

THOMSON REUTERS®

**LETTERS AND FILING INSTRUCTIONS
ADMINISTRATOR GUIDE**

FOR TAX YEAR 2021

Last Updated: October 19, 2021

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CHAPTER 1: GETTING STARTED

The letters and filing instruction administrator module is an inherited right for the firm administrative user. All other administrative users must have the right assigned to them.

To assign the right to administrative users:

1. Navigate to **Admin > Access Control**.
2. Select the **Users** tab.
3. Select the **User Location**.
4. Select the user's name to edit that user's rights.
5. Check the box for **Letters and Filing Instructions**.

<input checked="" type="checkbox"/> Administrator		
Administrator Rights:		
<input checked="" type="checkbox"/> Add Groups	<input checked="" type="checkbox"/> Add Users	<input checked="" type="checkbox"/> Create Administrators
<input checked="" type="checkbox"/> Edit Groups	<input checked="" type="checkbox"/> Edit Users	<input checked="" type="checkbox"/> Group Import
<input checked="" type="checkbox"/> Delete Groups	<input checked="" type="checkbox"/> Delete Users	<input checked="" type="checkbox"/> Free other returns
<input type="checkbox"/> Firm Config.	<input checked="" type="checkbox"/> Transfer	<input type="checkbox"/> De-Federate User
<input checked="" type="checkbox"/> Letters and Filing Instr.	<input type="checkbox"/> External Transfer	

Figure 1:1

6. Click the **Update** button to update the user.

Once the right is assigned, the user will see a new option under the **Admin** menu for **Letters and Filing Instructions**. Clicking this menu item will launch the **Letters and Filing Instructions Administrator** piece. Once in **Letters and Filing Instructions**, administrators will be able to view default templates, customize default templates, and clear default transmittal letter templates to begin creating their own templates, from scratch.

CHAPTER 2: KEY TERMS AND DEFINITIONS

Advanced Preparer Section A section added by the administrator, to the template, that will give preparers, at the return level, the ability to type in their own content including text, page breaks, tables, field references, and print conditions to be added to the firm template.

Book End The visual indicator around text that indicates the existence of a condition.

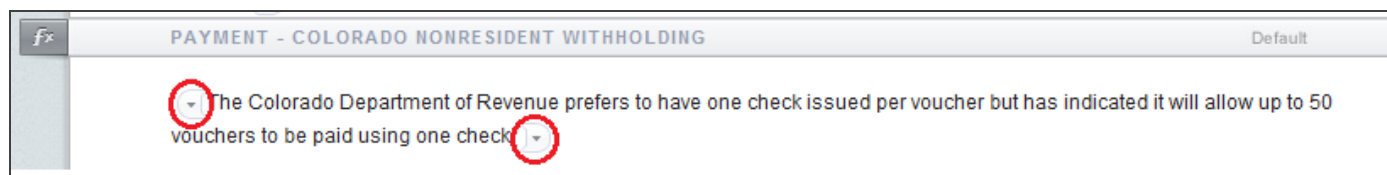


Figure 2:1

Condition Logic that is entered to control the printing of text based on specific variables. Text inside a condition will print when certain variables are met.

Field Reference A placeholder for data that is populated when print is generated in the locator. When print is generated, return specific data takes the place of the placeholder field reference. For example, "Firm Name" is replaced with *Firm ABC*.

Optional Paragraph A way to flag a portion of text (paragraph, section, sentence) as *Optional*. This flag allows the preparer to select to include or exclude the content on a return by return basis.

Preparer Section A section added by the administrator, to the template, that will give preparers, at the return level, the ability to type in their own content (text only) to be added to the firm template. Without having at least one of these sections, the preparers will not be able to type anything on the letter or filing instruction.

Preview Data Test data that an administrator can customize to preview the template with data, test conditions and replace field references. Preview Data is saved on a template-by-template basis so that changing the data in one template does not change the data in another template. Accessed via Preview.

Section A way to break paragraphs into a group allowing you to apply a condition to the group. Also allows you to easily reorder content without cutting and pasting text within the template.

Section Condition Condition placed on a section within a template. In this case, displaying the entire contents of the section is dependent on the condition being met. Section conditions have a visual indicator to the left of the section name bar:

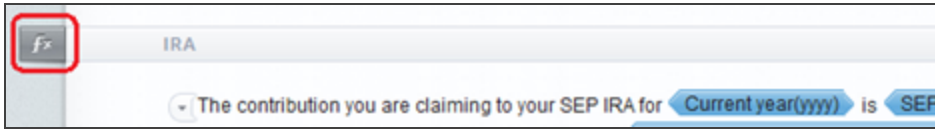


Figure 2:2

Section Name A unique identifier used for displaying sections. These section names will NOT print.

The figure below shows some of the key terms:

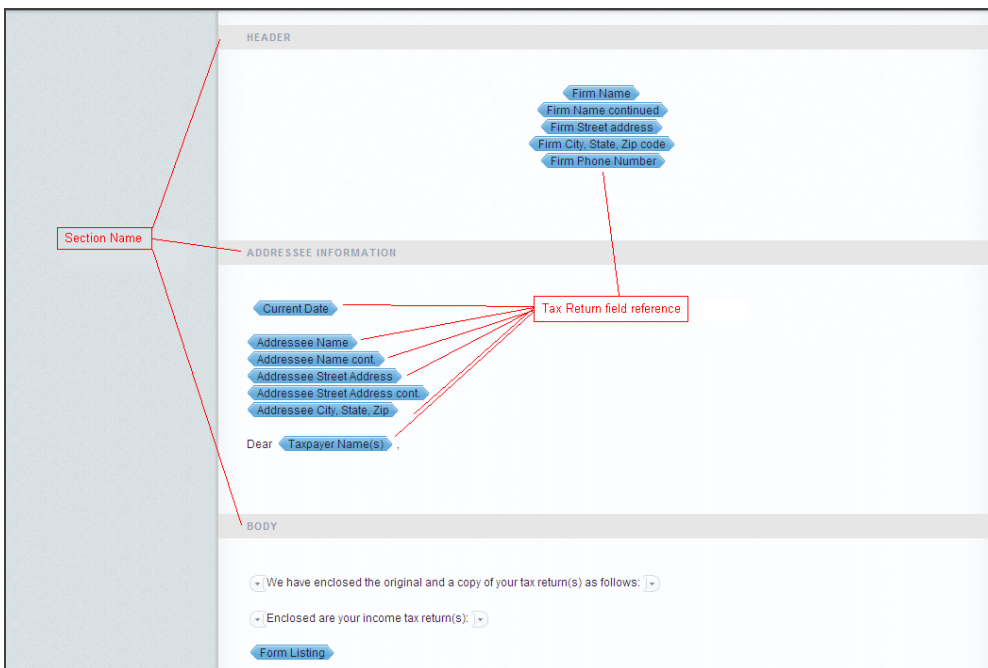


Figure 2:3

Template The letter or filing instruction in its pre-merged state. This contains tax return field references, conditions, section headers, and text. Preview at this level allows users to apply sample data and not return specific data. Templates are visible and editable by administrators with letters and filing instructions rights only.

CONDITIONS

In addition to the above identified items, there are also conditions in a given template. Hovering over the **Section Name** will bring up a tool tip displaying the condition that has been entered on the **Section**.

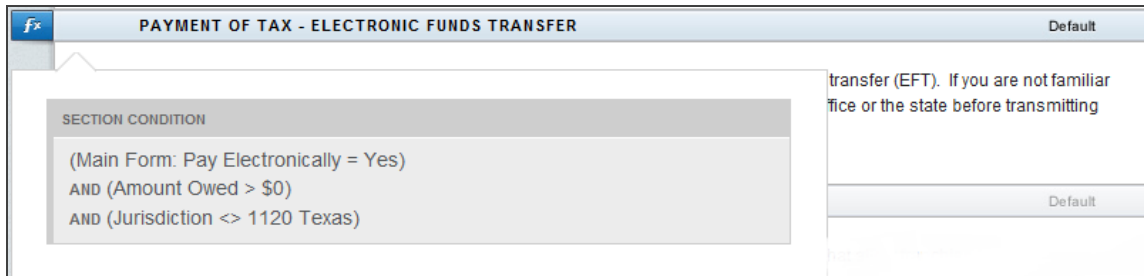


Figure 2:4

Hovering over one of the Book End images will bring up a tool tip displaying the condition that is being applied to that text or body of text. This tool tip shows the hierarchy of conditions including the **Section Condition**.

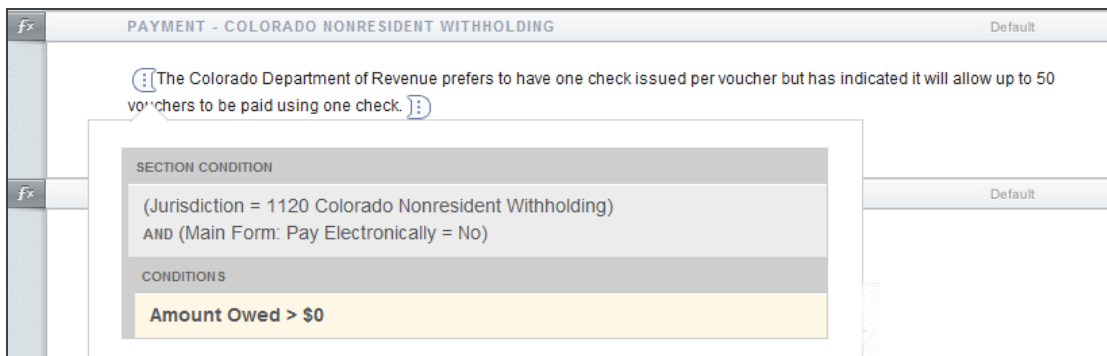


Figure 2:5

CHAPTER 3: USING TEMPLATES

TEMPLATE LISTING

After launching letters and filing instructions from the application, the template listing appears. The template listing is divided into two groupings of templates:

- The **Letters** grouping contains Transmittal Letters for the 1040, 1041, 1065, 1120, 5500, 709, 990, and 706 applications.
- The **Filing Instructions** grouping contains all the filing instructions for all eight applications.

Thomson Reuters will supply default templates for transmittal letters and filing instructions. The content in these templates can be modified, removed, added to, and reordered. To switch between Letters and Filing Instructions, click the group title to the left of the templates.

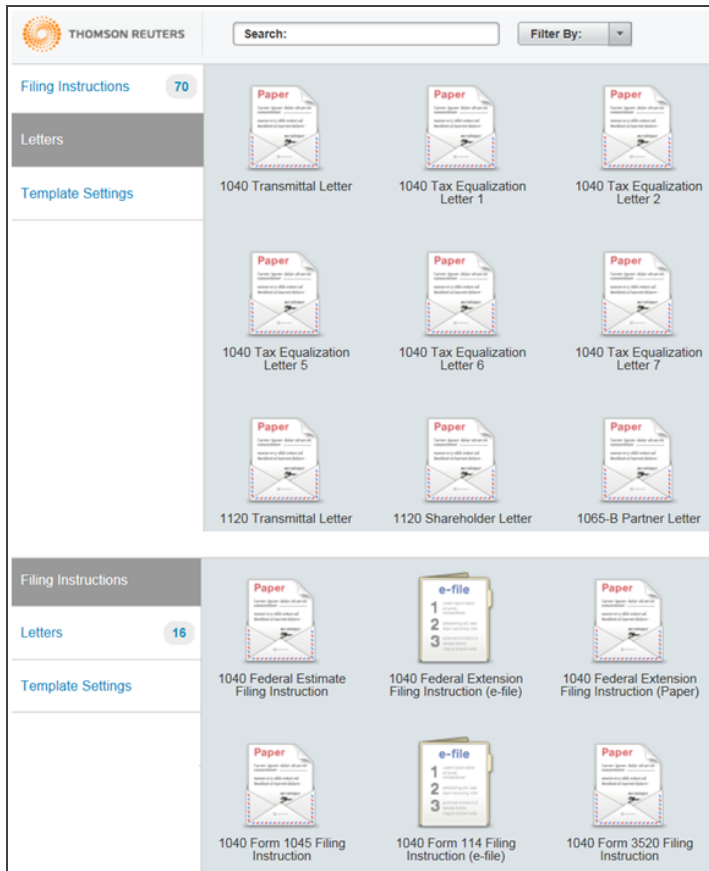


Figure 3:1

In addition to the template title, the template listing contains helpful information about each template. By hovering over a template, a tool tip will appear to give you:

- the template name
- the return type the template is associated with
- the group it belongs to (either **Letter** or **Filing Instruction**)
- who last edited the template and when
- the jurisdiction
- the filing type (paper versus e-file).

