

ATX™ Learning Portal

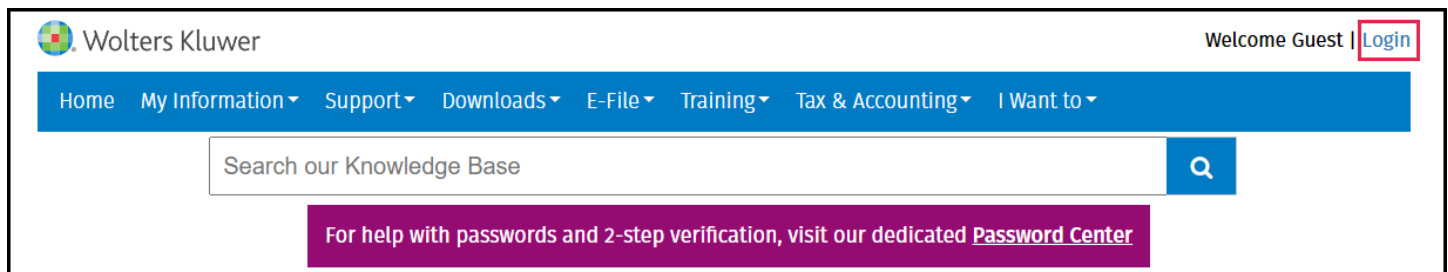
Installing ATX

You can install ATX multiple ways, depending on how your office is set up.

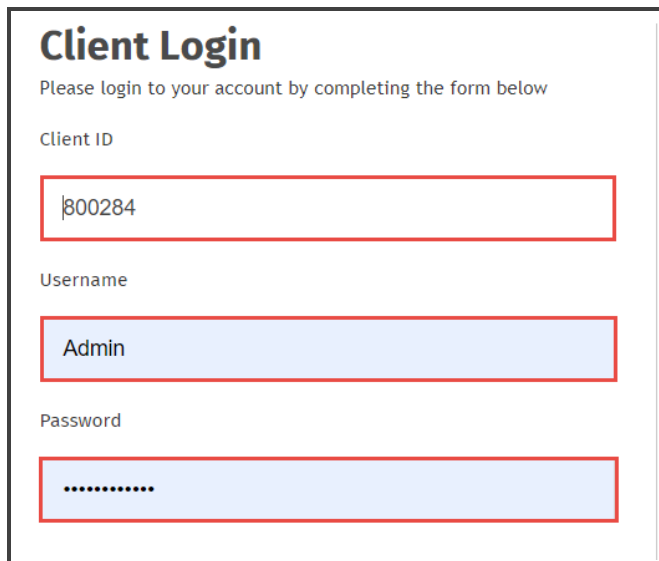
- Use **Stand-alone** installation if you are a single computer office or do not need to share information with another computer.
- If your computer stores all the tax data, but you do not prepare returns on that machine, use the **Server Only** installation.
- Use **Workstation Only** if you prepare returns on the machine but store the data on a server.
- If you use the computer to create returns as well as store the data, install as a **Server and Workstation**.

To install ATX:

1. Navigate to support.atxinc.com.
2. From the ATX Solution Center landing page, click **Login** located at the top right.



3. Type your **Client ID**, the username *Admin*, and your software registration code as the password.



Client Login

Please login to your account by completing the form below

Client ID

800284

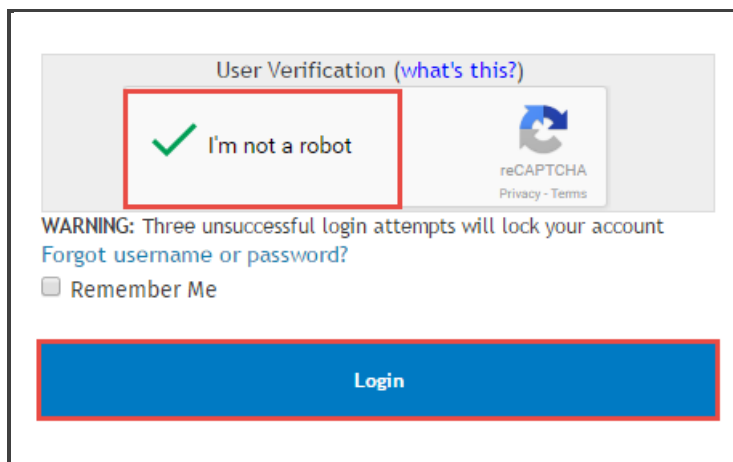
Username

Admin

Password

.....

