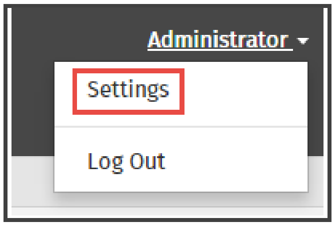
TaxWise® Online 2020

Setting up TaxWise Online

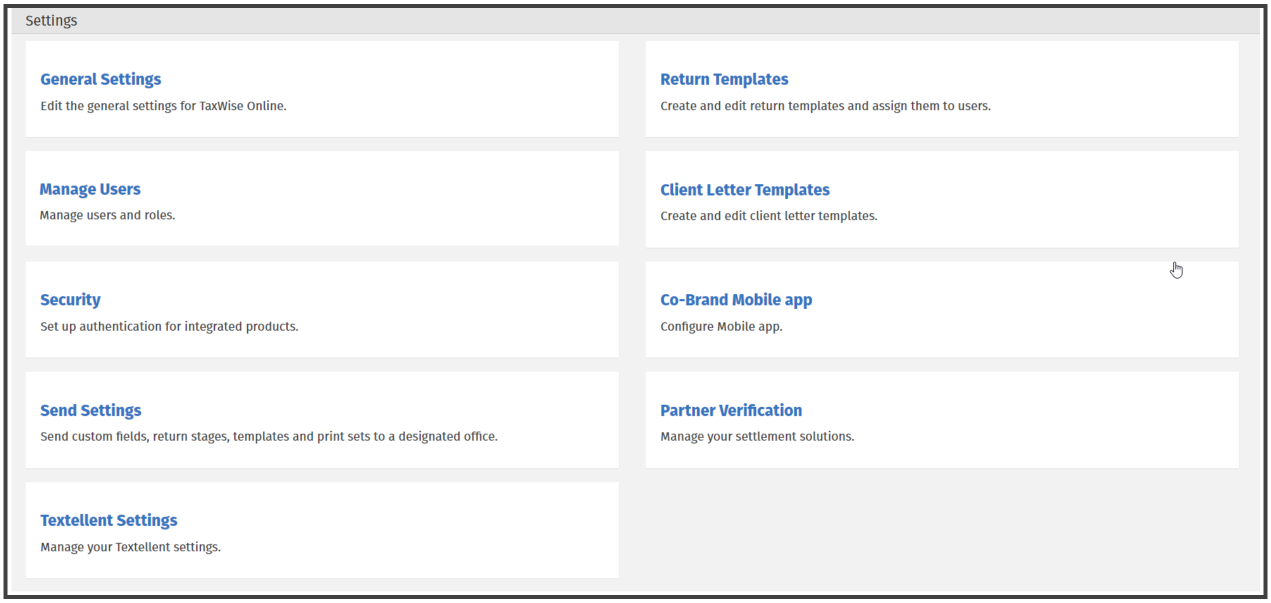
The admin user can access setup options for TaxWise Online, and assign these defaults to other users.

To access these options, click **Settings** on the Administrator menu.



There are nine categories the admin user can access from this page, including:

- General Settings
- Return Templates
- Manage Users
- Client Letter Templates
- Security
- Co-Branding Mobile App
- Send Settings
- Partner Verification
- Textellent Settings



General Settings

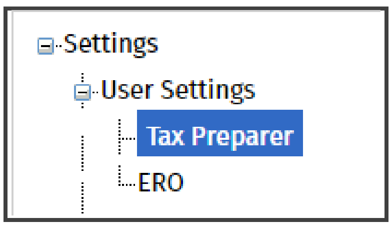
The General Settings dialog box allows you to enter preparer and ERO information under the User Settings section.

User Settings

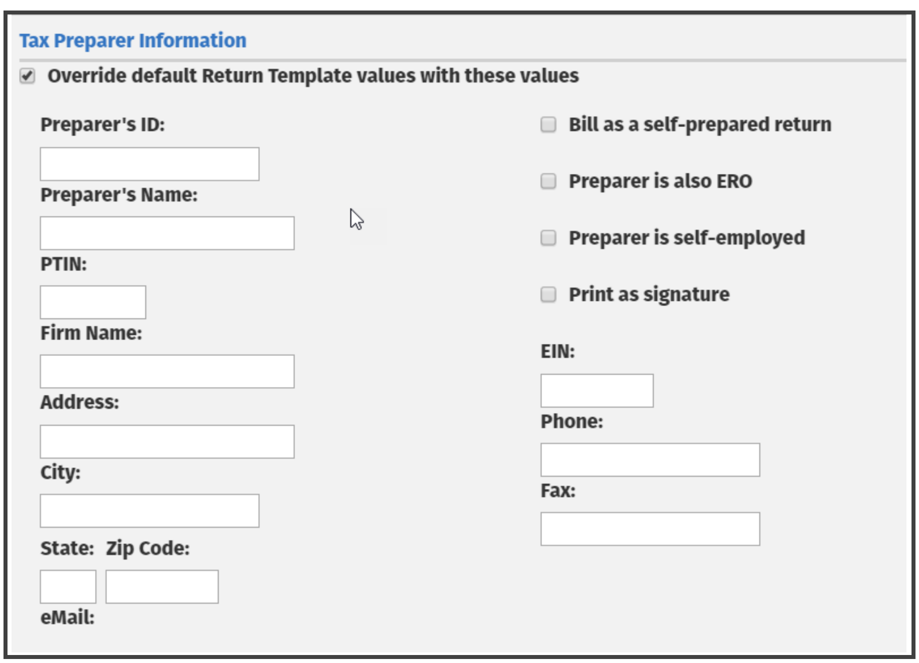
The User Settings allows each user to enter their Tax Preparer information and ERO information if it is different than the information in the Template. The settings are user specific and affect only subsequent new returns.

To enter preparer information:

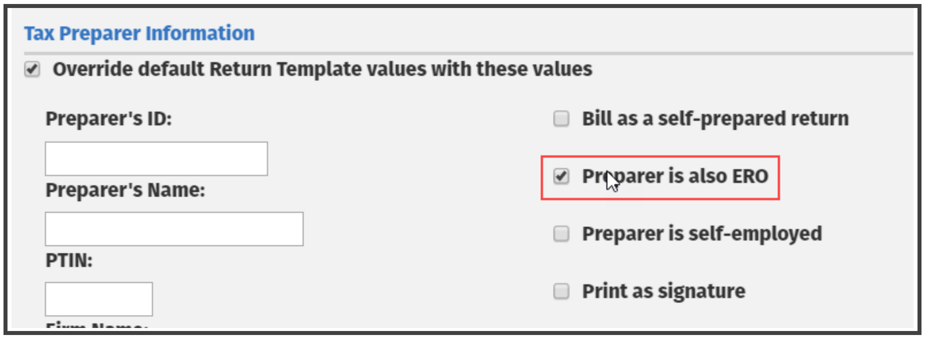
1. From the General Settings dialog box, click **Tax Preparer**.



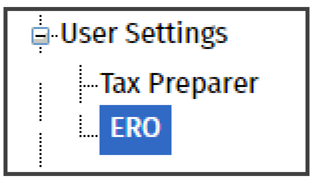
2. In the Tax Preparer Information section, click the Override default Return Template checkbox and type the preparer's information.



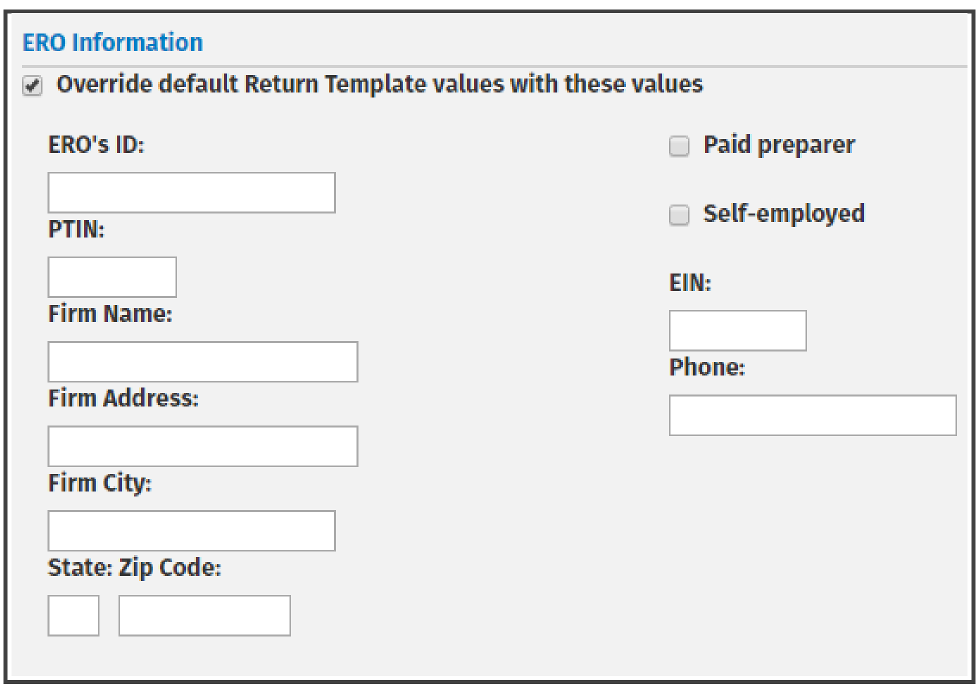
3. If this preparer is also the ERO, select the check box to indicate this.



4. To complete the ERO information, click **ERO** under User Settings.



5. In the ERO Information screen, type the required information.



If you only have one preparer and ERO and have set preparer and ERO information in Return Templates, you do not need to enter the information on these screens.

Administrator Settings

This section gives the administrator options to customize the following items:

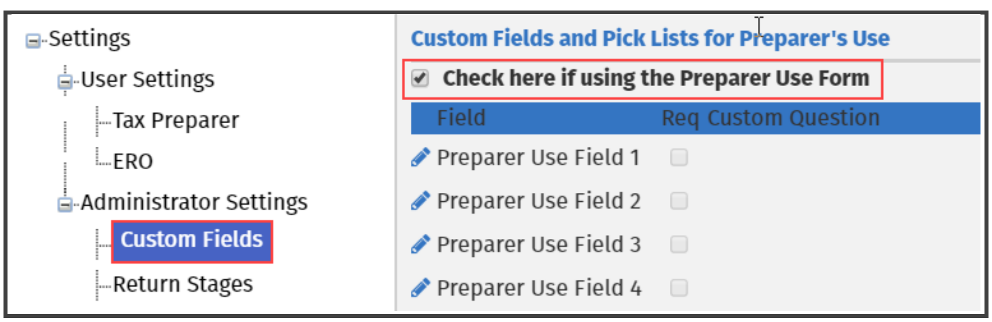
- Custom Fields
- Return Stages
- Print Sets
- Advanced
- Salutations

Custom Fields

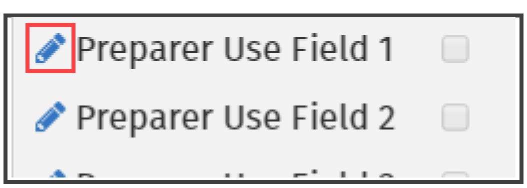
Admin users can set up custom questions for preparers to use during return preparation. These questions display on the Preparer Use Form inside returns.

To set up these questions:

1. From the General Settings dialog box, click **Custom Fields**.
2. Select the check box to indicate you are using the Preparer Use Form.

