

TaxWise® Online Learning Portal

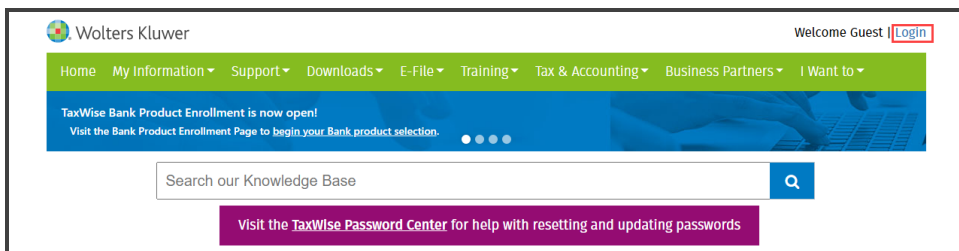
Tax & Accounting

Downloading and Installing TaxWise

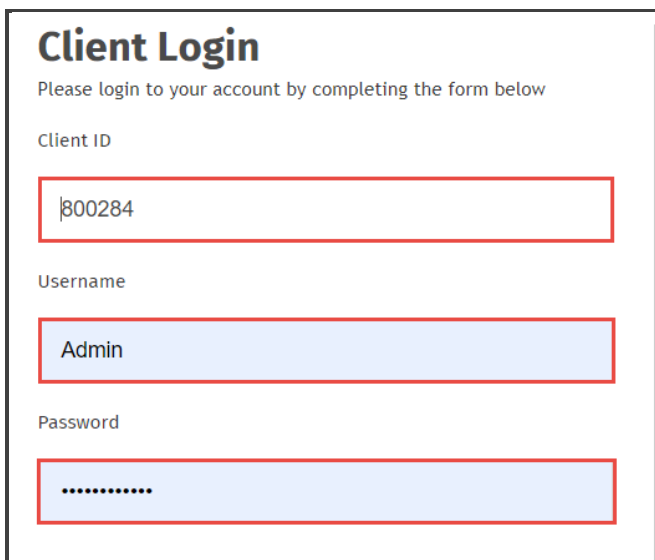
Downloading TaxWise

You can install TaxWise on either a standalone machine, or to a network. First, we'll discuss how to install to a single machine. Begin by downloading TaxWise. To do this:

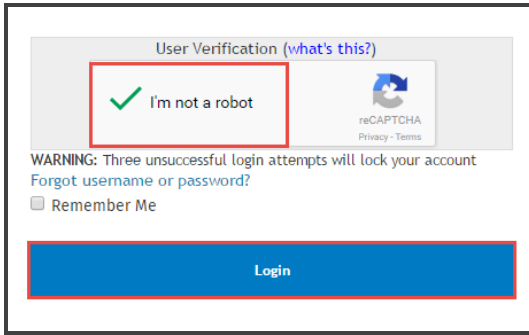
1. Navigate to support.taxwise.com.
2. From the TaxWise Solution Center landing page, click **Login** located at the top right.



