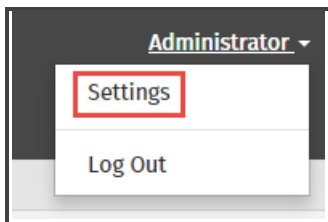


# TaxWise® Online 2020

## Setting up TaxWise Online

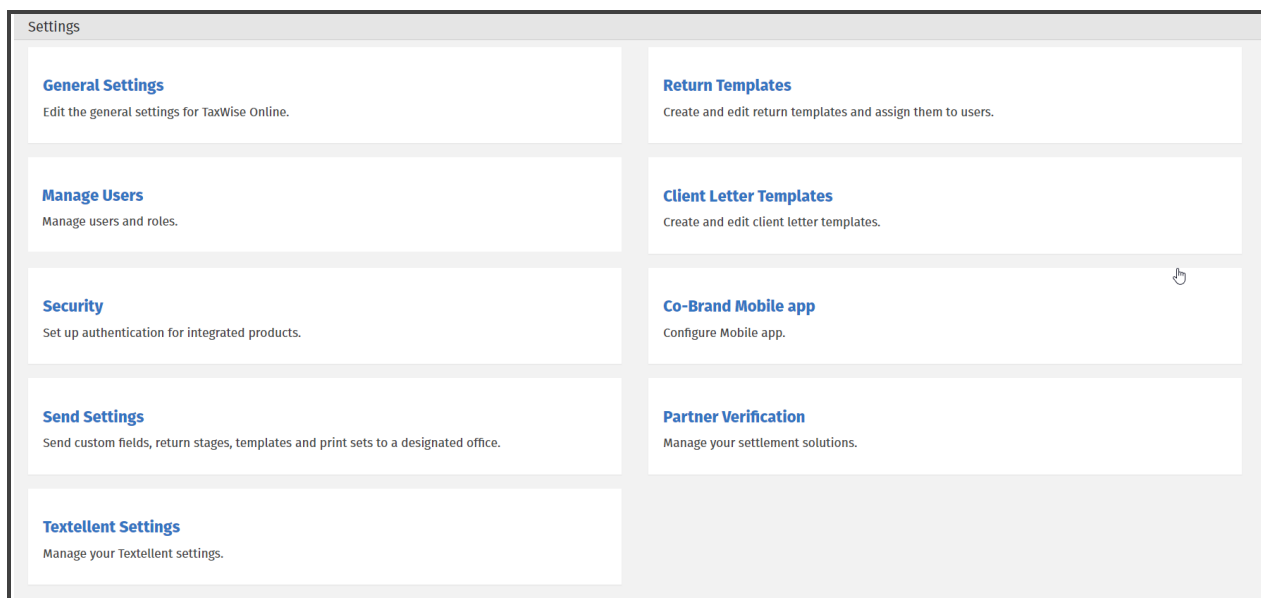
The admin user can access setup options for TaxWise Online, and assign these defaults to other users.

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

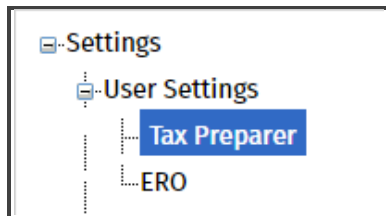
The General Settings dialog box allows you to enter preparer and ERO information under the User Settings section.

### User Settings

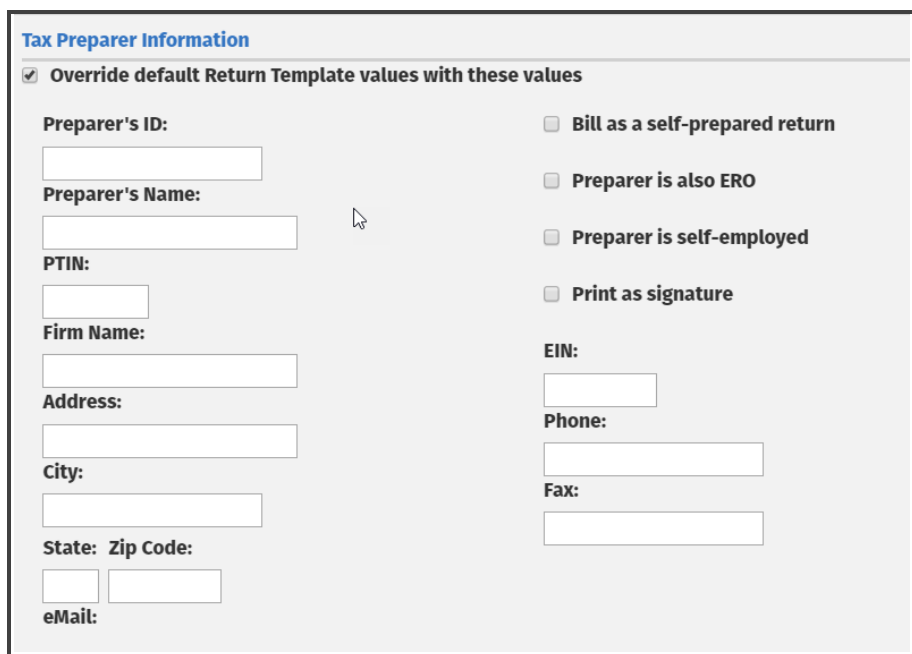
The User Settings allows each user to enter their Tax Preparer information and ERO information if it is different than the information in the Template. The settings are user specific and affect only subsequent new returns.

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.