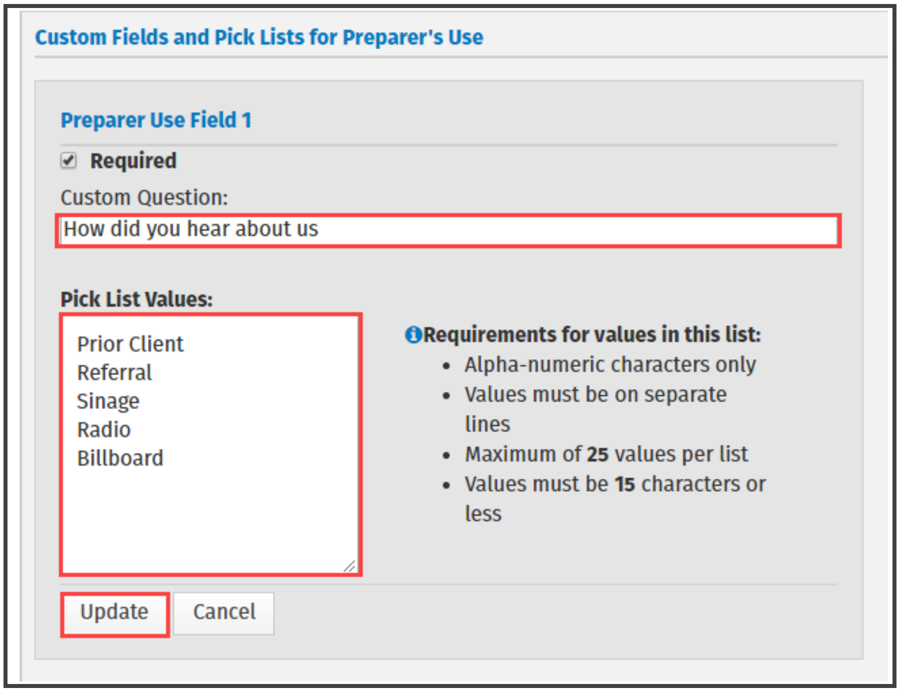


3. Click the **Edit** icon to the left of a field.



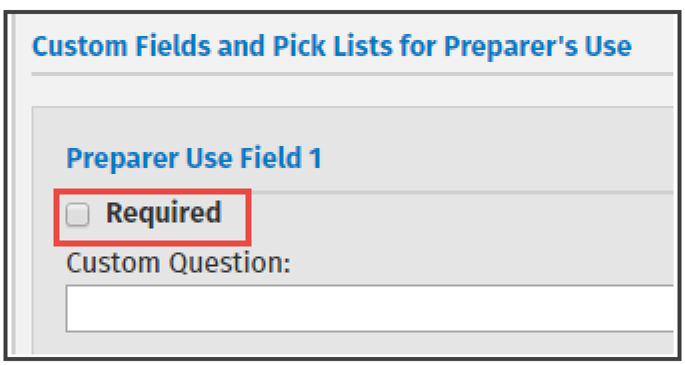
4. Type your question, along with the answer choices in the fields provided.

5. Click **Update**.



You can add up to 25 custom questions.

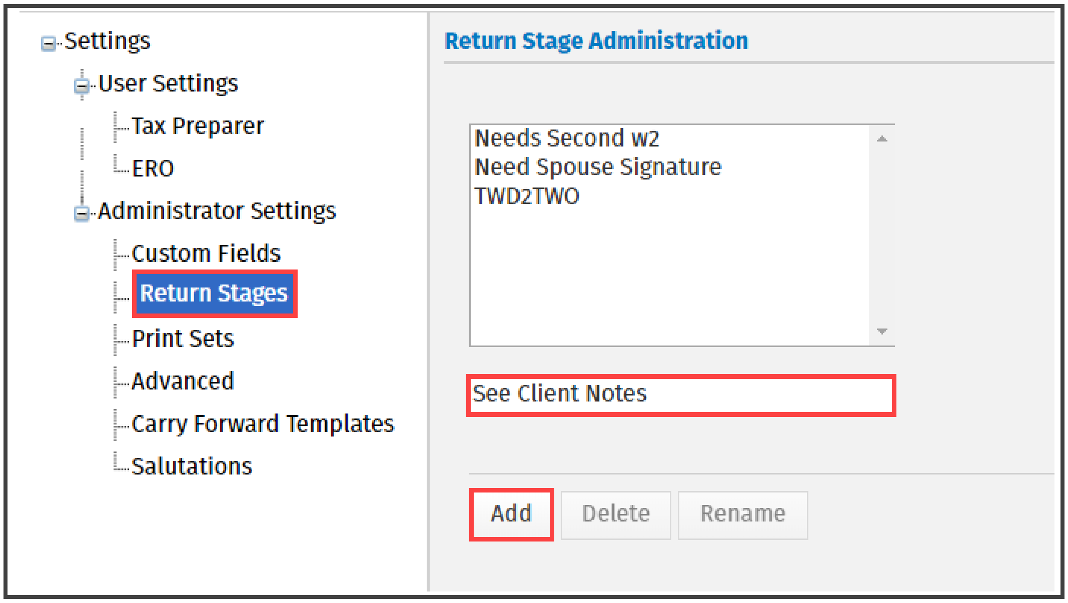
6. If you want to make any question a required field, select the **Required** check box when typing the question.



Return Stages

Return Stages allow you to indicate the current stage of a return in progress. You can create your own custom stages by typing them in the Return Stages section.

1. From the General Settings dialog box, click **Return Stages**.
2. Type your stages in the field provided, and click **Add**.



3. Repeat these steps to add multiple stages.

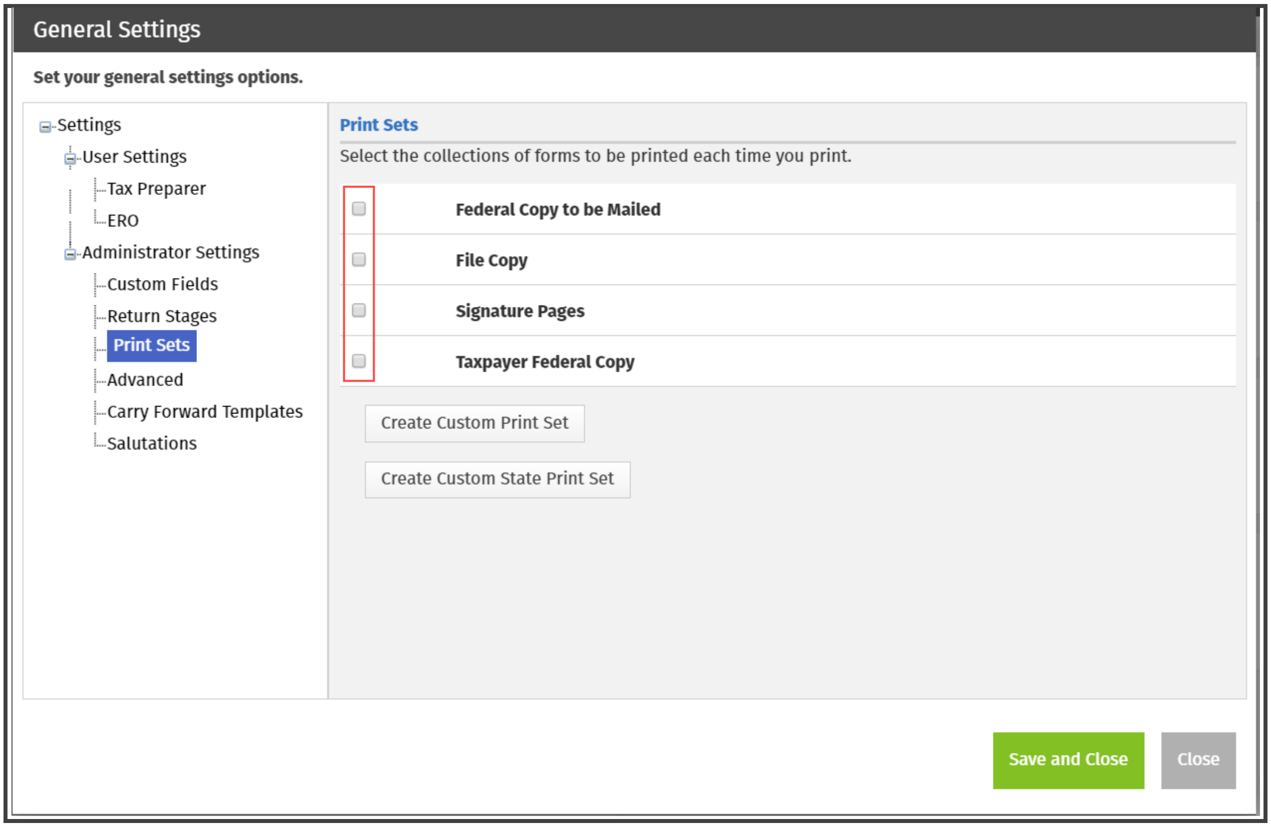
You can select these stages in an open return or from the Returns list to apply them.

Print Sets

The admin user can create default print sets to determine which forms to print with each return.

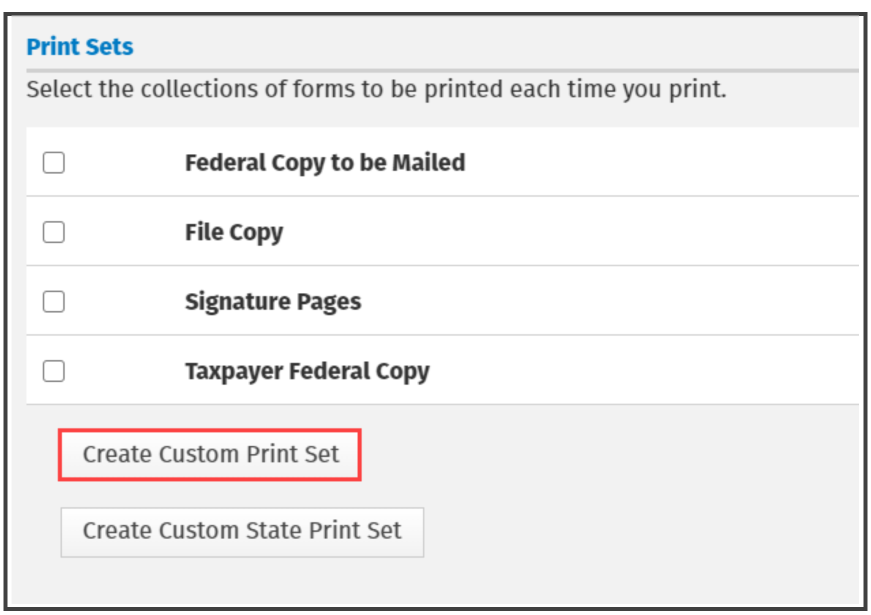
1. From the General Settings dialog box, click **Print Sets**.

2. Next, select the check boxes for the predefined sets for forms you want to include in your print sets. There are four predefined print sets to choose from.



You cannot edit the predefined print sets. There are no predefined state print sets, those you will have to do as a custom set.

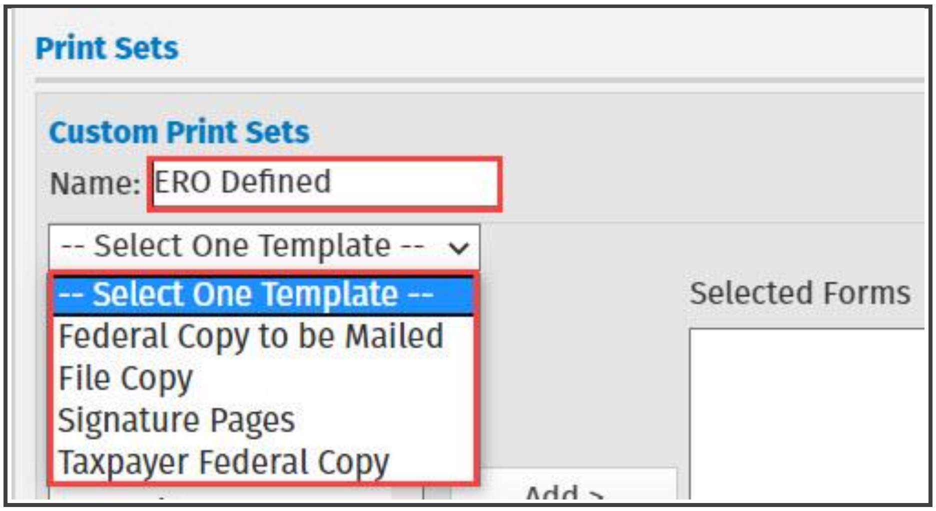
3. If you prefer to customize the print settings, click **Create Custom Print Set.**



To customize state print sets, use the **Create custom state print set** button.

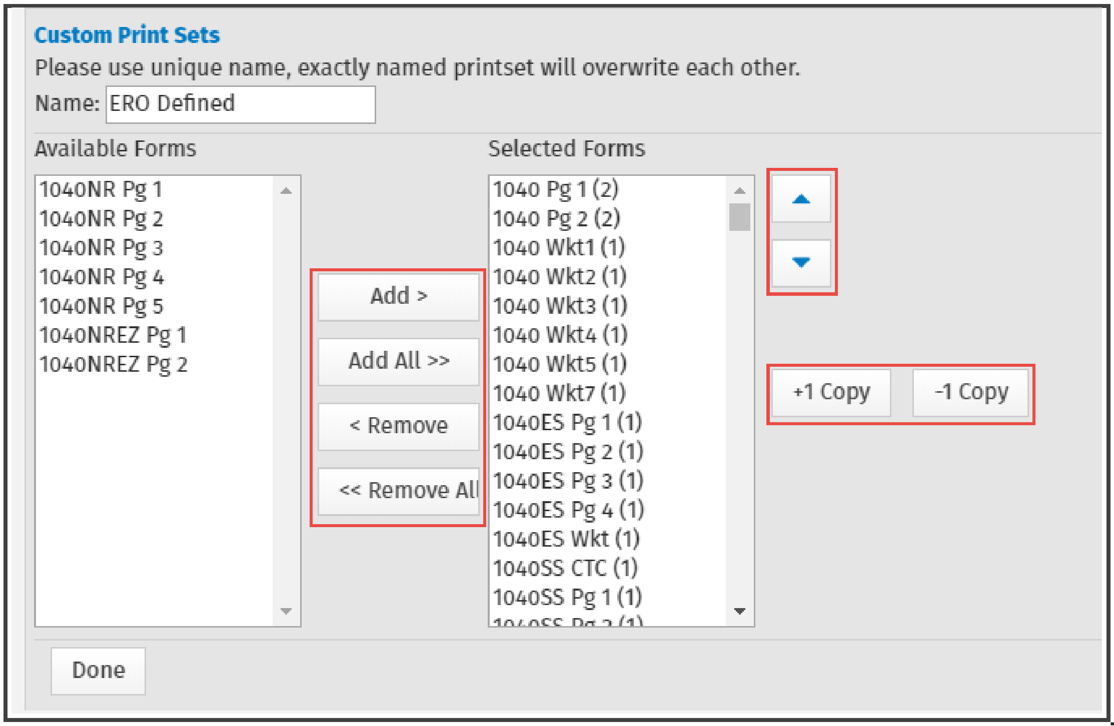
4. TaxWise displays the Custom Print Sets Screen. Enter the name you wish to use for this print set.

