

TaxWise Registration and Setup

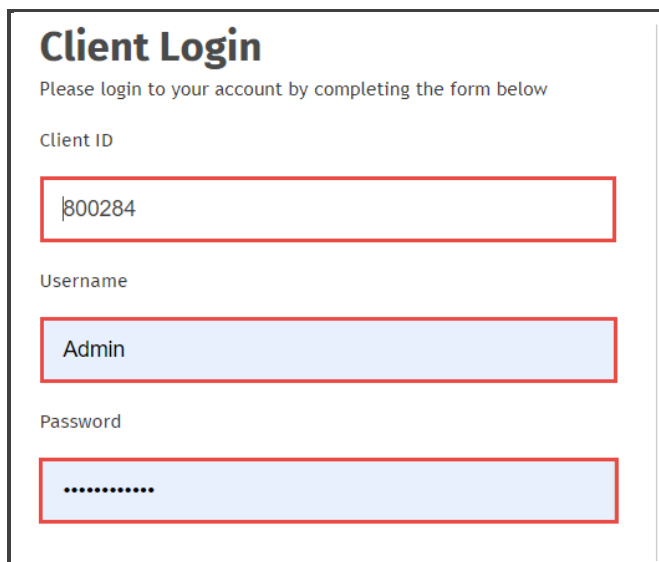
Installing TaxWise

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:

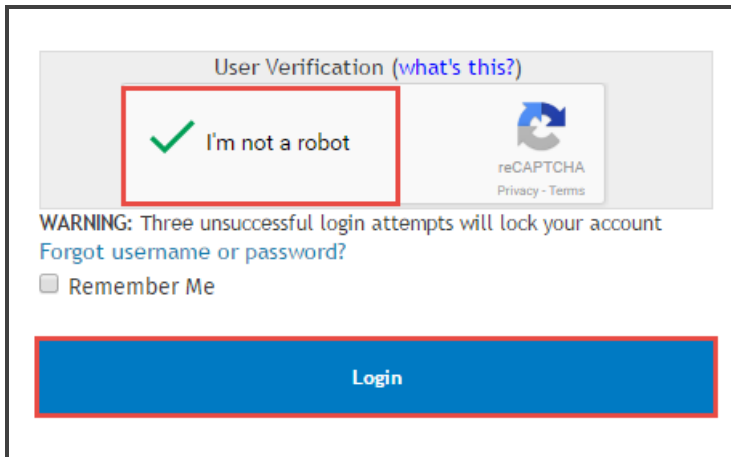
1. Navigate to support.taxwise.com.
2. From the TaxWise Solution Center landing page, click **Login** located at the top right.



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

A screenshot of the "Client Login" form. The title "Client Login" is at the top. Below it, the instruction "Please login to your account by completing the form below" is shown. There are three input fields: "Client ID" containing "800284", "Username" containing "Admin", and "Password" containing a series of dots. Each 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 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.

Password Requirements

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Must contain at least one special character(#?!@\$%^&*-))
- Must contain at least one upper case character
- Must contain at least one lower case character
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Passwords expire every 90 days

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.

6. 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)

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

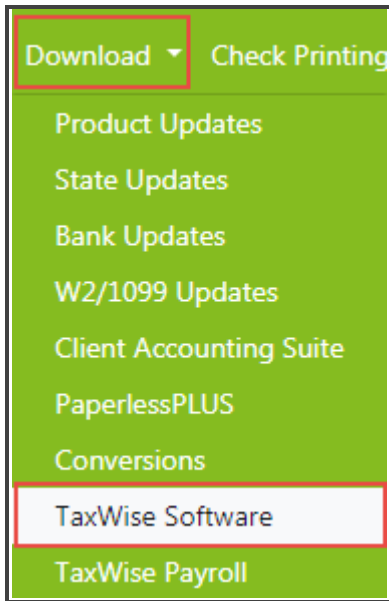
Verify Your Identity
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