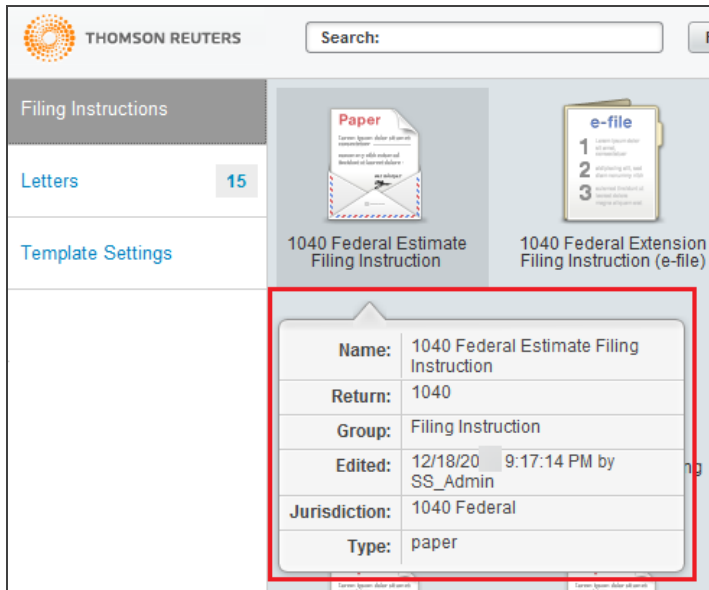


Figure 3:2

The **Edited** information changes when a user in your firm edits a template. It will show the day and time the user last edited, as well as the user name. In the figure above, user SS Admin last edited the template at 9:17 pm on 12/18/2020.

VIEWING DEFAULT TEMPLATES

To view and/or edit the template, click anywhere in the icon above the template name. The template opens and displays in the Editor.

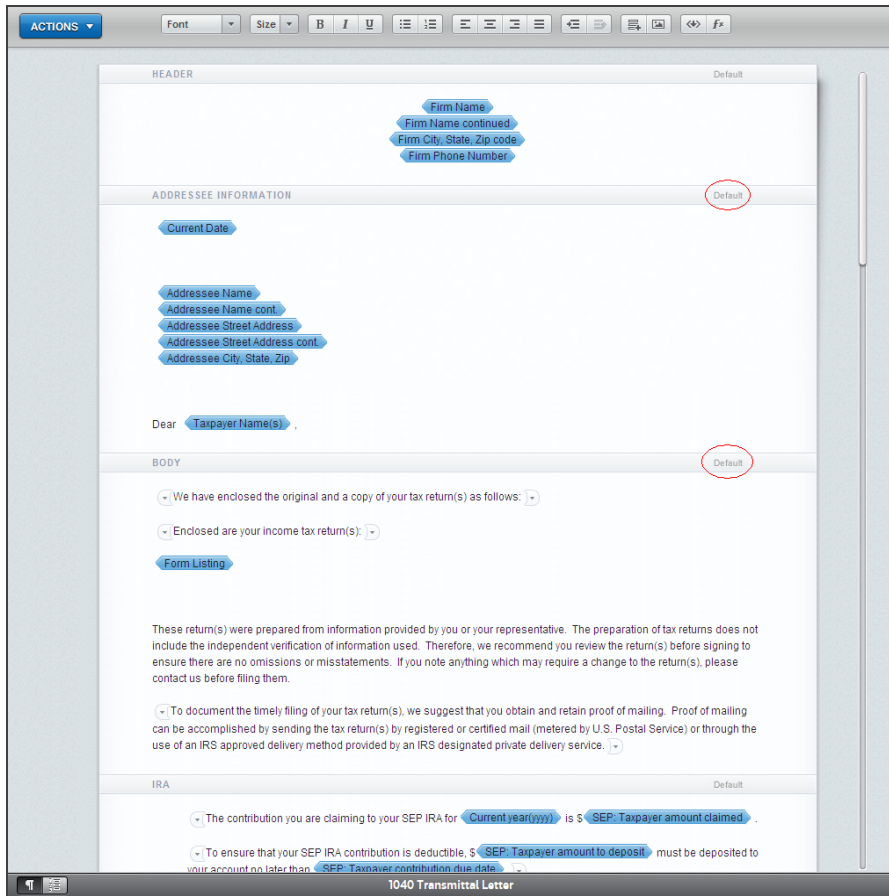


Figure 3:3

Once the template is open, you can begin reviewing and customizing the template to reflect the communication style of your firm.

When the template is first opened, all the sections have an indication in the header bar of *Default*. When you customize the template and save those customizations, you will see the *Default* change to *Custom*. When you customize a section, you “own” the contents of that section and will not get any automatic updates from Thomson Reuters. You will be provided information on any updates made, but the updates will not be pushed to that **Custom** section of the template (this will keep any customizations made intact and will not delete changes to update the template with a new default).

In the figure below, the field reference for *Taxpayer Name(s)* in the **Addressee Information** section has been changed to the typed word of *Client*.

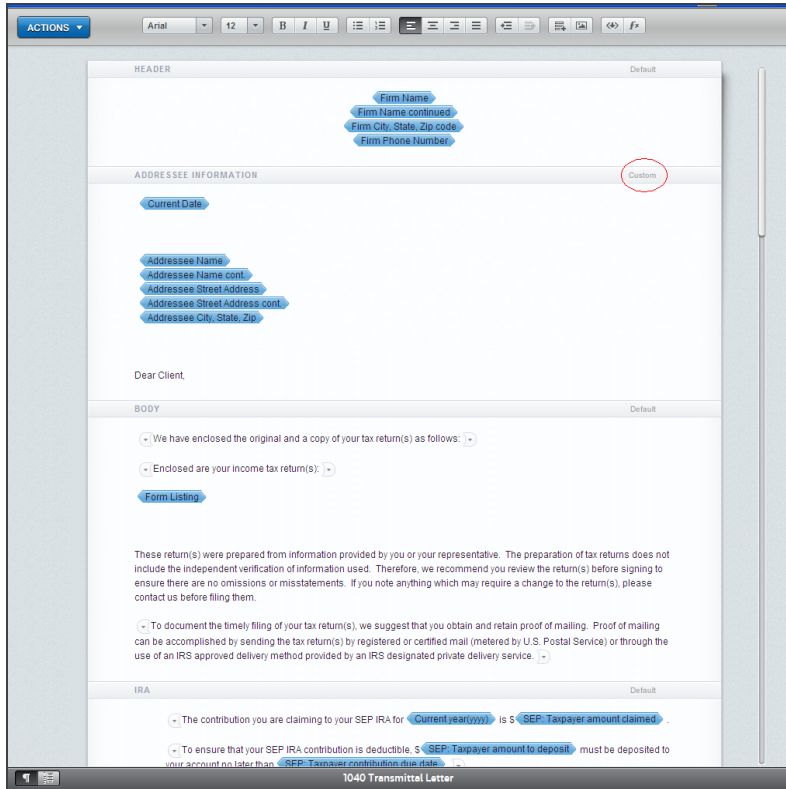


Figure 3:4

Customizations are tracked on a section-by-section basis so that, if an update is released to the **Addressee Information** and the **Body** sections of this 1040 Transmittal Letter template, the above template would receive the updates to the **Body** section but would not receive any update to the **Addressee Information** section.

After saving customizations, a new menu item under the **Actions** menu allows you to revert the entire template back to the Thomson Reuters supplied default template. You can use this action item at any time to return to the default template (even after changes have been saved and the template has been closed). Once you revert to the default template, your custom template is removed, and you will have to begin customization from scratch.

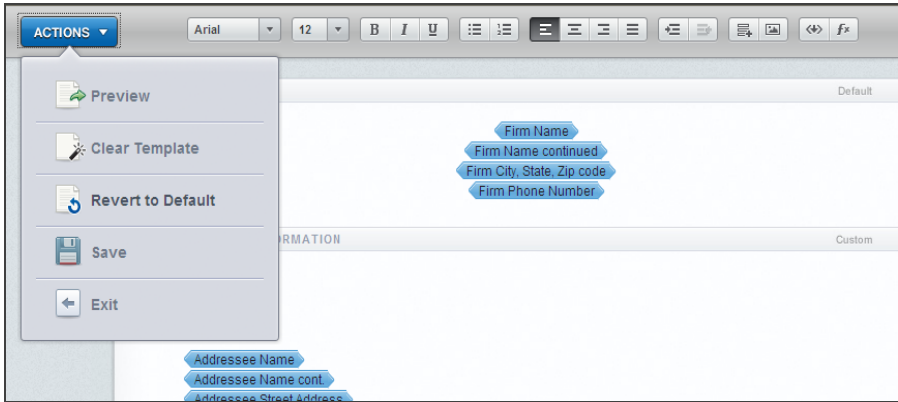


Figure 3:5

To add text inside a Template, position the cursor where you want the text, and begin typing.

ADDING A FIELD REFERENCE

To insert a field reference into a Template:

1. Position your cursor at the location within the Template, where you want to insert the field reference and select the **Add Field Reference** icon.

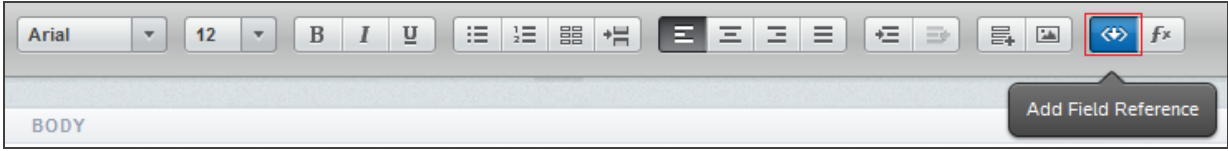


Figure 3:6

2. The **Choose a Field Reference** dialog opens.
3. Select a category, and browse to find the field reference you wish to insert, or you can begin typing the name of the field reference in the **Search** box and the list will be narrowed based on your search criteria. When you use the **Search** feature, the field references will not be displayed by category. The field references are separated out based on type of data (text, numeric, dates, etc.). Hovering over a field reference will display a long description/tool tip of the field reference item.