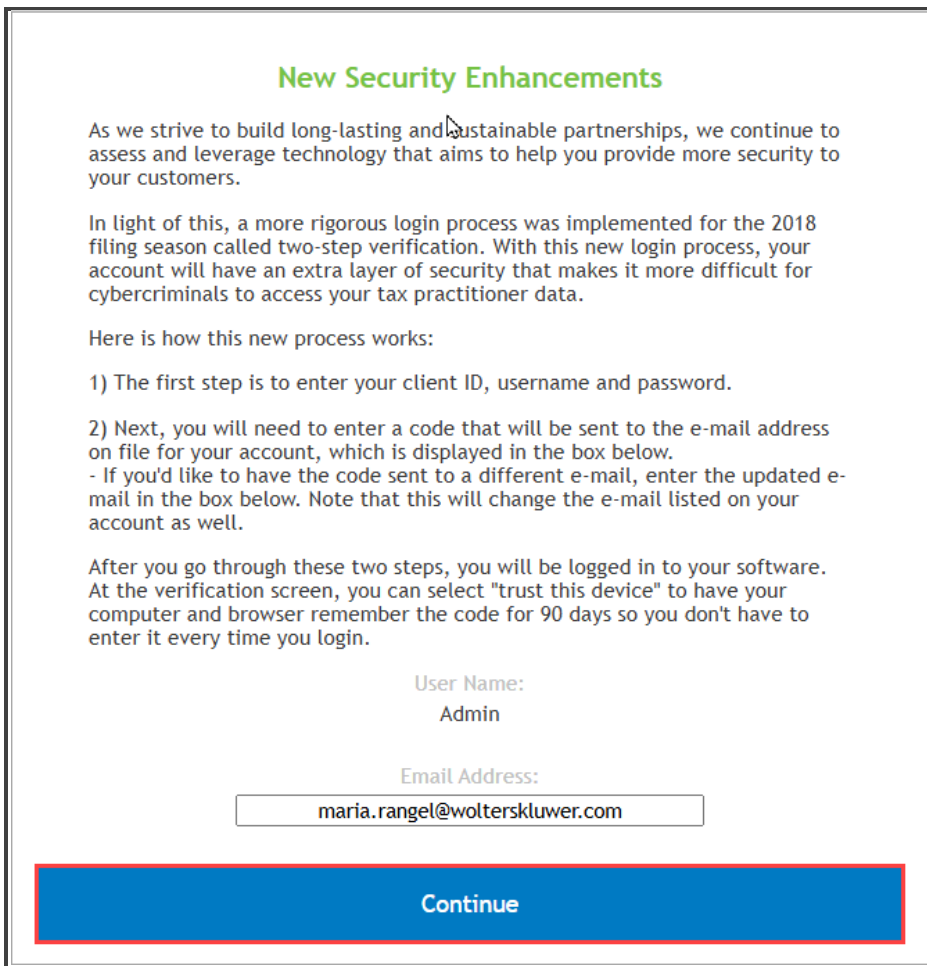
3. Type your **Client ID**, the username *Admin*, and your software registration code as the password.

A screenshot of the 'Client Login' form. The form has a title 'Client Login' and a subtitle 'Please login to your account by completing the form below'. There are three input fields: 'Client ID' with the value '800284', 'Username' with the value 'Admin', and 'Password' with a masked password represented by dots. Each input field is highlighted with a red border.

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



5. If this is the first time you log in, you will see displayed the New Security Enhancements dialog box. This describes the updated security requirements for the current year. Review your email address and click **Continue**.



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6. 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. Enter and rekey the new password and click **Change Password**.

What are the password rules?
New Password

.....

Show Password

Confirm New Password

.....

Show Password

Change Password

Cancel

7. 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. 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?

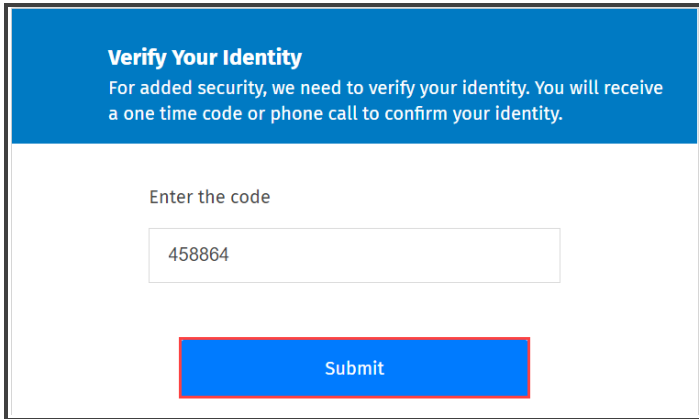
E-mail to

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

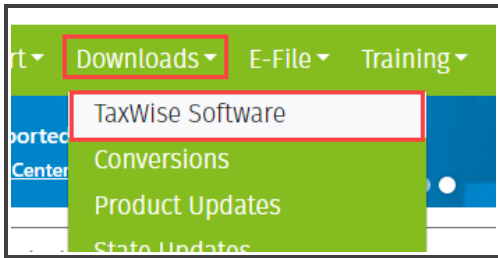
Send the code

This code will expire in 10 Minute(s)

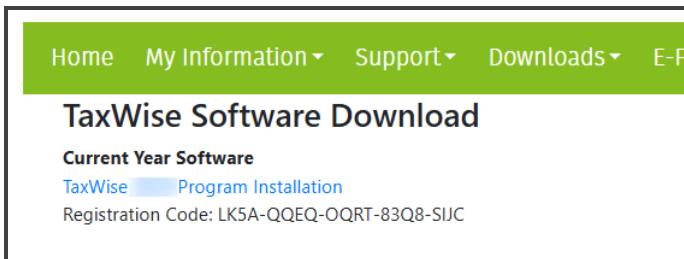
8. Type the code, then click **Submit**.