4. Select the reCAPTCHA check box for user verification and click **Login**.



User Verification ([what's this?](#))

☒ I'm not a robot

reCAPTCHA
[Privacy - Terms](#)

WARNING: Three unsuccessful login attempts will lock your account

[Forgot username or password?](#)

☐ Remember Me

Login

-  If this is the first time you are logging in, you will be prompted to create your own password. The requirements for this password are listed to the right of the login screen.

The Solution Center also uses two-step verification to ensure security. After you log in with your credentials, you will be prompted to have a code sent to your email address.

5. Click **Send the code**.

Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

How do you want to confirm your identity?
☒ E-mail to

meg*****@cc****.***

Send the code

This code will expire in 10 Minute(s)

6. Type the code, then click **Submit**.

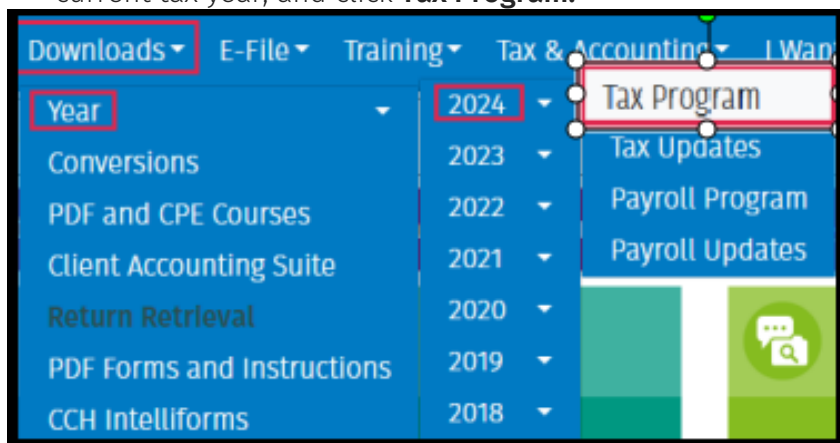
Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

Enter the code

458864

Submit

7. The ATX Solution Center displays the home page. From the **Download** menu, point to **Year**, then the current tax year, and click **Tax Program**.



The ATX Solution Center displays the **ATX Software Download** page. Click the link to download the current year software.

ATX 2024 Tax Program Download

Below are the ATX tax preparation products that are currently available to you for download.

If you purchased additional user licenses click [here](#) for your activation codes.

IMPORTANT DOWNLOAD INFORMATION:

- **This page is for the ATX download only:** If your package includes other products, or if you have purchased other products separately, those products must be downloaded from their corresponding pages from the **Download Center** above
- **New install vs. update:** If you **have not yet** installed ATX 2024 this year, download the version below, which includes all updates to-date. If you **have already** installed ATX 2024 this year, and only need the program updates, go to the [ATX 2024 Updates Page](#) **OR** click the 'Program' update icon within the ATX application.

ATX Tax Products

Year	SKU	Product	Activation/Installation Code	Download
2024	ATX-ADVANTAGE	ATX Advantage Package		Download
2024	ATX-OH CITIES	ATX Ohio Cities		Download

 Only your tax product displays on this page. To download additional software, such as Payroll Compliance Reporting, view the designated page on the **Download** menu inside the ATX Support Site.