4. Click to select the field reference you wish to insert, and then select **Insert Field Reference**.

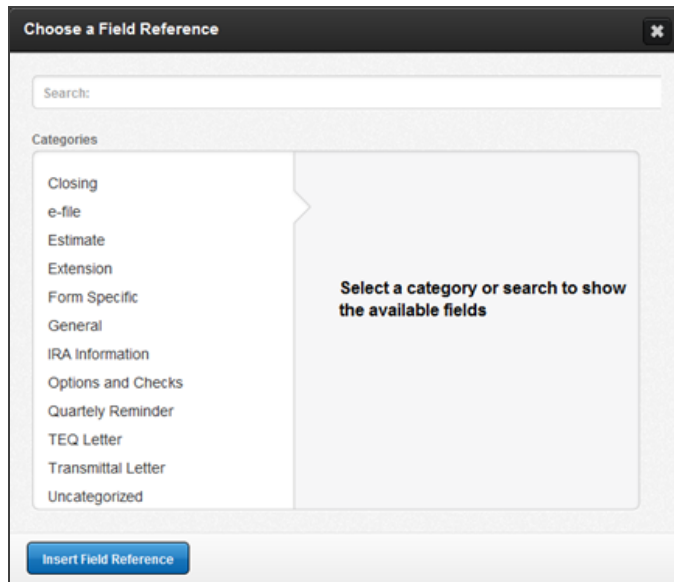


Figure 3:7

5. The following illustrates how to browse through categories to select a field reference:

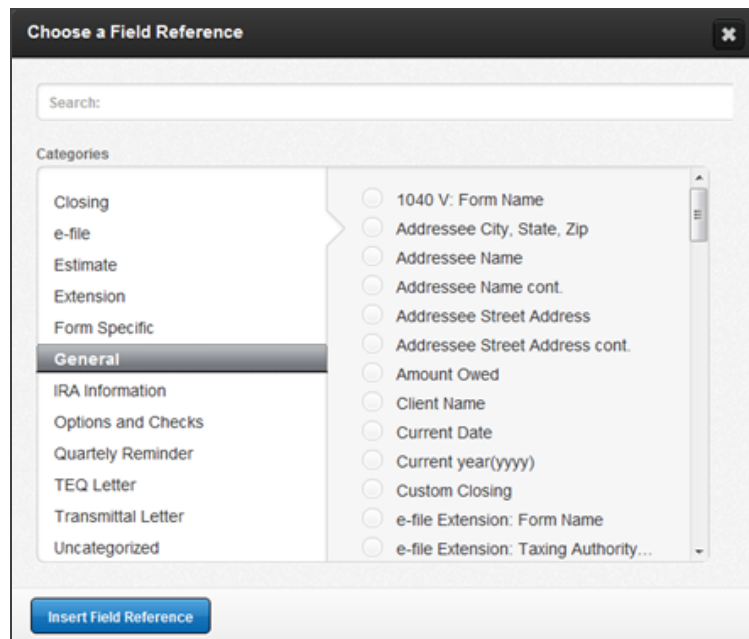


Figure 3:8

6. The following illustrates the use of search to select a field reference:

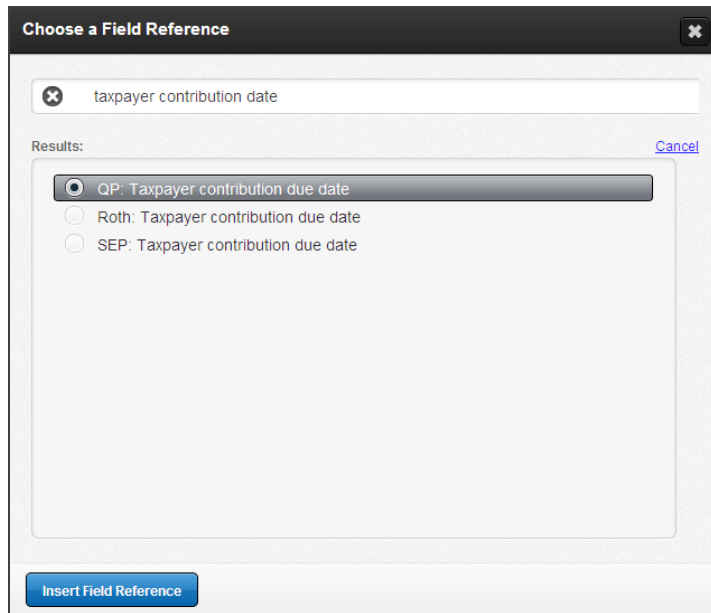


Figure 3:9

7. The field reference is now in the template and is indicated by the blue image around the field reference name:

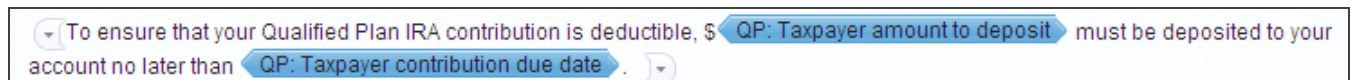


Figure 3:10

USING SECTIONS

Adding a Section

1. Click the **Create New Section** icon.

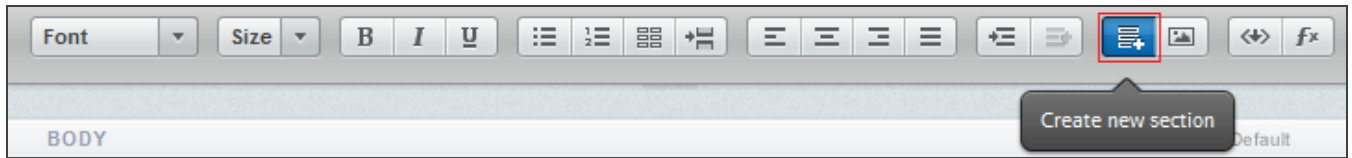


Figure 3:11

2. The **Create New Section** dialog opens.

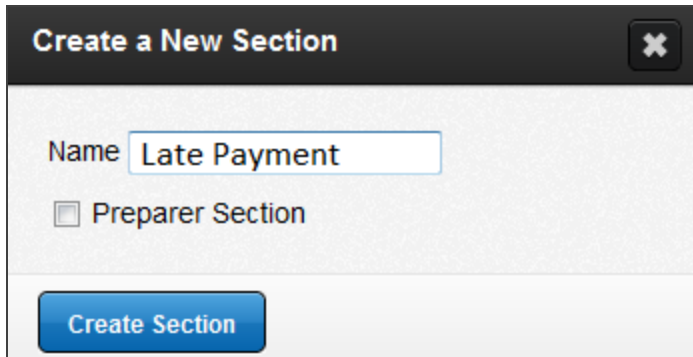


Figure 3:12

3. Click in the text box area to enter a section name. After typing in a section name, click **Create Section**.
4. The section name is just a name you give it. It does not print on the letter/filing instruction. It represents what is displayed when you reorder the letter. The new section will be created at the bottom of the template.
5. The **Preparer Section** check box under the **Section Name** creates a section in the template that will serve as a placeholder for a preparer section. Preparer Sections allow the tax preparer to enter free form text in the letter or filing instruction on a return by return basis. This is the only method to allow free form text addition to letters and filing instructions on a return by return basis. The text that is entered will be saved with the return and will print with the generated letter or filing instruction for that return.



No conditions or field references can be added to a Preparer Section.

Deleting a Section

You can delete a section (not only a section you added, but also a default section supplied by Thomson Reuters). To delete a section:

1. Click the **Section Header** bar in the template.
2. The Section Properties dialog box opens.
3. Click the **Delete Section** button.

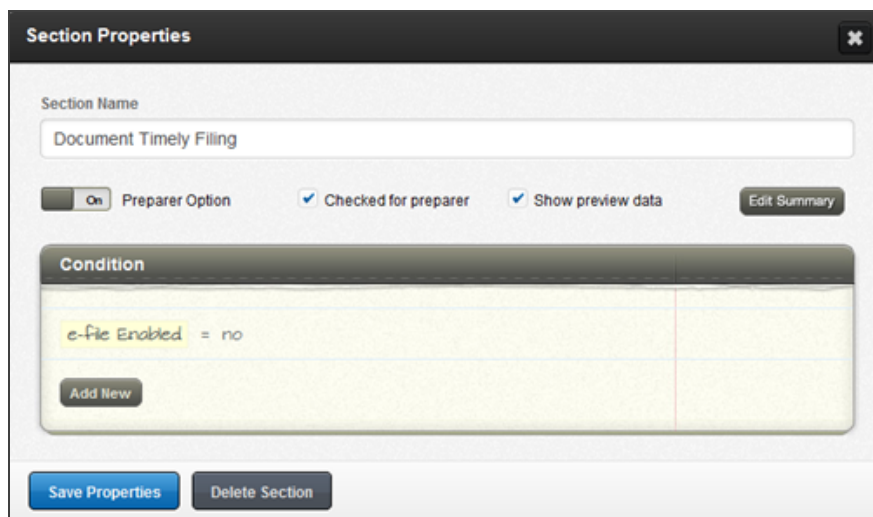


Figure 3:13

4. Confirm your selection in the pop-up message that follows.

Renaming a Section

To rename a section (including renaming a section supplied by Thomson Reuters):

1. Click the Section Header bar in the template. The **Section Properties** screen displays.
2. Click the **Rename Section** button. The **Rename Section** screen displays.

3. Type in the new section name in the Name box, and click the **Rename Section** button.

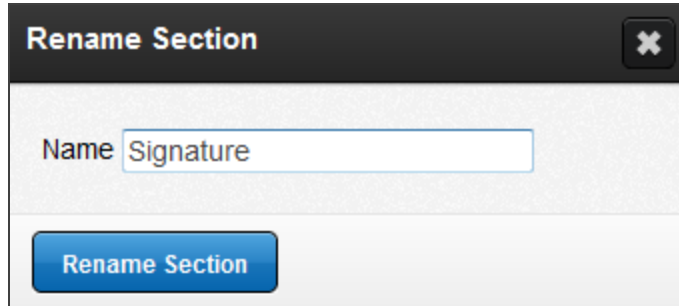


Figure 3:14

4. On the **Section Properties** screen, click the **Save Properties** button to save your changes. To discard your changes, click the **X** in the upper right corner.

Adding a Condition to a Section

Sections can have conditions added to them so that the entire contents of that section will only populate and print when the condition is met in a given locator.

1. To add a condition to a section, click the section header. The **Section Properties** dialog opens, and from here you can add the condition.

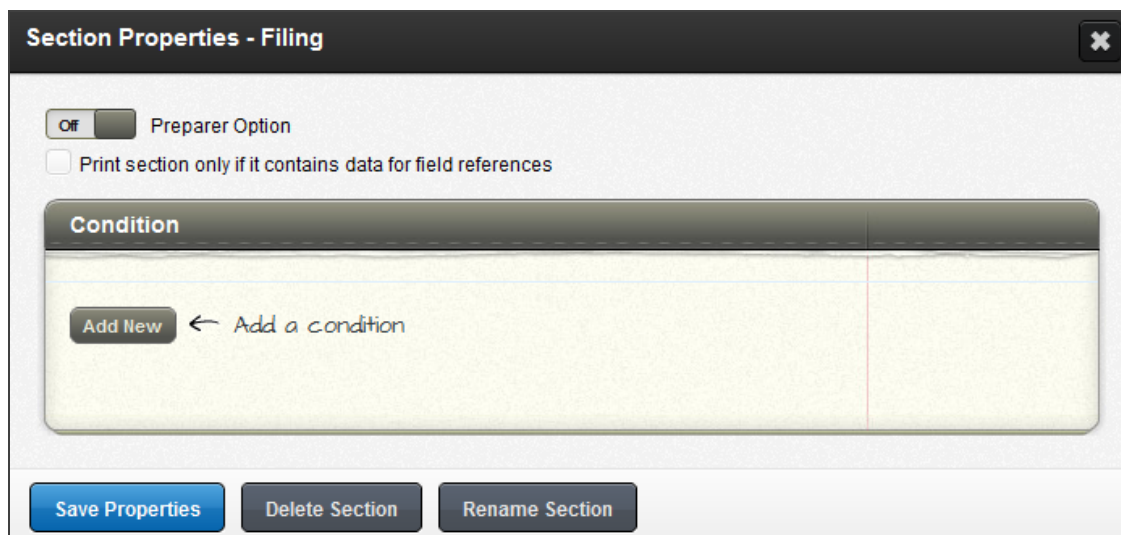


Figure 3:15

2. Click **Add New** to add a new condition.

The screenshot shows the 'Section Properties - Filing' dialog box. At the top, there is a title bar with a close button. Below the title bar, there are two options: 'Preparer Option' with a toggle switch set to 'Off', and a checkbox labeled 'Print section only if it contains data for field references'. The main section is titled 'Condition' and contains two radio buttons: 'And' (unselected) and 'Or' (selected). To the right of the 'Or' radio button is a dropdown menu showing 'Acknowle...'. Next to it is an equals sign operator dropdown menu. To the right of the operator is an empty text input field. To the right of the input field is another dropdown menu showing 'Text'. To the right of these elements are 'Save' and 'Cancel' buttons. At the bottom of the dialog are three buttons: 'Save Properties', 'Delete Section', and 'Rename Section'.

