

Setting Up Print Set Defaults

The admin user can create default print sets to determine which forms to print with each return.

1. From the General Settings dialog box, click **Print Sets**.
2. Next, select the check boxes for the predefined sets for forms you want to include in your print sets. There are four predefined print sets to choose from.

General Settings

Set your general settings options.

Settings

- User Settings
 - Tax Preparer
 - ERO
- Administrator Settings
 - Custom Fields
 - Return Stages
 - Print Sets**
 - Advanced
 - Carry Forward Templates
 - Salutations

Print Sets

Select the collections of forms to be printed each time you print.

<input type="checkbox"/>	Federal Copy to be Mailed
<input type="checkbox"/>	File Copy
<input type="checkbox"/>	Signature Pages
<input type="checkbox"/>	Taxpayer Federal Copy

Create Custom Print Set

Create Custom State Print Set

Save and Close Close

You **cannot** edit the predefined print sets. There are no predefined state print sets, those you will have to do as a custom set.

3. If you prefer to customize the print settings, click **Create Custom Print Set**.

Print Sets

Select the collections of forms to be printed each time you print.

- Federal Copy to be Mailed**
- File Copy**
- Signature Pages**
- Taxpayer Federal Copy**

Create Custom Print Set

Create Custom State Print Set

4. TaxWise displays the Custom Print Sets screen. Enter the name you wish to use for this print set.
5. From the **Select One Template** drop-down menu, select the template you want to base this new template on.

Print Sets

Custom Print Sets

Name: **ERO Defined**

-- Select One Template --

- Select One Template --
- Federal Copy to be Mailed
- File Copy
- Signature Pages
- Taxpayer Federal Copy

Selected Forms

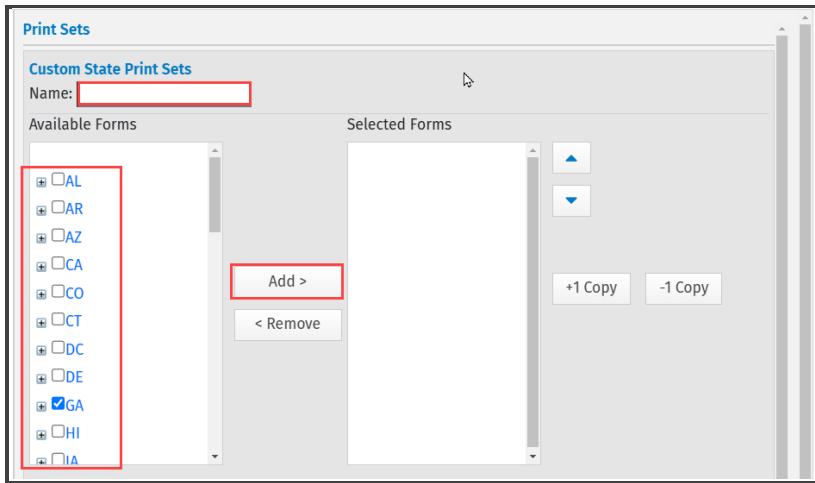
Add >

- i Keep in mind that if you use the exact name as another print set, they will overwrite each other.
6. Next, you can adjust the number of copies of forms, add or remove forms from your selected forms, and rearrange the order in which the forms print.

Create Custom State Print Set

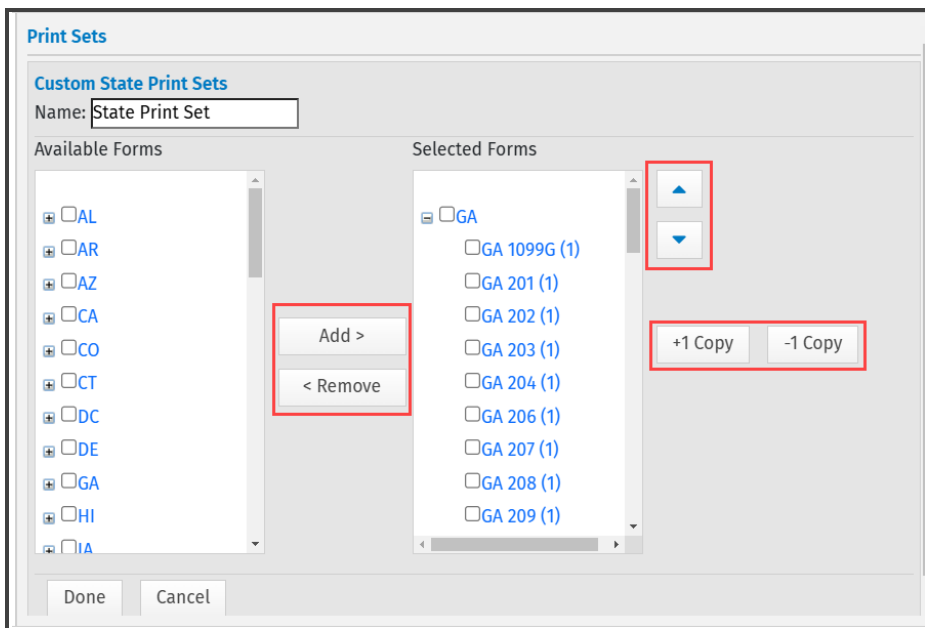
To customize state print sets, use the **Create custom state print set** button.

1. TaxWise displays the Custom State Print Sets screen. Enter the name you wish to use for this print set.
2. From the Available Forms column, select the state or states to be included in this state print set. Once Selected, click **Add**.



i Keep in mind that if you use the exact name as another print set, they will overwrite each other.

3. Next, you can adjust the number of copies of forms, add or remove state forms from your selected forms, and rearrange the order in which the forms print.



4. When changes are complete, click **Done**.

5. TaxWise Online Returns to the Print Sets page, where we now see the custom state Print set.

Print Sets

Select the collections of forms to be printed each time you print.

<input type="checkbox"/>	Federal Copy to be Mailed		
<input type="checkbox"/>	File Copy		
<input type="checkbox"/>	Signature Pages		
<input type="checkbox"/>	Taxpayer Federal Copy		
<input type="checkbox"/>	State Print Set	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
	Custom State Print Set		