Downloads

Year

Conversions

PDF and CPE Courses

Client Accounting Suite

Return Retrieval

PDF Forms and Instructions

CCH Intelliforms

2024

2023

2022

2021

2020

2019

2018

Tax Program

Tax Updates

Payroll Program

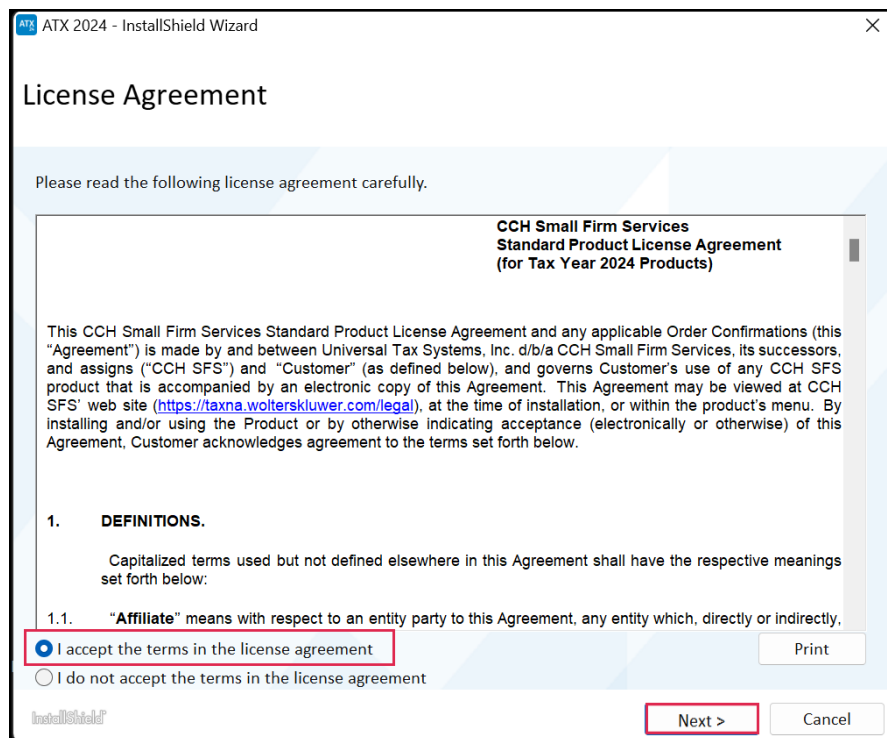
Payroll Updates

8. Run the download from the ATX Support Site.

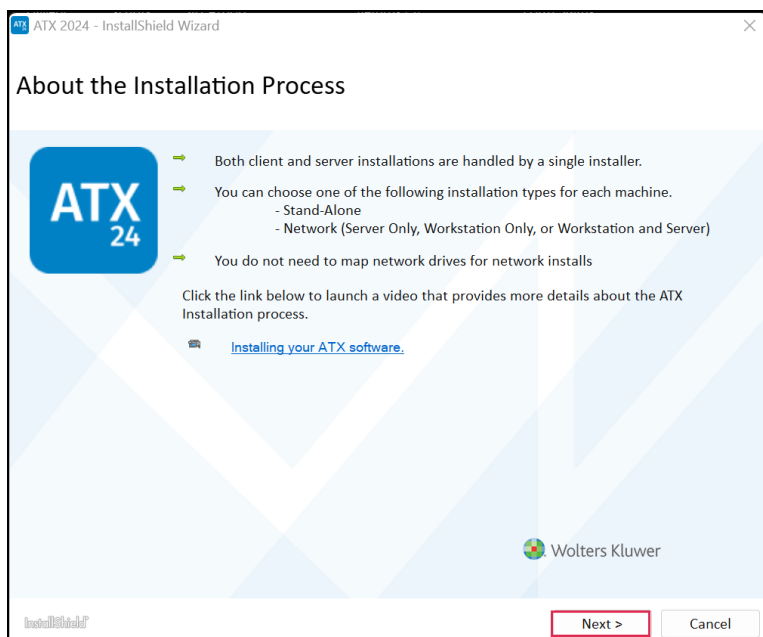
9. ATX displays InstallShield Wizard. Click **Next** to begin installation.



