Reporting Preferences

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Preferences define how you want your CenterPoint program to behave and can be changed at any time. If you change a preference and are currently in the screen that uses that preference, close the screen and then enter the screen again to initiate the preference.

How are the Different Tabs Used?

Federal Tax Forms

- Default Aatrix Executable
- Specify Where Aatrix History Files are Saved
- Specify Optional Preparer Information
- Backup Aatrix History Files
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How are the different tabs used?

Preferences can be set at different levels. The preference level is a hierarchy, for example, the Global level will be used if no Application, Database, or User levels are set. The levels are accessed with the tabs across the top of the Preferences screen.

Current Settings: Simply displays the settings that are currently being used.

Global: The Global level is typically used when your system is a network. The Global level affects all databases on the network. This allows a network administrator to setup Preferences just once and they will be used for all Database & all Users within that network setting.

Application: If the Preferences are set at the Application level, then all users of all databases will have the same Preferences.

Database: Preferences set at this level will affect each individual database separately. One can then have different settings for each Preference in each database.

User: Preferences set at the User level will only affect that user. This tab is not available on all preferences and is only available if you use Database Security.

Federal/State Tax Forms

CenterPoint integrates with a tax forms package called Aatrix so that you can print and eFile state and federal tax forms, for example 1099 and 1096 forms. The Aatrix Executable preference is automatically set to where the Aatrix program for producing state and federal tax forms is located. The default location for this file is C:\program

files\Aatrix Software\Aatrix Forms\AatrixForms.exe. The other settings in this preference allow you to specify a location other than the default location for history files that are saved for future reference.

Default Aatrix Executable

This default Aatrix Executable value will not need to be changed unless the location of the file is moved. If you choose to install CenterPoint Federal/State Tax Forms to a location other than the default location, you will need to change the Aatrix Executable default location to the location you installed to before you can print Federal or State reports or forms or perform a quarterly update.

1. Select **File > Preferences > Reports**> **Federal/State Tax Forms**.
2. Click the **Application** tab.
3. In the **Aatrix Executable** box, defaults to C:\Program Files\Aatrix Software\Aatrix Forms\AatrixForms.exe. This is the suggested location for the Aatrix executable file.

Specify Where Aatrix History Files are Saved

If you are networked and would like to specify where the Aatrix history files are saved instead of the default location <ProgramData>\Red Wing Software\CenterPoint\Aatrix\, follow the steps below.

1. Select **File** > **Preferences** > **Reports** > **Federal/State Tax Form**s.
2. Click the **Application** tab.
3. In the **Use Non-Default File Location** box, select **Yes**.
4. In the **Non-Default File Location** box, change the displayed default location to the network location you want to save the Aatrix History file to.
5. Click **Save**.



If you do not use a custom file location (the Use Non-Default File Location box is set to No), the Red Wing Software default location used is <Users>\<User>\AppData\Local\Aatrix Software\Aatrix Forms\Red Wing\.

Specify Optional Preparer Information

1. In the **Use Preparer Information** box, select **Yes** if you want the information you enter in the Preparer Information (Optional) section to automatically be included into the Paid Preparer Use Only section of your tax forms.
2. Enter the preparer's information including: **Name**, **Firm**, **Address**, **Phone**, **Fax**, **Email**, **Contact**, **PTIN**, and **EIN**.
3. Click **Save**.

Backup Aatrix History Files

If you would like to back up Aatrix history files, follow the steps below:

1. Select **File** > **Backup** > **Backup Aatrix History Files**.
2. Select the employers to backup history files for.
3. Click **OK**.
4. Select a location to save the AatrixHistoryBackup.zip file to and then click **Save**.
5. At the Backup Created message, click **OK**.

Restore Aatrix History Files

If you would like to restore Aatrix history files, follow the steps below:

1. Select **File > Restore >** .**Restore Aatrix History Files**.
2. Select the Aatrix History file you want to restore. Click **Open**.
3. Select the Aatrix History backup file and click **Open**.
4. Select the employer(s) you want to restore history for.
5. Click **OK**.
6. At the *This will overwrite the existing history data, are you sure?* message, click Yes to replace the existing Aatrix History files or No to cancel the restore.
7. Click **OK**.

Reports General Preference

The Reports Setting preference allows you to set the way that you want the Reports screen to work with Favorites.

1. Select **File > Preferences > Reports**> **General**.
2. Click the **Application** tab.

- **Display Database Favorites** - This setting provides functionality that allows you to save favorites with the open database that can then be used by other users of the same database. If you want to store favorite reports for this database on a Database tab, select **Yes**.
- **Default Report Tab** - This preference also allows you to determine which tab is the default tab that displays reports in a network installation, the options are the **Reports** tab, **Favorites** tab, **Database** tab, or **Network** tab.
- **Disable Reports Tab** - This preference allows you to control whether to display the Reports tab when the Reports screen displays. This can be used if you want your users to select reports only from the Favorites or Database Favorites tabs. If you've selected the Reports tab as the Default Report tab, this box will not be active.
- **Location of the Network Reports Variation File** - This preference allows network installations to set up one shared location for displaying and printing reports for everyone that uses the application. When you copy the CenterPoint.Favorites.Variations file from your Documents directory, rename and save the file to a Network Location,and then enter the saved location in this box, a Network tab will display that will allow all users to print reports that have custom variations made by an administrator. Note: You will not be able to save any of your favorites to the Network tab. If you save a report favorite, it will display on the Favorites tab.
- **Location of Custom Report Files** – This preference allows you to determine the location where custom report files designed by Red Wing Software will be located. For example, you may want to provide a network location so all users in a network installation have access to a custom report.
- **Location of Custom Export Files** - This preference allows you to determine the location where custom export files designed by Red Wing Software will be located. For example, you may want to provide a network location so all users in a network installation have access to a custom export.

Report Styles

1. Select **File > Preferences > Reports**> **Report Styles**.
2. Click the **Application** tab.

The appearance of your reports will change based on the style you select. You can set the preference so that all of your reports will be styled the same way. If you have any reports that are exceptions and you wish to have them styled differently, you can change the style of a specific report by previewing the report and clicking on the General fly-out tab and then changing the setting in the Style box.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.