5. From the Select One Template drop-down menu, select the template you want to base this new template on.



Keep in mind that if you use the exact name as another print set, they will overwrite each other.

6. Next, you can adjust the number of copies of forms, add or remove forms from your selected forms, and rearrange the order in which the forms print.



7. Click **Done.**

8. Repeat this process to create additional custom print sets.

Advanced

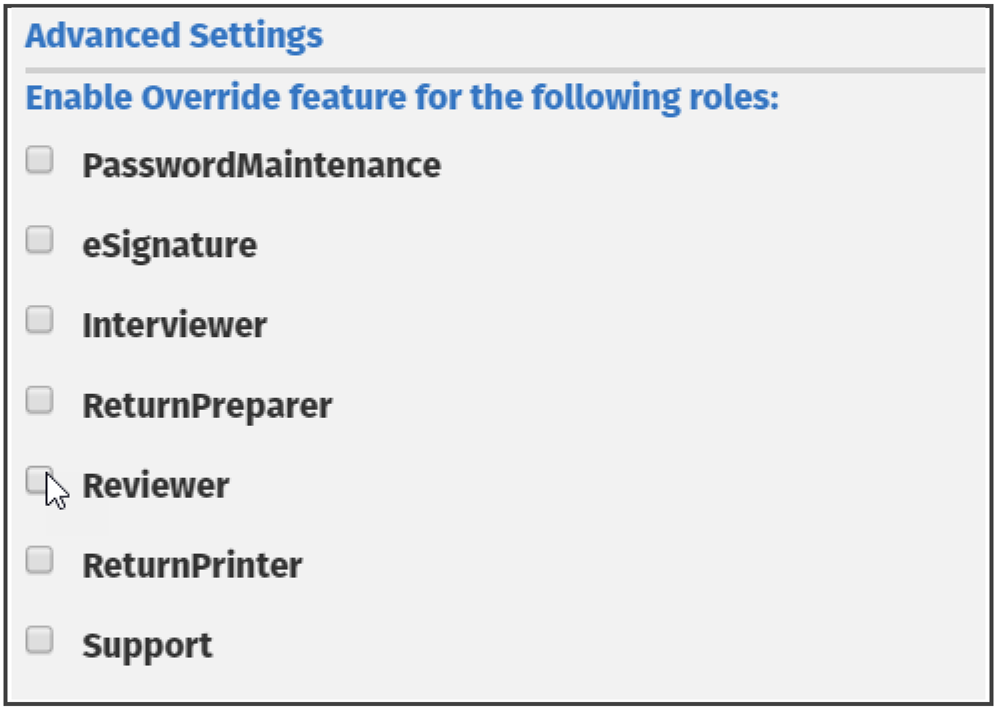
The advanced settings allow the admin user to provide certain roles the ability to use the Override feature in returns, and to carry forward the Preparer Use Form from the prior year program.

1. From the General Settings dialog box, click **Advanced**.

2. TaxWise Online allows you the option to enable the override features for the following security roles:

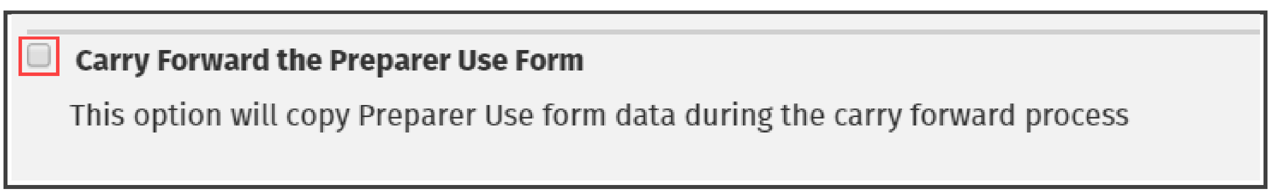
   - PasswordMaintenance
   - eSignature
   - Interview
   - ReturnPreparer
   - Reviewer
   - ReturnPrinter
   - Support

3. If you want to enable the Override feature, select the checkbox next to the security role.



Any user assigned the role enabled here, will now have the ability to override fields.

4. Next, select the check box to copy the data from the Preparer User Form during the carry forward process.

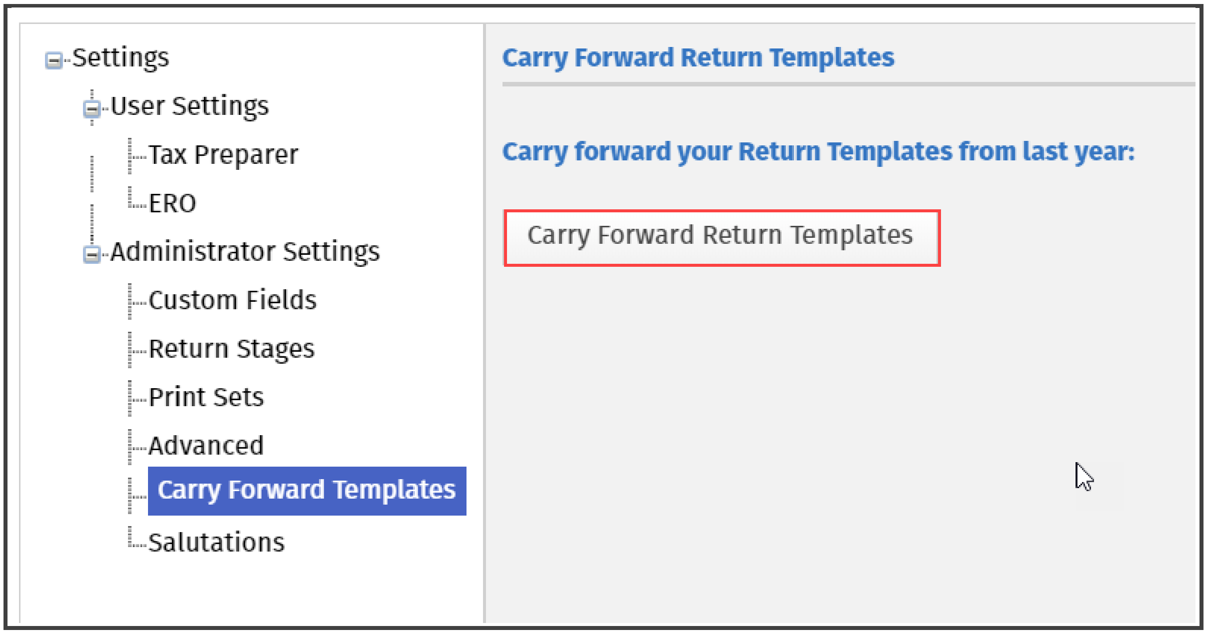


This process will carryforward both the Questions and Answers.

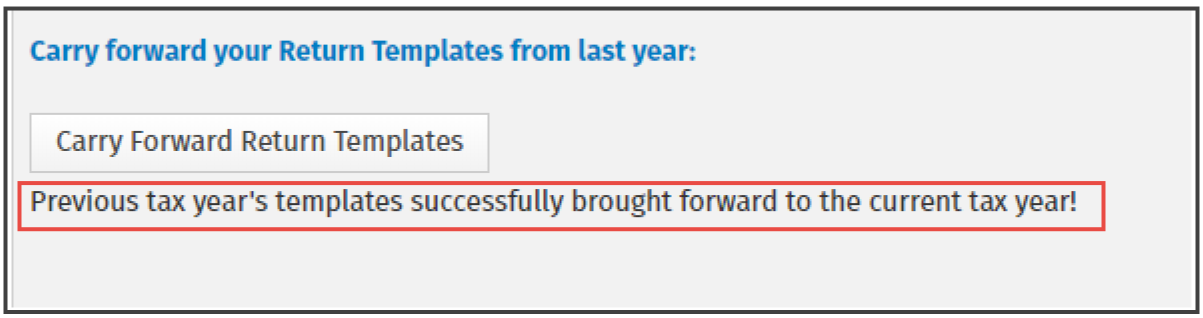
Carry Forward Templates

TaxWise Online allows you to bring forward any custom return templates you created in a prior year, which saves time in setting up the current year software. To do this:

1. From the general settings dialog box, click **Carry Forward Templates**.
2. Click the **Carry Forward Return Templates** button.



3. TaxWise Online displays a message that the templates were successfully carried forward.

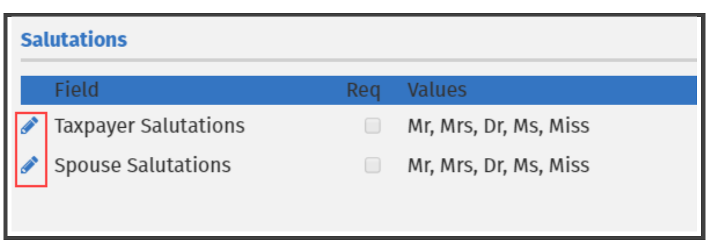


Salutations

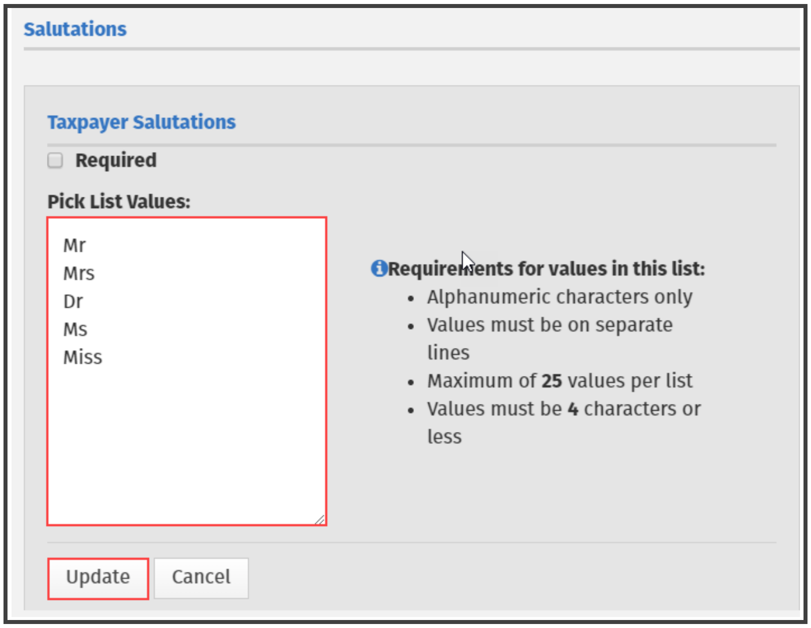
This section defines how taxpayer and spouses will be addressed on the Main Information Sheet. TaxWise Online provides a default list of options, but you can add custom values as well.

To do this:

1. From the Salutations screen, click the **Edit** icon to the left of the field name.



2. Type additional salutation options directly in the Pick List Values box, and click **Update**.



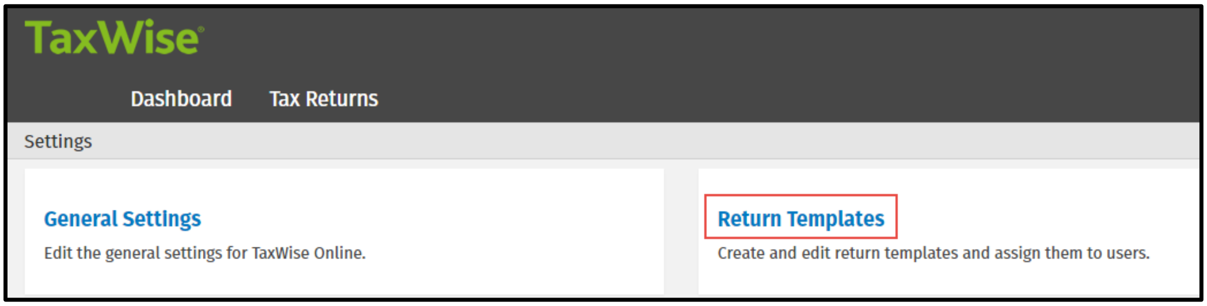
If you want salutations to be a required entry, select the **Required** check box.