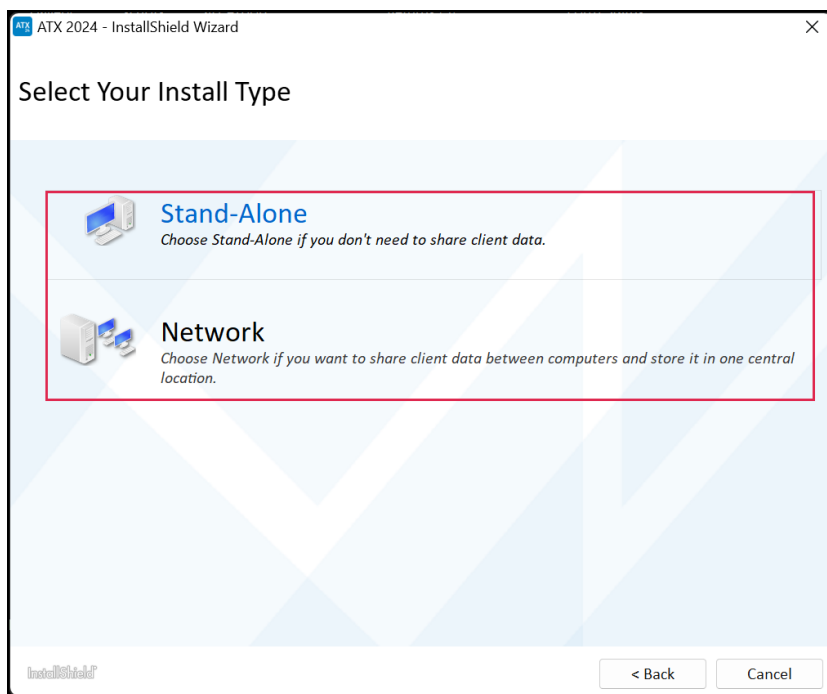
10. InstallShield Wizard displays the **License Agreement**. If you agree to the terms of the license agreement, select **I accept**, and click **Next**.



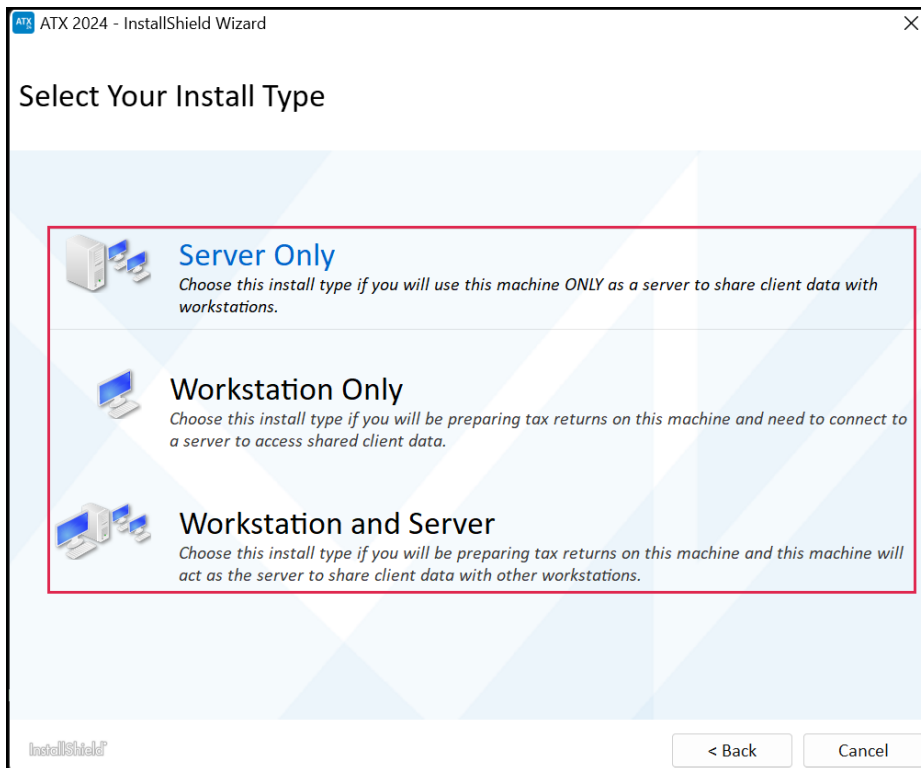
11. The next screen provides information about installation, as well as a video explaining the process. Click **Next** to continue installing.



