property income.

**CAPITALPROP** Capital property which is non depreciable. Use this group to maintain a database of such property (e.g. land or shares) and to enter disposals.

**M&PPROFITS** Manufacturing and processing profits deduction.

**DIVIDENDPAID** Dividends paid during the fiscal period.

**CCA-CLASS** Depreciable property and eligible capital property.

**CHARITY** All current year donations and prior year carryforwards.

**LOSSCF** Losses carried forward from prior years.

**RELATEDPARTY** Identify all parties (corporations, partnerships, joint ventures or individuals) involved with this corporation, provided that information about these parties is relevant to the corporation's tax return.

**INSTALREC** Information needed to generate instalment calculations and monthly instalment payment schedules.

**OPTIMIZE** Optimization of the provision for taxes.

**PROVTAXREDUC** Use to indicate that the corporation is claiming a provincial tax reduction or holiday. DT Max will then calculate the income tax based on the amount of the allowable reduction.

**CORPHISTORY** Historical data on taxable income, account of refundable dividend tax on hand, prior year-ends, etc. This information is used for calculations and data comparison in the current year. It is carried forward by DT Max.

**STATUSCHANGE** Report a change in status that occurred during the fiscal period (e.g. change in address of head office).

**NOTES** Leave notes and comments in a client's file.

**BLOCK** Prevent processing of a client's file.

## Tabs available on every toolbar in DT Max



F10













F2

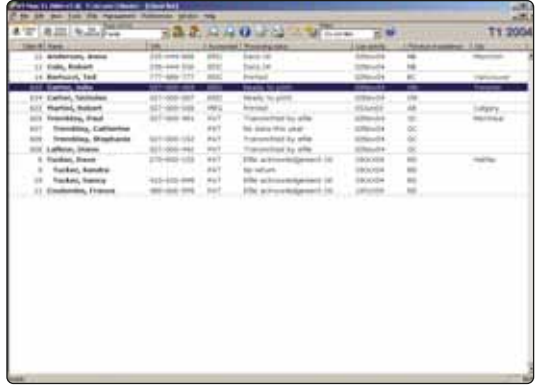


F9

## CLIENT LIST SCREEN















### Icons available on the *Client list* toolbar

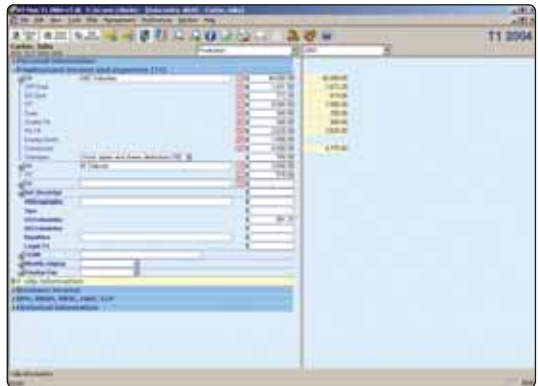
-  Add new client **F3**
-  Find client **Ctrl+F**
-  Zoom out **Ctrl+-**
-  Zoom in **Ctrl++**
-  Status information
-  Move statuses forward
-  Print client list
-  Efile
-  Customize client list
-  Help **F1**



## DATA ENTRY SCREEN














### Icons available on the *Data entry* toolbar

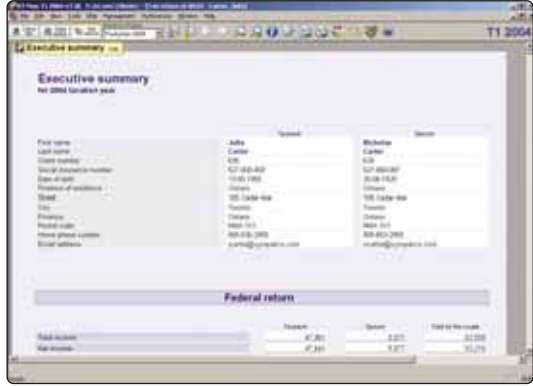
-  Add keyword **F11**
-  Keyword help index **F8**
-  Use **SmartStart** sections
-  **SmartStart** client outline
-  Zoom out **Ctrl+-**
-  Zoom in **Ctrl++**
-  Status information
-  Verify keywords
-  Print keywords
-  Save data
-  Show errors / warnings
-  Add new client **F3**
-  Open family member's file
-  Help **F1**



# TAX RETURN SCREEN

## Icons available on the *Tax return* toolbar

-  Select page
-  Previous / next page
-  Back
-  Forward
-  Zoom out **Ctrl+-**
-  Zoom in **Ctrl++**
-  Status information
-  Verify return
-  Print page
-  Production printing **Ctrl+P**
-  Save / email PDF file
-  Efile
-  Open family member's file
-  Help **F1**



# DT MAX SPECIAL FEATURES

**Finding the keyword you need** – If you don't know which keyword to look for, press **F8** or click the **Keyword help index** icon, then select one of the four types of keyword help available. For example, if you based your search on forms, you can find the keyword you need by selecting the relevant form number in the keyword help index.

**Getting help in DT Max** – Most of the tasks you can perform using the DT Max features provide you with assistance in the form of a **Help** button available in the relevant task window.

**Archiving** – To enable archiving of your tax returns, select the option **Archiving** in the **Preferences** menu.

**Aliases** – Aliases are available to help you find the keyword you need. For instance, searching for "schedule3" will bring up the keyword Capital-Gain in the T1 program. To locate a schedule in the T2 program, enter "Sch." and the schedule number. For instance, "sch.007" will bring up the keyword IncomeSource.

**Template clients** – Template clients are available in the right-hand side menu to help you with the data entry process.

**Emailing a tax return** – You can email the tax return (or selected pages only) to your client. On the tax return toolbar, click the icon **Save/email PDF file** and simply mark the desired pages.