A screenshot of a 'Tax Preparer Information' dialog box. At the top, there is a checkbox labeled 'Override default Return Template values with these values' which is checked. Below this, the form is divided into two columns. The left column contains text labels and input fields for: 'Preparer's ID:', 'Preparer's Name:', 'PTIN:', 'Firm Name:', 'Address:', 'City:', 'State:', 'Zip Code:', and 'eMail:'. The right column contains four unchecked checkboxes: 'Bill as a self-prepared return', 'Preparer is also ERO', 'Preparer is self-employed', and 'Print as signature'. Below these checkboxes are input fields for 'EIN:', 'Phone:', and 'Fax:'. A mouse cursor is visible over the 'Preparer's Name' input field.

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

**Tax Preparer Information**

☒ Override default Return Template values with these values

Preparer's ID:	<input type="text"/>	<input type="checkbox"/> Bill as a self-prepared return
Preparer's Name:	<input type="text"/>	<input checked="" type="checkbox"/> Preparer is also ERO
PTIN:	<input type="text"/>	<input type="checkbox"/> Preparer is self-employed
		<input type="checkbox"/> Print as signature

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

**User Settings**

Tax Preparer

**ERO**

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

**ERO Information**

☒ Override default Return Template values with these values

ERO's ID:	<input type="text"/>	<input type="checkbox"/> Paid preparer
PTIN:	<input type="text"/>	<input type="checkbox"/> Self-employed
Firm Name:	<input type="text"/>	EIN:
Firm Address:	<input type="text"/>	Phone:
Firm City:	<input type="text"/>	<input type="text"/>
State: Zip Code:	<input type="text"/>	

**i** 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:

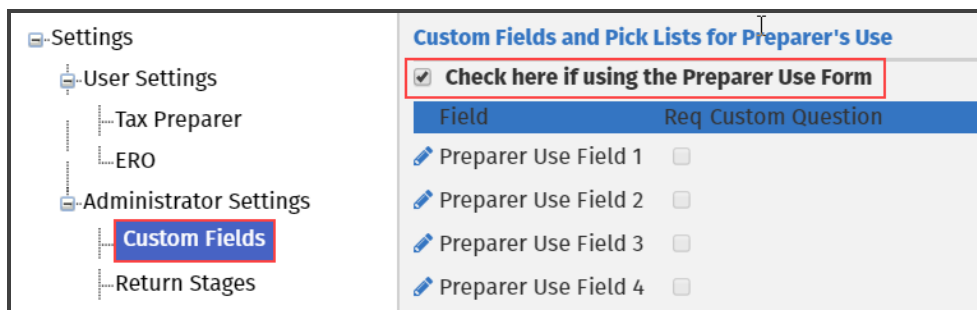
- Custom Fields
- Return Stages
- Print Sets
- Advanced
- Salutations





### 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.

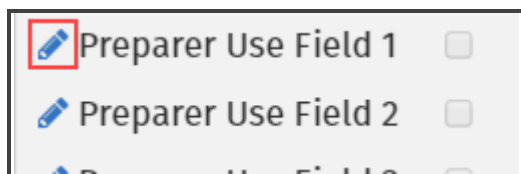
To set up these questions:

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



Field	Req Custom Question
 Preparer Use Field 1	<input type="checkbox"/>
 Preparer Use Field 2	<input type="checkbox"/>
 Preparer Use Field 3	<input type="checkbox"/>
 Preparer Use Field 4	<input type="checkbox"/>

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**.

**Custom Fields and Pick Lists for Preparer's Use**

**Preparer Use Field 1**

☒ **Required**

Custom Question:  
How did you hear about us

**Pick List Values:**

- Prior Client
- Referral
- Sinage
- Radio
- Billboard

**Requirements for values in this list:**

- Alpha-numeric characters only
- Values must be on separate lines
- Maximum of **25** values per list
- Values must be **15** characters or less

**Update** **Cancel**

**i** 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.

**Custom Fields and Pick Lists for Preparer's Use**

**Preparer Use Field 1**

☐ **Required**

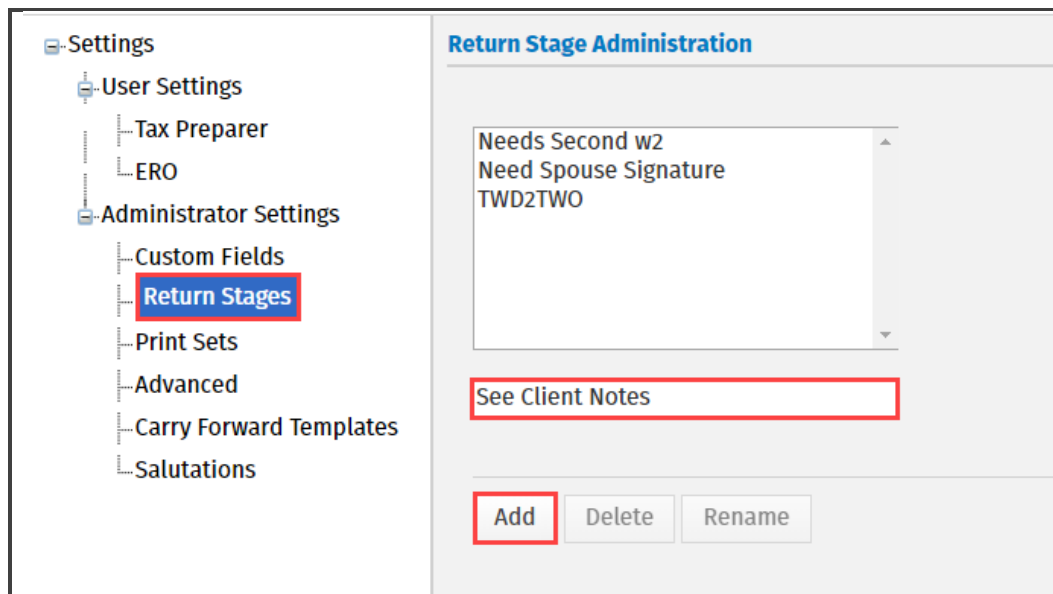
Custom Question:

**Update** **Cancel**

## 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.

General Settings

Set your general settings options.