3. After making all the changes, click **Save and Close** to exit the General Settings screen.

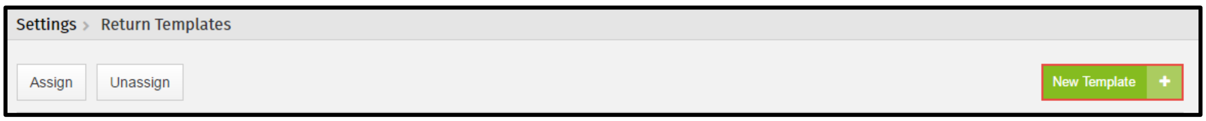
Return Templates

Return Templates allow you to save time by defaulting information that you normally enter on every return. Admin users and others with these rights can edit forms to add default information that displays on all new returns. These templates can be shared to all other users, to make return preparation both consistent and efficient.

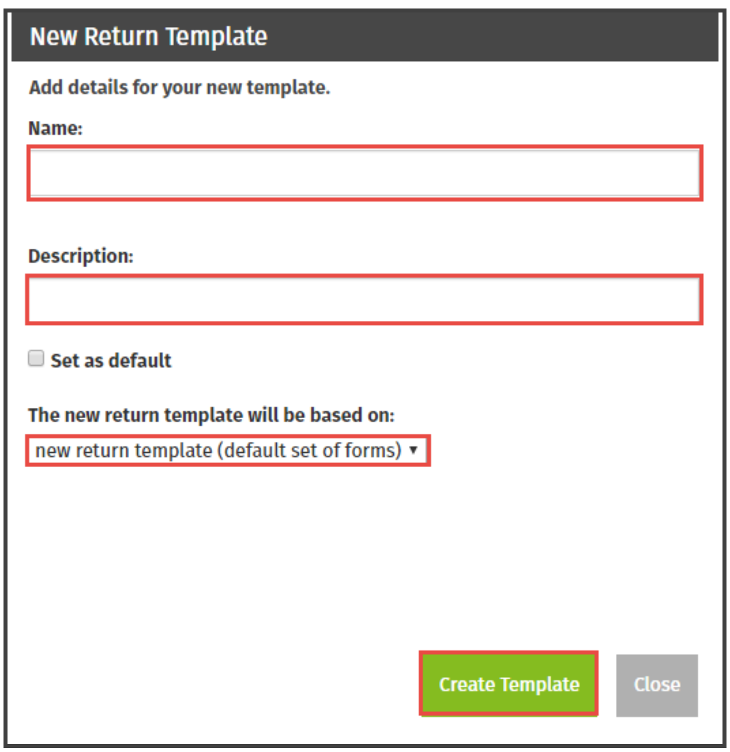
1. From the Settings page, click **Return Templates**.



2. Click **New Template**.



3. TaxWise Online displays the New Return Template page. Type a name and description for the new template, select a template on which to base it, and click **Create Template**.



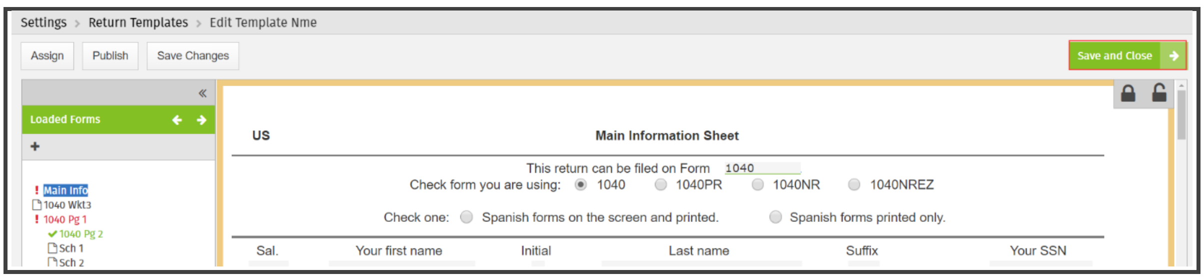
Select the **Set as default** check box to use this template as the default for all returns.

4. TaxWise Online adds the template to your list of available templates. To edit the template, click the **Edit icon** to the left.

5. TaxWise Online opens the return so you can add or remove forms and type default information in the template.

In order for the form to stay in Return templates, you must F3 or Ctrl + Spacebar on a non-calculated filed to make it red for the form to stay in the return template.

6. After making any changes, click **Save and Close**.

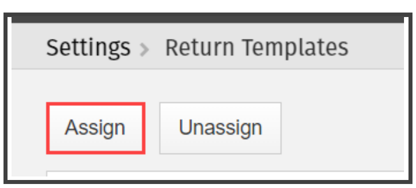


TaxWise Online returns to the Return Template settings page.

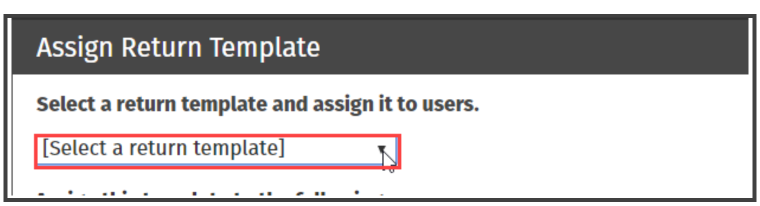
If the return template is marked as default, then you do not need to assign it to users. This is done automatically, unless the user was previously assigned a template.

To assign the template to other users:

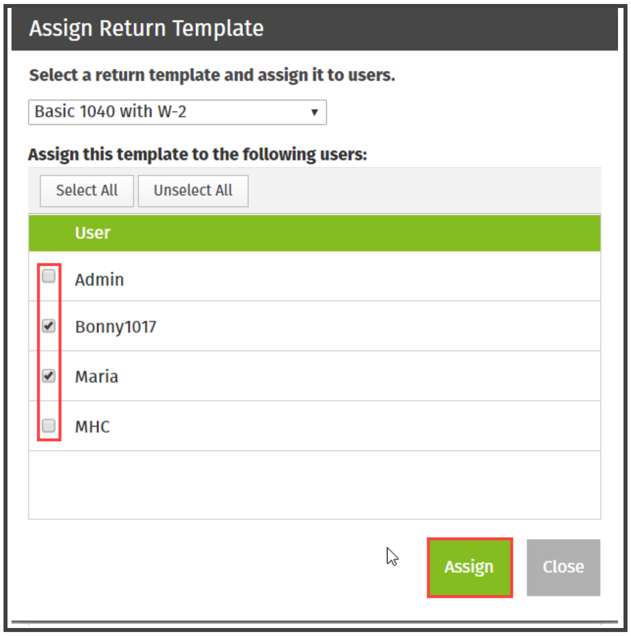
1. Click the **Assign** button.



2. TaxWise Online displays the Assign Return Template window. Choose the template from the list.

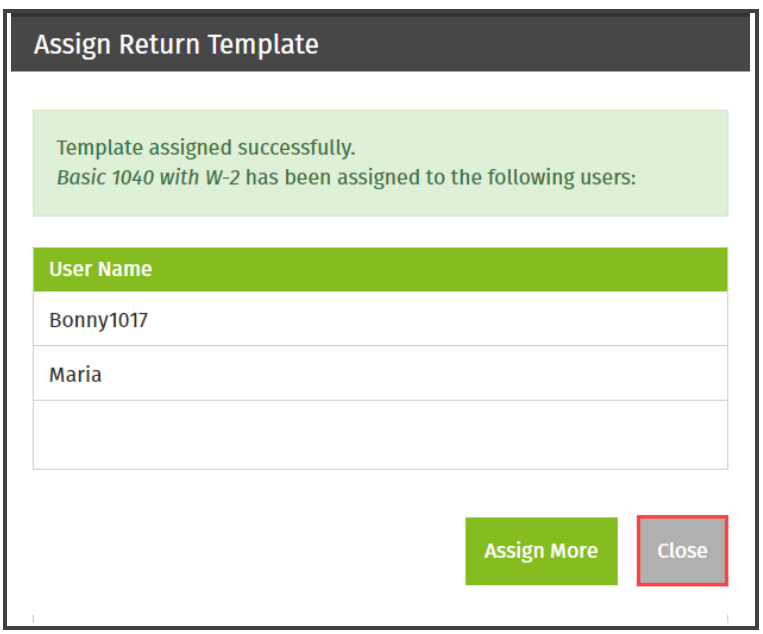


3. Select the users from the list and then click **Assign**.



4. TaxWise Online displays confirmation that the chosen template was successfully assigned to the selected users.

5. To assign another template click **Assign More**, or click **Close** to exit. For this lesson, click **Close**.

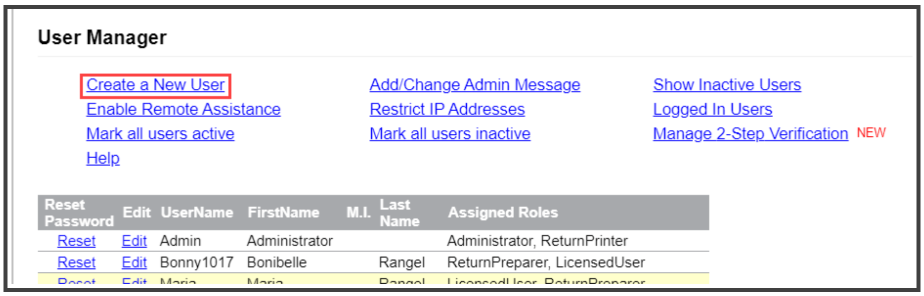


Manage Users

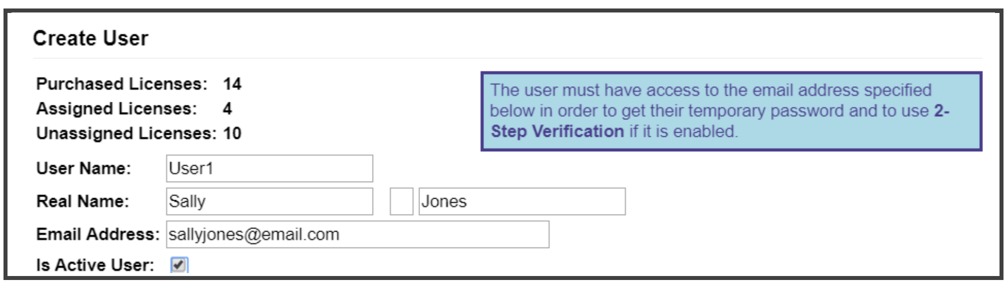
Use the Manage Users feature to add users and passwords. This section also allows the Admin user to manage user roles.