Figure 3:16

3. The first option is an **And/Or** radio button. If you have multiple conditions to be applied to the same set of text, you can set it up as an and condition or an or condition. The and condition will populate the text only if all pieces in the condition are true. The or condition will display the text if any of the pieces in the condition are true.
4. The second drop-down lists the field references you can use to trigger conditional text.
5. You can change the identifier (third drop-down) to be *not equal to*, *greater than*, *less than*, etc.
6. Use the final drop-down box to select one of the following options:
 - comparing the field reference to a text string
 - comparing the field reference to another field reference.

- 7. If you wish to compare the value in the locator (of the first field reference) to a value you type in as text (that will not change when using different locators), select *Text* and input the value. The value typed in will be evaluated against the selected field reference.

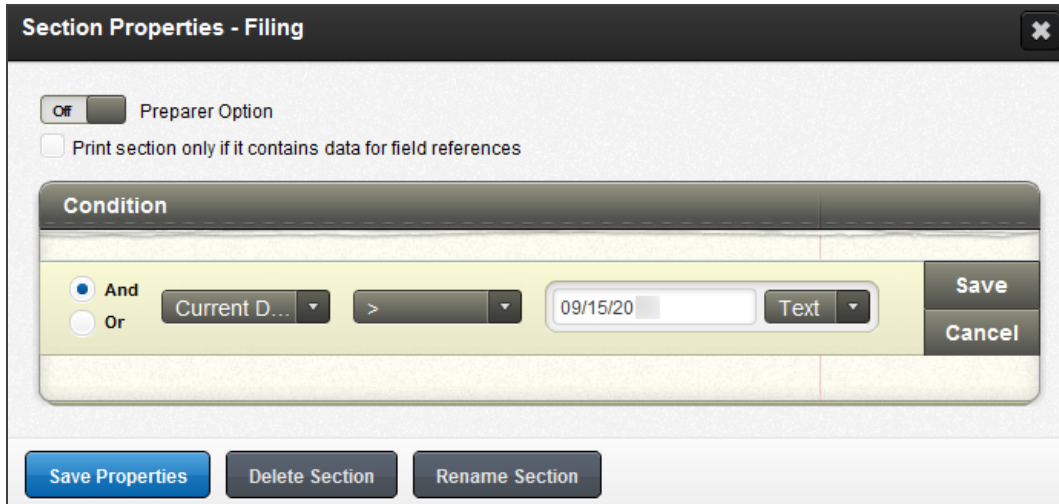


Figure 3:17

- 8. Click **Save**, and you will see the actual condition.



Figure 3:18

9. If you wish to compare the value in the locator (of the first field reference) to another field reference in the locator (that changes depending on the values in the locator), select *Field*. This selection changes the value cell to a drop-down with a list of field references of the same type. Select the field reference you wish to compare.

The screenshot shows a dialog box titled "Section Properties - Filing". At the top, there is a toggle for "Preparer Option" which is currently turned off. Below it is a checkbox for "Print section only if it contains data for field references" which is unchecked. The main area is titled "Condition" and contains a table with two columns. The first column has radio buttons for "And" (selected) and "Or". The second column contains a series of dropdown menus: "Current Date", ">", "Return Due Date", and "Field". To the right of the table are "Save" and "Cancel" buttons. At the bottom of the dialog are three buttons: "Save Properties", "Delete Section", and "Rename Section".

Figure 3:19

The screenshot shows a dialog box titled "Section Properties". At the top, there is a text input field for "Section Name" containing "Late Filing Section". Below it is a toggle for "Preparer Option" which is turned off. The main area is titled "Condition" and contains a table with two columns. The first column contains the text "Current Date" and the second column contains the text "Return Due Date". Below the table is an "Add New" button. At the bottom of the dialog are two buttons: "Save Properties" and "Delete Section".

Figure 3:20

10. You may add additional condition logic statements by selecting the **Add New** button. (You may also use the **Edit** and **Remove** buttons that appear when you hover at the end of the condition logic line.)

- Click to add your condition to the section, and then click the **Save** button to save your condition. If the condition set is met, the content within this section will print, unless conditions are set up for text(s) inside the section that must be met in order to print.

Adding Optional Sections/Text

You can also make a section optional. When a section is optional, it will be a decision made by the preparer, at the return level, on whether the text is included or excluded. By making an optional section (or optional text), you are controlling the wording and can include field references and/or conditions. The preparer will see the text in the locator and be able to select to include or exclude that on a return-by-return basis.

- To set up an optional section, click the section header. The **Section Properties** dialog opens.

Toggle the **Preparer Option** switch to *On*.

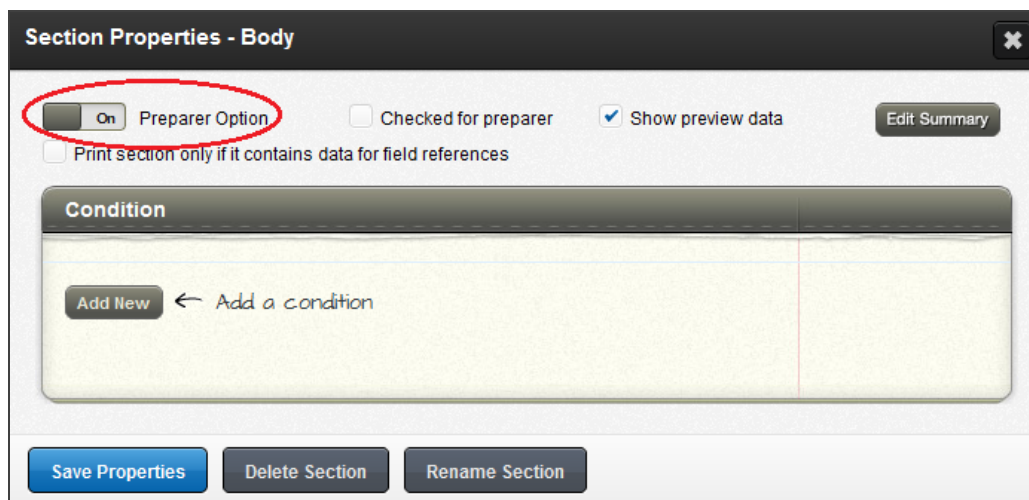


Figure 3:21

- Additionally, you have the option to make the optional paragraph included or excluded, by default, for all returns. The **Checked for preparer** check box next to **Preparer Option** indicates if the text is included by default or excluded by default.
 - By checking the box, you are indicating that you want the text included, by default, with the preparer having the option to exclude the paragraph.
 - By unchecking the box, you are indicating that you want the text excluded by default with the preparer having the option to include the paragraph.

- The third check box on the preparer option is to have this optional section display in the **Administrative Preview**. Checking the box next to **Show preview data** will make the section contents display in the **Administrative Preview**.
- A section with a condition or that has been made optional will have an icon to the left of the header bar (the icon is the same for inserting a condition).

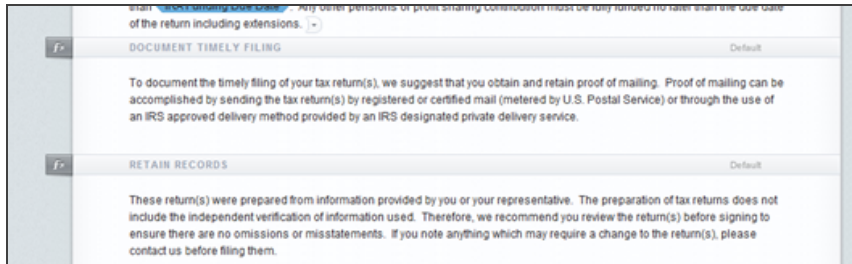


Figure 3:22

Putting Conditions Around Text/Content

Putting conditions around text/content within a section has similar steps to **adding optional sections** (see [Adding Optional Sections/Text \(page 20\)](#)).

- Highlight/select the content you want the condition to apply to and click the **Insert Condition** icon.

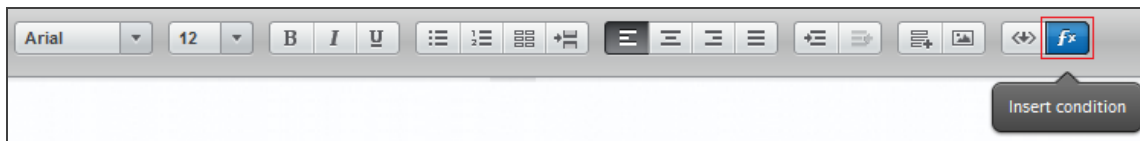


Figure 3:23

- The **Condition Builder** dialog opens.
- You can also make a portion of content optional in the same way you can make a section optional. Highlight the text/content you wish to make optional and click the **Insert Condition** icon. The **Condition Builder** dialog containing the optional check boxes opens. **Use the same steps to make content optional that you used to make a section optional.** (See [Adding Optional Sections/Text \(page 20\)](#).)

4. Once added, the text has bookend markers around it to indicate what is included in the condition/optional paragraph. Hovering over one of the book ends will display a tool tip where you can see the following:

- the applied condition
- if this is an optional paragraph
- the default selection. Hidden by default means that the preparer will have to select to include it in the return. Visible by default means that the preparer will have to deselect the box to exclude it from the return).

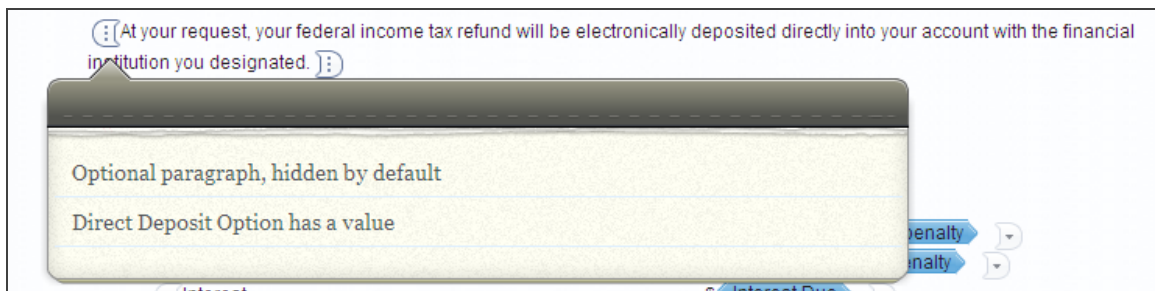


Figure 3:24

Reordering Sections of a Template

To reorder the sections of a template:

1. From inside a template, click the **Reorder** icon on the bottom left of the page.

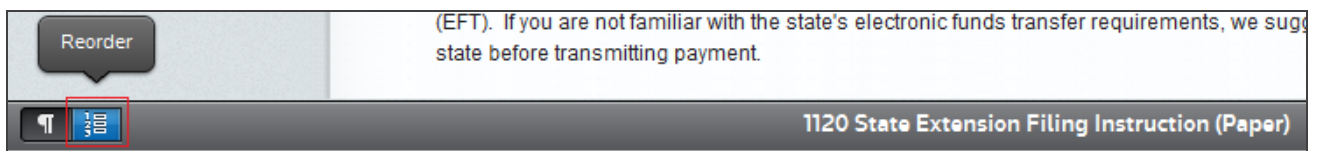



Figure 3:25

- The **Reorder Sections** page collapses all the content and shows only the section headers.