Enter the code

458864

Submit

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



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



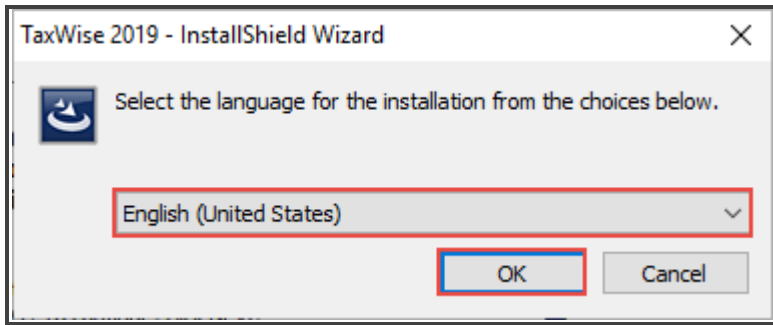
- i** If you use Internet Explorer, the browser displays a yellow download bar at the bottom of the page. Click **Run** or **Save** to complete the download.

10. When the download is complete, double-click the **TW19setup.34.0.exe** icon from your desktop.

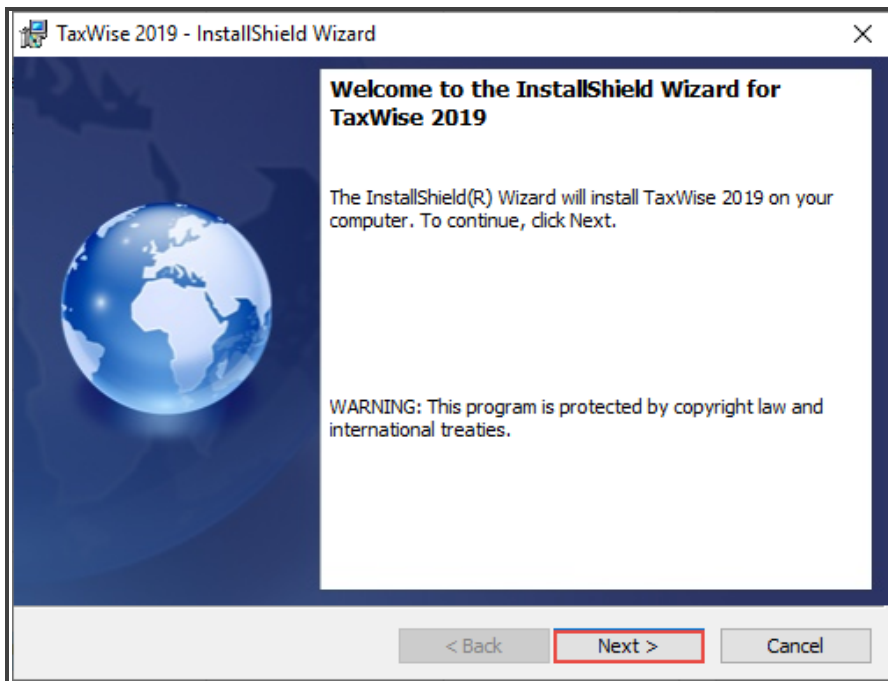


To install TaxWise:

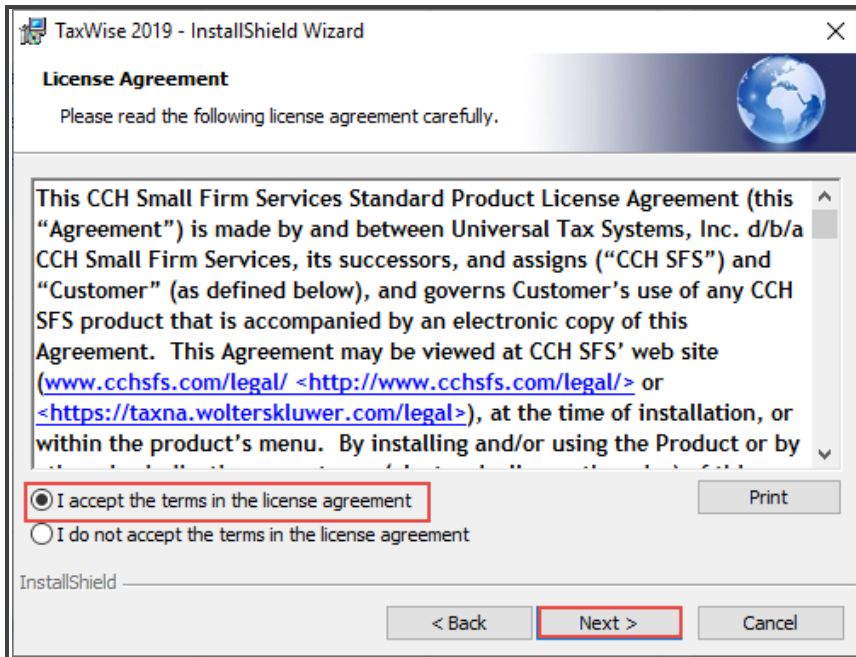
1. On the **TaxWise – InstallShield Wizard** dialog box, choose a language, and click **OK**.