To add a new user:

1. From the User Manager dialog box, click **Create a New User**.

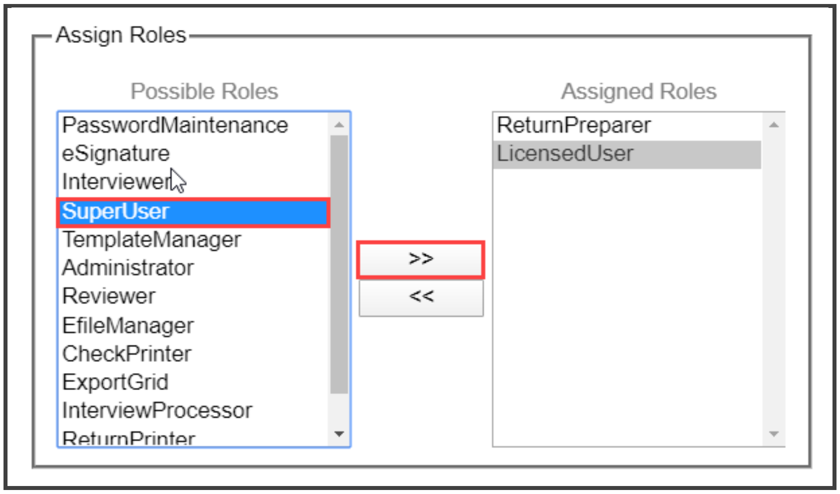


2. In the Create User screen, type the required information in the fields provided.

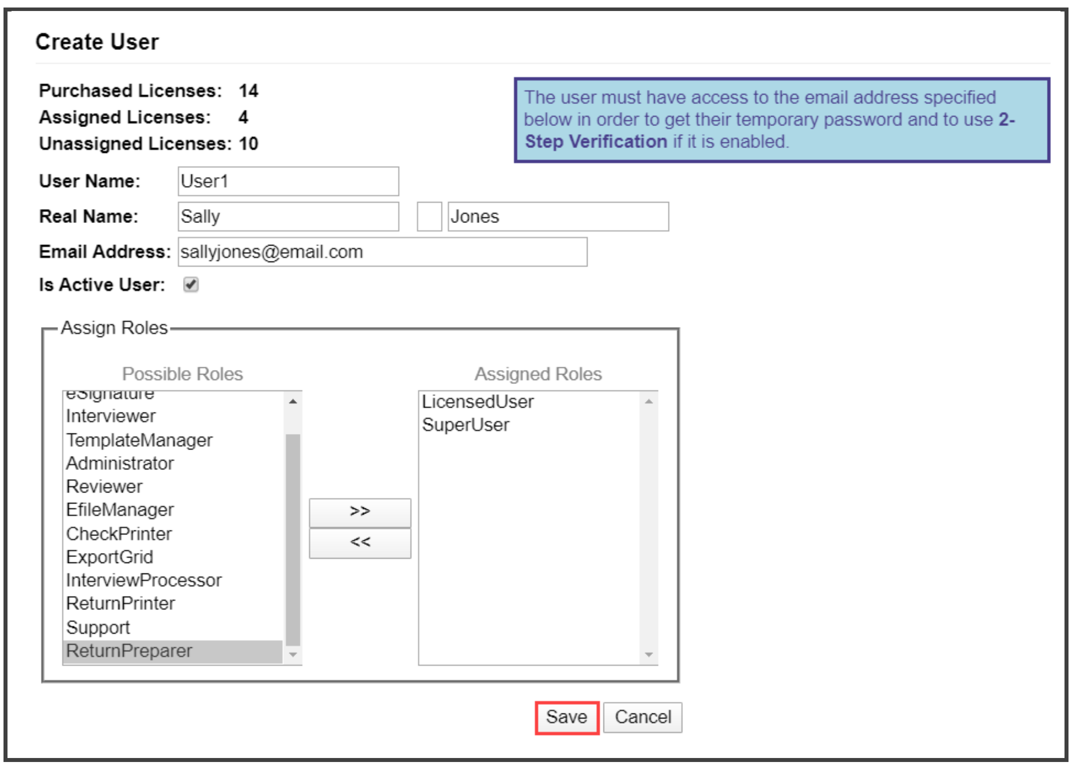


Make sure the **Is Active User** check box is selected.

3. In the Assign Roles section, select a **Possible Role** and use the arrows to move this role to the **Assigned Roles** box.



4. Once you have assigned the appropriate security roles, click **Save**.



In order for users to be able to log in, you must add the **Licensed User** role to all users. For additional information on User Roles, review the next section.

User Roles

The user roles available can be classified as main user roles and add-on user roles.   The table below is the list of Main User Roles.

User Role	Description
Administrator	The **Administrator** role allows access to all program features as well as access to the user settings for all users.
SuperUser	The **Superuser** role is the highest role a preparer can have, next to the Administrator Role. A superuser can create returns, verify return status, print, submit e-files, print reject details, and view acknowledgements. A superuser can also move, delete, and restore their returns. A superuser can use the eSignature option from within an open return.
ReturnPreparer	The **ReturnPreparer** role allows a preparer to create new returns and verify return status. This user role cannot access any of the e-filing functions.
Reviewer	The **Reviewer** roles allows a preparer to create new returns, verify return status, and move returns. This role can also print the reject details and view acknowledgements but cannot submit e-files.
Interviewer	The **Interviewer** roles allows a preparer to create new returns verify return status. However, any user assigned the Interviewer role, will only be able to start a new return via the Interview mode.

All the users in the table above have access to the Dashboard view, and can access their User Settings.

The table below is a list of the Add-on User Roles. These roles must be assigned in addition to one of the following user roles:

- SuperUser
- ReturnPreparer
- Interviewer
- Reviewer

User Role	Description
TemplateManager	Allows a user the ability to create and edit return templates and assign them to users.
EfileManager	Allows a user the ability to submit e-files.
PasswordMaintenance	Allows a non-admin user to rest user passwords and manage user details such as name, email address, and active/inactive user status. This user cannot edit role assignments.
InterviewProcessor	Allows the user to ability to import interviews.
CheckPrinter	Allows the user to print checks.

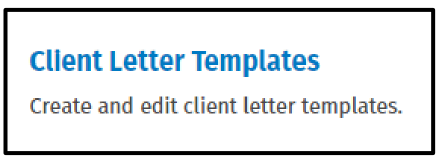
User Role	Description
ReturnPrinter	Allows the user to print returns.
ExportGrid	Allows the user to Export the return list function under View More Actions menu.
ReturnDeleter	Allows the user to delete and restore returns.
eSignature	Allows the user access to the eSignature
Support	If your TaxWise has sub-offices, you can assign this role to users giving them access to the Login As feature. Users with this role will be able to log in to the sub-offices without having to logout of the Main Office's site of TaxWise Online.

Client Letter Templates

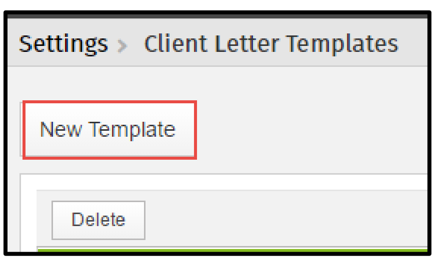
You can also create default client letters using the Client Letter templates feature. This allows you to set up standard letters to attach to your clients' returns.

To create a client letter template:

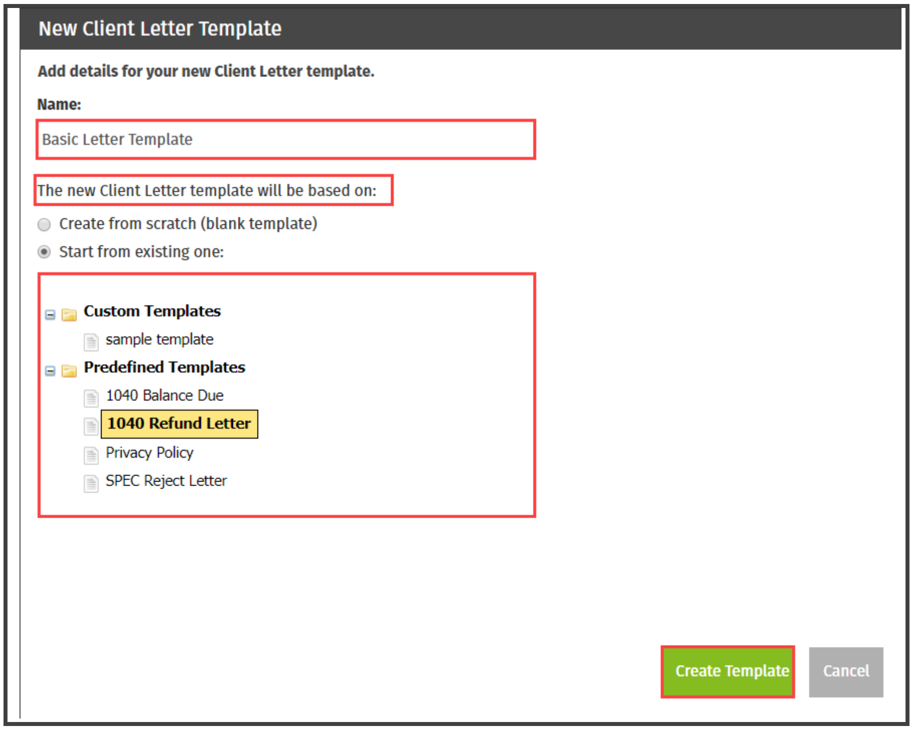
1. From the Settings page, click **Client Letter Templates**.



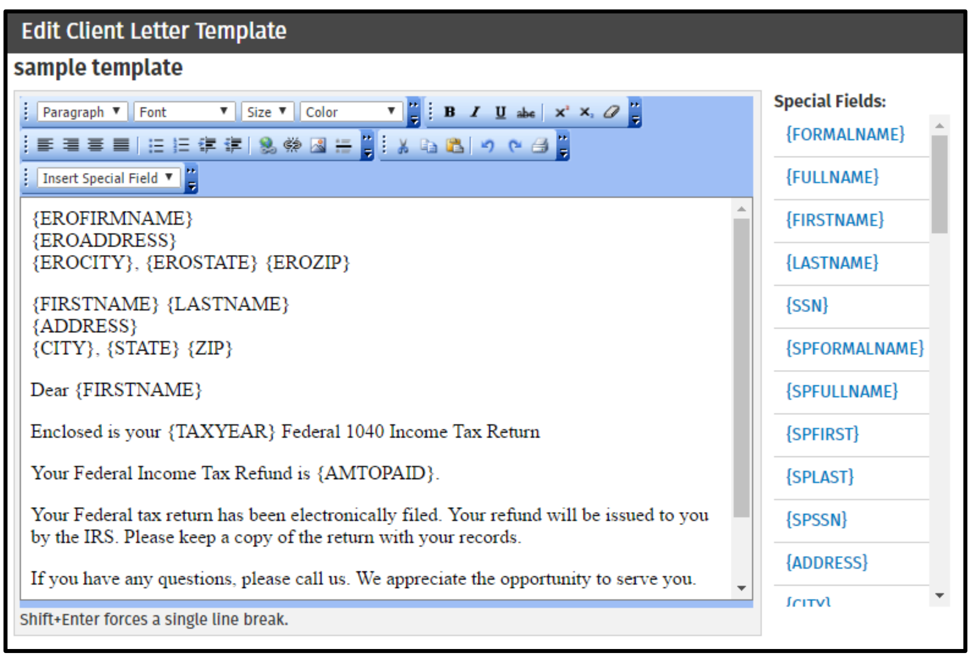
2. Click **New Template**.



3. TaxWise Online displays the New Client Letter Template. From this screen:
    - Type a name for the template.
    - Choose to create from scratch or a pre-defined template.
    - Click **Create Template**.



4. TaxWise Online displays the Edit Client Letter Template dialog box:



5. From here, you can type text, use the formatting bar or add Special Fields to customize the letter. Click **Save**.

When you choose to add a client letter inside a return, any custom templates display in the list, along with the pre-defined templates.

IFirm Integration

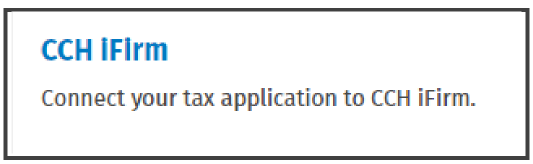
The Security settings module allows you to sync your CCH iFirm account with TaxWise Online. Once these accounts are synched, you can print a client's completed return directly from TaxWise Online to the CCH iFirm Client Portal, a secure, online document sharing system.

To integrate TaxWise Online with CCH iFirm:

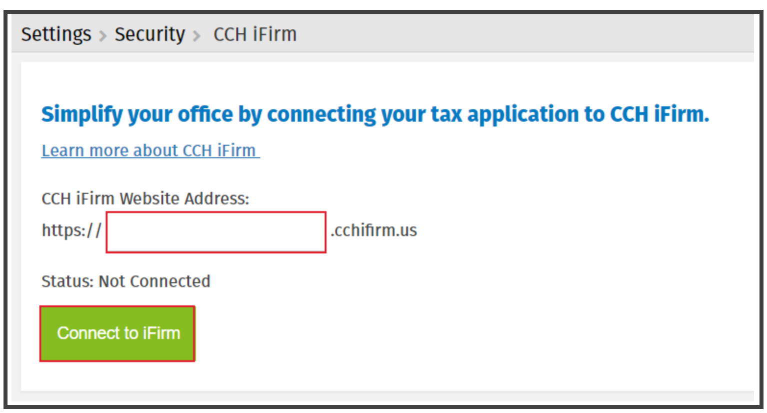
1. From the Settings page, click **Security**.

2.