Figure 3:26

- Drag and drop the section to the new location to reorder the template.
- After you have finished setting the order of the sections, click the **Edit** icon  (next to the **Reorder** icon) to switch back to editing mode.
- Be sure to save the Template so the order of the Sections will be saved.



You can reorder default sections without taking ownership of the template.

Adding the Preparer Section

As a firm administrator, you can add a section that will allow tax preparers to enter free form text on a return by return basis called the **Preparer Section**. You also have the option to add a section that will allow tax preparers to enter free form text, tables, page breaks, field references, and print conditions called the **Advanced Preparer Section**. Once they enter this content, the content will save with the return and will print in the output. Firm administrators can only control the availability of preparer sections and the placement of the preparer section.

To create a preparer or advanced preparer section:

- Click to add a **New Section**.
- Enter the name you want your tax preparers to see, and use the drop-down list to select either **Preparer Section** or **Advanced Preparer Section**.

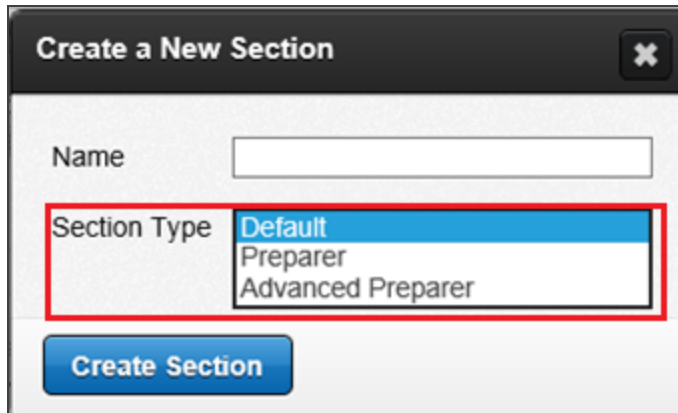


Figure 3:27

The **Preparer** or **Advanced Preparer Section** will be added at the bottom of the template. You can reorder the template and put this section in the correct location.

Preparer or **Advanced Preparer Section** header bars will be wider than a normal section header and you, the firm administrator, cannot put any content, conditions or field references in the **Preparer** or **Advanced Preparer Section**.

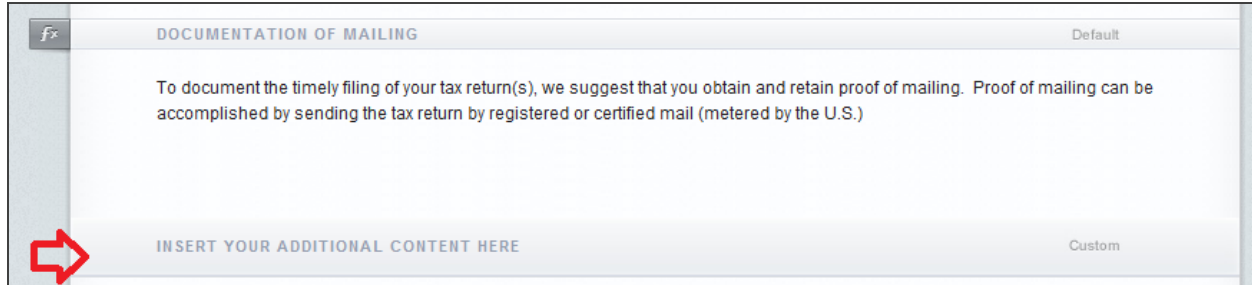


Figure 3:28

PREVIEWING THE TEMPLATE

You can preview the letter or filing instruction with sample data applied. Click or hover over the **Actions** button in the upper right corner of the template page, and then select **Preview**.



Figure 3:29

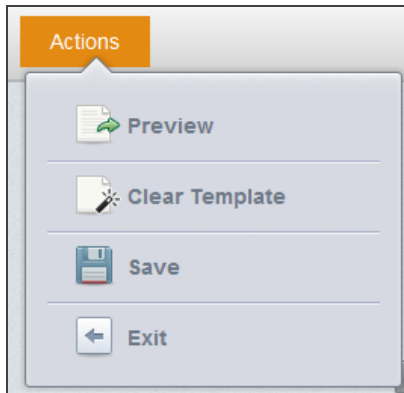


Figure 3:30

The template is brought up in a preview page (this initial, quick preview contains no page breaks, so it is one long page previewing).

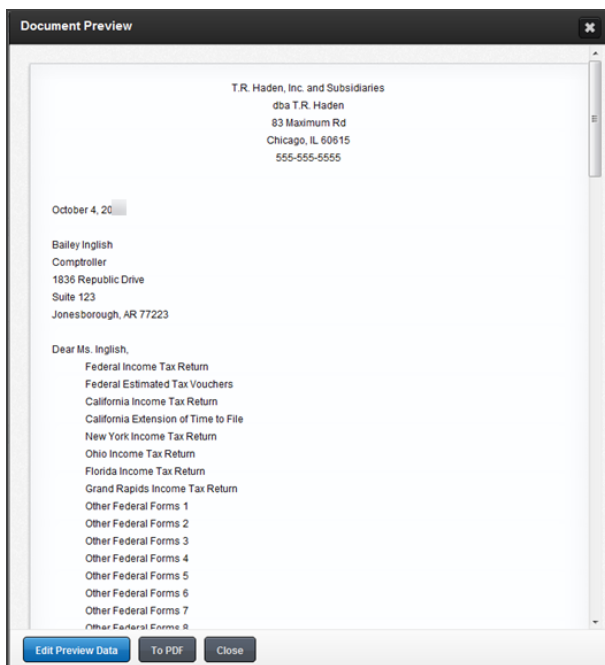


Figure 3:31

The tax return field references that are included in the template display a value in the preview. This value is currently the default preview data supplied with the Letters and Filing Instructions module.

You can change these field references by clicking the **Edit Preview Data** button inside the preview. The **Edit Preview Data** dialog will show all available field references in a given template, including those used in conditions. These values are customized on a template-by-template basis. The preview data fields are listed alphabetically.

After making changes, click the **Save Data** button at the bottom of the window.



For preview data for the Form Listing, each form is separated by a comma. Putting commas in the **Preview Data** field for Forms Listing is equivalent to the **Enter** key.

Preview Data

Addressee City, State, Zip Jonesborough, AR 77223	Addressee Name Bailey English
Addressee Name cont. Comptroller	Addressee Street Address 1836 Republic Drive
Addressee Street Address cont. Suite 123	Current Date <input type="checkbox"/> Has No Value 12/6/20
Current year(yyyy) <input type="checkbox"/> Has No Value 2011	e-file Enabled e-file Enabled
Enclosure Name 1 Enclosure Name 1	Enclosure Name 10 Enclosure Name 10
Enclosure Name 2 Enclosure Name 2	Enclosure Name 3 Enclosure Name 3
Enclosure Name 4 Enclosure Name 4	Enclosure Name 5 Enclosure Name 5
Enclosure Name 6 Enclosure Name 6	Enclosure Name 7 Enclosure Name 7
Enclosure Name 8 Enclosure Name 8	Enclosure Name 9 Enclosure Name 9

Save Data

Figure 3:32

To test conditions using sample data, change the value in the **Preview Data** field for the condition.

Example: For the condition below, change the value (in **Preview Data**) for **Electronic payment required** to blank (having no value). This causes the sentence contained in this condition not to display.

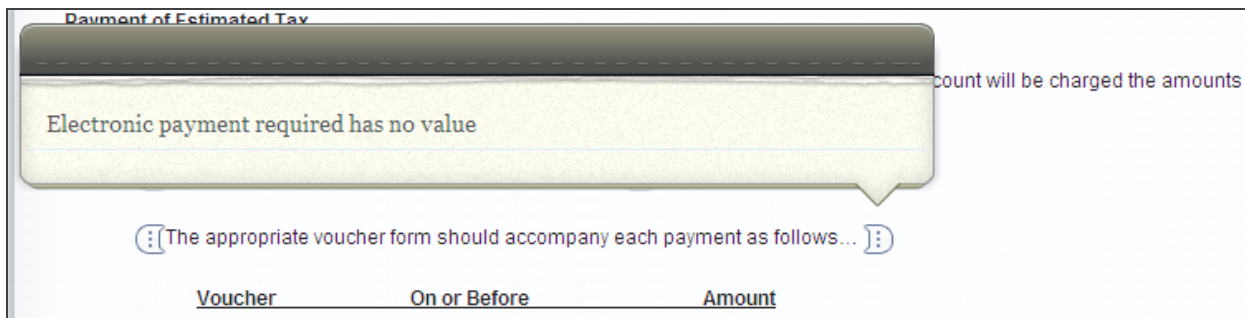


Figure 3:33

1. To preview the letter with page breaks, click the **To PDF** button in the preview window.
2. You will get a prompt to enter a **Letterhead**.

If you want to preview the template with the default header and footer or with your new header and footer created in Letters and Filing Instructions, click **Preview PDF** without entering anything.

3. A new window will open showing you what a printed version of your letter or filing instruction, with **Preview Data**, will look like (including page breaks and footers).

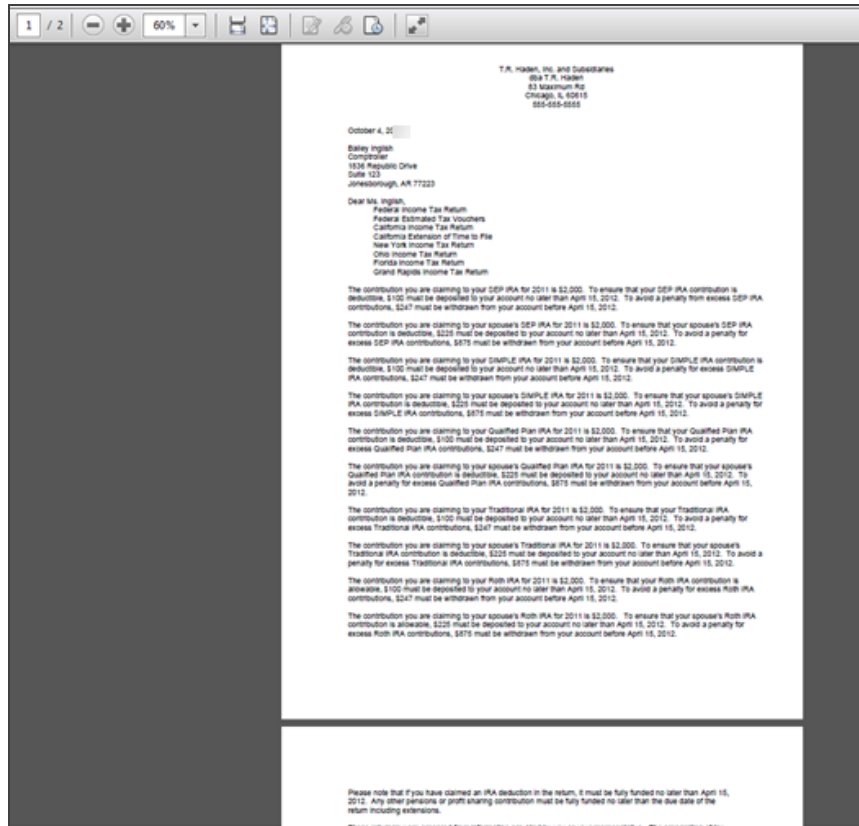


Figure 3:34

GLOBAL HEADER AND FOOTER TEMPLATES

Two templates for global header and footers: one for the **Letters** template and another for the **Filing Instructions** template, allow you to create a global letterhead and first page footer that will apply to all letters or all filing instructions.