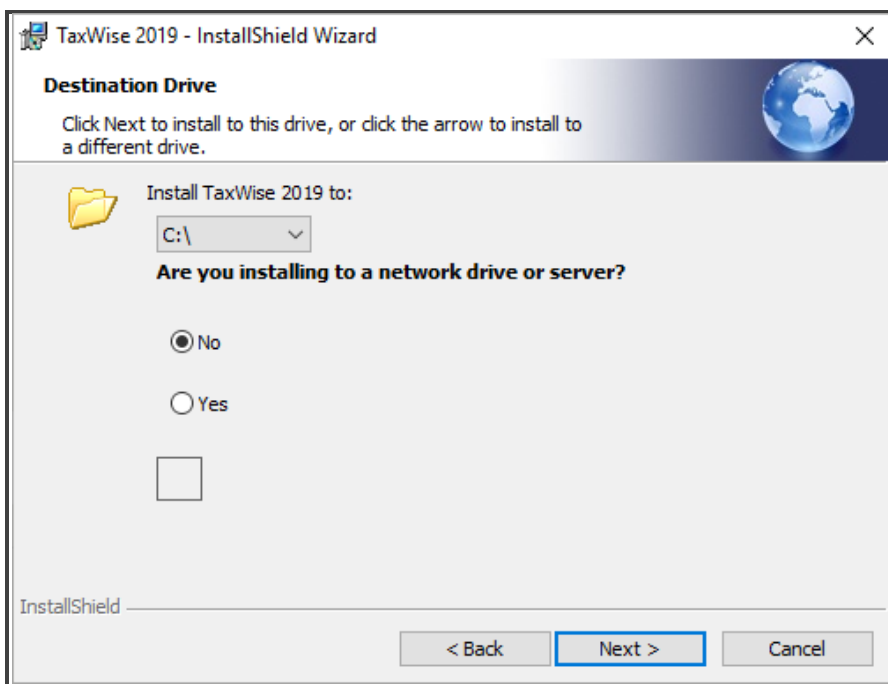
2. InstallShield Wizard displays the Welcome to the InstallShield Wizard for TaxWise window. Click **Next**.



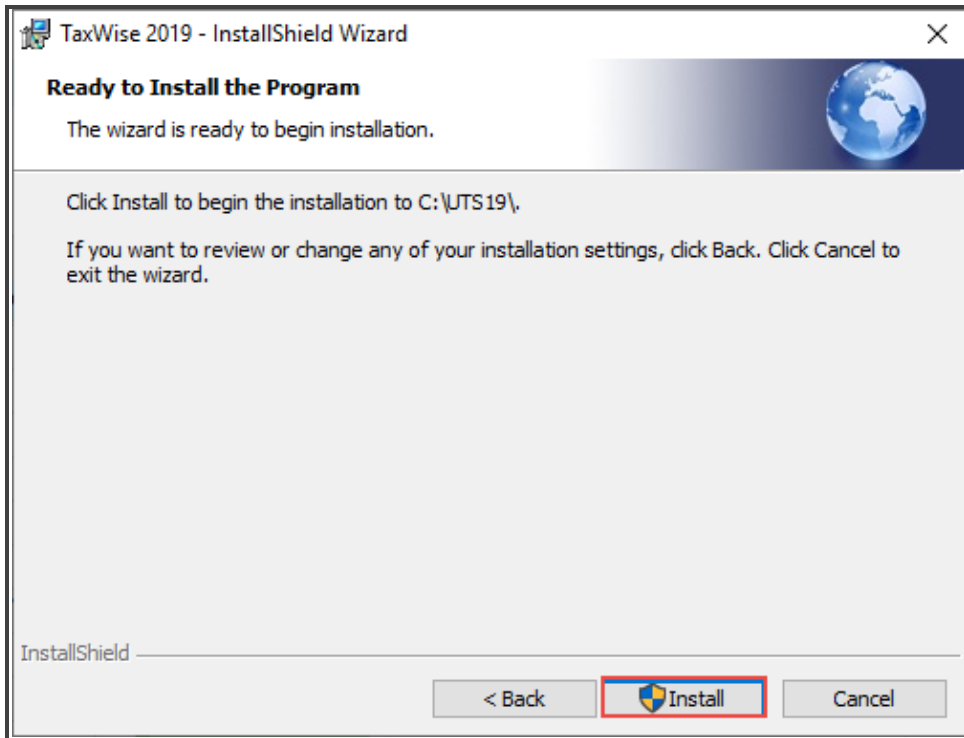
3. InstallShield Wizard displays the License Agreement window. Read the license agreement. If you accept the terms, select **I accept the terms in the license agreement**, and click **Next**.



