

4

Creating User Files

The e-Tax software uses a user file to store information necessary for filing an electronic tax return, application, etc.

This chapter describes how to create a user file.

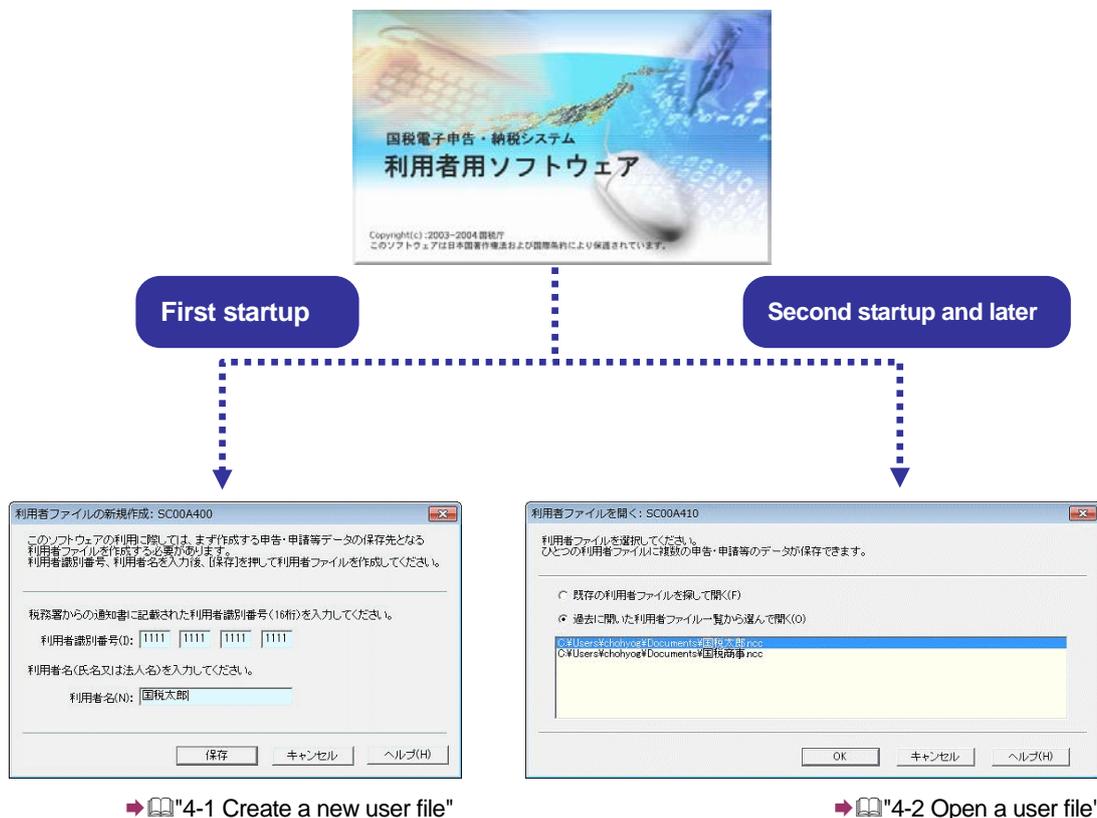
Incidentally, since a user identification number is necessary for creating a user file, prepare the notice from the Tax Office before starting the operation.

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When you start the e-Tax software for the first time, create a user file first.

For the second time and later, select a created user file to start the operation of the e-Tax software.

The following chart shows these flows.



Also, you can use the e-Tax software in various styles such as (1) filing returns by business office, (2) using one computer for multiple users, and (3) letting a tax accountant, etc., use it. In such cases, create multiple user files before using. For details, refer to the following:

⇒ "4-3 Use multiple user files"

4-1

Create a new user file

When you start the e-Tax software for the first time, create a user file first.

手順

1. Enter a user identification number.
2. Enter a user name.
3. Save a user file.

When you start the e-Tax software for the first time, the following screen will appear.

- 1 Enter "User identification number" in half-width numeric characters.

Enter the 16-digit number shown in the notice from the Tax Office by four digits.

- 2 Enter "User name" (name or corporation name). It must be up to 30 characters in length.



Hint

The user name you entered here will be displayed as "Name" or "Corporation name" in basic information, etc., of a tax return, application, etc., and displayed as "Name or designation" in a list screen.

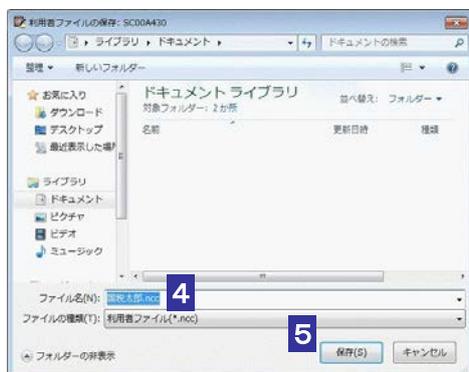
You can change the user name later.