9. The TaxWise Solution Center displays the home page. On the **Download** menu, click **TaxWise Software**.



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

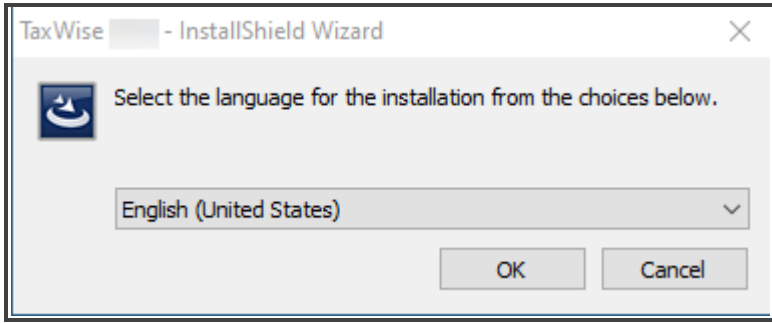


11. When the download is complete, double-click the **TWXX.Setup.exe** download file to initiate the installation.

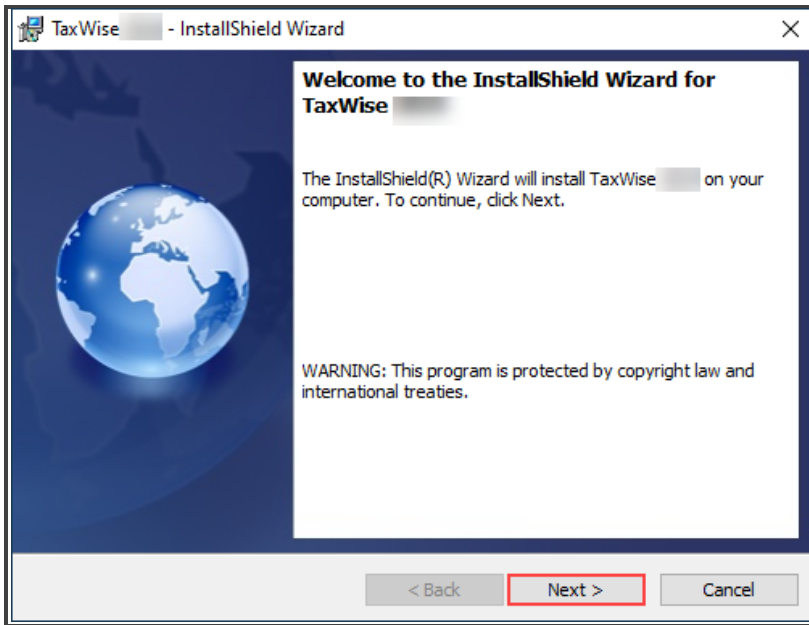
Installing TaxWise

To install TaxWise:

On the **TaxWise – InstallShield Wizard** dialog box, choose a language, and click **OK**.