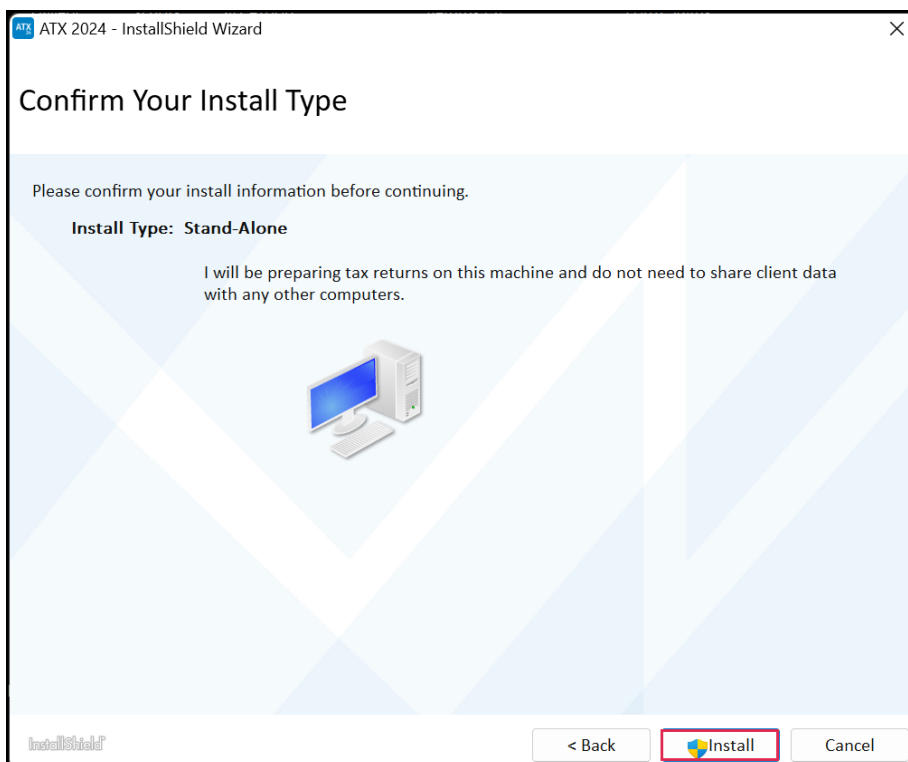
12. The InstallShield Wizard displays the **Select Your Install Type** page. Choose between a Stand-alone or Network installation.



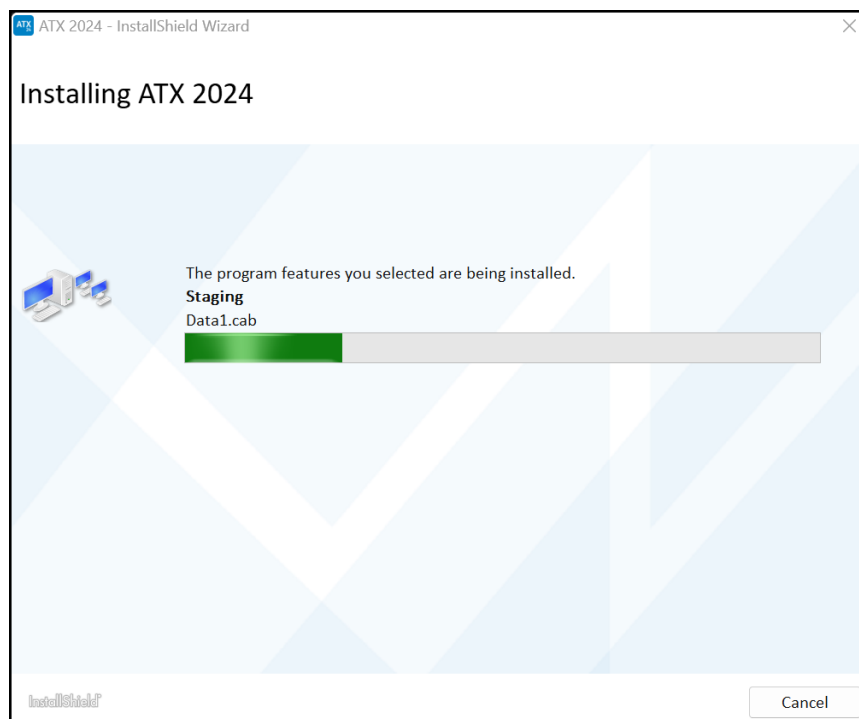
-  If you choose **Network**, you must choose the type of network install.