Settings

User Settings

Tax Preparer

ERO

Administrator Settings

Custom Fields

Return Stages

Print Sets

Advanced

Carry Forward Templates

Salutations

Print Sets

Select the collections of forms to be printed each time you print.

☐

Federal Copy to be Mailed

☐

File Copy

☐

Signature Pages

☐

Taxpayer Federal Copy

Create Custom Print Set

Create Custom State Print Set

Save and Close

Close

**i** 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**.

Print Sets

Select the collections of forms to be printed each time you print.

☐

Federal Copy to be Mailed

☐

File Copy

☐

Signature Pages

☐

Taxpayer Federal Copy

Create Custom Print Set

Create Custom State 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.

**Print Sets**

**Custom Print Sets**

Name:

-- Select One Template -- ▾

- Select One Template --
- Federal Copy to be Mailed
- File Copy
- Signature Pages
- Taxpayer Federal Copy

Selected Forms

--

**i** 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.



**Custom Print Sets**  
Please use unique name, exactly named printset will overwrite each other.

Name:

Available Forms		Selected Forms	
1040NR Pg 1	<input type="button" value="Add &gt;"/> <input type="button" value="Add All &gt;&gt;"/> <input type="button" value=" &lt; Remove"/> <input type="button" value=" &lt;&lt; Remove All"/>	1040 Pg 1 (2)	<input type="button" value="▲"/> <input type="button" value="▼"/>
1040NR Pg 2		1040 Pg 2 (2)	
1040NR Pg 3		1040 Wkt1 (1)	<input type="button" value="+1 Copy"/> <input type="button" value="-1 Copy"/>
1040NR Pg 4		1040 Wkt2 (1)	
1040NR Pg 5		1040 Wkt3 (1)	
1040NREZ Pg 1	1040 Wkt4 (1)		
1040NREZ Pg 2	1040 Wkt5 (1)		
	1040 Wkt7 (1)		
	1040ES Pg 1 (1)		
	1040ES Pg 2 (1)		
	1040ES Pg 3 (1)		
	1040ES Pg 4 (1)		
	1040ES Wkt (1)		
	1040SS CTC (1)		
	1040SS Pg 1 (1)		
	1040SS Pg 2 (1)		

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.

**Advanced Settings**

**Enable Override feature for the following roles:**

☐ PasswordMaintenance

☐ eSignature

☐ Interviewer

☐ ReturnPreparer

☒ Reviewer

☐ ReturnPrinter


☐ Support

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

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

☒ **Carry Forward the Preparer Use Form**

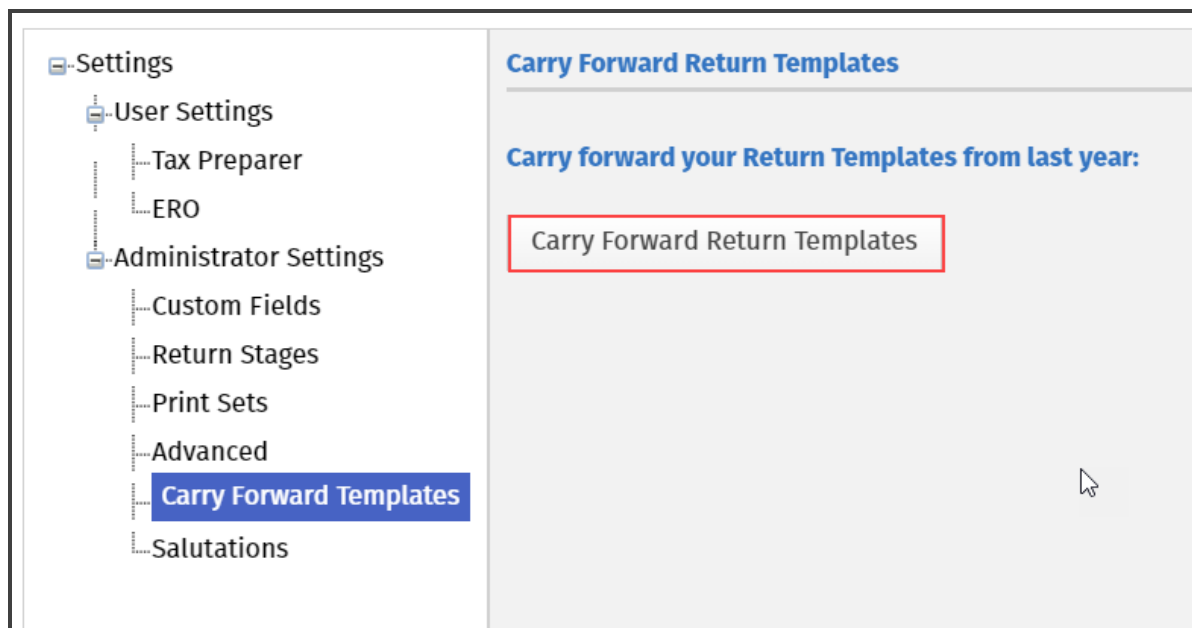
This option will copy Preparer Use form data during the carry forward process

 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:

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



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

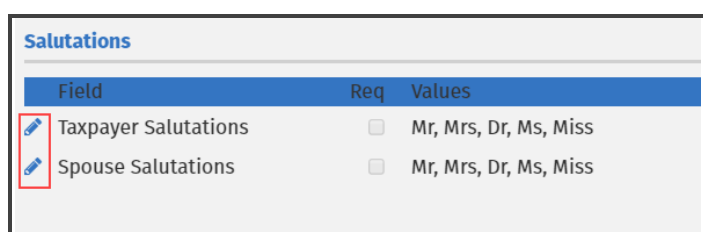


## Salutations

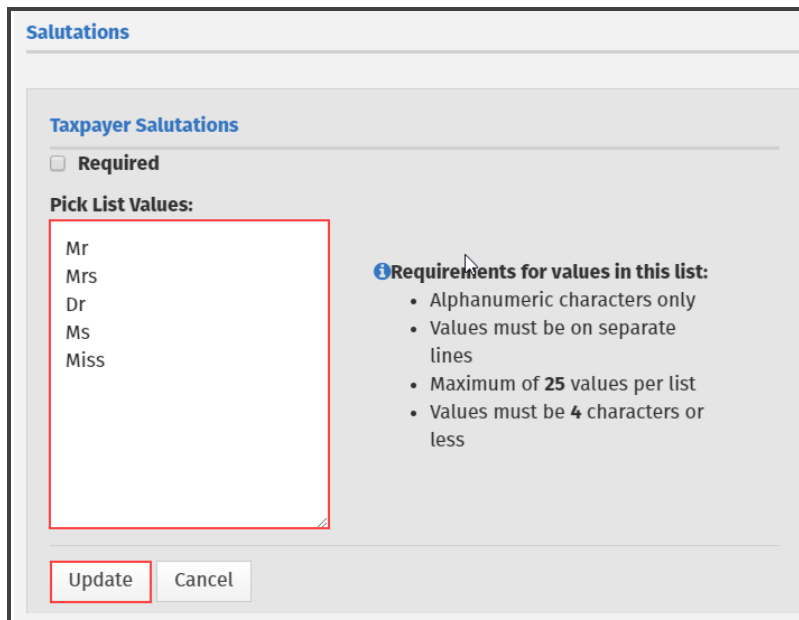
This section defines how taxpayer and spouses will be addressed on the Main Information Sheet. TaxWise Online provides a default list of options, but you can add custom values as well.

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**.



The screenshot shows a window titled "Salutations". Inside, there is a section "Taxpayer Salutations" with a "Required" checkbox. Below it is a "Pick List Values:" label and a text box containing the following salutations: Mr, Mrs, Dr, Ms, Miss. To the right of the text box is an information icon and a heading "Requirements for values in this list:" followed by a bulleted list: "Alphanumeric characters only", "Values must be on separate lines", "Maximum of 25 values per list", and "Values must be 4 characters or less". At the bottom of the window are "Update" and "Cancel" buttons.

**i** 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.

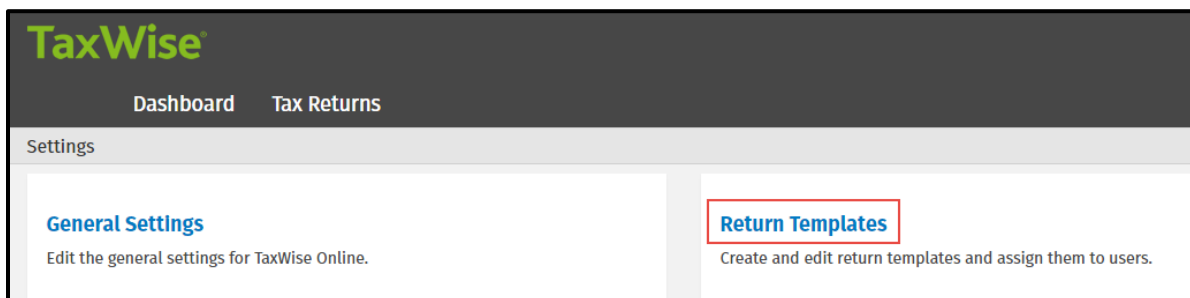


The screenshot shows two buttons: "Save and Close" (highlighted with a red border) and "Close" (grayed out).

## 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**.

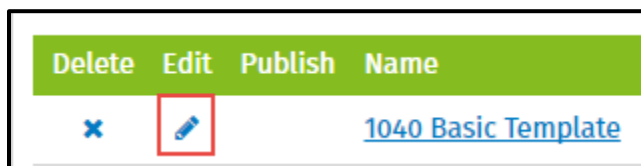


3. TaxWise Online displays the New Return Template page. Type a name and description for the new template, select a template on which to base it, and click **Create Template**.

The screenshot shows the 'New Return Template' form. It has a dark header with the title 'New Return Template'. Below the header, there's a section titled 'Add details for your new template.' with two input fields: 'Name:' and 'Description:'. Below these fields, there's a checkbox labeled 'Set as default'. Further down, there's a section titled 'The new return template will be based on:' with a dropdown menu showing 'new return template (default set of forms)'. At the bottom right, there are two buttons: 'Create Template' (green) and 'Close' (gray). The 'Create Template' button is highlighted with a red box.

-  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.

**i** In order for the form to stay in Return templates, you must F3 or Ctrl + Spacebar on a non-calculated field 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.

**i** 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**.

**Assign Return Template**

Select a return template and assign it to users.

Basic 1040 with W-2 ▼

**Assign this template to the following users:**

Select All Unselect All

User
<input type="checkbox"/> Admin
<input checked="" type="checkbox"/> Bonny1017
<input checked="" type="checkbox"/> Maria
<input type="checkbox"/> MHC

Assign Close

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**.

**Assign Return Template**

Template assigned successfully.  
Basic 1040 with W-2 has been assigned to the following users:

User Name
Bonny1017
Maria

Assign More 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**.