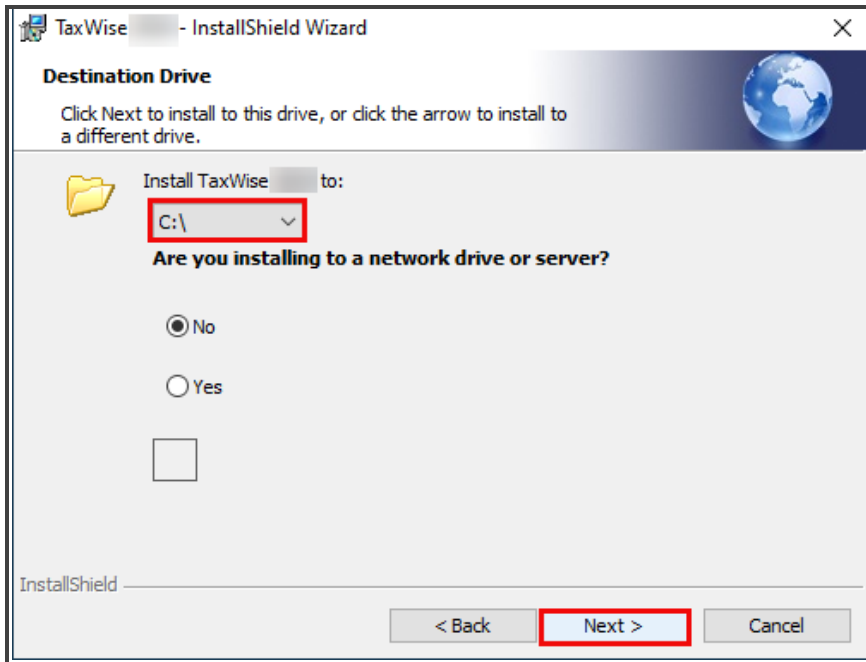
1. InstallShield Wizard displays the Welcome to the InstallShield Wizard for TaxWise window. Click **Next**.



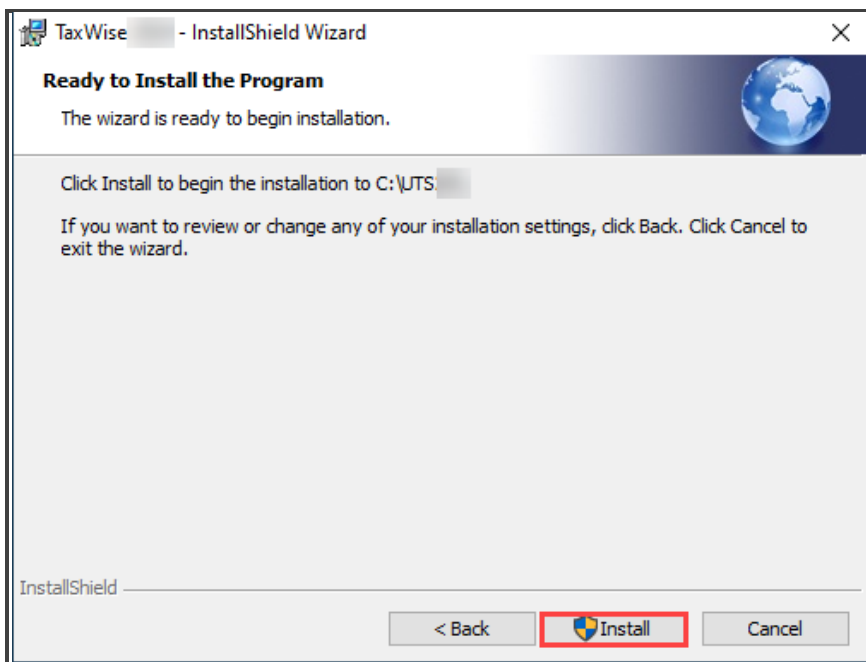
2. InstallShield Wizard displays the License Agreement window. Read the license agreement. If you accept the terms, select **I accept the terms in the license agreement**, and click **Next**.



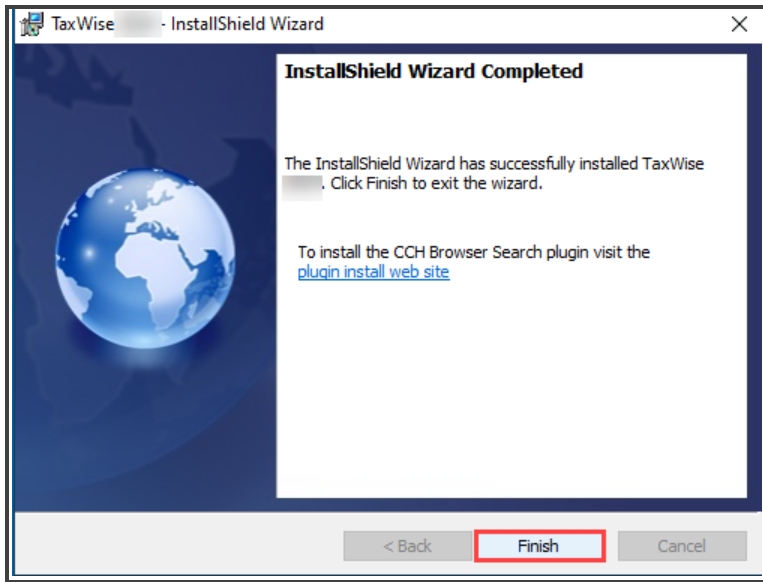
3. InstallShield Wizard displays the Destination Drive dialog box. Select the drive to which you want to install TaxWise and click **Next**.