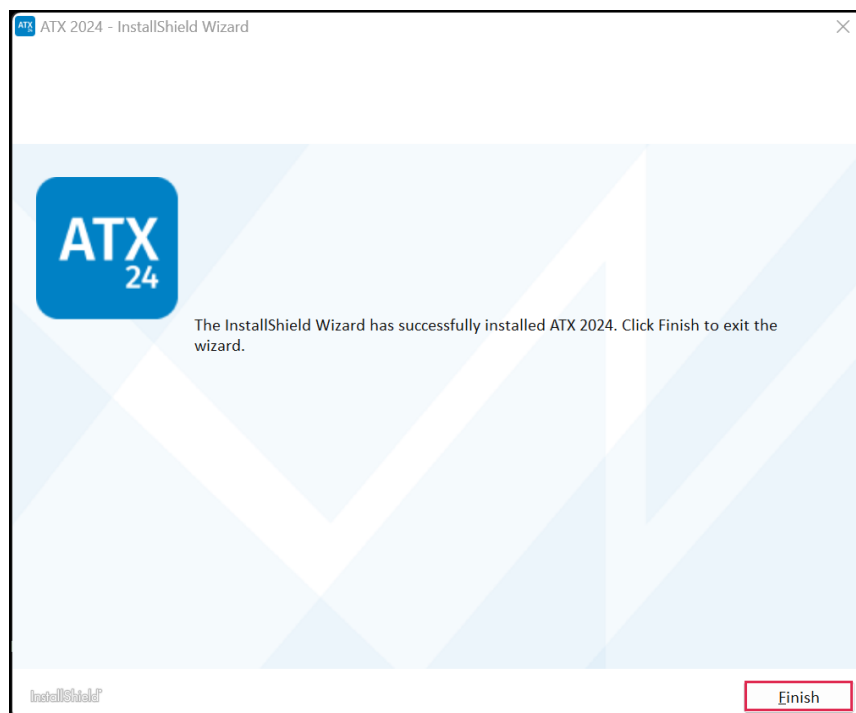
13. Once you choose an install type, the InstallShield Wizard displays the **Confirm Your Install Type** page. In this example, we use Stand-alone. Verify the install type based on the information provided in this screen. Click **Install**.



14. Regardless of the installation option, the InstallShield Wizard displays the installation progress screen:



15. When ATX finishes the installation, click **Finish**.



i For all installation types, except Server Only, ATX displays an icon on your desktop. The Server Only installation type does not create a desktop icon because a server computer should not access ATX. If you need to prepare tax returns on the server computer, install using the Workstation and Server installation option.

16. Double click the ATX 2024 icon.



17. ATX displays the Activation Codes dialog box. Type the code listed on the Download page in the Solution Center and click **Activate**.

The 'Activation Codes' dialog box has a title bar with the text 'Activation Codes' and a close button. The main area contains the instruction 'To activate a new product, enter your activation code and click Activate.' Below this is a label 'Enter your activation code:' followed by four input fields separated by hyphens. Underneath is a section labeled 'Products:' with a list box containing 'ATX Advantage'. At the bottom, there is a 'Help' link with a question mark icon, and two buttons labeled 'Activate' and 'Cancel'.

18. ATX verifies your code with your Client ID and registers your program.

Login Requirements

Every user must create both a username and a password to log into ATX. There are no passwords associated with the admin username when you first install.

1. To establish the admin user password, enter and rekey your chosen admin password, and click **Login**.

ATX Welcome To ATX

ATXTM
Tax Year 2024

Wolters Kluwer

Login passwords do not rollover from prior year versions and are different than passwords used on the support site.

User Name
Admin

Enter a new password:
[Input Field]

Re-enter new password:
[Input Field]

Check IRS e-Services account weekly for number of returns filed with EFIN.
See [Publication 5294](#) for more information.

[Help](#) ☐ Remember User Name Login Cancel

Passwords must meet the following requirements:

- 8-20 characters
- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character/punctuation

After five failed attempts to log in, ATX automatically locks the user's account.

 The admin user has the ability to reset other user accounts, but if the admin user is locked out, the software activation code must be re-entered to unlock the program. Again, this can be found on the Download page of the Solution Center.