

# TaxWise® Online Learning Portal

## Managing Textellent Settings

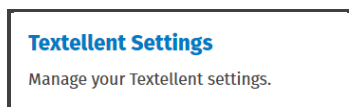
Textellent offers automated text messaging solution for business looking to attract and return clients. This solution offers:

- Two-way text communication with clients as well as voice calls
- Personalized text message marketing campaigns
- Automated reminders
- Self-service appointment scheduling
- Referral programs
- Refund status updates

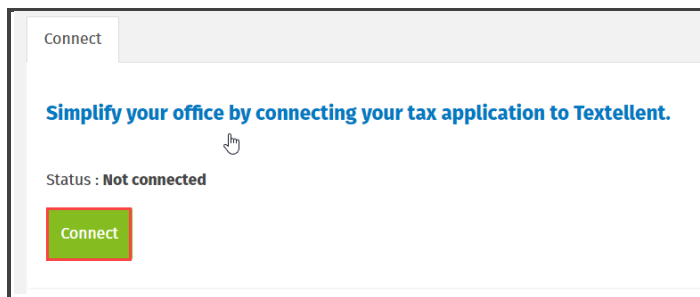
If you are interested in what Textellent has to offer, go to <https://engagetax.wolterskluwer.com/textellent>

To integrate your Textellent subscription with TaxWise Online:

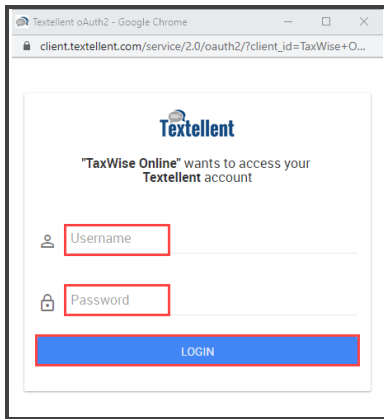
1. From the Settings page, click **Textellent Settings**.



2. On the Textellent Settings page, click **Connect**.

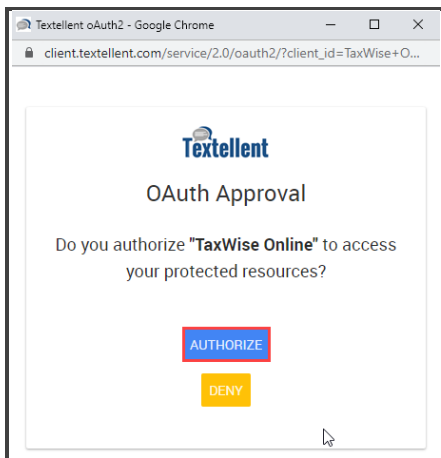


3. Enter your Textellent login credentials and click **Login**.



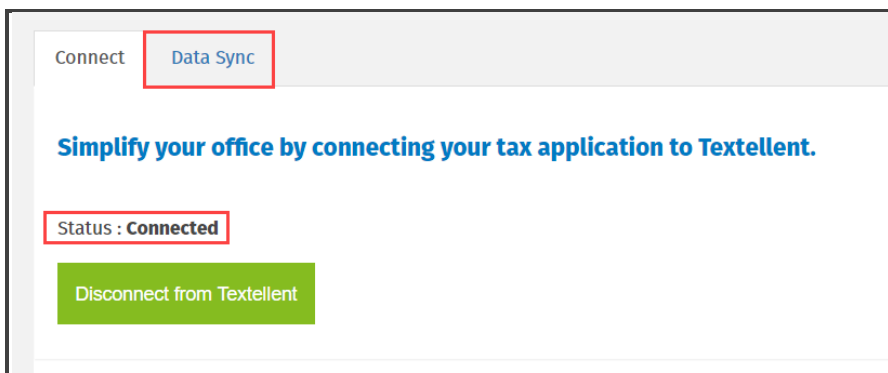
A screenshot of a web browser window showing the Textellent login page. The page has the Textellent logo at the top. Below it, a message says "TaxWise Online wants to access your Textellent account". There are two input fields: "Username" and "Password", both with red borders. Below the password field is a blue "LOGIN" button.

4. Textellent will ask you to confirm, you want to allow TaxWise Online access, click **Authorize**.



A screenshot of a web browser window showing the Textellent OAuth Approval screen. The page has the Textellent logo at the top. Below it, the text "OAuth Approval" is displayed. A message asks "Do you authorize 'TaxWise Online' to access your protected resources?". There are two buttons: a blue "AUTHORIZE" button and a yellow "DENY" button. A mouse cursor is pointing at the bottom right of the page.

5. TaxWise Online displays the status as Connected. Once TaxWise Online is connected to Textellent you will see the Data Sync tab at the top, click **Data Sync**.



A screenshot of a web browser window showing the Textellent Data Sync screen. The page has a header with two tabs: "Connect" and "Data Sync", with "Data Sync" highlighted. Below the header, a message says "Simplify your office by connecting your tax application to Textellent." Below this, a status box shows "Status : Connected". At the bottom, there is a green button labeled "Disconnect from Textellent".

6. The automatic data sync allows TaxWise online to send data to Textellent for the texting campaigns. To enable, click **Enable Automatic Data Sync**.

### Enable Data Sync

Enabling automatic sync allows TaxWise Online to send data to Textellent for the texting campaigns.

Status: **Not Running**

Enable Automatic Data Sync

7. TaxWise Online displays confirmation message stating that Automatic Data Sync was successfully enabled, click **OK**.

### Success

Automatic Data Sync enabled successfully.

OK

8. TaxWise Online displays the status as Running.

### Enable Data Sync

Enabling automatic sync allows TaxWise Online to send data to Textellent for the texting campaigns.

Status: **Running**

Disable Automatic Data Sync

9. This also displays the Upload Prior Year data section. To enable automatic texting campaigns for prior year clients, you must upload your prior year's data. To do so, click **Upload Prior Year Data**.

### Upload Prior Year Data

To enable automatic texting campaigns for prior year clients, you must upload your prior year's data.

Status: **Not Synced**

Upload Prior Year Data

10. TaxWise Online proceeds to upload the prior year data. When the process is complete, TaxWise Online displays the confirmation message stating that the upload was successful, click **OK**.

### Success

Prior year data uploaded successfully.

OK

11. TaxWise Online updates the Status to reflect the date and time stamp of the last time this information was synchronized.

#### Upload Prior Year Data

To enable automatic texting campaigns for prior year clients, you must upload your prior year's data.

Status: Last Sync Time: 5/7/2020 8:56:40 PM

Upload Prior Year Data