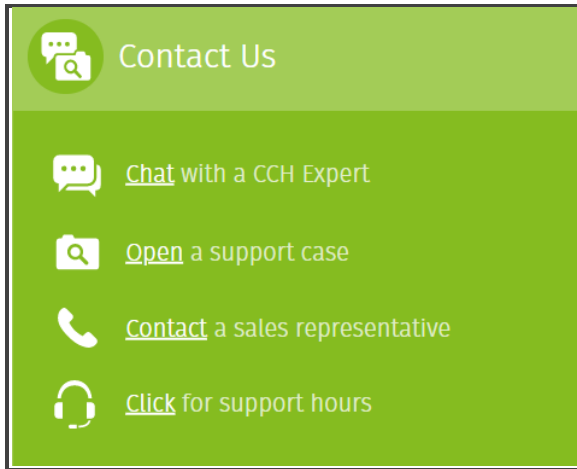


TaxWise® Desktop Learning Portal

Tax & Accounting

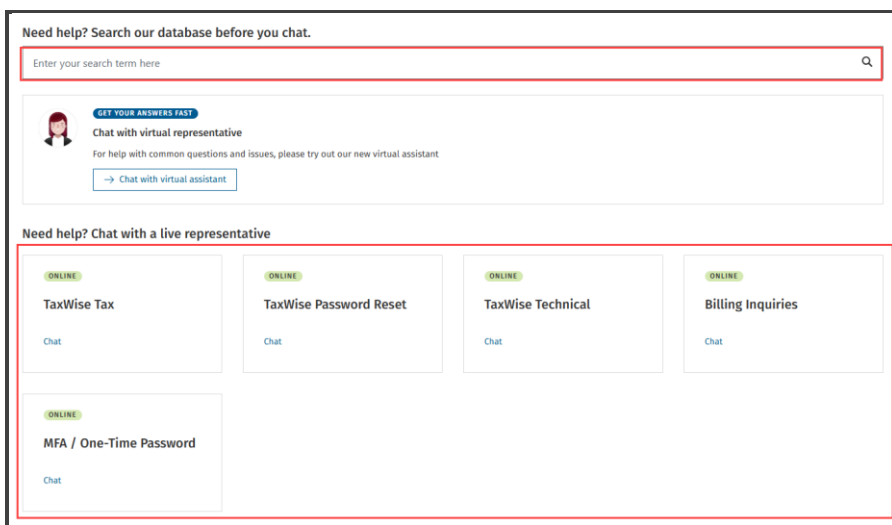
Contact Us

From the Contact Us box, you can chat with a representative, create a case for a Customer Support representative to resolve, contact a sales representative, or find the hours our Customer Support department is available.



Chat with a CCH Expert

1. Click **Chat with a CCH Expert** to view options to Search the Knowledge Base before you chat, chat with a virtual representative or click the **Chat with a live representative** button for the product you would like assistance with.



2. The TaxWise Solution Center displays a dialog box where you can enter your information and your question to begin the chat conversation.

Live chat with a representative ×

First Name *

Last Name *

Select Account Number *

Email *

Please enter issue summary * 0/255

Briefly describe your issue * 0/1000

By using our chat feature, you agree that our conversation may be recorded by Wolters Kluwer, and agree to our [Privacy Policy](#).

3. Click **Chat Now**.

Open a Support Case

4. Click **Open a Support Case** to begin submitting a question for a support representative to review and then contact you at a specified time to resolve. If you have not already logged in, you will be prompted to do so at this time.
5. From the available options, select which best describes your need. Options include Product or Technical Support, Billing & Accounts, Orders & Returns, and Interested in Product or Service.

Which of the following best describes your need?



Product or Technical Support



Billing & Accounts



Orders & Returns



Interested in a Product or Service

6. For the purpose of this lesson, I selected Product or Technical Support.
7. Displayed you will see the Open a case page. Here you are prompted to :
 - Select your product
 - Enter your account number
 - Select the type of help you need
 - Provide a brief Issue Summary
 - Provide additional detail description about the issue.
8. Once this information has been entered, click **Next**.

Home > Open a support case > Product or Technical Support

Open a case

Progress: Describe your issue (active) | Contact Details | Case Created

Which of the following best describes your need?