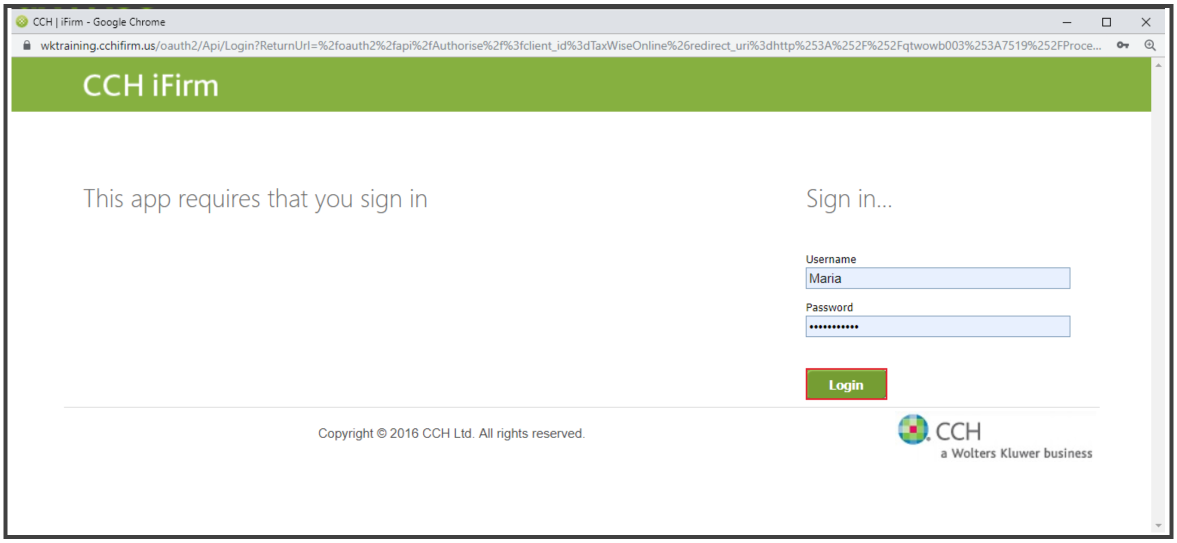
3. Click **CCH iFirm**.



4. Type your CCH iFirm URL in the field provided, and click **Connect to iFirm**.

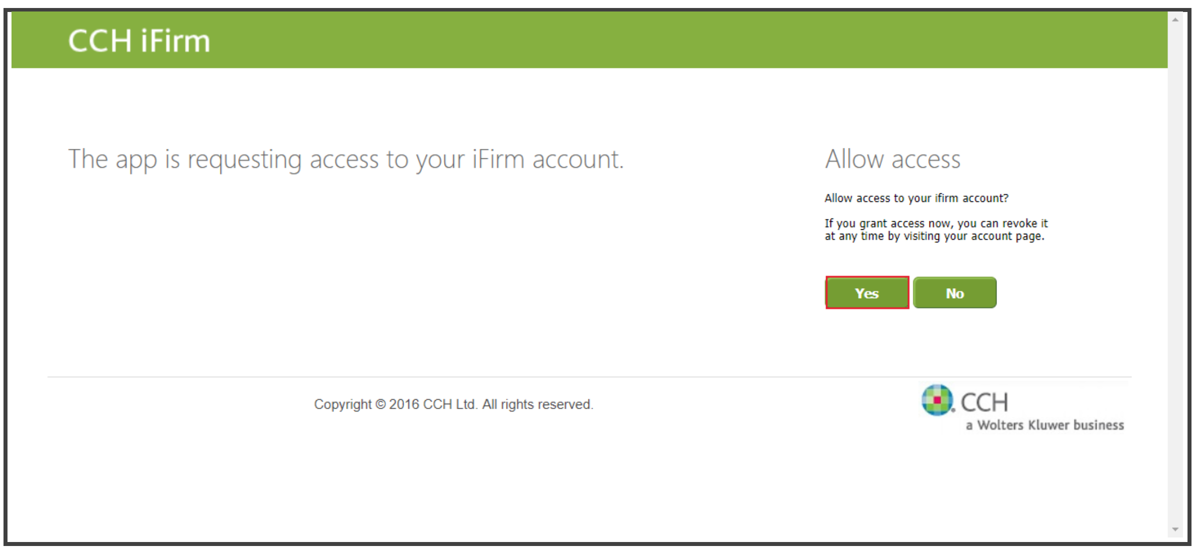


5. Enter your login credentials, and click **Login**.

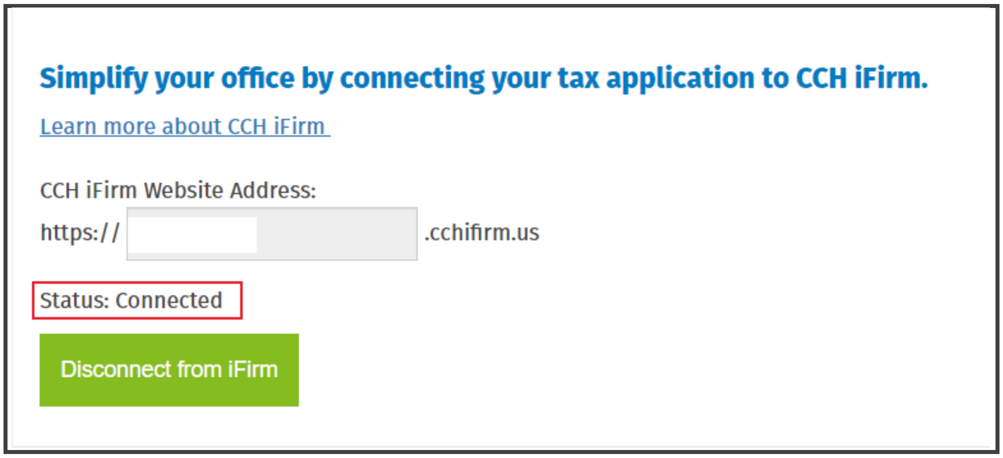


Use the general user log in credentials, not the Admin user credentials.

6. Click **Yes** to allow the program to connect.



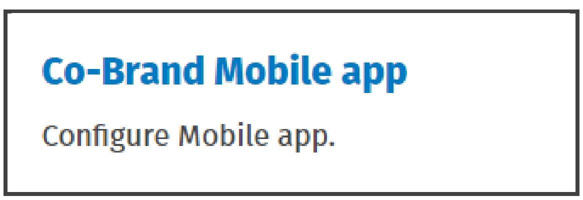
7. TaxWise Online displays the status as Connected.



Not all users have CCH iFirm Client Portal.

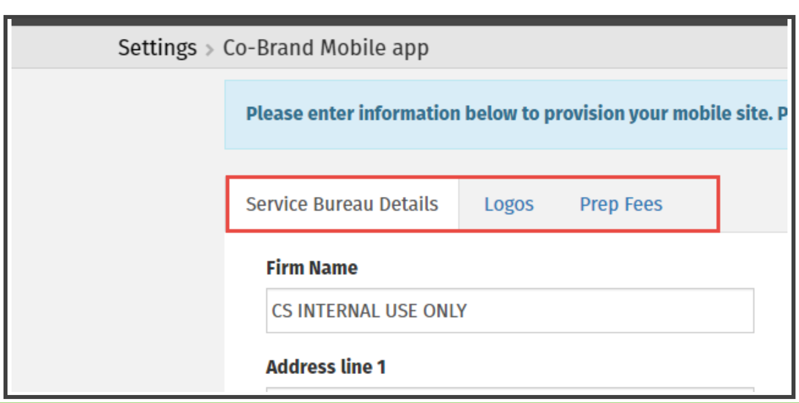
Co-Brand Mobile App

1. Click **Co-Brand Mobile App**.



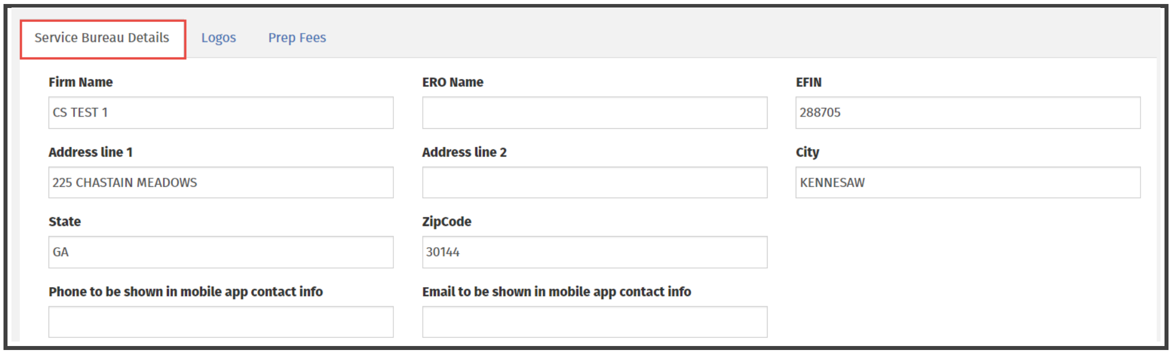
2. TaxWise Online displays the Co-Brand Mobile app window, that consists of the following 3 tabs:
   - Service Bureau Details
   - Logos
   - Prep Fees

Please enter information below to provision your mobile site. Please ensure that you fill out information in all 3 tabs.

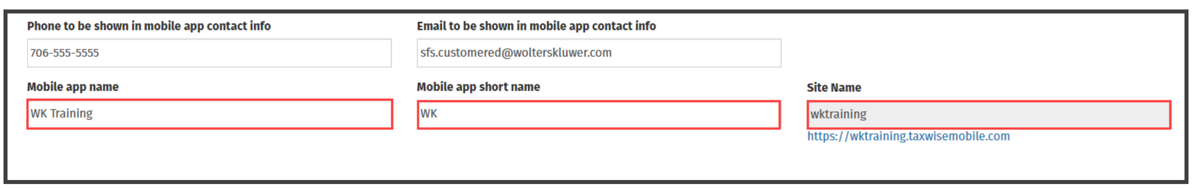


3. On the Service Bureau Details tab, complete the fields, including:

- ERO name
- EFIN
- Address
- Phone number
- Email address

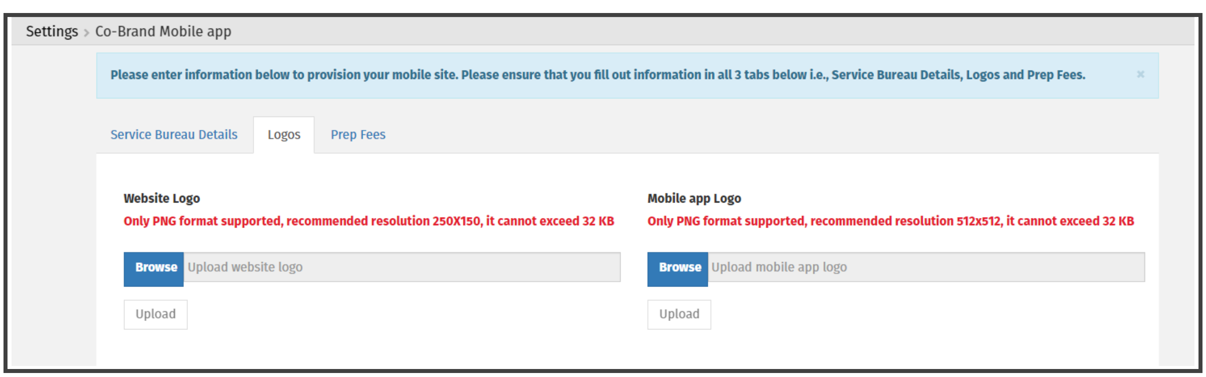


4. In the **Mobile app name** field, type the name you want to call your mobile application, and type a shortened version of that name in the **Mobile app short name** field. This short name displays along with an icon on your client's mobile device. The Site name field will be the part of your site URL. For example, if the site name is wktraining, your site URL will be **https://wktraining.taxwisemobile.com/**.

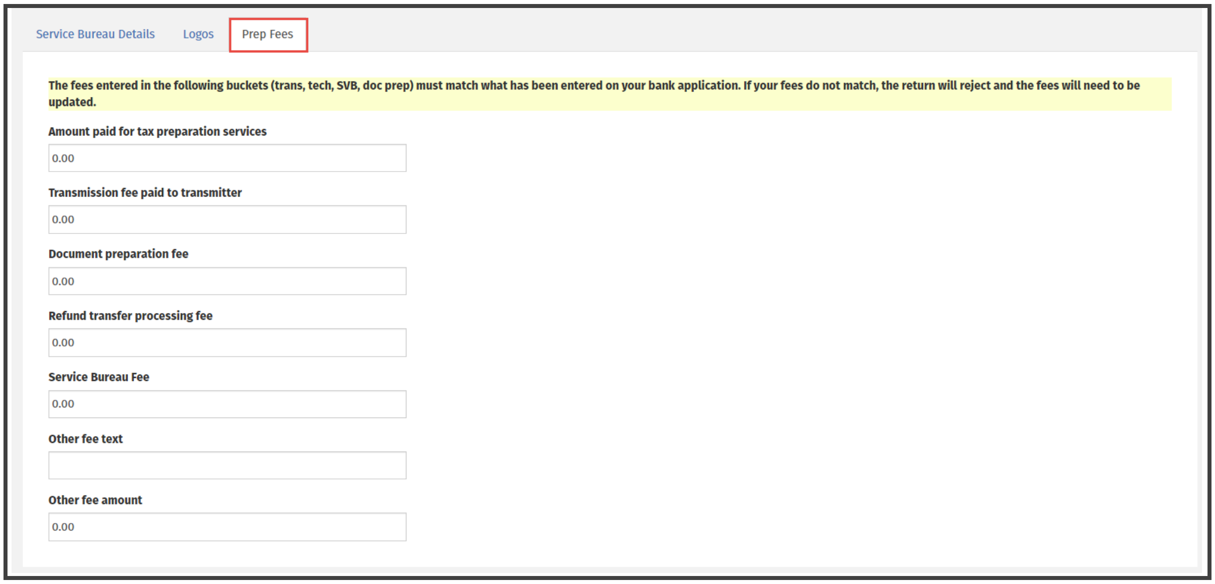


When you type the site name, you will see your Mobile URL listed below the field.

