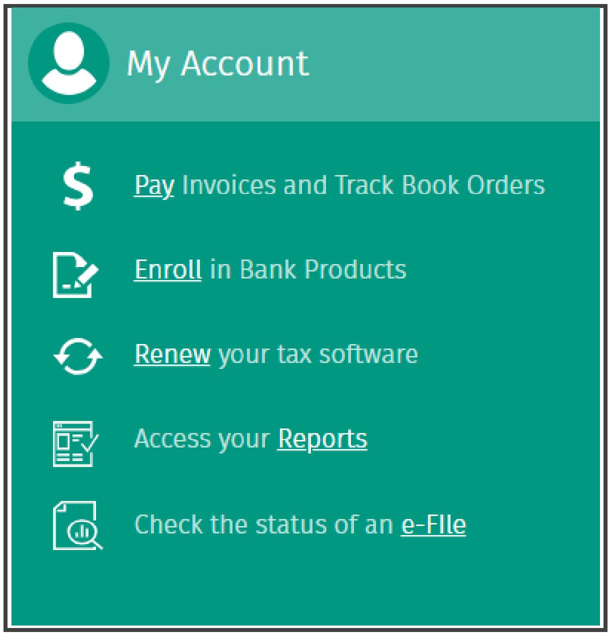
My Account

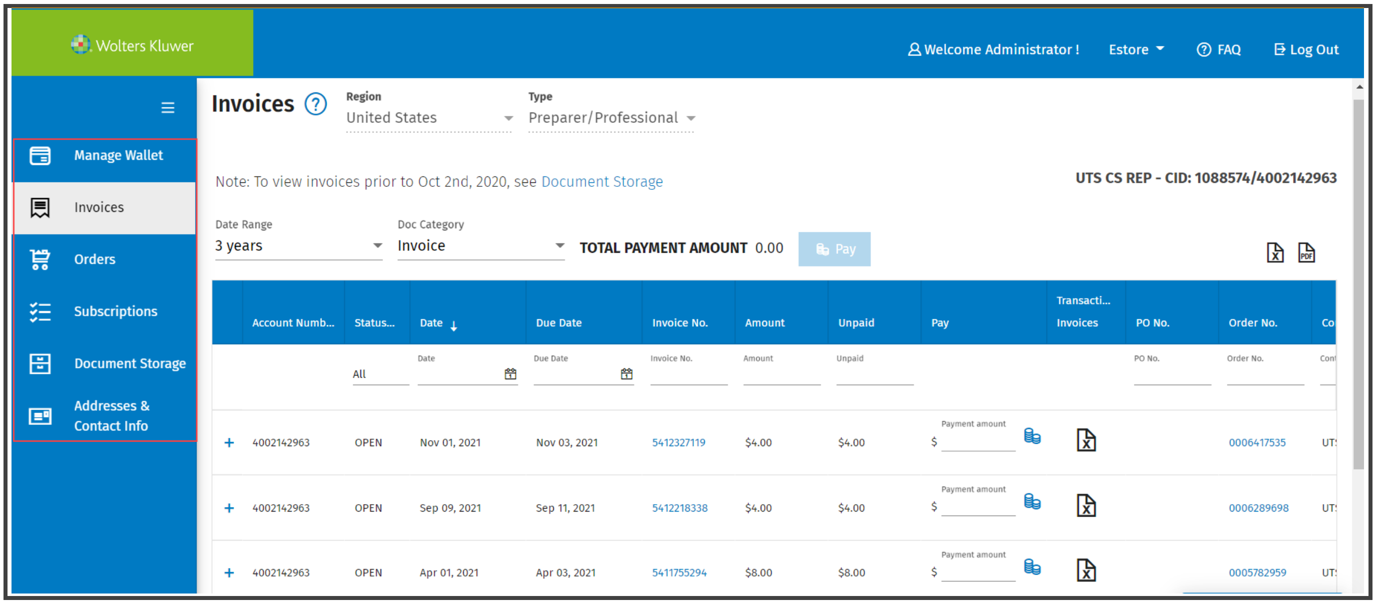
Use the My Account section to view and pay invoices, apply to offer bank products, renew your software, Access reports, and check the status of an e-File.



All the items in this section require you to log into the Solution Center. For more information on logging in, please review the *Using the Solution Center* lesson.

Pay Invoices and Track Book Orders

1. Click **Pay Invoices and Track Book Orders** to view invoices for a specified date range and make any payments.
2. Use the navigation tabs on the left to access additional information about your account, including:
   - **Manage Wallet**: allows you to add or edit the credit card or bank account information for your account
   - **Orders**: allows you to review any orders placed within a specified date range
   - **Subscriptions**: allows you to review any subscription-based products purchased in a specified date range
   - **Document Storage**: allows you to search for invoices stored from the previous invoicing system
   - **Addresses and Contact Info**: allows you to review and update your contact information for billing and shipping purposes



Enroll in Bank Products

1. Click **Enroll in Bank Products** to launch the application you must complete to offer refund settlement solutions through one of our banking partners.

