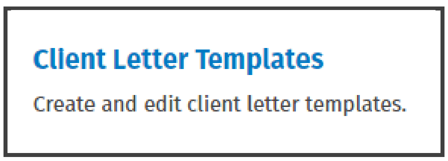
TaxWise® Online Learning Portal

New Client Letter Templates

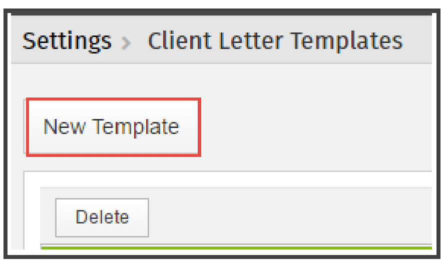
For Tax Year 2022, Wolters Kluwer reworked Client Letter Templates. You can create default client letters using the Client Letter templates feature. This allows you to set up standard letters to attach to your clients' returns.

To create a client letter template:

1. From the user drop down menu, select **Settings**.
2. From the Settings page, click **Client Letter Templates**.



3. Click **New Template**.



4. TaxWise Online displays the New Client Letter Template. From this screen:
   - Type a name for the template and a description.
   - Choose to create from scratch or use a pre-defined template.
   - Click **Create Template**.

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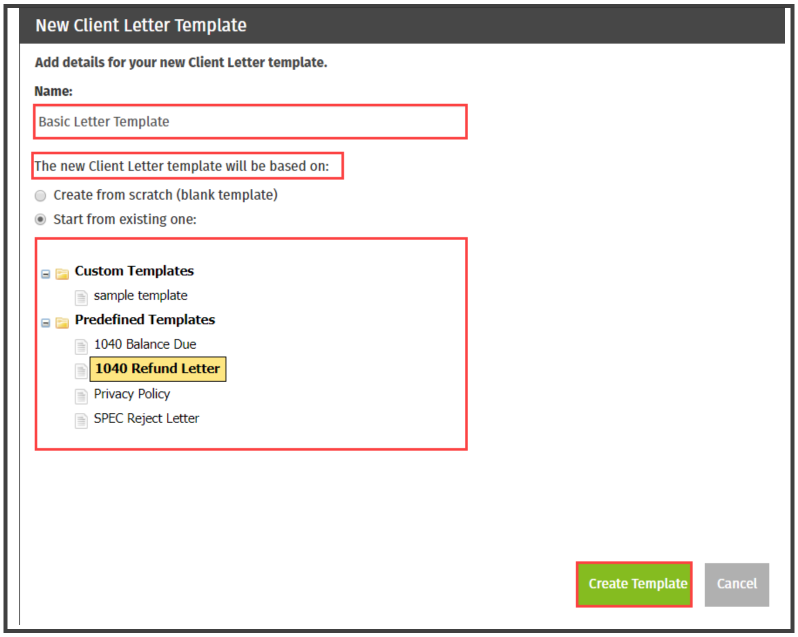
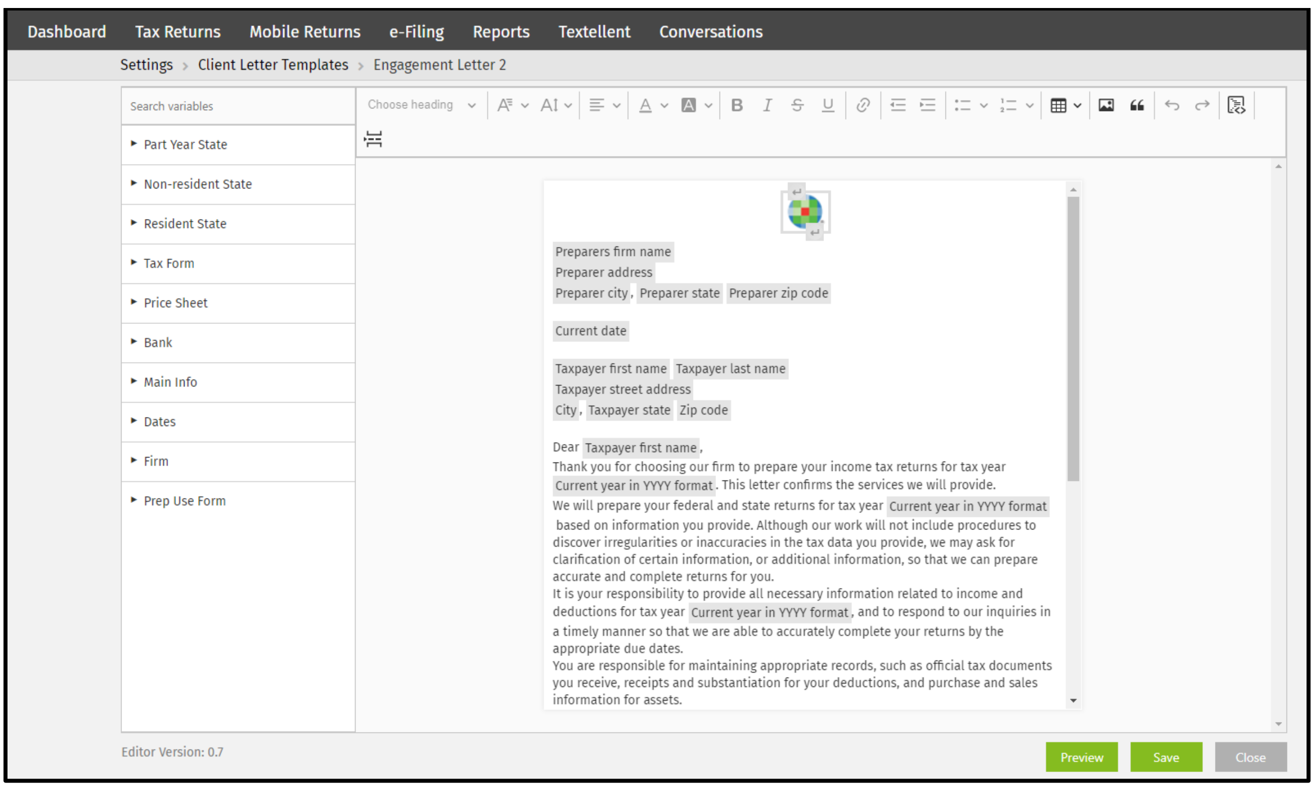
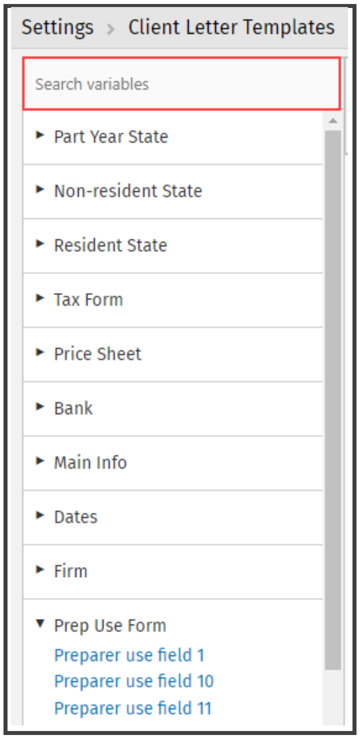