User Manager

[Create a New User](#)  
[Enable Remote Assistance](#)  
[Mark all users active](#)  
[Help](#)

[Add/Change Admin Message](#)  
[Restrict IP Addresses](#)  
[Mark all users inactive](#)

[Show Inactive Users](#)  
[Logged In Users](#)  
[Manage 2-Step Verification](#) NEW

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
<a href="#">Reset</a>	<a href="#">Edit</a>	Admin	Administrator			Administrator, ReturnPrinter
<a href="#">Reset</a>	<a href="#">Edit</a>	Bonny1017	Bonibelle	Rangel		ReturnPreparer, LicensedUser
<a href="#">Reset</a>	<a href="#">Edit</a>	Maria	Maria	Bernal		LicensedUser, ReturnPreparer

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

Create User

Purchased Licenses: 14

Assigned Licenses: 4

Unassigned Licenses: 10

The user must have access to the email address specified below in order to get their temporary password and to use **2-Step Verification** if it is enabled.

User Name:

Real Name:

Email Address:

Is Active User: ☒

**i** 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.



**Assign Roles**

Possible Roles		Assigned Roles
PasswordMaintenance		ReturnPreparer
eSignature		LicensedUser
Interviewer		
<b>SuperUser</b>	>>	
TemplateManager	<<	
Administrator		
Reviewer		
EfileManager		
CheckPrinter		
ExportGrid		
InterviewProcessor		
ReturnPrinter		

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

**Create User**

Purchased Licenses: 14  
Assigned Licenses: 4  
Unassigned Licenses: 10

The user must have access to the email address specified below in order to get their temporary password and to use **2-Step Verification** if it is enabled.

User Name:

Real Name:

Email Address:

Is Active User: ☒

**Assign Roles**

Possible Roles		Assigned Roles
eSignature		LicensedUser
Interviewer		SuperUser
TemplateManager		
Administrator		
Reviewer		
EfileManager	>>	
CheckPrinter	<<	
ExportGrid		
InterviewProcessor		
ReturnPrinter		
Support		
ReturnPreparer		

**Save**

- i** 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
<b>Administrator</b>	The <b>Administrator</b> role allows access to all program features as well as access to the user settings for all users.
<b>SuperUser</b>	The <b>Superuser</b> 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.
<b>ReturnPreparer</b>	The <b>ReturnPreparer</b> role allows a preparer to create new returns and verify return status. This user role cannot access any of the e-filing functions.
<b>Reviewer</b>	The <b>Reviewer</b> 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.
<b>Interviewer</b>	The <b>Interviewer</b> 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
<b>TemplateManager</b>	Allows a user the ability to create and edit return templates and assign them to users.
<b>EfileManager</b>	Allows a user the ability to submit e-files.
<b>PasswordMaintenance</b>	Allows a non-admin user to reset user passwords and manage user details such as name, email address, and active/inactive user status. This user cannot edit role assignments.
<b>InterviewProcessor</b>	Allows the user to ability to import interviews.
<b>CheckPrinter</b>	Allows the user to print checks.

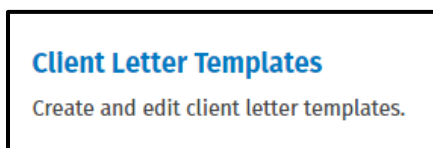
User Role	Description
<b>ReturnPrinter</b>	Allows the user to print returns.
<b>ExportGrid</b>	Allows the user to Export the return list function under View More Actions menu.
<b>ReturnDeleter</b>	Allows the user to delete and restore returns.
<b>eSignature</b>	Allows the user access to the eSignature
<b>Support</b>	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

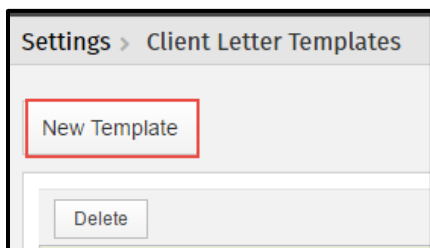
You can also create default client letters using the Client Letter templates feature. This allows you to set up standard letters to attach to your clients' returns.

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**.

**New Client Letter Template**

Add details for your new Client Letter template.

**Name:**  
Basic Letter Template

The new Client Letter template will be based on:

☐ Create from scratch (blank template)

☒ Start from existing one:

**Custom Templates**

- sample template

**Predefined Templates**

- 1040 Balance Due
- 1040 Refund Letter**
- Privacy Policy
- SPEC Reject Letter

**Create Template** Cancel

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

**Edit Client Letter Template**

sample template

Paragraph Font Size Color B I U abc x x x

Insert Special Field

{EROFIRMNAME}  
{EROADDRESS}  
{EROCITY}, {EROSTATE} {EROZIP}

{FIRSTNAME} {LASTNAME}  
{ADDRESS}  
{CITY}, {STATE} {ZIP}

Dear {FIRSTNAME}

Enclosed is your {TAXYEAR} Federal 1040 Income Tax Return

Your Federal Income Tax Refund is {AMTOPAID}.

Your Federal tax return has been electronically filed. Your refund will be issued to you by the IRS. Please keep a copy of the return with your records.

If you have any questions, please call us. We appreciate the opportunity to serve you.

Shift+Enter forces a single line break.

**Special Fields:**

- {FORMALNAME}
- {FULLNAME}
- {FIRSTNAME}
- {LASTNAME}
- {SSN}
- {SPFORMALNAME}
- {SPFULLNAME}
- {SPFIRST}
- {SPLAST}
- {SPSSN}
- {ADDRESS}
- {CITY}

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

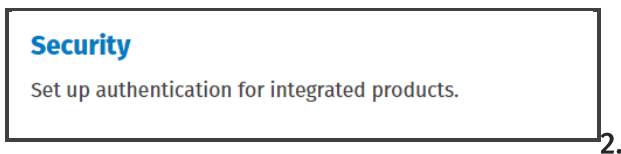
- i** When you choose to add a client letter inside a return, any custom templates display in the list, along with the pre-defined templates.

