

General Options

The **General Options** screen allows you to configure your invoice options, set your current MeF Submission ID, and determine your 1040 Individual options. There are also options to enable history list functions.

Invoice Options

Select the option you prefer:

- If you select **Do NOT auto number**, you may manually enter a number on each invoice (Price Sheet form) within each tax return or you may leave the number entry blank.
- If you select automatic numbering only on MY LOCAL COMPUTER, you may change the starting number by entering a different number in the box labeled **Start my local invoice number with**.
- If you are using multiple computers, select **Auto number ALL invoices, making each UNIQUE across the entire network**.

E-File ID

Leave this number at 0 if:

- TaxWise is being used by multiple workstations on a network, or;
- You have only one computer using TaxWise, or
- You will not electronically file any Individual (1040) or business Federal or state tax returns.

Every [Submission ID](#) must be unique. If you are creating e-files on multiple non-networked computers you must take certain steps to avoid assigning the same Submission ID to different returns.

If you are preparing returns for e-filing on multiple non-networked (stand-alone) computers, you must estimate the number of returns that will be prepared on each computer and enter "Current Submission IDs" that are far enough apart that there will be no duplication of numbers with another computer during the tax season.

For example, if you have two non-networked computers in your office plus a laptop which you use in clients' homes, you might pre-set the **Current Submission ID** on each machine as follows:

- On computer #1, leave it at one.
- On computer #2, change it to 10000.

- On computer #3, change it to 20000.

The first computer generates the numbers 1-9999.

The second computer generates the numbers 10000-19999.

The third computer generates the numbers 20000-99999.

You should estimate the number of returns that will be prepared on each computer and allow enough numbers so that there will be no duplication of numbers during the tax season. The highest possible number is 99999.

1040 Individual Options

The **Resident State** drop-down list allows you to select the state (or None) to be loaded into returns by default.

The **Return Type** drop-down list allows you to select the default return type (Bank Product, E-file only, Paper) to be used on 1040 returns.

These options will be disabled for packages other than 1040.

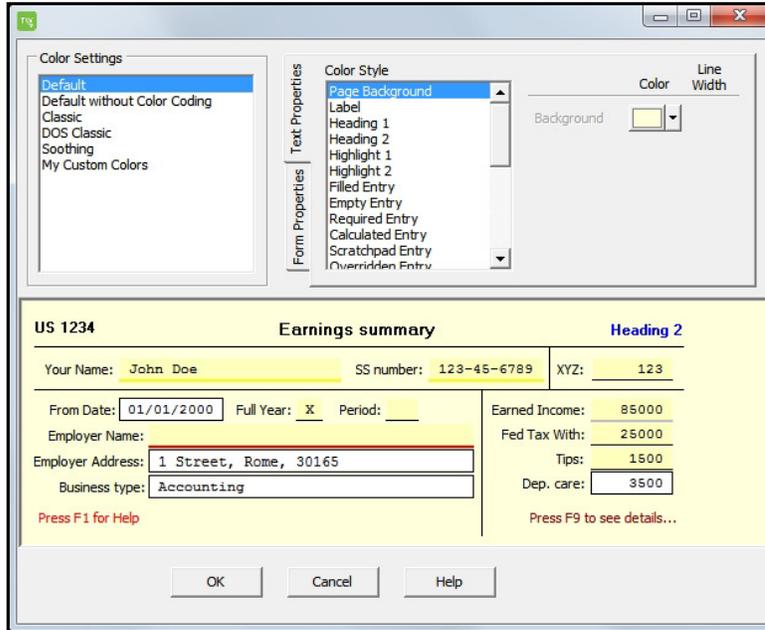
Miscellaneous options

Option	Description
Enable auto-complete for entries with history lists	Allows you to type the first character or first few characters of an entry and TaxWise auto-completes the entry for you.
Display user-defined and auto-populated history lists	By default, user-defined and auto-populated history lists are turned off, meaning that you cannot see them unless you activate this option. When you select this option, TaxWise makes these lists available to you. This option does not affect your ability to see and use pre-defined history lists, such as Relationship to You for dependents.
Automatically show history lists	This option causes the history list to open automatically when you are on the entry. When this option is not selected, users should press the Spacebar or click the down arrow to display the history list.
Display taxpayer reminder (each time return is opened)	Selecting this check box causes TaxWise to display taxpayer reminders each time a return is opened.
Prompt when closing the program (when using Windows close button "X")	By default, this check box is selected and causes TaxWise to display a confirmation box when you click the X in the upper right corner of the program or use any other Windows method of closing the program. Selecting Yes will close TaxWise normally. Selecting No will close the confirmation box and return you to TaxWise. The confirmation box allows you to select Do Not Show so that the box will not be shown when you click the X in the upper right corner of the program. If you select this check box, the Prompt before closing TaxWise check box in Setup Assistant will be cleared. Pressing Ctrl+Alt+Del will not display the confirmation box. You will only receive the confirmation by clicking the X in the upper right corner of the program or using other Windows methods of closing the program.
Enable Screen Reader for Visually Impaired	Selecting this check box allows the JAWS reader (if installed locally on the computer and turned on) to announce the fields in TaxWise for visually impaired users.

Color Setup

Click the **Color Setup** button to edit your color settings, form properties, and text properties.

TaxWise displays the **Color Settings** window:



- Color settings are workstation-specific. They affect only the workstation at which changes are made, even if you are using TaxWise on a network. All users at that workstation will see the same colors at that workstation.
- You may choose from five color settings which cannot be modified.

Color Settings

Select one of the following color settings from the **Color Setup** tab:

- **Default**, which is the TaxWise view that includes color coding.
- **Default without Color Coding**, which is the TaxWise view that does not include color coding.
- **Classic**, which is referred to as TaxWise Classic view.
- **DOS Classic**, which is the TaxWise view used prior to the release of TaxWise for Windows.
- **Soothing**, which was formerly called Soothing Gray and is a softer form of Classic.

When you choose a setting, the colors are shown in the sample form at the bottom of the window.

Sample Form at the Bottom of the Window (Default Setting)

- **Calculated** entries are underlined with yellow, as in the **Your Name** entry.
- **Overridden** entries are underlined in gray, as in the **Earned Income** entry.
- **Required** entries are underlined in red, as in the **Employer Name** entry.
- **Selected** entries are shown in a white box with a black border, as in the **From Date:** entry.
- In TaxWise, **Heading 2** is the color style for titles of TaxWise forms such as Main Information Sheet, Price Sheet, Scratch Pad, and worksheet. **Heading 1** is the color style for titles of official IRS forms and statements.
- TaxWise assigns the **Highlight 1** color style to helpful on-screen instructional text, such as that shown above, **Press F9 to see details...** The **Highlight 2** color style is assigned to on-screen instructional text that is critical to the correct calculation of the

form, as in "Press F1 for Help."

Once you have finished configuring your general options and color settings, click the **Next** button to carry forward taxpayer data.

See Also

[Register Software](#)

[Configuration Settings](#)

[Partner Verification](#)

[Office Information](#)

[CCH iFirm](#)

[Groups & Users](#)

[Preparer Information](#)

[Printing & Network Setup](#)

[Carry Forward Taxpayer Data](#)