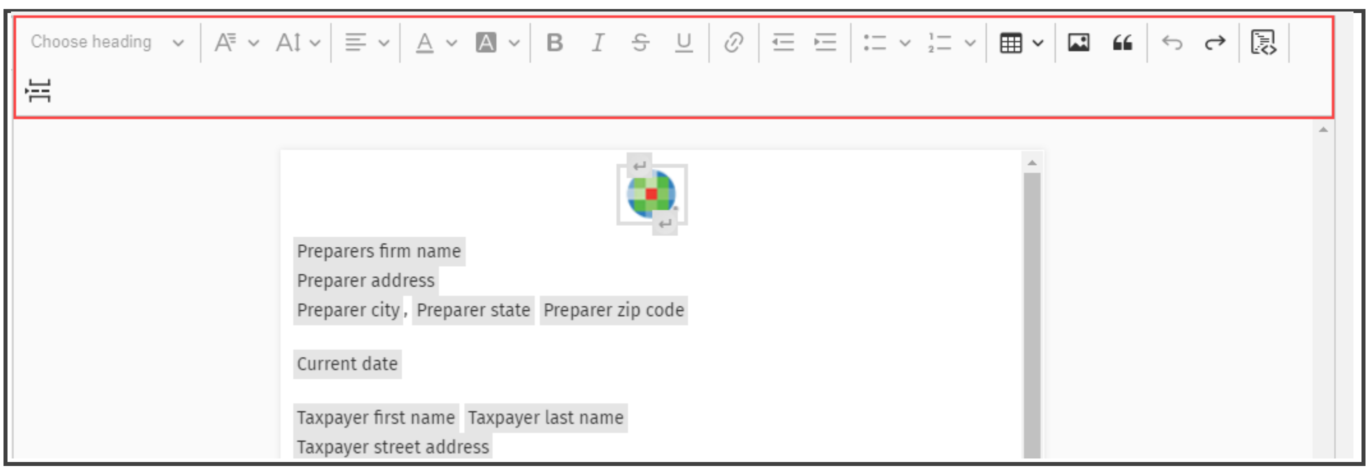
5. TaxWise Online displays the Edit Client Letter Template dialog page.