This process is described in more detail in the *Refund Settlement Solutions* lesson.

Renew your Tax Software

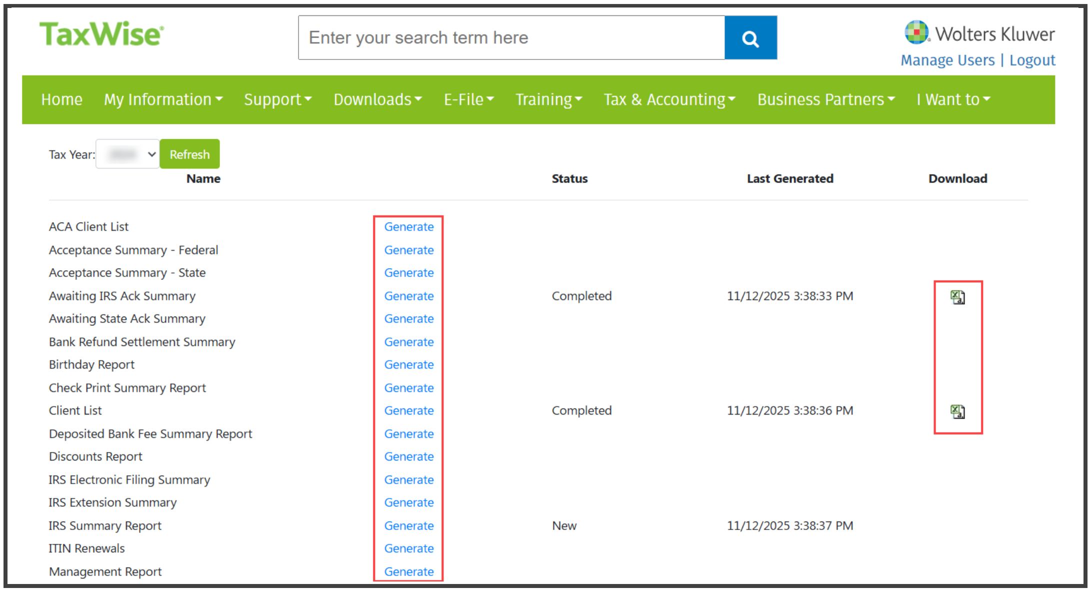
1. Click **Renew your tax software** to submit an order for your program for the upcoming tax year.

Access Reports

You can access reports on various information for your office(s) from the Solution Center. This tool requires you to log in.

You can access reports from the quick link in the My Account section, or access reports from the My Information menu.

1. From the My Account section, click **Access your Reports.** If you are not logged in, you will be prompted to do so at this time.
2. The Solution Center displays the list of available reports. Click **Generate** next to the report you want to run.



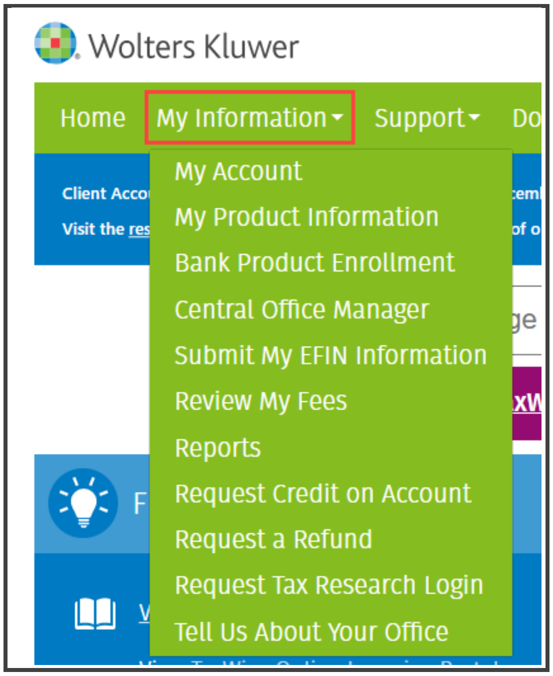
3. Within a few minutes, the page refreshes to display the updated status and provide a link to download the report.
4. Click the **Download** icon to open the report in Microsoft Excel, where you can filter and sort the information if needed.

Check e-File Status

The Return Query allows you to search for the current status of an e-filed return. This can be accessed from the My Account Information section or the Quick Links tab.

My Information

In addition to the tools available in the My Account block, you can also access tools for managing your account from the My Information menu. These options include reviewing your products and fees, uploading your EFIN, and accessing reports.


Wolters Kluwer
Home
My Information
Support
My Account
My Product Information
Bank Product Enrollment
Central Office Manager
Submit My EFIN Information
Review My Fees
Reports
Request Credit on Account
Request a Refund
Request Tax Research Login
Tell Us About Your Office