5. Click the **Logos** tab. You can browse for and add a logo to display on your Website and Mobile application



6. Click the **Prep Fees** tab. Enter your tax preparation fees that will display when a taxpayer uses your mobile site.



7. Click **Create Mobile Site**. Your clients can now access your mobile site by visiting **https://sitename.taxwisemobile.com/**

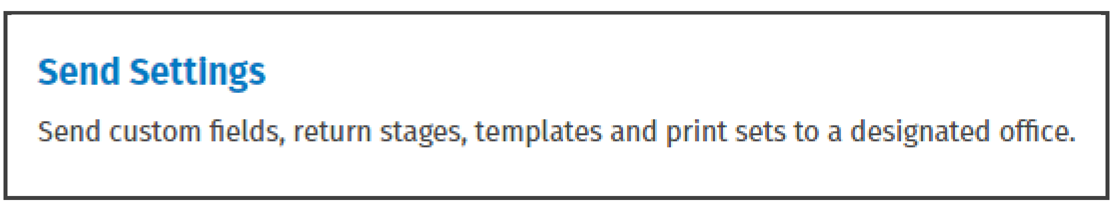
Send Settings

This feature is used by businesses that have multiple offices only.

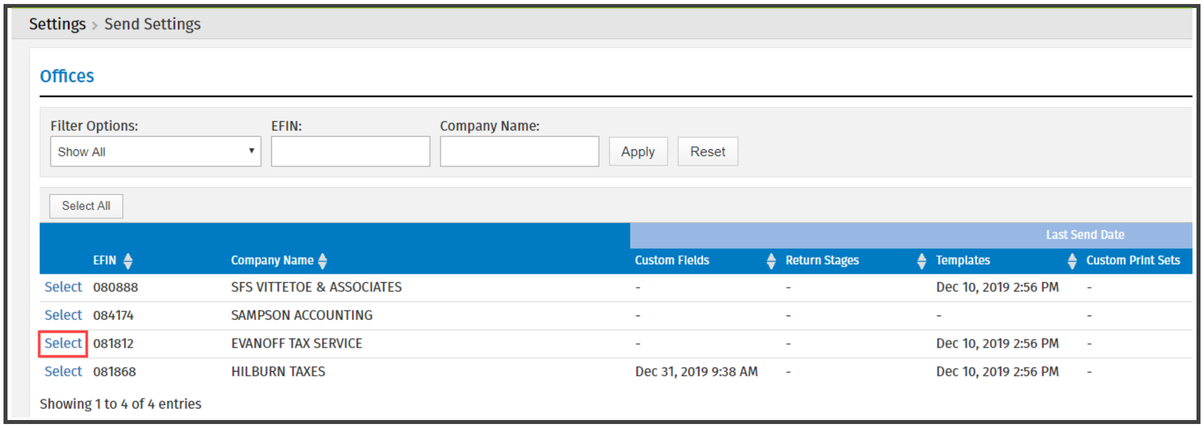
Send Settings allows you to create default settings under one EFIN, and send these defaults to all your other EFINs, saving time and ensuring consistency across all offices.

To send settings to other offices:

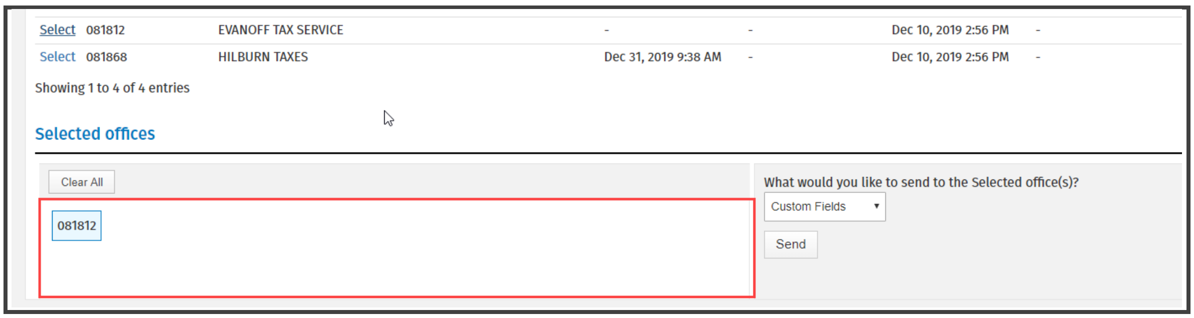
1. In the Settings page, click **Send Settings**.



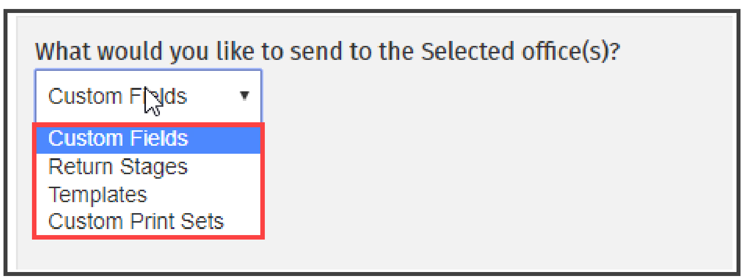
2. In the Offices section, select the office to which you want to send defaults.



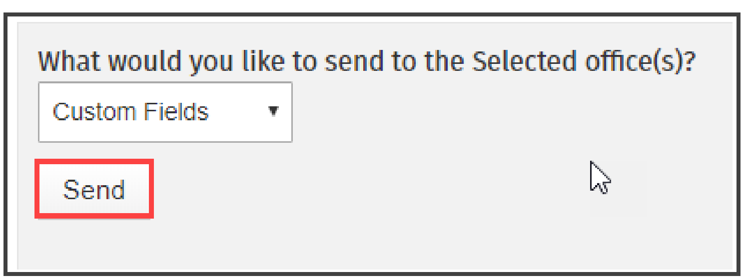
3. TaxWise Online, will now display this office , in the Selected Offices section.



4. In the bottom right section, choose the defaults category. Your options are: Custom Fields, Return Stages, Templates, and Custom Print Sets.

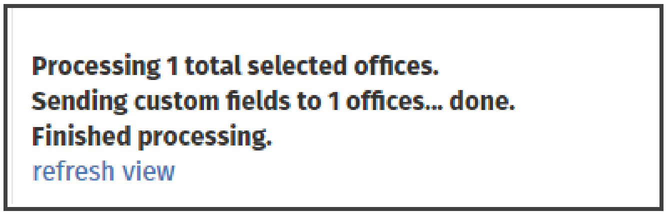


5. Select the defaults category and click **Send**.



For Custom Fields and Return Stages just select the category and click send.   Templates and Custom Print Sets have additional options.

6. TaxWise Online sends the defaults to the selected offices. If you scroll down, you will see a message, in the lower left-hand corner, a message telling you what was send and to how many offices.

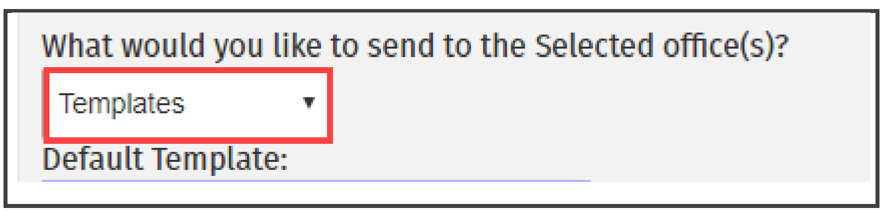


Templates

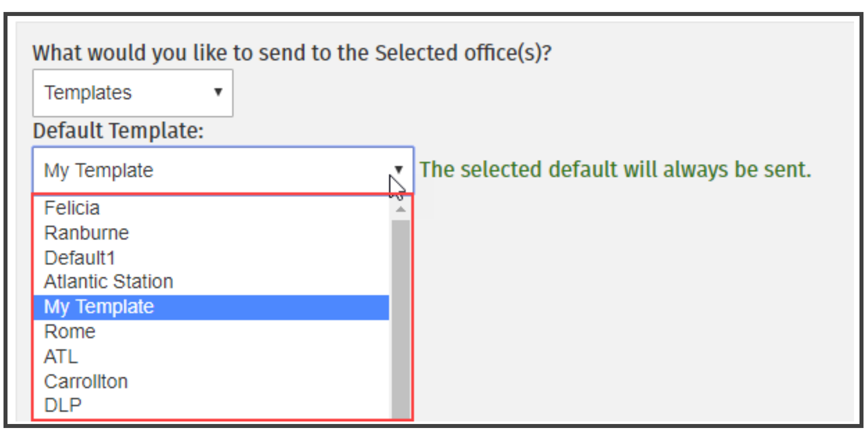
When sending templates, you will have additional options to select from. You can send just the default template, or additional templates to the selected offices.

The steps are the same as above, until you select what you want to send.

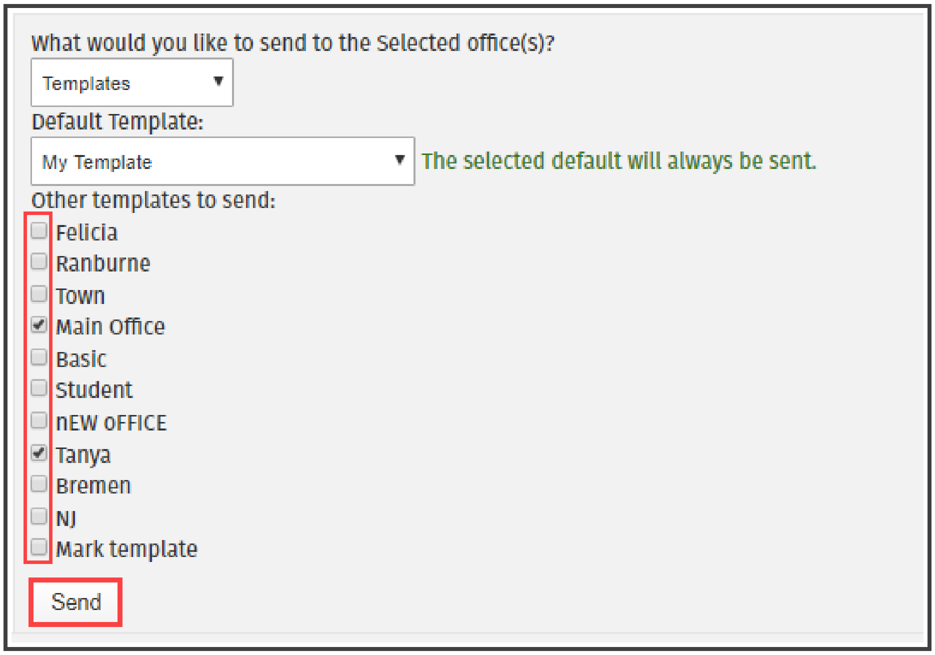
1. In the What would you like to send to the Selected office(s)? drop-down menu, select Templates.



2. From the Default Template drop down, select the template you want to use as the default.



3. Also select any other templates you want to send to the Selected Offices, and click **Send**.



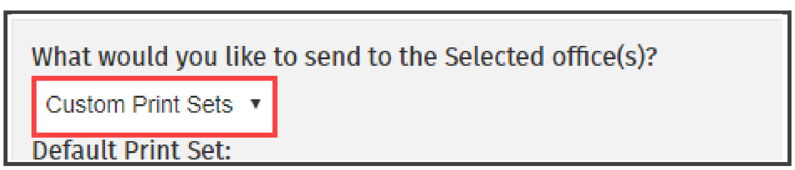
4. TaxWise Online sends the defaults to the selected offices.