➡ "6-2 Register basic information of a tax return, application, etc."

- 3 Click [Save].

4 Specify the save location and change the file name as necessary.

The user name is displayed as the initial file name.



5 Click [Save].

The user file will be saved and the "Main" screen will appear.



Hint

All data created by the user will be saved in the user file such as the user identification number, user name, tax returns, and applications.



Register user information.

➔ "5 Registering User Information"



When you have reinstalled the e-Tax software

You can continue to use created user files (although a version upgrade of the e-Tax software may be necessary). In such a case, perform the following operation:

1. In the "Create a new user file" screen, click [Cancel].
A message will appear to confirm that you do not select a user file.
2. In the message screen confirming that you do not select a user file, click [Yes].
The "Main" screen will appear.
3. From the "Select user" in the menu button, select "Select a created file".
The "Open a user file" screen will appear.
4. Select "Search for an existing user file and open it", and then click [OK].
The "Open a user file" screen will appear.
5. Select a user file, and then click "Open".
The user file will open and the "Main" screen will appear.



Hint

The default save location of user files is My Documents.

4-2

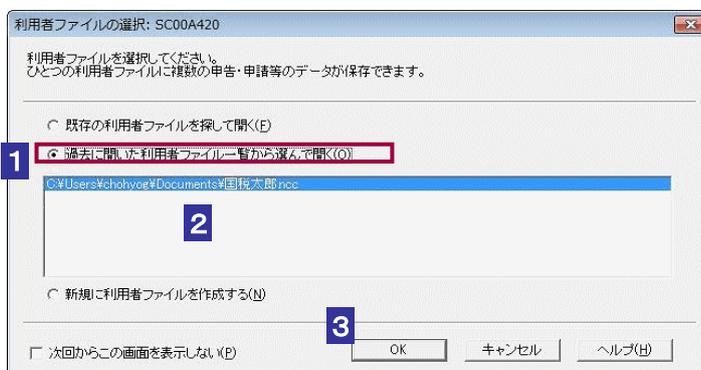
Open a user file

When starting the e-Tax software for the second time and later, select a created user file to start the operation of the e-Tax software.

Steps

1. Select how to open a user file.
2. Select a user file.

When you start the e-Tax software for the second time and later, the following screen will appear.



- 1 Select "Select and open from the list of user files opened in the past".



The latest five user files opened in the past by the e-Tax software are displayed in the list.
User files that are moved or deleted are not displayed in the list.

Hint If you cannot find the desired file in the list, refer to the following:

➔ Page 55 "Search for an existing user file to open it"

- 2 Click the desired file in the list to select it.



You can also open a user file from the "Main" screen without displaying this screen. To do this, select "Do not show this screen again".

Hint For how to operate, refer to the following:

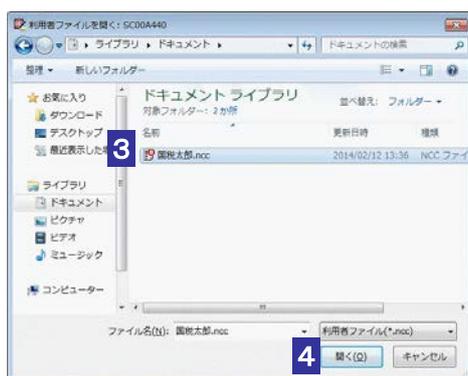
➔ Page 56 "Open a user file from the "Main" screen"

- 3 Click [OK]

The user file will open and the "Main" screen will appear.

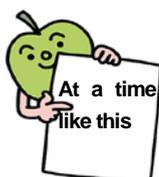
Search for an existing user file to open it

- 1 Select "Search for an existing user file and open it".
- 2 Click [OK].
- 3 Specify the folder the user file is saved, and then select the file.



- 4 Click [Open].

The user file will open and the "Main" screen will appear.



To open a user file with another computer

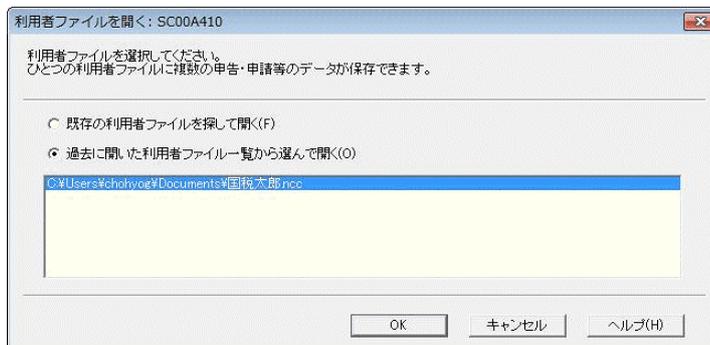
You can store a user file into a floppy disk or CD to use it with another computer. Insert the disk containing the user file into the drive (copy the file to the hard disk drive as necessary), and then perform the operation of "Search for an existing user file to open it" on page 55

Open a user file from the "Main" screen

- 1 From the "Select user" in the menu button, select "Select a created file".