If you want a particular header or footer applied to one template while all other templates use the global header and footer, you will simply create a new section in the desired template called **Header** (or **Footer**) and create that template's header and/or footer. This section will override the global **Header and Footer** template.

See [Positioning a Header \(page 31\)](#) for more information on positioning the header.

See [Positioning Text \(page 34\)](#) for information on positioning text within filing instructions and letters.

USING YOUR OWN TEMPLATE FOR TRANSMITTAL LETTERS

In some cases, you may wish to delete the entire default template and start with one of your own. To do so:

1. Open the Thomson Reuters supplied default template you wish to replace with one of your firm's standards.
2. Click **Actions** and select **Clear Template**.

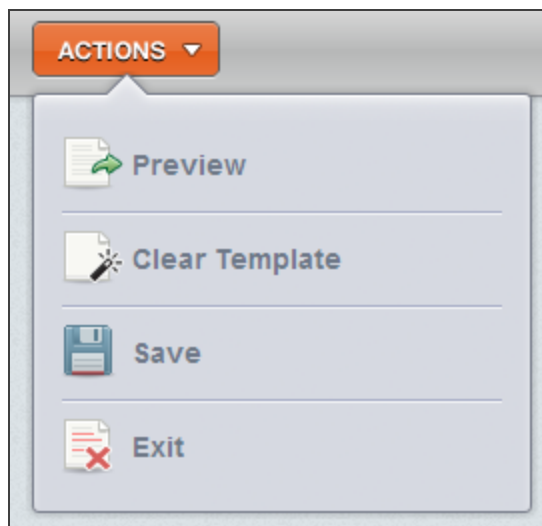


Figure 3:35

3. After selecting **Clear Template**, you will be asked to confirm your selection.

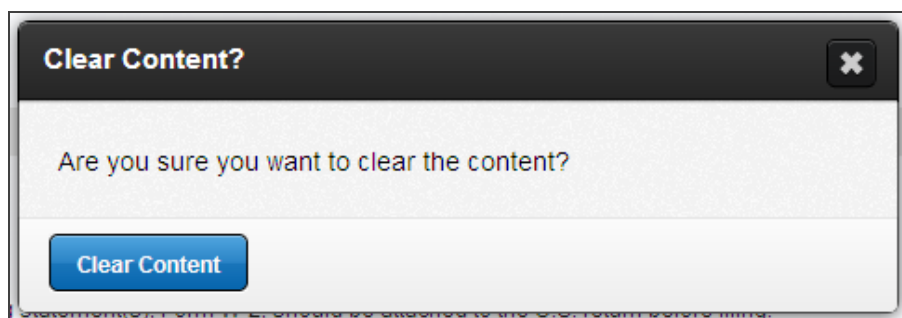


Figure 3:36

4. Confirming that you wish to clear the template will remove all content, return field references, conditions, and sections. You will have one **Body** section remaining. You can rename this section and add additional sections.

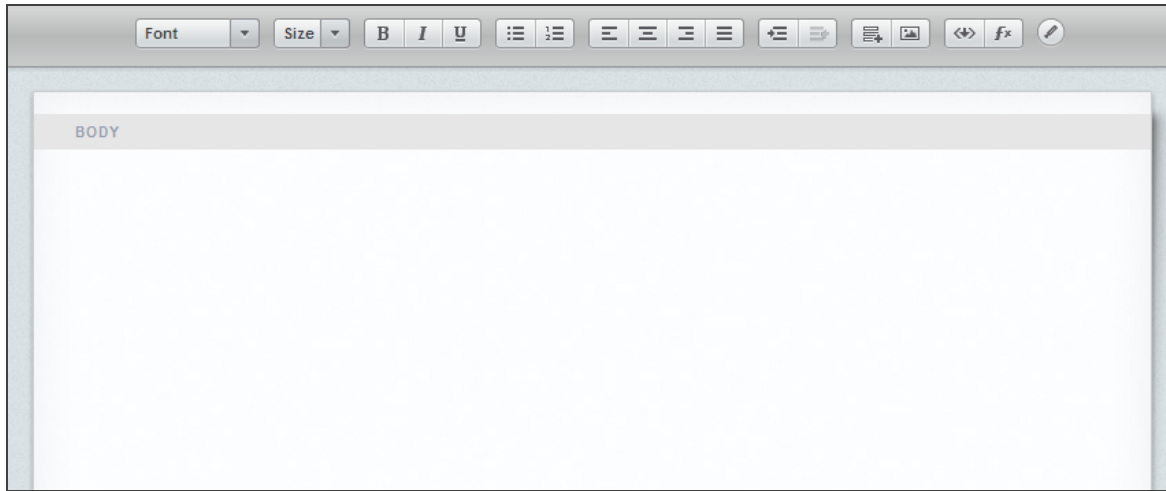


Figure 3:37

5. Within the blank template, you can begin typing in your new letter, inserting field references, creating conditions and sections, inserting images, and reordering the template.

You can also copy and paste from Word, a text file, PDF, etc.

To copy and paste from another source:

1. Go to the original source and highlight the information to be copied in to the template.
2. Select the copy within that source.
3. Go to the open template, and right-click in the body.

4. Select **Paste** (**Ctrl + V** also works). The text will be pasted without any formatting or fonts applied.

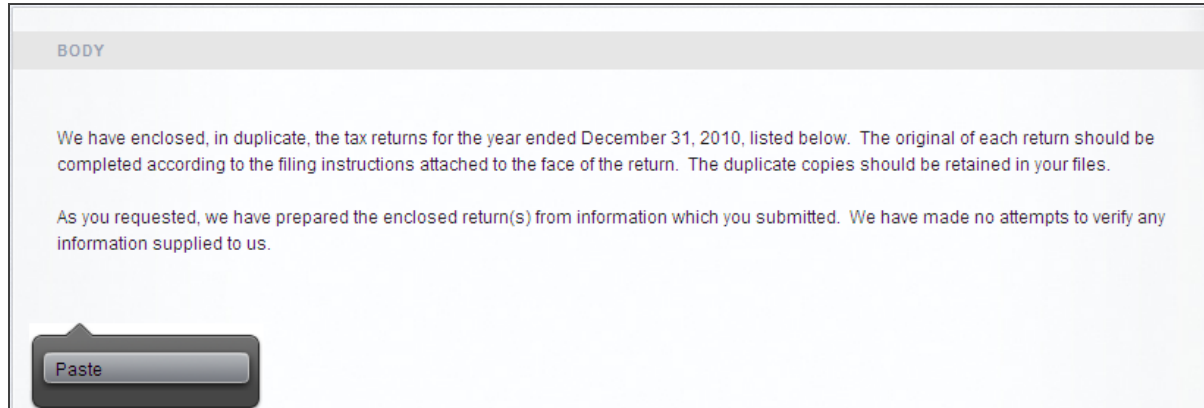


Figure 3:38

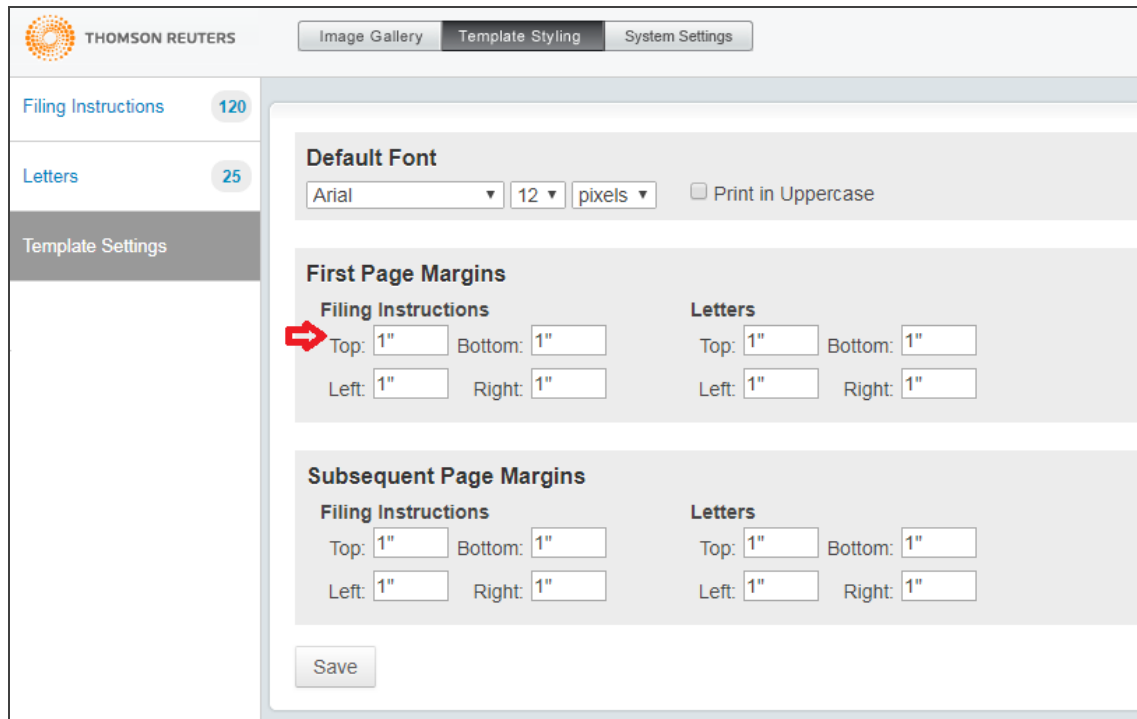


To undo changes, use the keyboard shortcut of **Ctrl + Z**. To redo, use **Ctrl + Y**.

Positioning a Header

1. Launch the LAFI Admin module (**Admin > Letters and Filing Instructions**).
2. Go to the **Template Settings > Template Stylings** tab.
3. Tab to **First Page Margins > Filing Instructions**.

- Adjust the “top” margins for **Filing Instructions**. This will dictate where the LAFI header/heading begins. These settings will impact all filing instructions for all tax applications.



The screenshot displays the Thomson Reuters Template Styling interface. The left sidebar shows navigation options: Filing Instructions (120), Letters (25), and Template Settings. The main content area is titled 'Template Styling' and contains three sections: 'Default Font', 'First Page Margins', and 'Subsequent Page Margins'. A red arrow points to the 'Top' margin input for 'Filing Instructions' in the 'First Page Margins' section. The 'Default Font' section shows 'Arial' as the font, '12' as the size, and 'pixels' as the unit, with a 'Print in Uppercase' checkbox. The 'First Page Margins' section has two columns: 'Filing Instructions' and 'Letters'. Each column has four input fields for Top, Bottom, Left, and Right margins, all currently set to '1\"

Figure 3:39

- Tab to **First Page Margins > Letters**.

- Adjust the “top” margins for **Letters**. This will dictate where the LAFI header/heading begins. These settings will impact all letters for all tax applications.

The screenshot shows the Thomson Reuters Template Styling interface. The left sidebar contains navigation options: Filing Instructions (120), Letters (25), and Template Settings (selected). The main content area is titled 'Template Styling' and includes a 'System Settings' button. The 'Default Font' section shows 'Arial' font, size '12', and 'pixels' unit, with a 'Print in Uppercase' checkbox. The 'First Page Margins' section is divided into 'Filing Instructions' and 'Letters'. The 'Letters' top margin field is highlighted with a red arrow. The 'Subsequent Page Margins' section also has 'Filing Instructions' and 'Letters' sub-sections, with all margin fields set to '1\"

Figure 3:40

- Click **Save**.



If inconsistencies exist between firm level and account level margins, you may see spacing issues in some instances. Many times, making the margins consistent between firm level and account level will address the issue. Account level selections will override firm level selections.

Tip

You can enter separate first page margins for the header and the content. If your header does not print, do the following:

- Go to **Launch Letters and Filing Instructions Admin Tool > Template Settings > Template Styling > First Page Margins > Content**.
- Change your **Content** top margin in the **First Page Margins** section to 1" or a top margin which will print the content below the header.