4. InstallShield Wizard displays the Ready to Install the Program window. Click **Install**.



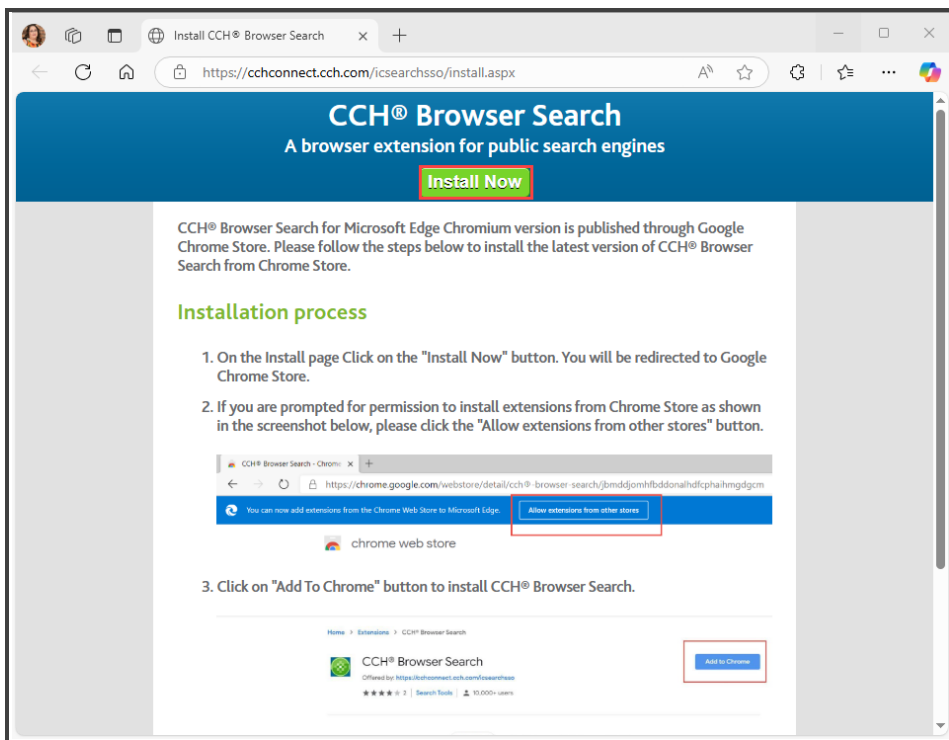
5. Once the program installation is complete, InstallShield Wizard displays the link to install the CCH® Browser Search. Click the link to visit the website or click **Finish** to exit the wizard.