6. On the left, you will see a list of variable categories. You can use the **Search Variables** field to search for a variable or expand the category sections to see the list of variables available in each section.



7. From here, you can type text, use the formatting bar, or add variables to customize the letter.



8. Once the changes have been made, you can:
    - Click **Preview** to review changes made.
    - Click **Save** to save changes made.
9. Click **Save**.

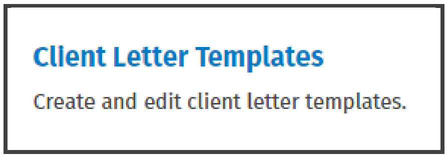
When you choose to add a client letter inside a return, any custom templates display in the list, along with the pre-defined templates.

You can also choose to load letters as part of your Return Templates.

Sharing Client Letter Templates with Sub-Offices

To share Client Letter Template, you must log in as the Admin user or a user with the Administrator Role.

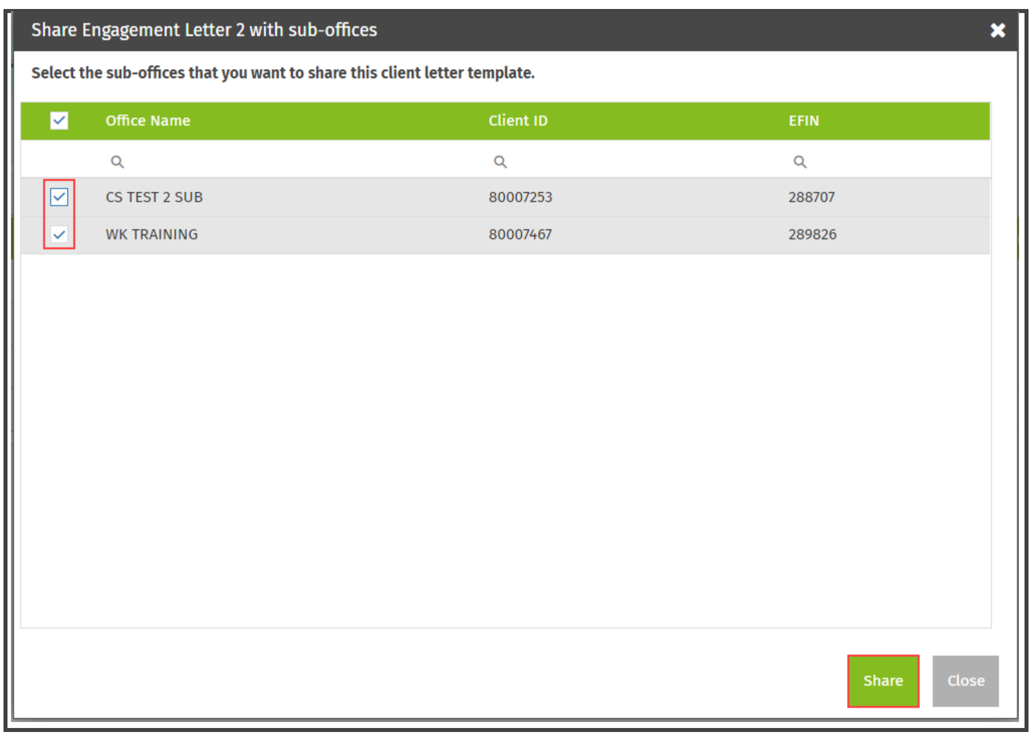
1. From the user drop down menu, select **Settings**.
2. From the Settings page, click **Client Letter Templates**.



3. From the Client Letter Templates page, locate the custom client letter template you want to share, and click the **Share** link.

	Name	Description	Created Date	Last Edit Date	Edited By	Configure Sub-Offices	Shared With Offices
	Engagement Letter 2	Client Engagement Letter 2	11/10/2022 4:02:07 PM	11/10/2022 4:37:54 PM	Admin	Share | Un-Share	1
	Engagement Letter Center	Engagement letter with center aligned logo	10/12/2022 12:29:41 PM	10/12/2022 12:29:49 PM	Admin		
	Federal Letter	Federal letter	10/24/2022 12:54:16 PM	10/25/2022 6:48:31 PM	Admin		
	Privacy Policy Center	Privacy policy letter with center aligned logo	9/16/2022 6:05:08 PM	10/12/2022 11:05:21 AM	Admin		

4. Select the sub-office(s) that you want to share the template with and click the **Share** button.



	Office Name	Client ID	EFIN
☑	CS TEST 2 SUB	80007253	288707
☑	WK TRAINING	80007467	289826

5. TaxWise displays a confirmation message stating that the templates were successfully shared with sub-offices. Click **Close**.

6. TaxWise Online returns to the Client Letter Templates list.

Note that you can un-share the client letter templates at any time.