

TaxWise® Desktop Learning Portal

Tax & Accounting

Creating and Editing Client Letters

Client Letters allow you to communicate with your clients about their tax returns. TaxWise enables you to print custom letters for your clients with important information regarding their returns. The client letters include information about:

- Refund or balance due
- Where to mail the tax return
- Related state return information

TaxWise provides a standard client letter template for each tax package except for the Miscellaneous. Client letters are available in both English and Spanish. If the standard letter template does not meet your client needs, you can save the template with a different file name and customize it to suit your tax practice.

i If you wish to add a client letter to all returns, you can set this up in Tax Form Defaults.

The screenshot shows a form titled "US Main Information Sheet". At the top, it says "This return can be filed on Form 1040". Below that, there are checkboxes for "Check form you are using": 1040 (checked), 1040PR, 1040NR, and 1040NREZ. There are also checkboxes for "Check one": "Spanish forms on the screen and printed." and "Spanish forms printed only.". The form has several input fields: "Sal.", "Your first name", "Initial", "Last name", "Suffix", and "Your SSN" (with the value 000-00-0000). Below these, there are fields for "Spouse's SSN" and "Mailing address".

To add the client letter:

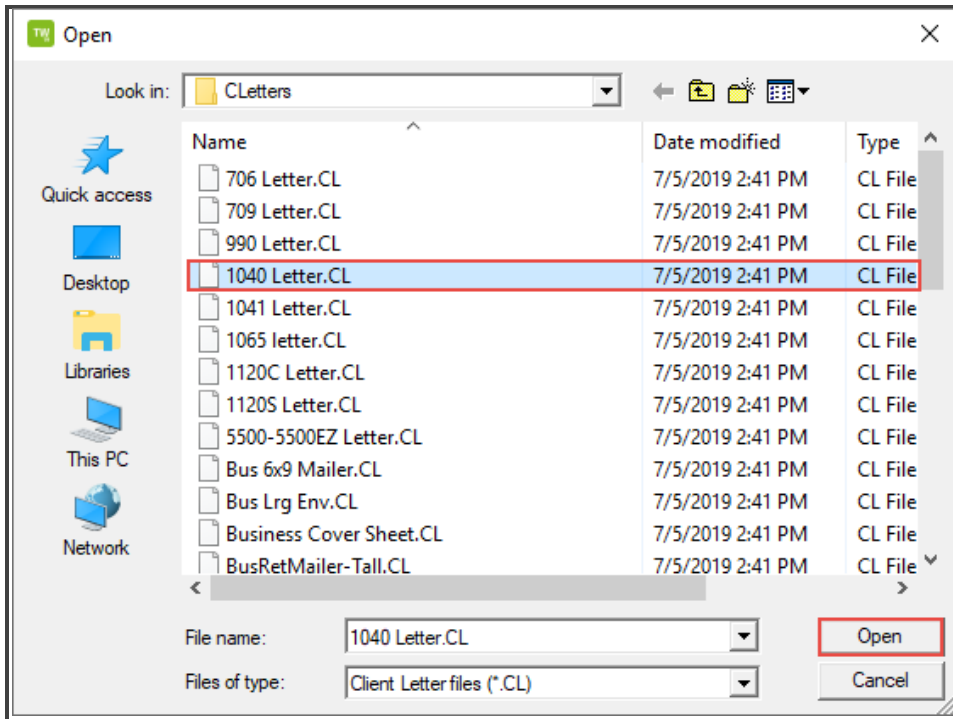
1. Click the **Add Form/Display Form List** tab.

The screenshot shows the same "US Main Information Sheet" form, but the "Add Form/Display Form List (Ctrl+F10)" tab at the top is highlighted with a red box.

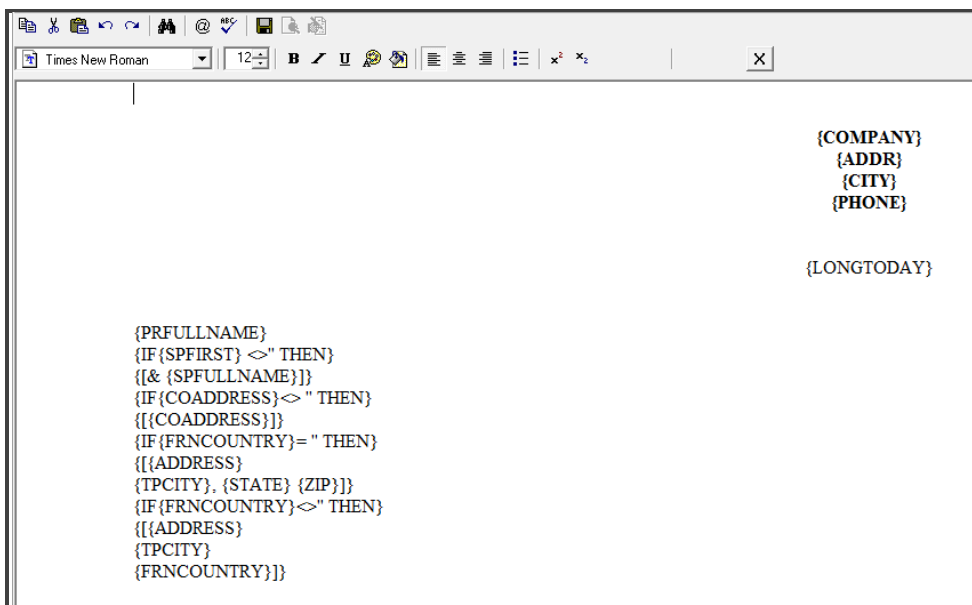
2. TaxWise displays the Find a Form page. In the Look for box, type **Letter**.

The screenshot shows a "Find a form" dialog box. The "Look for:" field contains the text "Letter". Below the field, there are four radio buttons: "Show All Forms" (selected), "Use Private Forms: None", "Can't find it? Try Form Filter List", and "Edit Private Forms". An "Open" button is located to the right of the "Look for:" field.

- TaxWise displays a blank client letter in the background and the Open dialog box. Select the letter you want to use. Click **Open**.



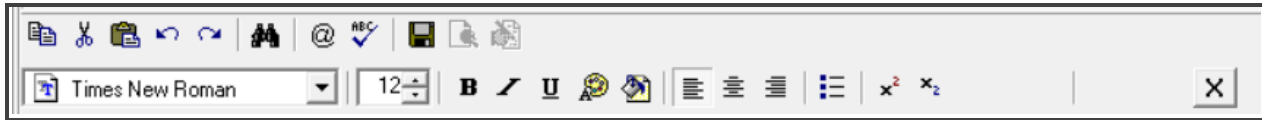
- TaxWise displays the selected letter:



i You cannot preview or print client letter templates in Tax Form Defaults.

You can add additional text by typing directly into the template. Use the formatting bar along the top of the letter to make changes such as:

- Font size and color
- Adding bulleted or numbered lists
- Adding images
- Adding additional variables



i If you make changes to a template, you will need to save the template with a new name. TaxWise retains all default letters in addition to your edited versions.