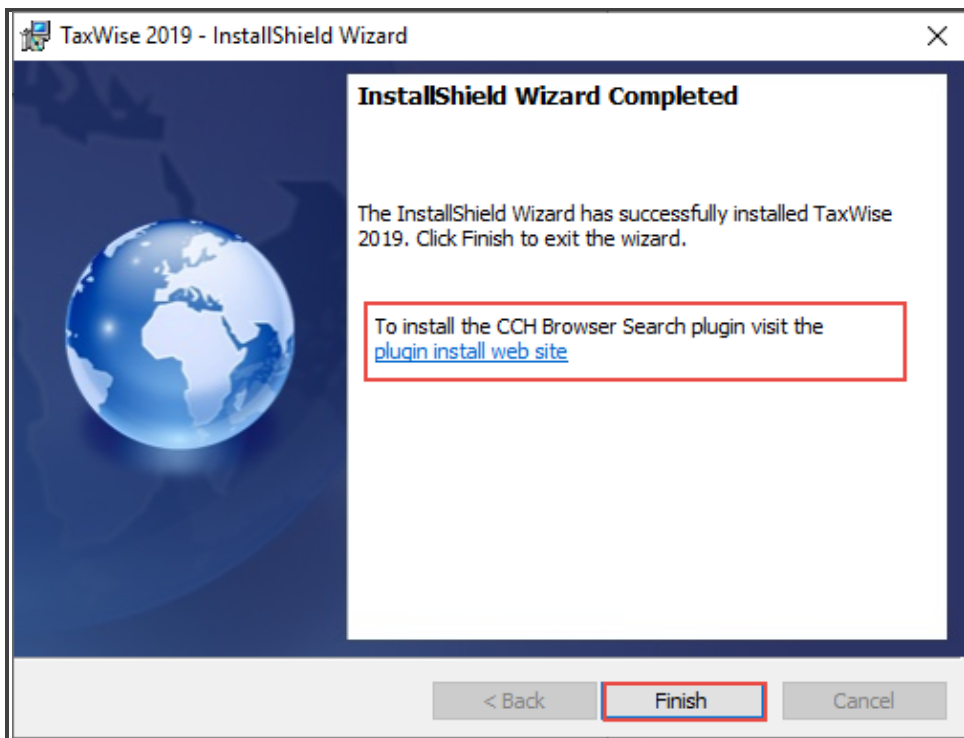
4. InstallShield Wizard displays the Destination Drive dialog box. Select the drive to which you want to install TaxWise and click **Next**.



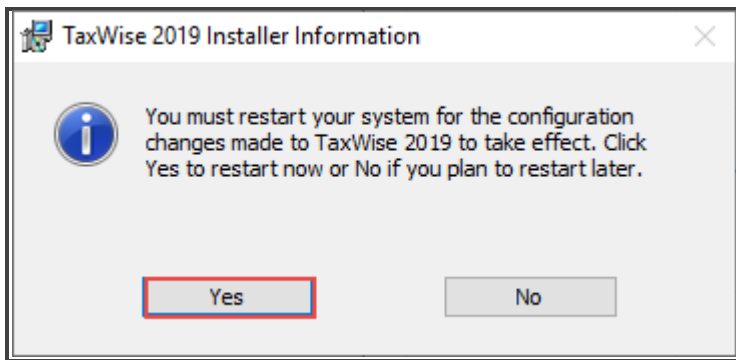
5. InstallShield Wizard displays the Ready to Install the Program window. Click **Install**.



