

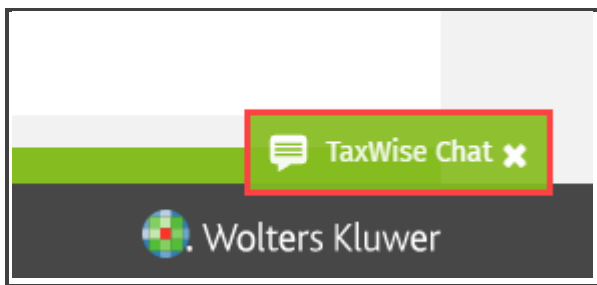
TaxWise® Online Learning Portal

TaxWise Chat

New for TaxWise Online 2021 you can now chat with support from within the TaxWise Online application. This feature allows you to quickly receive answers via our virtual chat assistance, or request to chat with a live representative. Finally, you can submit a Support Case, which allows you to have a support representative contact you back to assist.

To access the In-App Chat feature:

1. In the lower right-hand corner, click the **TaxWise Chat** icon.



1. TaxWise launches the TaxWise Chat in a separate browser tab. Here you can select one of the example questions, or type your question in the appropriate field.

A screenshot of the TaxWise Chat interface. At the top, a grey message bubble from a virtual support representative says: "Hello, I am your virtual support representative. I can help you with tax and technical questions around TaxWise™. What question can I help you with today?" Below this, another grey message bubble says: "Please ask using complete sentences, this will help me find the best answer for you. For privacy reasons personally identifiable or sensitive information such as social security or account numbers should not be included in the questions you ask." A third grey message bubble asks: "Are you looking for information on one of the following?" Below this is a blue rectangular box containing a list of example questions: "How do I reset the Admin password for TaxWise®?", "How do I reset/unlock a user's password in TaxWise®?", "How do I download and install prior year versions of TaxWise®?", "Will my TaxWise® 2019 admin password open my TaxWise® 2020 software?", and "When is the e-file deadline for 2020?". Below the blue box, a grey message bubble says: "If not, here are some examples of questions you can ask me." Below this are two more example questions: "How do I add a state to my TaxWise package?" and "How do I reset the Admin password for TaxWise?". At the bottom left, there is a circular avatar of a woman. To the right of the avatar is a text input field with a "Start over" button on the left and a "Send" button on the right. At the very bottom, a small line of text reads: "Information provided shall be processed in accordance with our Privacy & Cookie Notice".

2. Once you click one of the links, or submit your question, the page displays various related KnowledgeBase articles that may provide the answer. Select one of the links to display the article.

The screenshot shows the Wolters Kluwer website interface. At the top, there is a navigation bar with 'Home' and 'Small Firm Services'. Below this, a breadcrumb trail shows 'Home > Video Library'. The main content area features a video player for 'TaxWise® Online: Resetting Admin and User Passwords'. The video player includes a play button, a progress bar at 0:11 / 6:50, and a 'Watch later' button. To the right of the video player, there is a description: 'This video covers resetting admin and user passwords.', and a table showing 'Views: 0' and 'Duration: 06:51'. Below the video player, there is a 'MORE VIDEOS' section with a link to 'Resetting Admin and User Passwords'. At the bottom right, there is a chat button labeled 'Chat with our virtual representative'.

3. After reviewing the article, return to the TaxWise Chat. Here, you can now choose a different article, or indicate whether your question has been answered.

The screenshot shows the TaxWise Chat interface. At the top, there is a message: 'If not, here are some examples of questions you can ask me.' followed by a list of suggested questions: 'How do I add a state to my TaxWise package?' and 'How do I reset the Admin password for TaxWise?'. Below this, there is a 'Training' tab. A message states: 'These articles from the Knowledge Base might be able to help you with that question.' followed by a list of suggested articles: 'What is the TaxWise® Training Electronic Filing Center (EFC) and what are the offline dates?', 'How to guide customers looking for training on our products.', 'Transmitting Training Returns to the Electronic Filing Center (EFC) in TaxWise®', 'Why am I unable to connect to the TaxWise® Training Electronic Filing Center (EFC)?', and 'TPG EROs who have not completed compliance training'. Below the list of articles, there is a feedback prompt: 'Does this information help answer your question?' followed by three buttons: 'yes, thank you', 'no, not quite', and 'I want to ask another question'. At the bottom, there is a 'Start over' button and a 'Send' button. A footer note states: 'Information provided shall be processed in accordance with our Privacy & Cookie Notice'.