Positioning Text

Filing Instructions

1. Launch the LAFI Admin module (**Admin > Letters and Filing Instructions**).
2. Go to **Filing Instructions**.
3. Scroll to the bottom of the screen.
4. Select the **Header and Footer for Filing Instructions** template.
5. Place the cursor at the bottom right position of the first page header section (i.e. at the bottom on an inserted image or last field reference – e.g., Firm Phone Number - or typed text).

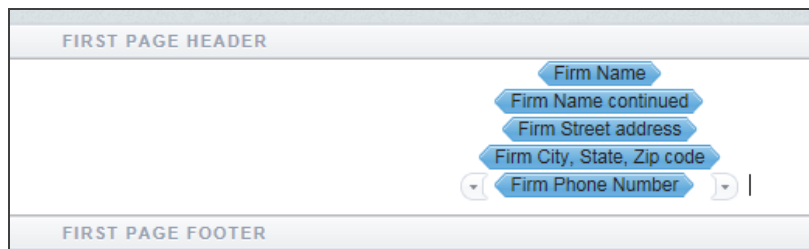


Figure 3:41

6. Press the **Enter** key to insert the desired number of blank lines between the header section and the location of the filing instructions text.

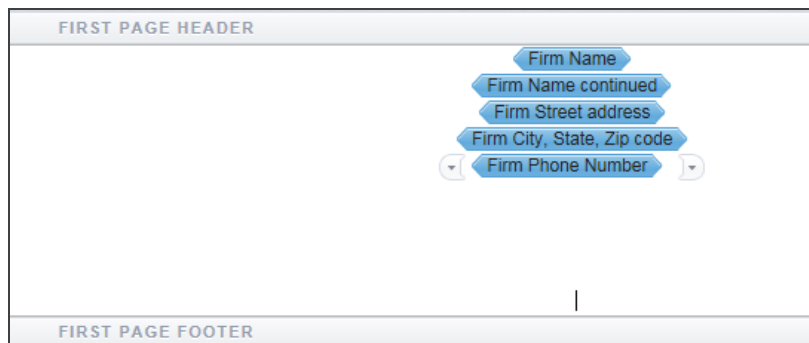


Figure 3:42

7. Click **Actions > Save**.

Letters

1. Launch the LAFI Admin module (**Admin > Letters and Filing Instructions**).
2. Go to **Letters**.
3. Scroll to the bottom of the screen.
4. Select the **Header and Footer for Letters** template.
5. Place the cursor at the bottom right position of the first page header section (i.e. at the bottom on an inserted image or last field reference or typed text).

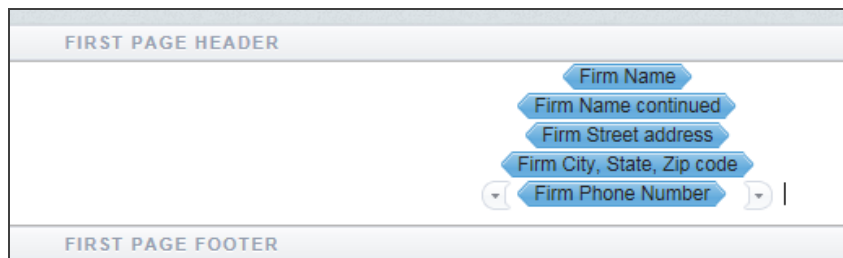


Figure 3:43

6. Press the **Enter** key to insert the desired number of blank lines between the header section and the location of the letters text.

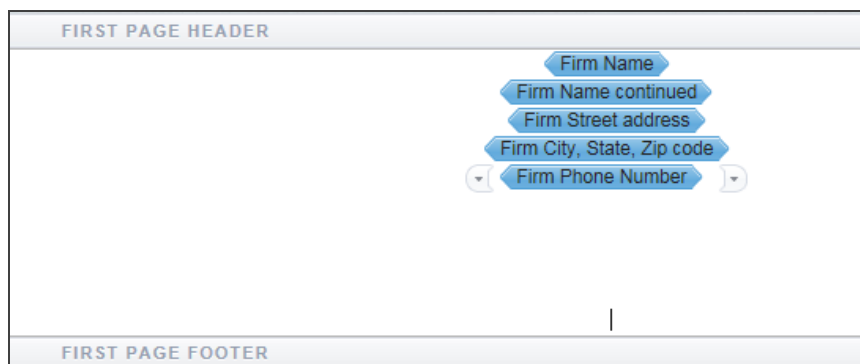


Figure 3:44

7. Click **Actions > Save**.

Tip

You can enter separate first page margins for the header and the content. If your header does not print, do the following:

1. Go to **Launch Letters and Filing Instructions Admin Tool > Template Settings > Template Styling > First Page Margins > Content**.
2. Change your **Content** top margin in the **First Page Margins** section to 1" or a top margin which will print the content below the header.

CHANGING ACCOUNTS

From the administrator module, you can make changes to either the firm letter templates and firm filing instruction templates or to an individual account letter templates and filing instruction templates.

Changes made to the firm templates are also applied to the account templates unless you change a section of the template that has been customized on the account template. Changes made to an account template will only affect returns within that account.

To change to a specific account within a firm:

1. Select **Change Account** from the left menu.

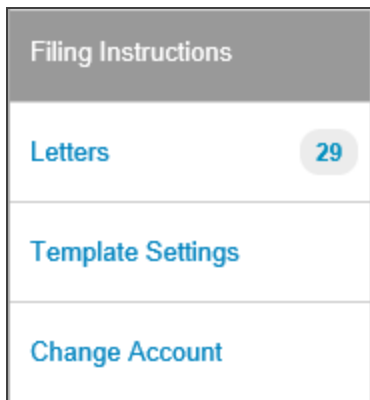


Figure 3:45

2. Select the account you wish to edit.

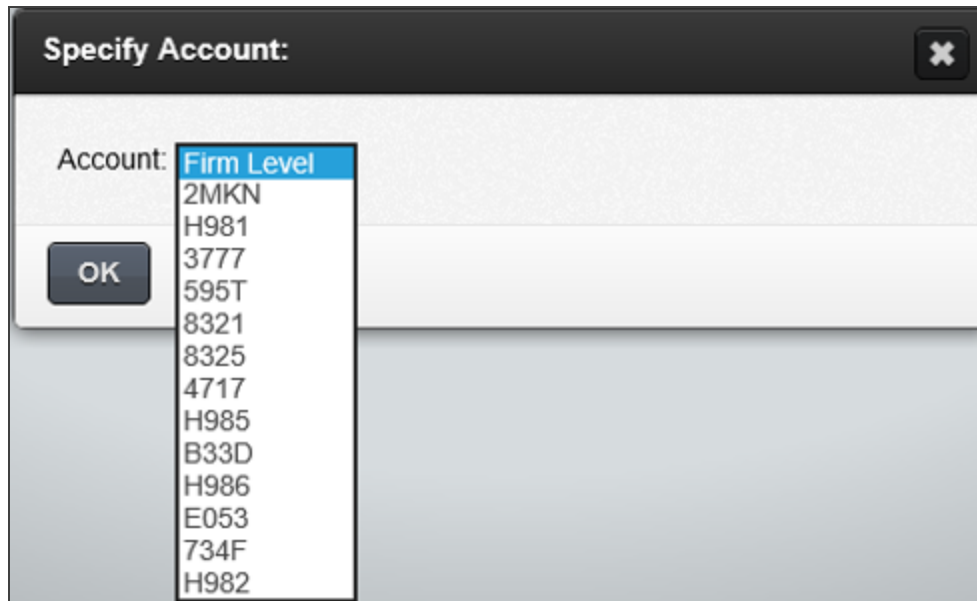


Figure 3:46

3. Click **OK**.

Once the account is selected, when you navigate back to the Letters or Filing Instructions screens, the Firm and Account will be displayed in the lower right corner of the window.

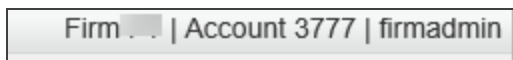


Figure 3:47

TEMPLATES: YEAR-SPECIFIC

The letters and filing instruction administrator module has letter templates and filing instruction templates that apply to a single year. By default, **2021** will display when you launch the letters and filing instruction administration module. Users are able to make edits to the prior year templates as well as the 2021 templates.

To switch to a prior year:

1. Navigate to **Template Settings**.
2. Select the **System Settings** tab.

3. Select the **Tax Year** you wish to edit (if it is not 2021).

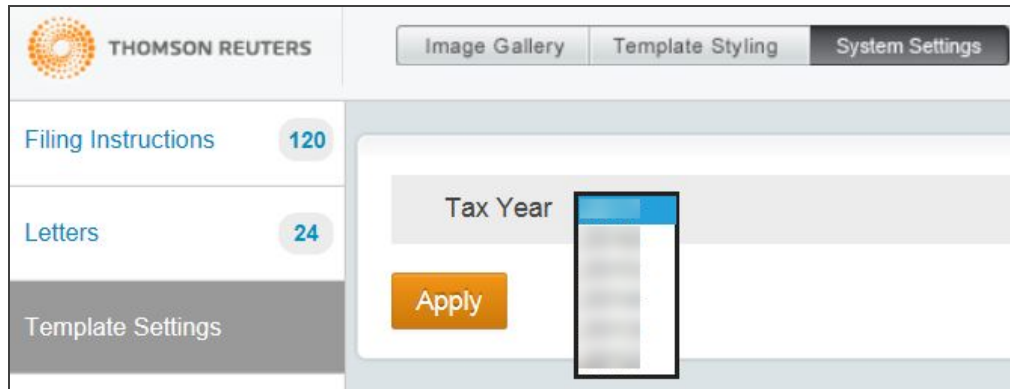


Figure 3:48

4. Click **Apply**.

Once the year is selected, when you navigate back to the **Letters** or **Filing Instructions** screens, the year selected (if a prior year) will display in **RED** next to the filter drop-down menu at the top of the screen.

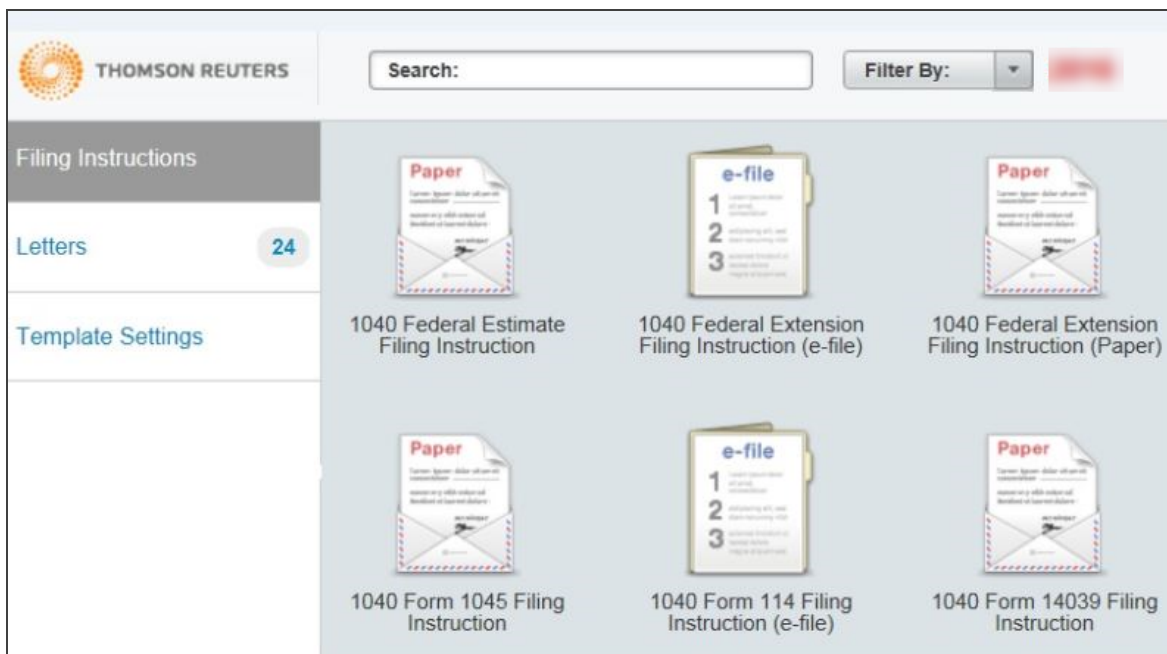


Figure 3:49

In addition to the year indicator on the outside browser window for the letters and filing instructions module, the year of the template being edited is visible when a user opens the template. The year displays at the bottom of the template window, along with the template title.