6. 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.

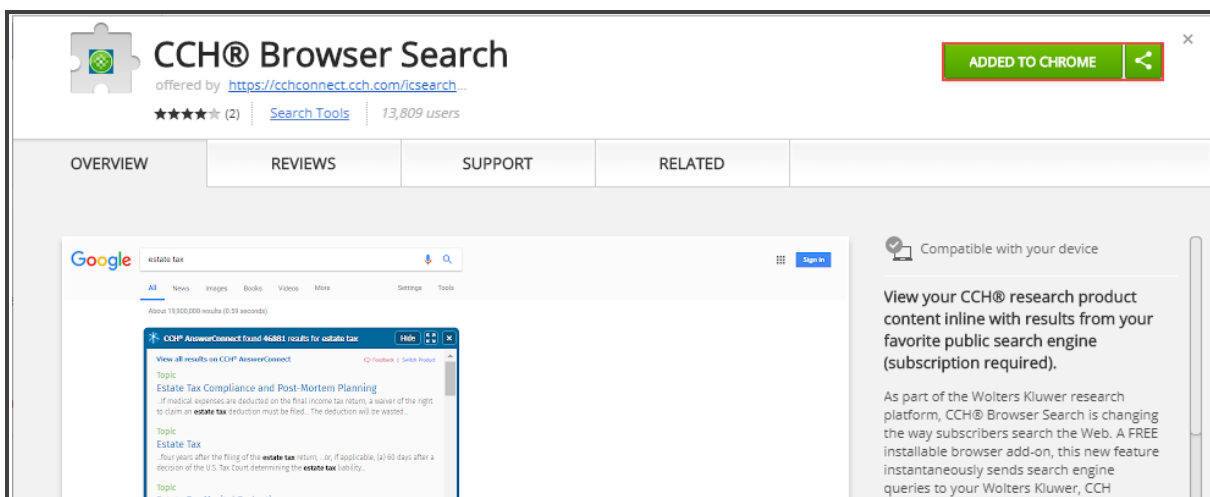


- i** InstallShield Wizard displays the TaxWise Installer Information dialog box prompting you to restart your computer. If you are installing the CCH Browser Search plugin, restart the computer when that process is complete.



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

1. If using Google Chrome, click the **Add to Chrome** button in the upper right corner.



2. Once the button reads *Added to Chrome*, close your browser and reopen to begin using the plugin.
- i** When using Internet Explorer, there are additional steps you must complete to enable the browser plugin. These steps are outlined below. Click **Next** to continue.
3. When your internet browser opens the page in Internet Explorer, you must click the **Install Now** button to download the installer.

CCH® Browser Search
A browser extension for public search engines

Install Now

Installation process

1. Close all open programs and other browser tabs or windows.
2. Click on the "Install Now" button above and wait a few seconds for the download/Install process to begin.
3. If you are using Internet Explorer®, click Run at the prompt (see Image below). If you are using Chrome™ or Firefox®, you will need to manually run the CCHBrowserSearch.single.exe once it downloads.

Do you want to run or save CCHBrowserSearch.single.exe from cchconnect.cch.com?

Run Save Cancel

4. On the Welcome screen, click Next.

4. Follow the instructions on the webpage to complete the installation. Again, close all browsers after you install, and then reopen the browser to begin searching.