4. If you indicate your question has been answered, you can ask another question, request additional assistance, or end the chat session.

Does this information help answer your question?

yes, thank you

I'm glad to hear this helped answer your question. Is there anything else I can assist you with today?

I want to ask another question | I require additional assistance | end chat session

Start over

Send

Information provided shall be processed in accordance with our Privacy & Cookie Notice

5. If you indicate your question was not answered, TaxWise Chat asks follow-up questions to locate additional articles.

no, not quite

I have some follow up questions to see if we can find a better answer for you.

Is your Input Method *worksheet view*?

yes no

Start over

Send

Information provided shall be processed in accordance with our Privacy & Cookie Notice

6. If you indicate you need additional assistance, TaxWise Chat allows you to choose between chatting with a live representative or creating a Support Case.

I require additional assistance

I would be happy to help you get some additional assistance with our support staff.

I want to create support case | I want to chat with a live representative

Start over

Send

7. If you choose to create a support case, the TaxWise Chat will display a Create a support case dialog box. Complete the required information. This includes your information and your issue details.

Create Support Case

Please complete the form below to create a Support Case for your issue.

Your information

Your first name

Your last name

Your email address

- Note that a full transcription of your conversation with TaxWise Chat will be included with your support case. You also have the ability to provide additional information. Once your customer information and the details of your issue have been entered, click the **Create Case** button.

Issue summary

A full transcript of our conversation will be included with your support case. If you wish to provide any additional information about your issue you may do so below.

Additional information (limit 500 characters)

Characters remaining: 454

Please check the box below to successfully submit this form.

☒ I understand and agree to the [Privacy Notice](#)

Cancel

Create case

-  We will cover checking the status of a support case later in this lesson.

9. If you select that you want to chat with a live representative, you will receive a Start Live Chat dialog box, where you will be asked to complete your customer information along with details of the issue you are having. The full transcript of your conversation with TaxWise Chat, will be included with the case that the system creates as it connects you to a live representative. Once you have entered the details, click **Continue**.

Start Live Chat

Please complete the form below to start Live Chat for your issue.

Your information

Your first name

Your last name

Your email address

Your account number

Your issue details

Issue type

Technical

▼

A full transcript of our conversation will be included with your support case. If you wish to provide any additional information about your issue you may do so below.

Additional information (limit 500 characters)

Ⓢ

Characters remaining: 464

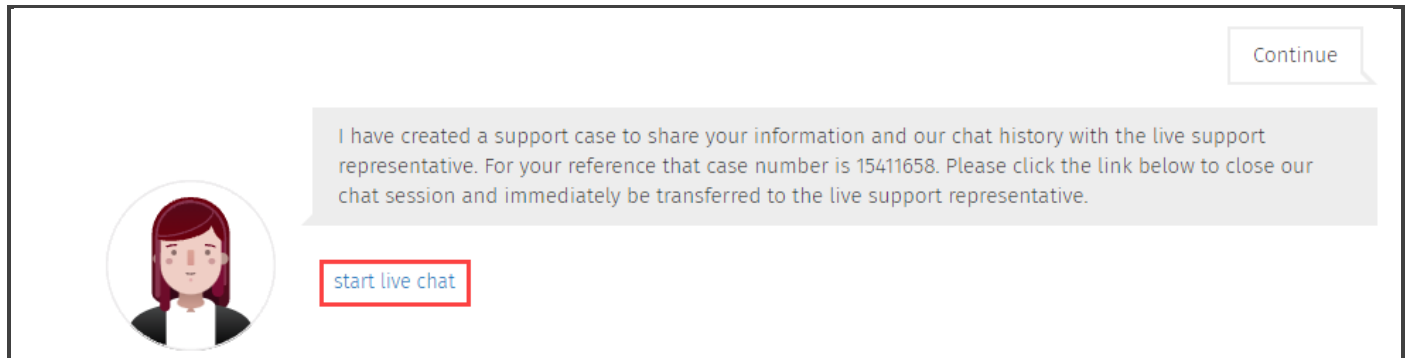
Please check the box below to successfully submit this form.

☒ I understand and agree to the [Privacy Notice](#)

Cancel

Continue

10. The support case is created and provided to you on the screen, click the link on the screen to close TaxWise Chat, and be transferred to the live support representative. Click **start live chat**.



11. You will be connected to a live representative. They will ask you to confirm your Client ID, and then proceed to assist you. Click **Exit** when done.