## IFirm Integration

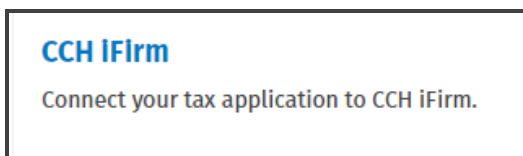
The Security settings module allows you to sync your CCH iFirm account with TaxWise Online. Once these accounts are synched, you can print a client's completed return directly from TaxWise Online to the CCH iFirm Client Portal, a secure, online document sharing system.

To integrate TaxWise Online with CCH iFirm:

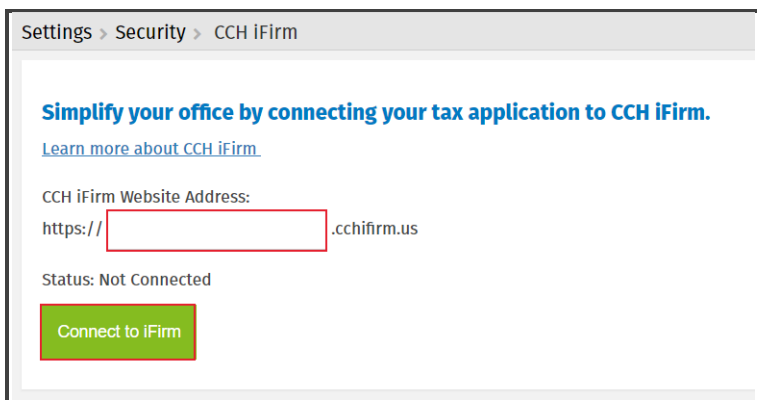
1. From the Settings page, click **Security**.



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**.

CCH iFirm - Google Chrome

wktraining.cchifirm.us/oauth2/Api/Login?ReturnUri=%2foauth2%2fapi%2fAuthorize%2f%3dTaxWiseOnline%26redirect\_uri%3dhttp%253A%252F%252Fqtwowb003%253A7519%252FProce...

# CCH iFirm

This app requires that you sign in


Sign in...

Username  
Maria

Password  
\*\*\*\*\*

Login

Copyright © 2016 CCH Ltd. All rights reserved.

 CCH  
a Wolters Kluwer business

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

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

# CCH iFirm


The app is requesting access to your iFirm account.

Allow access

Allow access to your ifirm account?  
If you grant access now, you can revoke it at any time by visiting your account page.

Yes No

Copyright © 2016 CCH Ltd. All rights reserved.

 CCH  
a Wolters Kluwer business

7. TaxWise Online displays the status as Connected.

**Simplify your office by connecting your tax application to CCH iFirm.**

[Learn more about CCH iFirm](#)

CCH iFirm Website Address:

https://  .cchifirm.us

Status: Connected

Disconnect from iFirm

**i** Not all users have CCH iFirm Client Portal.

## Co-Brand Mobile App

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

**Co-Brand Mobile app**

Configure 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

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

Settings > Co-Brand Mobile app

Please enter information below to provision your mobile site. P

Service Bureau Details   Logos   Prep Fees

**Firm Name**

CS INTERNAL USE ONLY

**Address line 1**

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

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

Service Bureau Details Logos Prep Fees

**Firm Name**  
CS TEST 1

**ERO Name**

**EFIN**  
288705

**Address line 1**  
225 CHASTAIN MEADOWS

**Address line 2**

**City**  
KENNESAW

**State**  
GA

**ZipCode**  
30144

**Phone to be shown in mobile app contact info**

**Email to be shown in mobile app contact info**

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/>.

**Phone to be shown in mobile app contact info**  
706-555-5555

**Email to be shown in mobile app contact info**  
sfs.customered@wolterskluwer.com

**Mobile app name**  
WK Training

**Mobile app short name**  
WK

**Site Name**  
wktraining  
<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

Settings > Co-Brand Mobile app

Please enter information below to provision your mobile site. Please ensure that you fill out information in all 3 tabs below i.e., Service Bureau Details, Logos and Prep Fees.

Service Bureau Details Logos Prep Fees

**Website Logo**  
Only PNG format supported, recommended resolution 250X150, it cannot exceed 32 KB  
Browse Upload website logo  
Upload

**Mobile app Logo**  
Only PNG format supported, recommended resolution 512x512, it cannot exceed 32 KB  
Browse Upload mobile app logo  
Upload



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

Service Bureau Details Logos **Prep Fees**

The fees entered in the following buckets (trans, tech, SVB, doc prep) must match what has been entered on your bank application. If your fees do not match, the return will reject and the fees will need to be updated.

Amount paid for tax preparation services  
0.00

Transmission fee paid to transmitter  
0.00

Document preparation fee  
0.00

Refund transfer processing fee  
0.00

Service Bureau Fee  
0.00

Other fee text

Other fee amount  
0.00

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

## Send Settings

**i** 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**.

### Send Settings

Send custom fields, return stages, templates and print sets to a designated office.