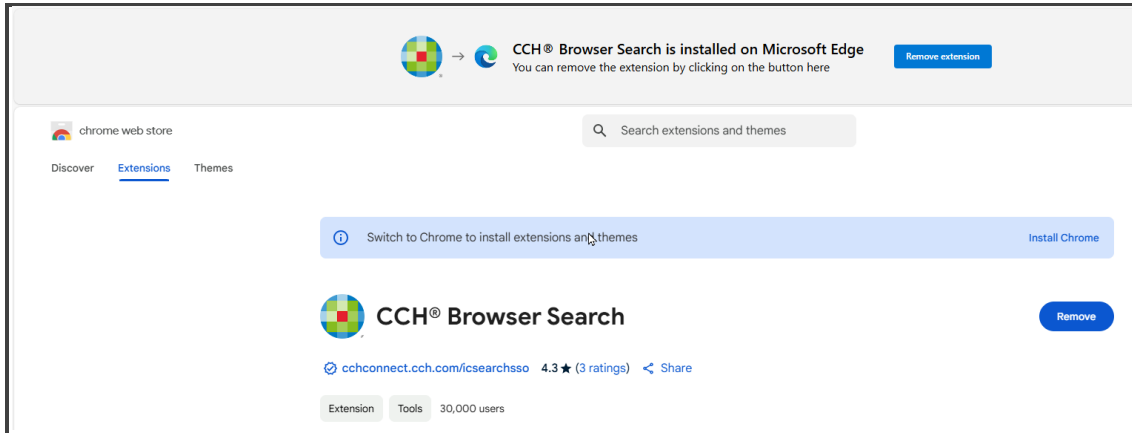
CCH Browser Search

If you click the link to install CCH Browser Search, your internet browser displays the next steps to download; shown below.

You will be directed to the [Install CCH® Browser Search](#) page. Click **Install Now**.



This will redirect you to the Chrome Web Store page. If you wish to remove the extension, click the **Remove** option. If not, you can close your browser and reopen to begin using the plugin.



Network Installation

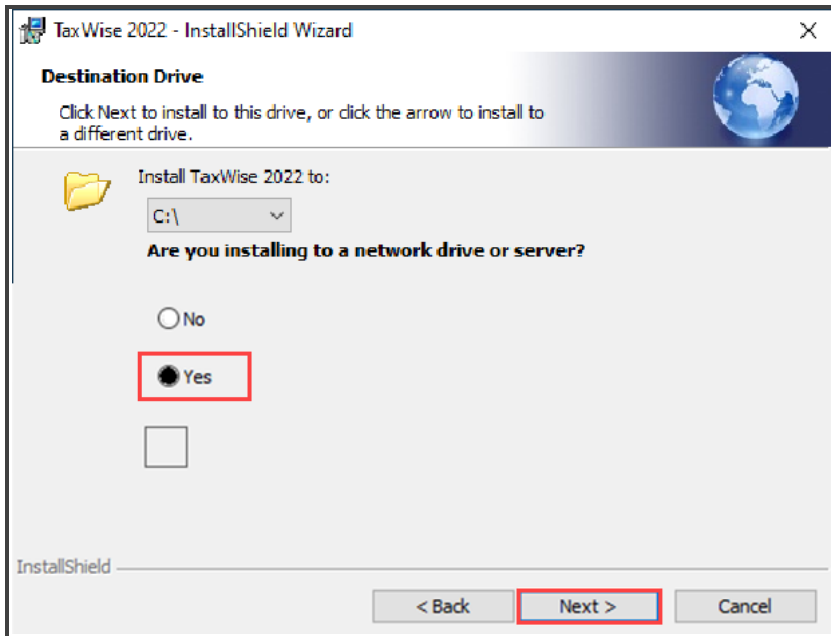
Next, we will review installing to a network. TaxWise operates on two network types: client server network and a peer-to-peer network. On a peer-to-peer network, set the most powerful machine to act as the server for TaxWise.

i For security reasons, we do not recommend operating TaxWise on the following:

- Wireless networks
- Domain-based networks
- Virtual private networks (VPN)
- Wide-area networks (WAN)
- Windows terminal servers
- Citrix systems

To install TaxWise on a network, use the same steps outlined earlier to download from the TaxWise Solution Center.

1. On the **Destination Drive** screen, choose your mapped network drive.
2. Select **Yes** for the question “Are you installing to a network drive or server?” and click **Next**.

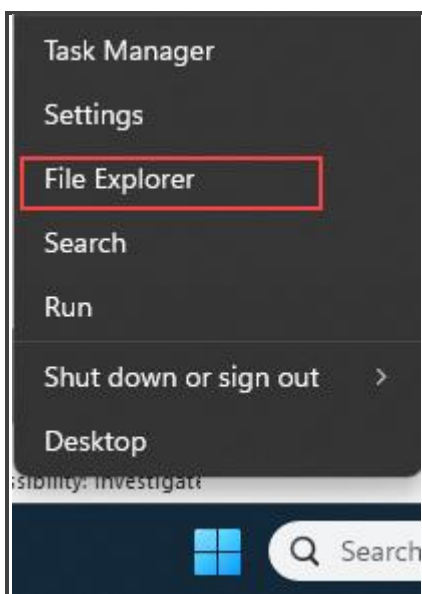


3. Finish the installation as described before and click **Finish**.

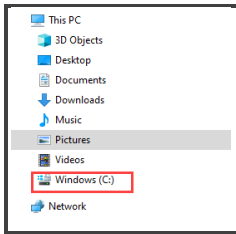
Workstation Network Installation

After you install TaxWise to the server, install it to your workstations. To do this from a workstation computer:

