

TaxWise® Desktop Learning Portal

Tax & Accounting

Textellent Settings

TaxWise now integrates directly with Textellent. Textellent offers an automated text messaging solution for businesses looking to attract and retain clients. This solution offers:

- Two-way text communication with clients as well as voice calls
- Personalized text message marketing campaigns
- Automated reminders
- Self-service appointment scheduling
- Referral programs
- Refund status updates

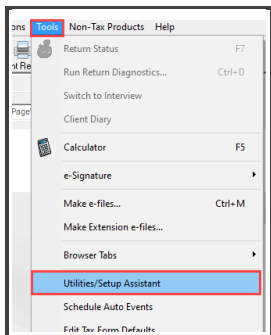
If you are interested in what Textellent has to offer, visit <https://engagetax.wolterskluwer.com/textellent>

Here, you can sign up to activate your 30-Day Free Trial and register at the same time for your activation training call. After completing your registration form, you will receive an email from Textellent with your login credentials.

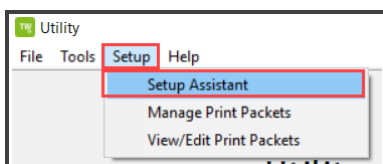
Integrate Textellent with TaxWise

To integrate your Textellent subscription with TaxWise:

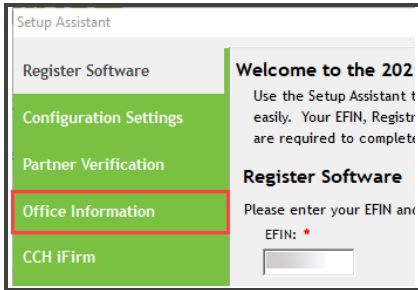
1. Login to TaxWise Desktop as the Admin user. From the On the Tools menu, click **Utilities/Setup Assistant**.



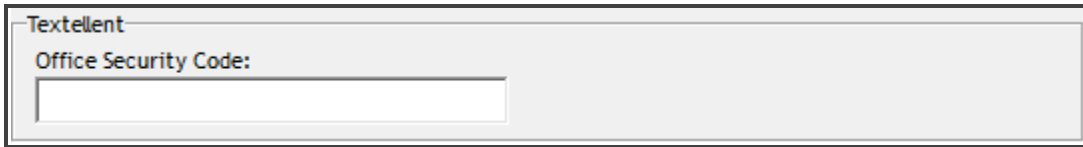
2. From the Utility dialog box, click on the **Setup** menu and then select **Setup Assistant**.



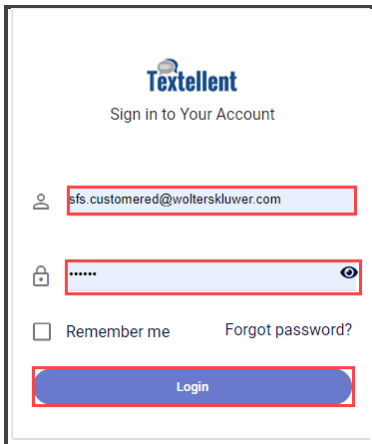
3. From the Setup Assistant dialog box, select the **Office Information** tab.



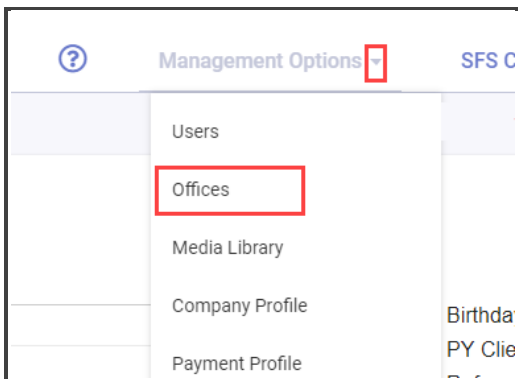
4. At the bottom of the Office Information Tab, you will see the Textellent section where you require and Office Security Code.




5. To obtain the Office Security Code, go to www.textellent.com
6. Sign in to Your Textellent account using your email address and password. Click **Login**.



7. From the Manage Options menu, select **Offices**.



8. Click the **Edit** icon for your office information.

Office Name	Manager	Manager Cell	Office Phone	ProText Number	Edit
Wolterskluwer	Shane Maddox	7706244508	7706244508	2076130153	

9. Located at the bottom of the window, you will see the Security Code. Highlight and copy the code.

← Edit Offices

Office Name *
Wolterskluwer

Address *
225 Chastain Meadows CT NW, Suite 200

City *
Kennesaw

State *
GA

Manager First Name *
Shane

Manager Last Name *
Maddox

Manager Cell *
7706244508

Assign Tag(s) to Incoming Messages
Select an option

ProText Number * : 2076130153

Security Code * : 9166\$5903065

* required fields

10. Return to the Setup Assistant and paste the security code in the appropriate field and click **Save and Close**.

Setup Assistant

Register Software
Configuration Settings
Partner Verification
Office Information
CCH iFirm
Groups & Users
Preparer Information
Printing & Network Setup
General Options
Carry Forward Taxpayer Data

Office Information

Contact Information

Contact Name: Maria Rangel
Contact's Phone Number: (770)857-1234

Company Name: Mar Financial Services
Fax Number: () - -

Company Address: 225 Chastain Meadows Court
Company EIN (if you have one): -

City, State, ZIP Code: Kennesaw GA 30144

Other Information

iTransact Merchant Services Client ID:
Company Service Bureau (if applicable):

[Learn more about iTransact...](#)

e-Signature Login (email)

Tax Help Login Credentials

User Name: Password:

[Learn more about Tax Help](#)

Textellent

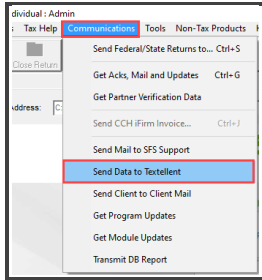
Office Security Code:

Save as Workstation Defaults

Send Data to Textellent

Once you have completed the steps to setup Textellent, you can send your client tax return data to Textellent. To do so:

1. From the **Communications** menu, click **Send Data to Textellent**.



i Note that only the Admin user can communicate with Textellent.

2. TaxWise connects to Textellent.
3. When the communication is complete, TaxWise displays a Status dialog box confirming the data was successfully sent to Textellent. Click **OK**.