Network Installation

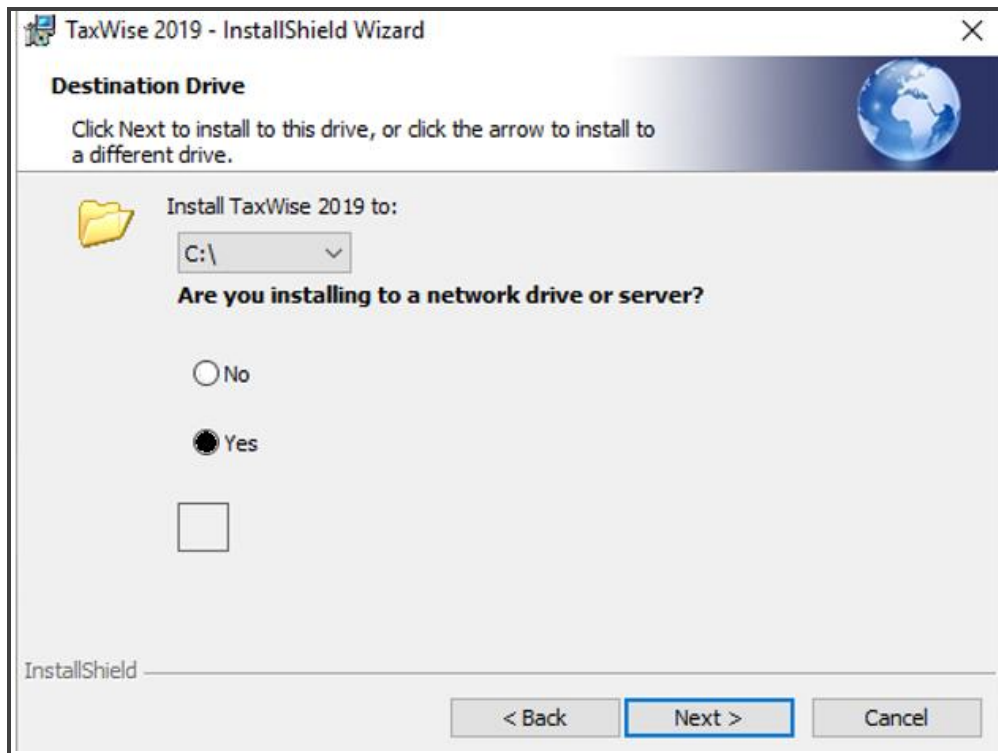
Next, we will review installing to a network. TaxWise operates on two network types: client server network and a peer-to-peer network. On a peer-to-peer network, set the most powerful machine to act as the server for TaxWise.

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**.