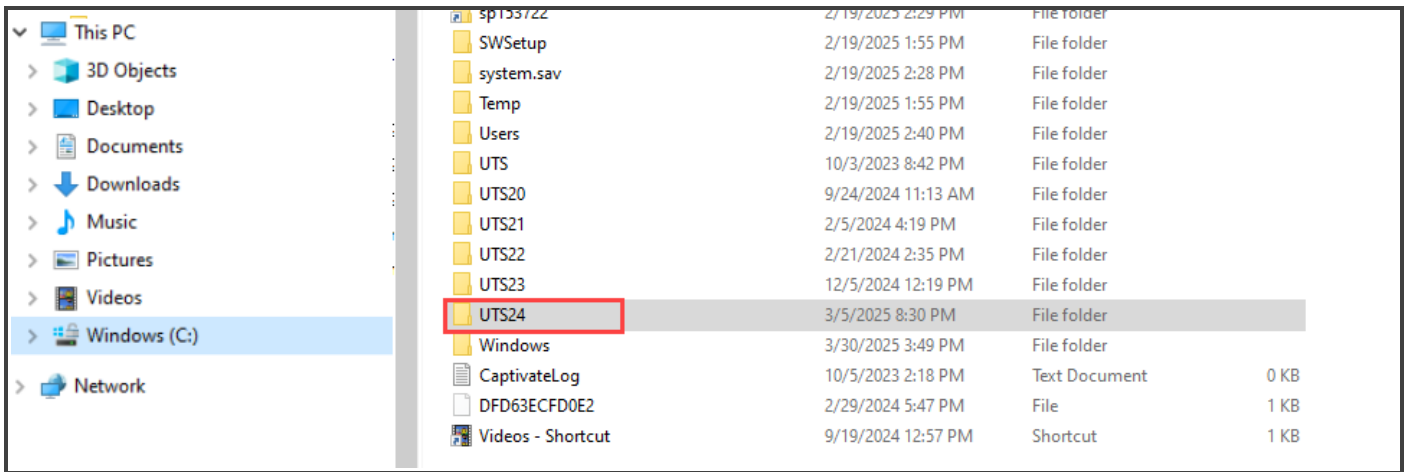
1. Right click the windows icon and select File Explorer.



- Windows displays the File Explorer dialog box. Select the Drive the program is installed on. In this case that is the C drive.

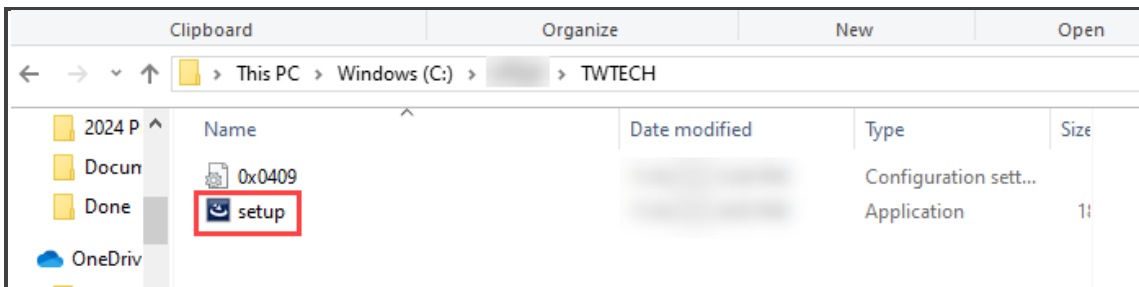


- Double-click the **UTSXX** folder.



- Double-click **TWTECH**.

- Windows displays the contents of the **TWTECH** folder. Double click **setup.exe**.



- Follow the InstallShield instructions to install TaxWise to the workstation, repeating these steps on each additional workstation.