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

Settings > Send Settings

### Offices

Filter Options:  EFIN:  Company Name:

	EFIN	Company Name	Custom Fields	Return Stages	Templates	Custom Print Sets
Select	080888	SFS VITTETOE & ASSOCIATES	-	-	Dec 10, 2019 2:56 PM	-
Select	084174	SAMPSON ACCOUNTING	-	-	-	-
Select	081812	EVANOFF TAX SERVICE	-	-	Dec 10, 2019 2:56 PM	-
Select	081868	HILBURN TAXES	Dec 31, 2019 9:38 AM	-	Dec 10, 2019 2:56 PM	-

Showing 1 to 4 of 4 entries

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

Select	081812	EVANOFF TAX SERVICE	-	-	Dec 10, 2019 2:56 PM	-
Select	081868	HILBURN TAXES	Dec 31, 2019 9:38 AM	-	Dec 10, 2019 2:56 PM	-

Showing 1 to 4 of 4 entries

### Selected offices

081812

What would you like to send to the Selected office(s)?

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

What would you like to send to the Selected office(s)?

Custom Fields

Custom Fields

Return Stages

Templates

Custom Print Sets

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

What would you like to send to the Selected office(s)?

Send

**i** 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.

**Processing 1 total selected offices.**  
**Sending custom fields to 1 offices... done.**  
**Finished processing.**  
[refresh view](#)

## 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.

What would you like to send to the Selected office(s)?

Templates ▼

Default Template: \_\_\_\_\_

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

What would you like to send to the Selected office(s)?

Templates ▼

Default Template:

My Template ▼

Felicia

Ranburne

Default1

Atlantic Station

My Template

Rome

ATL

Carrollton

DLP

The selected default will always be sent.

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

What would you like to send to the Selected office(s)?

Templates ▼

Default Template:  
My Template ▼ The selected default will always be sent.

Other templates to send:

- ☐ Felicia
- ☐ Ranburne
- ☐ Town
- ☒ Main Office
- ☐ Basic
- ☐ Student
- ☐ NEW OFFICE
- ☒ Tanya
- ☐ Bremen
- ☐ NJ
- ☐ Mark template

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

What would you like to send to the Selected office(s)?

Custom Print Sets ▼

Default Print Set:

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

What would you like to send to the Selected office(s)?

Custom Print Sets ▼

Default Print Set:  
Custom File Copy ▼ The selected default will always be sent.

- Custom File Copy
- Estimated payments
- ITIN
- state set

Estimated payments

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

What would you like to send to the Selected office(s)?

Custom Print Sets ▾

Default Print Set:  
Custom File Copy ▾ The selected default will always be sent.

Other Print Sets to send:

<input type="checkbox"/>	Custom File Copy
<input checked="" type="checkbox"/>	Estimated payments
<input checked="" type="checkbox"/>	ITIN
<input type="checkbox"/>	state set

**Send** Select All Clear All

- 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:

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

**TaxWise** Administrator ▾

Dashboard Tax Returns

Settings > Partner Verification

### Settlement Solutions

You are not currently enrolled with a Settlement Solutions Partner. To learn more about how your business may benefit from offering settlement solutions, contact your main office or sales representative.

### Additional Services

Service	Details
Protection Plus	Available
Protection Plus Fee	\$44.95
Protection Plus Add ON Fee	<input type="text" value="\$0.00"/>
Versicom	Not Enrolled

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

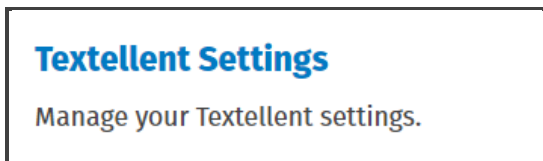
## Textellent Settings

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

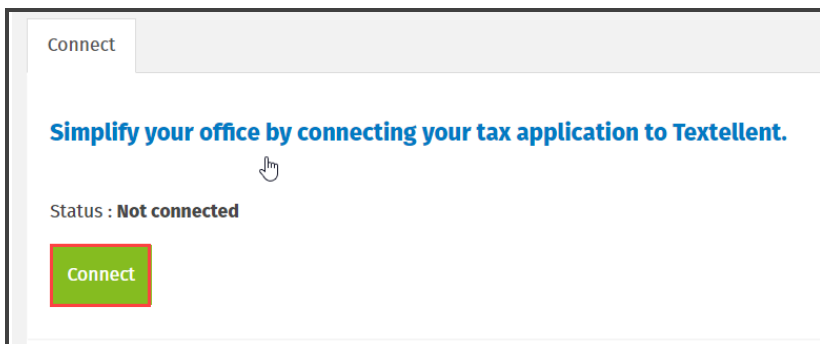
- Two-way text communication with clients as well as voice calls
- Personalized text message marketing campaigns
- Automated reminders
- Self-service appointment scheduling
- Referral programs
- Refund status updates

To integrate your Textellent subscription with TaxWise Online:

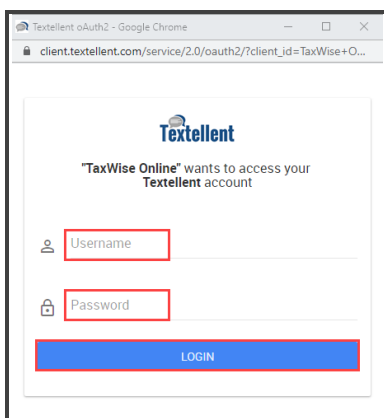
1. From the Settings page, click **Textellent Settings**.



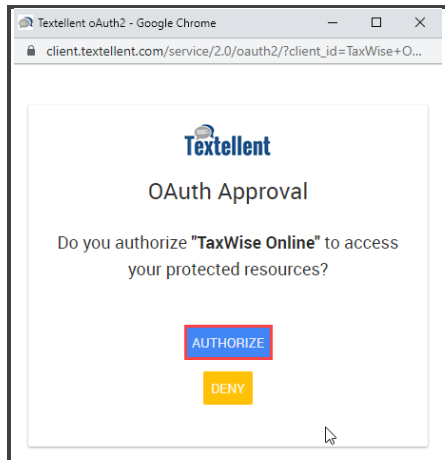
2. On the Textellent Settings page, click **Connect**.