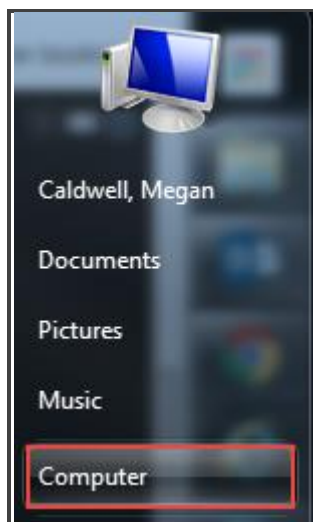


3. Finish the installation as described before and click **Finish**.

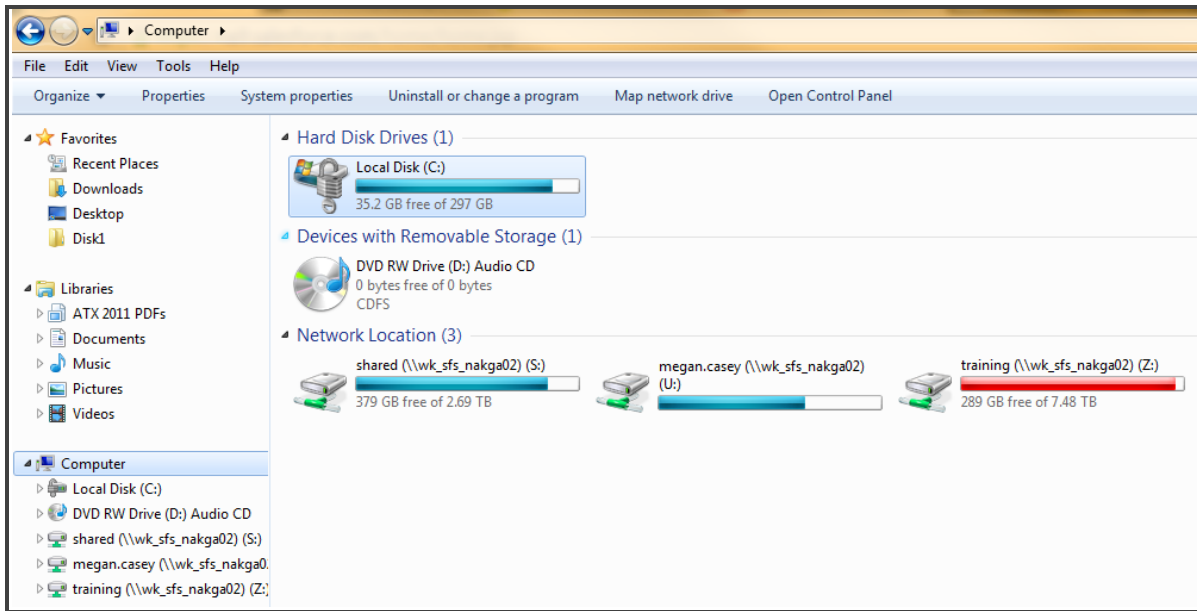
Workstation Network Installation

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

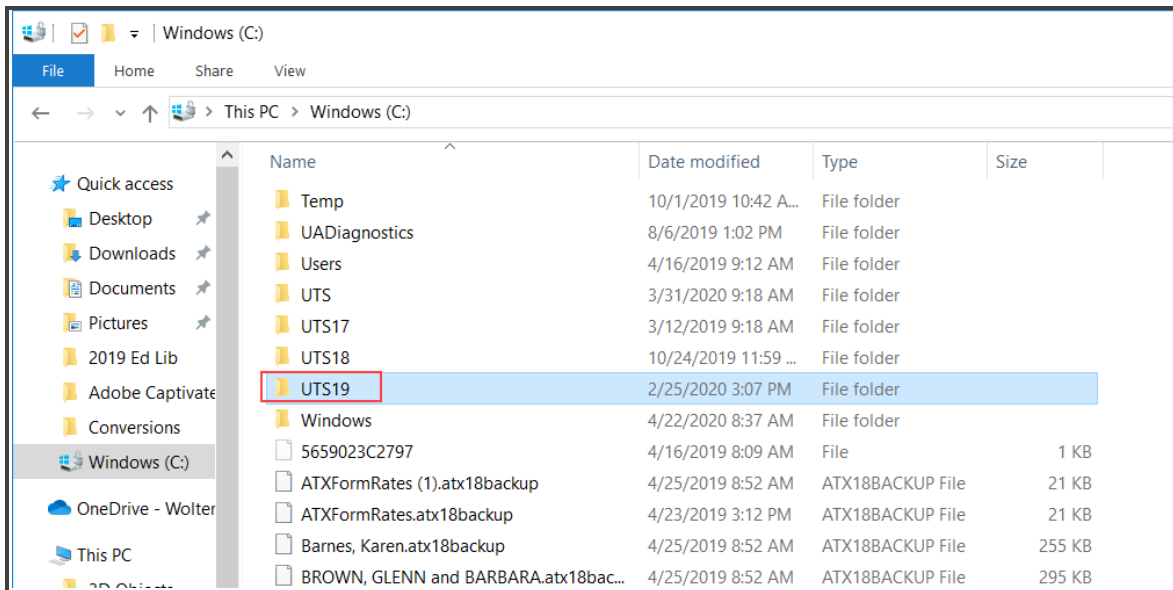
1. Go to the **Start** menu and click **Computer**.



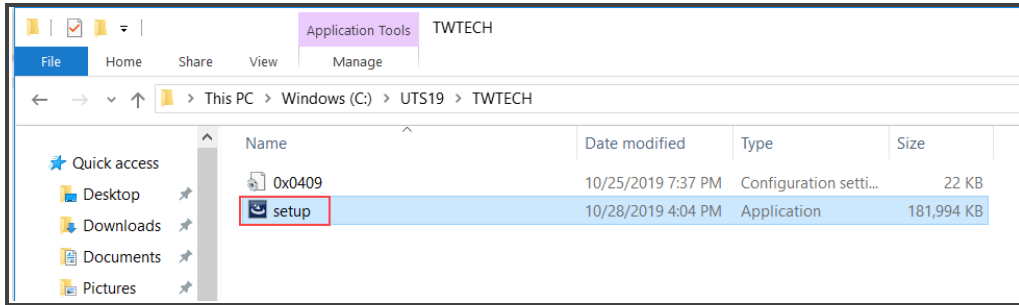
2. Windows displays the Computer dialog box:



3. Double-click the mapped drive. Windows displays the mapped drive contents.
4. Double-click the **UTS19** folder.



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



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