Custom Print Sets

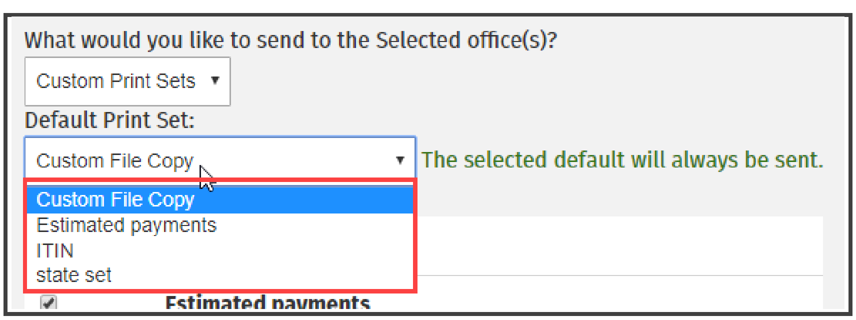
When sending custom print sets, you will have additional options to select from. You can send just the default print set, or additional print sets to the selected offices.

The steps are the same as above, until you select what you want to send.

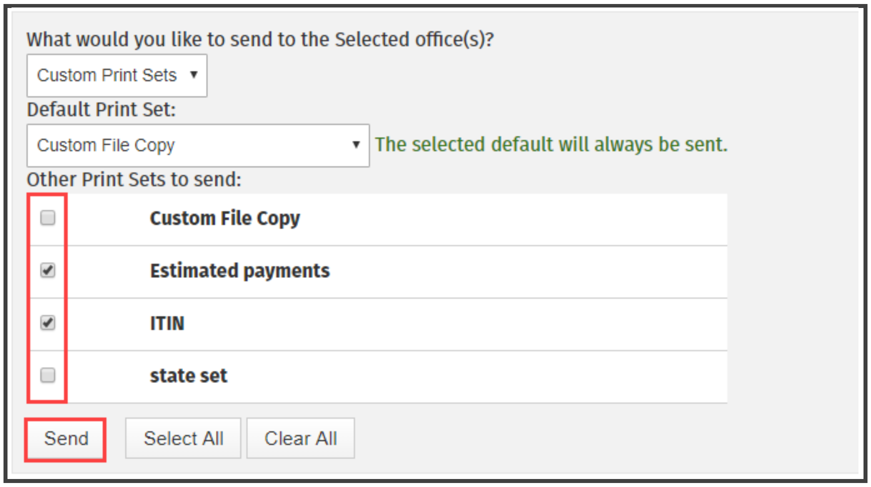
1. In the What woud you like to send to the Selected office(s)? drop-down menu, select **Custom Print Sets**.



2. From the Default Print Set drop-down menu, select the print set you want to use as the default.



3. Also select any other print sets you want to send to the Selected Offices, and click **Send**.



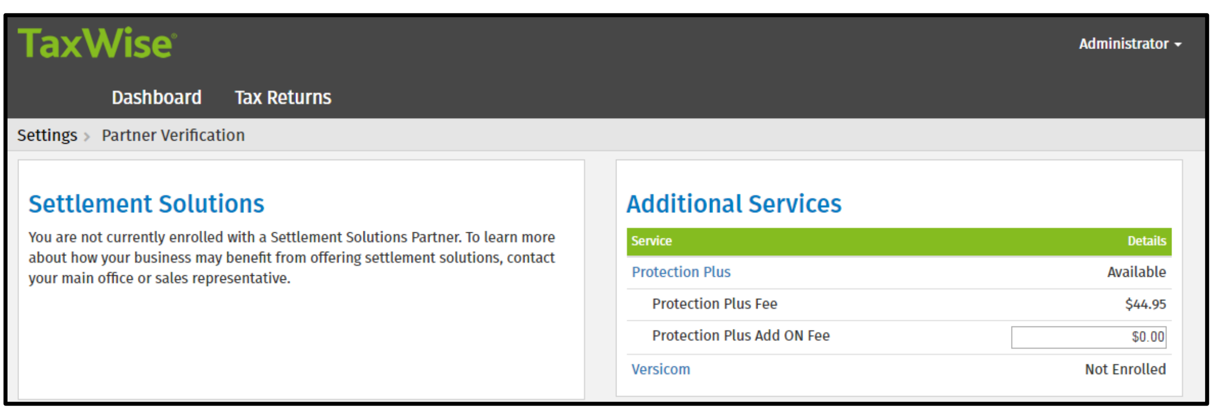
4. TaxWise Online sends the defaults to the selected offices.

Partner Verification

If you sign up to offer your clients refund settlement solutions or other services with one of our partners, you want to review your partner verification data for accuracy.

To review your partner verification data:

1. From the Settings page, click **Partner Verification**.
2. Verify that the services you signed up to offer and any associated fees are correct.



These fees automatically link to your Price Sheet for the returns that choose these services.

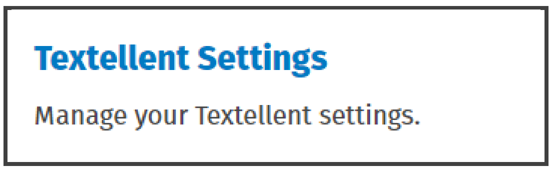
Textellent Settings

Textellent offers automated text messaging solution for business looking to attract and return clients. This solution offers:

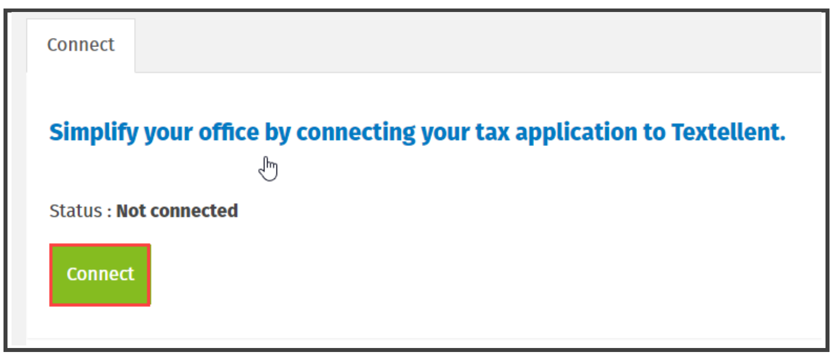
- Two-way text communication with clients as well as voice calls
- Personalized text message marketing campaigns
- Automated reminders
- Self-service appointment scheduling
- Referral programs
- Refund status updates

To integrate your Textellent subscription with TaxWise Online:

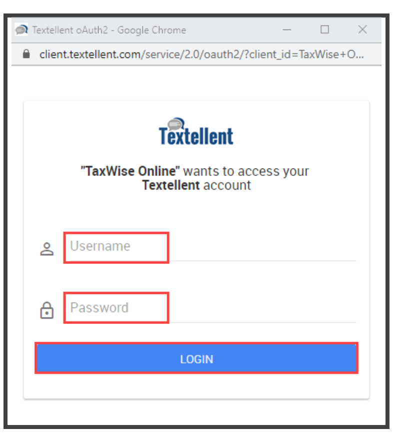
1. From the Settings page, click **Textellent Settings**.



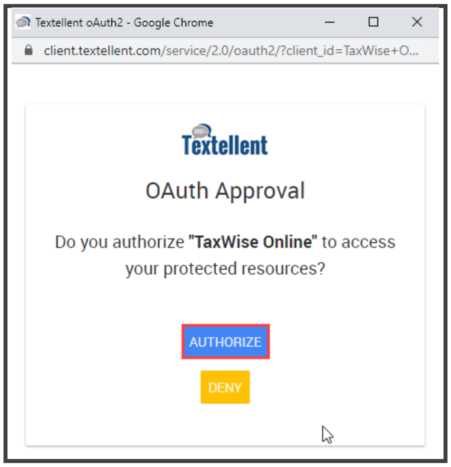
2. On the Textellent Settings page, click **Connect**.



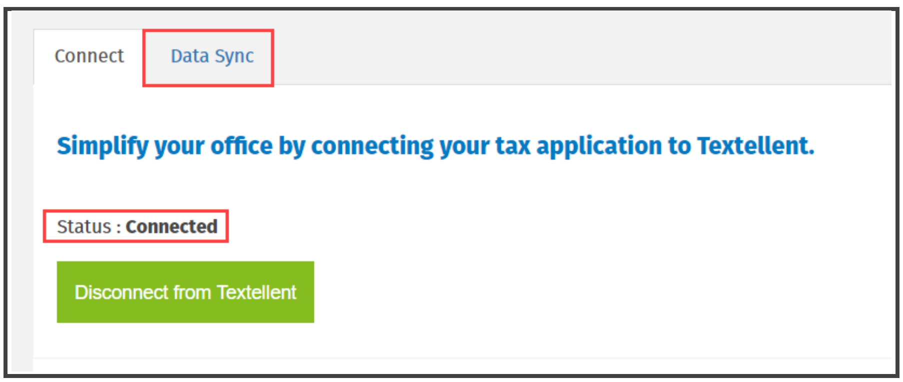
3. Enter your Textellent login credentials, and click **Login**.



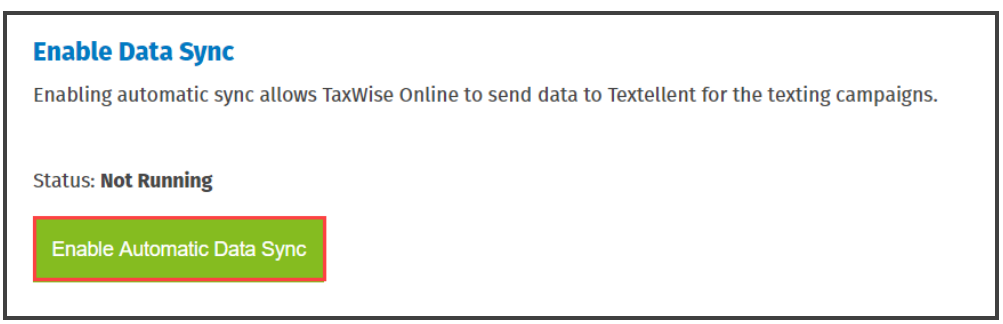
4. Textellent will ask you to confirm, you want to allow TaxWise Online access, click **Authorize**.



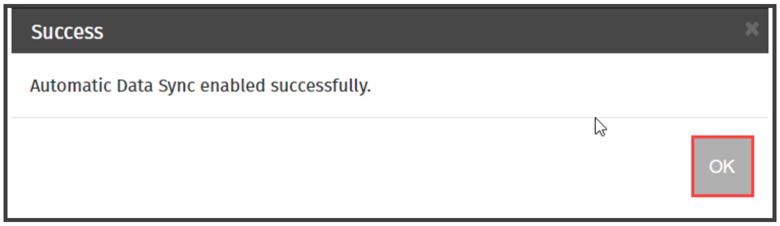
5. TaxWise Online displays the status as Connected. Once TaxWise Online is connected to Textellent you will see the Data Sync tab at the top, click **Data Sycn**.



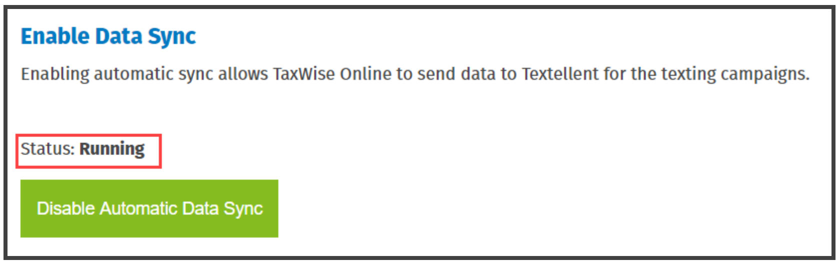
6. The automatic data sync allows TaxWise online to send data to Textellent for the texting campaigns. To enable, click **Enable Automatic Data Sync**.



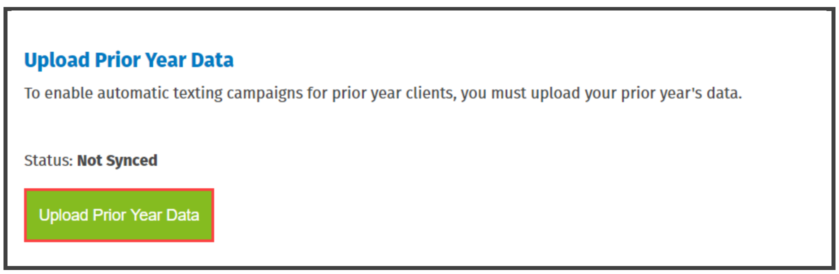
7. TaxWise Online displays confirmation message stating that Automatic Data Sync was successfully enabled, click **OK**.



8. TaxWise Online displays the status as Running.



9. This also displays the Upload Prior Year data section. To enable automatic texting campaigns for prior year clients, you must upload your prior year's data. To do so, click **Upload Prior Year Data.**



10. TaxWise Online proceeds to upload the prior year data. When the process is complete, TaxWise Online displays the confirmation message stating that the upload was successful, click **OK**.

11. TaxWise Online updates the Status to reflect the date and time stamp of the last time this information was synchronized.