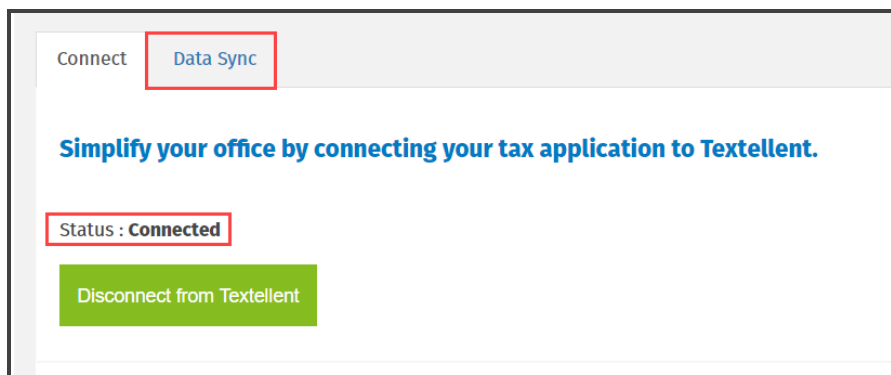
3. Enter your Textellent login credentials, and click **Login**.



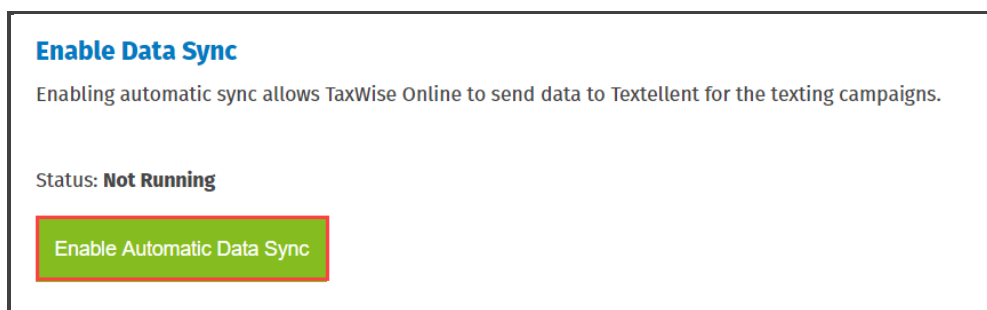
4. Textellent will ask you to confirm, you want to allow TaxWise Online access, click **Authorize**.



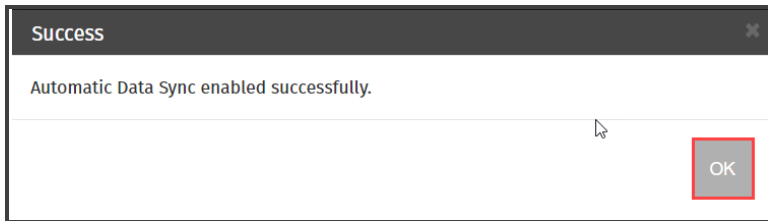
5. TaxWise Online displays the status as Connected. Once TaxWise Online is connected to Textellent you will see the Data Sync tab at the top, click **Data Syncn**.



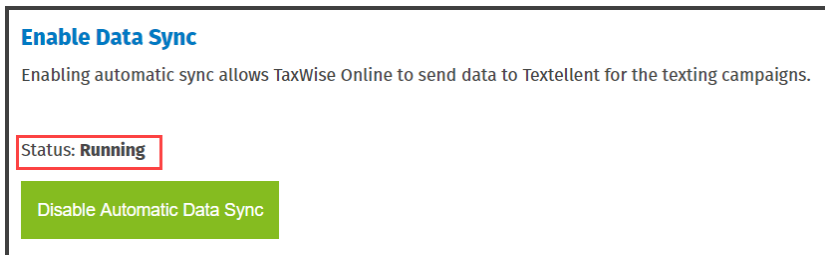
6. The automatic data sync allows TaxWise online to send data to Textellent for the texting campaigns. To enable, click **Enable Automatic Data Sync**.



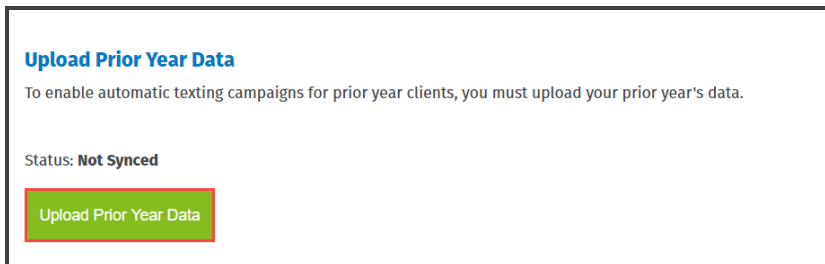
7. TaxWise Online displays confirmation message stating that Automatic Data Sync was successfully enabled, click **OK**.



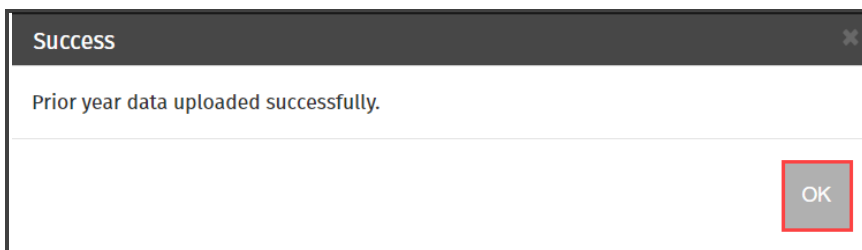
8. TaxWise Online displays the status as Running.



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.