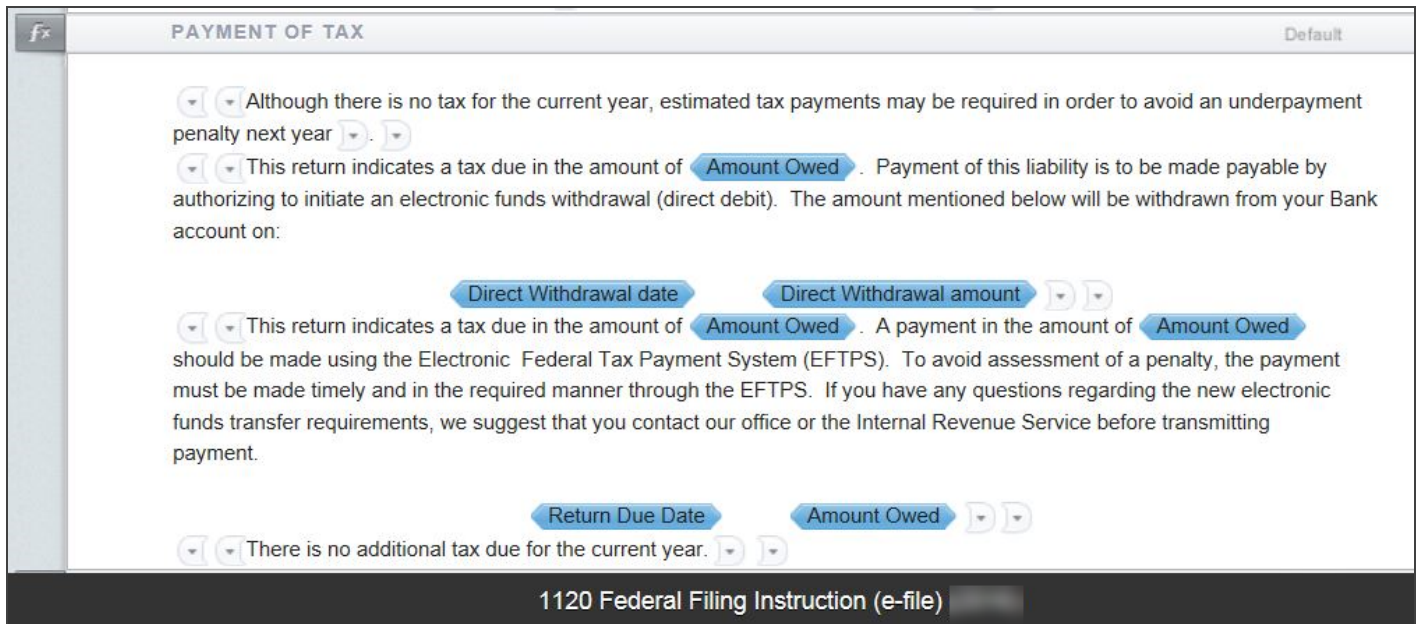


Figure 3:50



The starting point for the 2021 templates is the 2020 template as it exists the night before the initial release of the software. All edits made by a firm or an account in a prior year will be the starting point for 2021. Thomson Reuters default template updates will only apply to those sections that had not been previously customized in the prior year. Administrative users have the option to revert any sections back to the Thomson Reuters default if desired.

TEMPLATES THAT ARE NOT YEAR-SPECIFIC

Within the Letters and Filing Instructions module, there are two Templates for global header and footers: one for the Letters Templates and another for the Filing Instructions Templates. These templates are not year-specific. Changes made to the **Header and Footer** template for both letters and filing instructions will apply to all years.

For example, when a change is made to a Header for the filing instructions, that change will print on the filing instructions for all returns in all tax applications for all years. The user will not have to make **Header and Footer** changes in multiple templates to cover multiple years.

Even when the templates are switched to a prior year for edits, the **Header and Footer** templates will show that they are year agnostic. In the screen shots below, notice the missing year indicator after the template title.

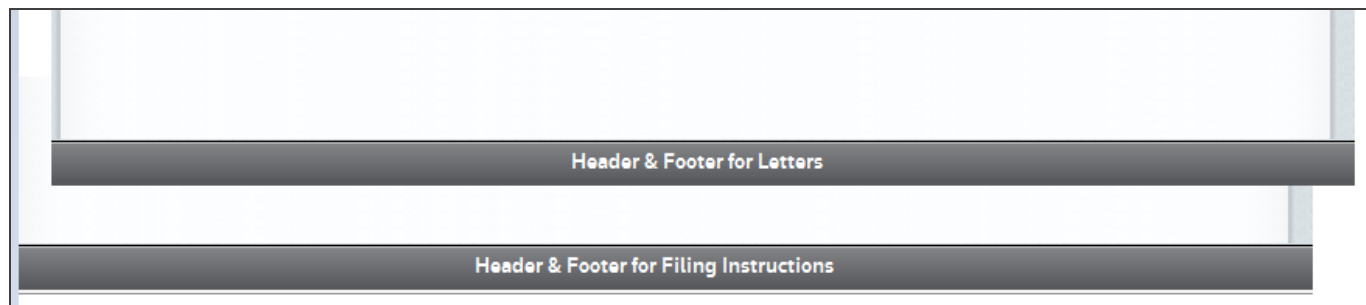


Figure 3:51



There is no action needed by the administrative user to make the current year templates available. This action is done automatically by Thomson Reuters in the initial release of the software each year.

CHAPTER 4: USING IMAGES

UPLOADING AN IMAGE

To insert an image in to a template, you must first upload images to the Image Bank.

1. From the main **Letters and Filing Instructions** page (not inside a template), go to **Template Settings**.
2. Browse to find an image and click **Upload**.
3. The image will be uploaded and can be previewed in the thumbnail displaying in the Image Gallery.

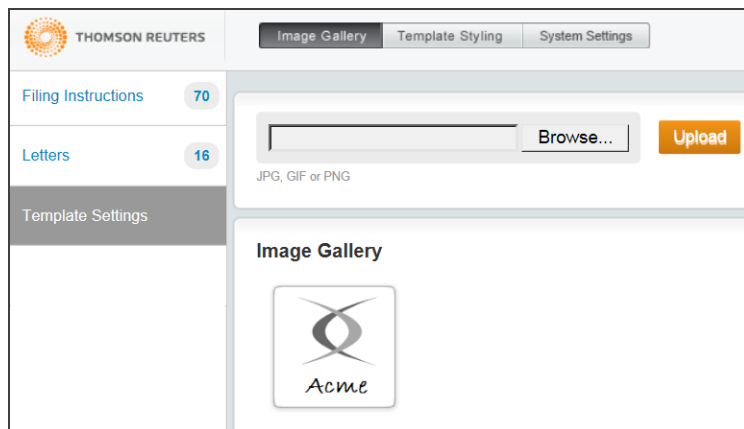


Figure 4:1

4. You can upload more than one image into the Image Gallery.

INSERTING AN IMAGE

1. Within a given template, position your cursor where you would like to place the image.

2. Click the **Add Image** icon .

3. From the thumbnail preview of images in the Image Bank, select the image and click **Insert Image**. The image will be inserted in to your template.

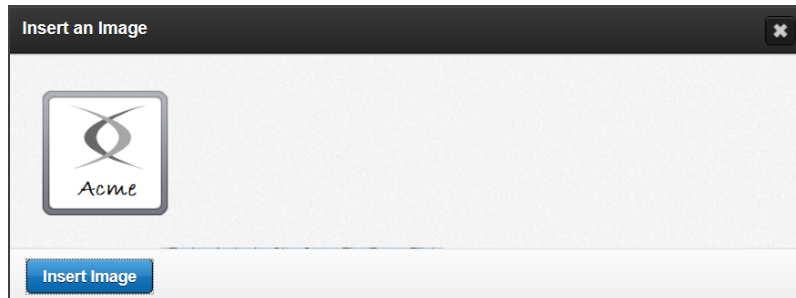


Figure 4:2

4. To adjust the image, right-click it and go to **Edit Image**.
5. The **Image Properties** dialog opens.

6. In this dialog, you can modify the extra space around the image as well as adjust the wrapping of the text around the image.

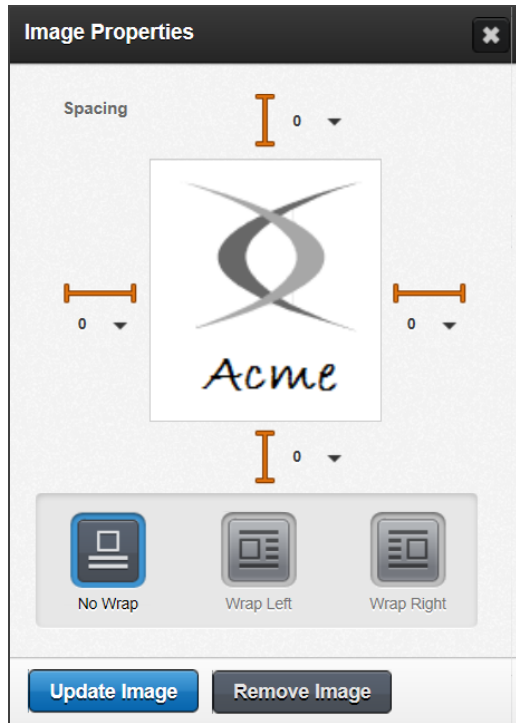


Figure 4:3



To undo changes, use the keyboard shortcut of **Ctrl + Z**. To redo, use **Ctrl + Y**.

CREATING A LOGO

When creating the logo, we recommend that you keep the following in mind:

- Creating your logo in vector format will allow you to resize it without losing quality.
- Use the highest resolution possible (at least 1200 DPI recommended).
- Upload your file in PNG format. PNG produces the best quality when printed.
- The size of the image to upload is based on pixel width. LAFI will increase the scale of the image by roughly 300% when displaying and printing. Once you upload the image, you cannot change the scale of the image.

Full Width Logos

Full-width logos span the entire width of the header. To create a full-width logo, use the following guidance:

MARGINS	MAXIMUM WIDTH IN PIXELS	NOTES
Standard 1" left/right	615 pixels	Any image greater than 615 pixels will be cut off on the right side.
Margins < 1"	> 615 pixels	Width depends on how narrow the margins are. We recommend that you test different width to determine the maximum pixel width.
Margins > 1"	< 615 pixels	

Less than Full Width Logos

When you use standard 1" left and right margins, the width of the logo in pixels is determined by multiplying the max width in pixels (615) by the desired percentage of the size of the image relative to the page.

For example: When you use 1" left and right margins, you have a printable width of 6.5 inches. If the desired logo width should cover 1" of this printable width, then the percentage of the logo relative to the printable width is 15.385%.

- Max width in pixels = 615
- Percentage of image relative to printable width = 15.385%
- Size of image width to upload = $615 * 0.15385 = 94.6 = 95$ pixels

With non-standard left and right margins, the ideal width of the image in pixels depends on your selected margins.