- 2 The "Open a user file" screen will appear.



The subsequent operation is the same as ➡📖 "4-2 Open a user file".



Hint

When you select [View] - [Display the "Select a user file" screen at startup] in the menu bar, the "Select a user file" screen will always appear at startup.

When you do not want the screen to appear every time, clear the check mark of [Display the "Select a user file" screen at startup].

The setting you changed will take effect from the next startup.



Create tax returns, applications, etc.

➡📖 "6 Creating Tax Returns, Applications, Etc."

4-3

Use multiple user files

To (1) file returns by business office, (2) use one computer for multiple users, or (3) let a tax accountant, etc., use the e-Tax software, create multiple user files and operate the e-Tax software switching the user file.

Steps

1. Select a create function.
2. Enter a user identification number and user name.
3. Save a user file.



Multiple user files cannot be opened simultaneously.

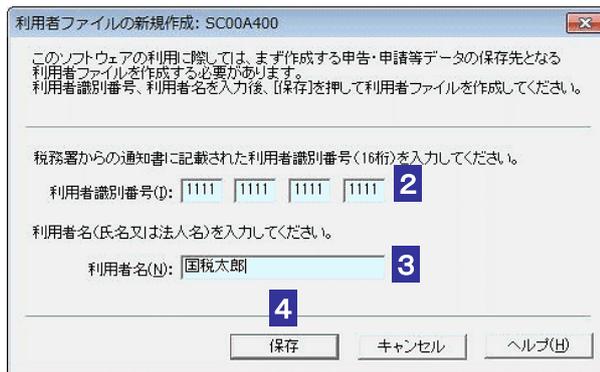
Note

- 1 From the "Select user" in the menu button, select "Create".



To create a user file when you start the e-Tax software for the second time or later, select "Create a new user file" in the "Select a user file" screen, and then click [OK].

Hint



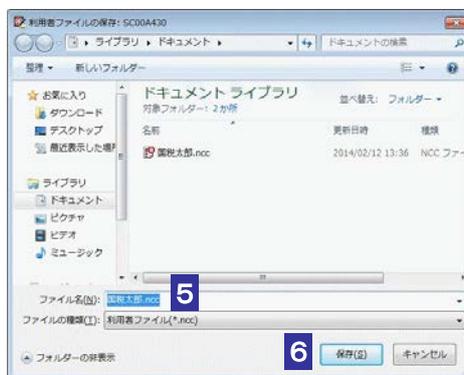
2 Enter a "User identification number" in half-width numeric characters.

Enter the 16-digit number shown in the notice from the Tax Office by four digits.

3 Enter a "User name" (name or corporation name). It must be up to 30 characters in length.

4 Click [Save].

5 Specify the save location and change the file name as necessary.



6 Click [Save].

The user file will be saved and you will return to the "Main" screen.



Register user information.

➡ 📖 "5 Registering User Information"

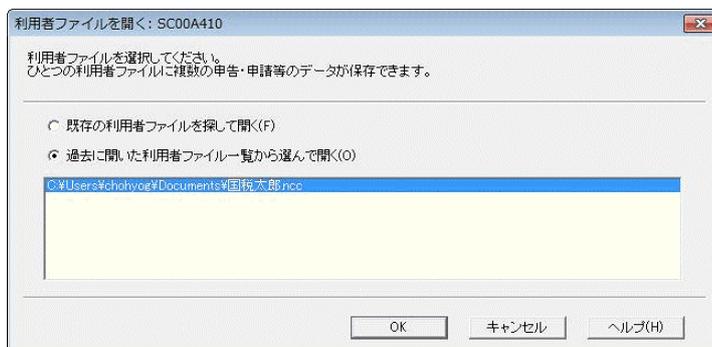
Perform operations of steps **1** to **6** for each user to create user files.

Switch to another user file

- 1 From the "Select user" in the menu button, select "Select a created file".



- 2 The "Open a user file" screen will appear.



The subsequent operation is the same as ➡📖 "4-2 Open a user file".



Note

When you switch to another user file while logged in, you will be automatically logged out.

➡📖 Page 44 "Log out of the reception system"



Hint

You can also exit the e-Tax software once and start it again to switch to another user file. For how to operate, refer to the following:

➡📖 "4-2 Open a user file"



Create tax returns, applications, etc.

➡📖 "6 Creating Tax Returns, Applications, Etc."