Product *

Account Number *

I Need *
 Help Using the Product
 Technical Support (ex.: installation, configuration, printing)

Brief Issue Summary *

Detailed Description *



9. TaxWise will display a list of links to knowledge base articles that may be helpful in resolving your issue. If none of the articles help answer your question, click **Yes, Create a case**.

Open a case

○ ————— ○

Describe your issue Suggested Solution Contact Details Case Created

1 Brief Issue Summary
Unable to add form

Here are the links that might be helpful:

- [Where do I enter 1098-T information in TaxWise®?](#)
- [How do I enter Form 1098-T information in my TaxWise® Software?](#)
- [Taxwise was unable to find a form that matches your criteria](#)
- [Why am I not able to locate Form 1099-C for a 1040 return in TaxWise®?](#)
- [When adding forms in Taxwise the shortcut is not populating the form](#)

Do you still want to create a new support case?

10. Next, provide your contact information, so that we can contact you in regard to your issue. Once the information is complete, click **Open a case**.

Open a case

Describe your issue **Contact Details** Case Created

Brief Issue Summary
Unable to add form

First Name
Administrator

Last Name *
Rangel

Company / Organization Name *
Mar Financial Services

Phone Number *
🇺🇸 (201) 555-0123

Email Address
maria.rangel@wolterskluwer.com.sfstest

ZIP/Postal Code *
30165

Alternate phone number

Alternate email

Best Time to Contact
After 2:30

Cancel ← Previous **Open a case**

11. Displayed you will see a confirmation message that your case successfully opened. You can see its status, edits, its details, or attach files.

Open a case

Describe your issue Contact Details **Case Created**

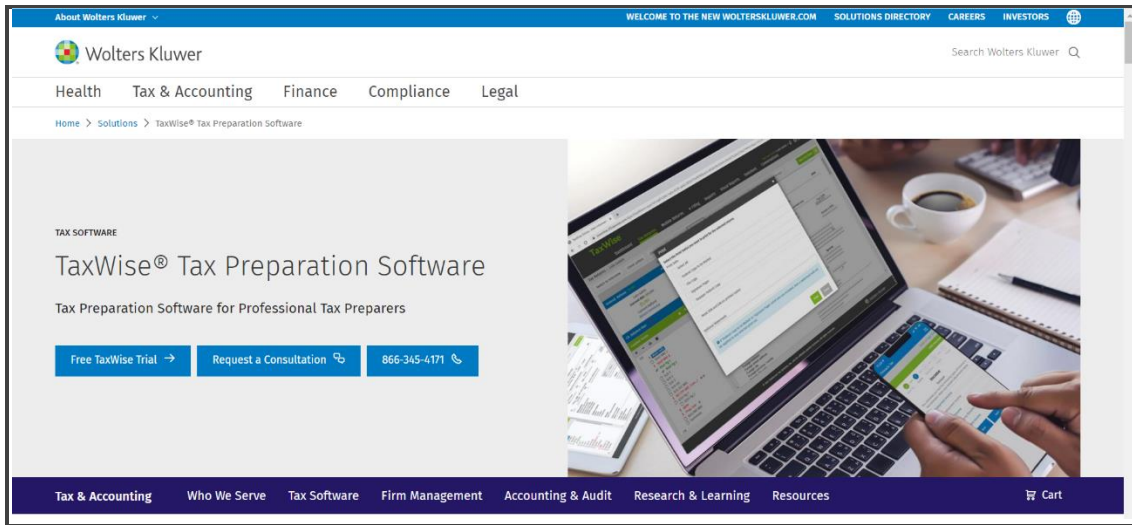
Brief Issue Summary
Unable to add form

Thank you for submitting
Your case **18687442** was successfully opened. You can now see its status, edit details or attach files.

Attach files **Go to all cases →**

Contact a Sales Representative

1. Click the **Contact a sales representative** link to view the phone number where you can reach our sales department, as well as request a demo of a specific software, or register to attend a demo of a program and ask any questions you may have before making your purchase.



Click for Support Hours

1. Click the **Click for Support Hours** link to view the phone number, as well as charts indicating when phone and chat support is available during different times of year.