TaxWise Registration and Setup

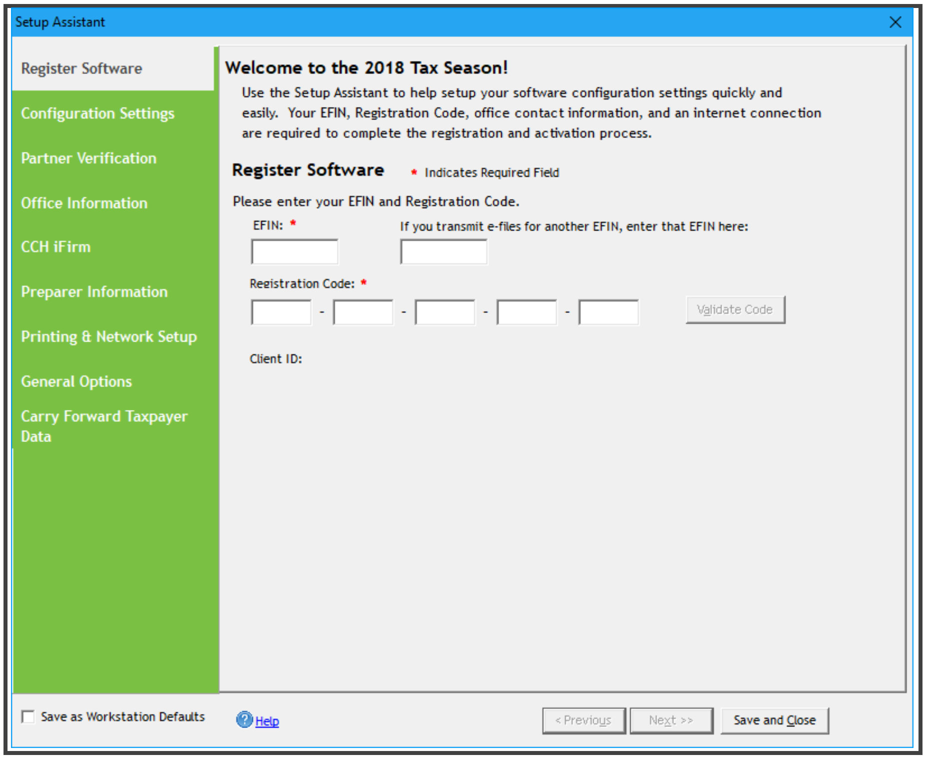
Setup Assistant

After installing TaxWise, double-click the desktop icon to launch the program. The first screen you see is the Setup Assistant. Setup Assistant walks you through setting up your software, including registering your software, carrying forward prior year data, and setting your program preferences. You will need the following items to complete this step:

- EFIN
- Registration code
- Office contact information
- Internet connection

Register Software

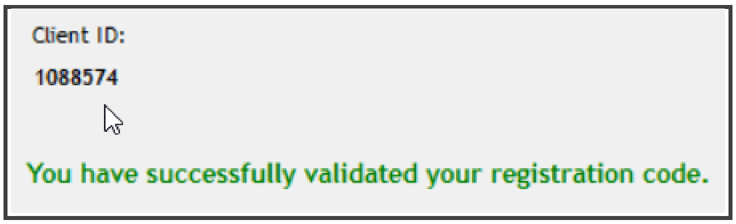
The first tab consists of entering your EFIN and the registration code you received in email. You can also locate this on the TaxWise Solution Center, where you downloaded your software.



1. Type your EFIN in the appropriate field.

2. Next, enter your software registration code in the space provided, and click **Validate Code**.

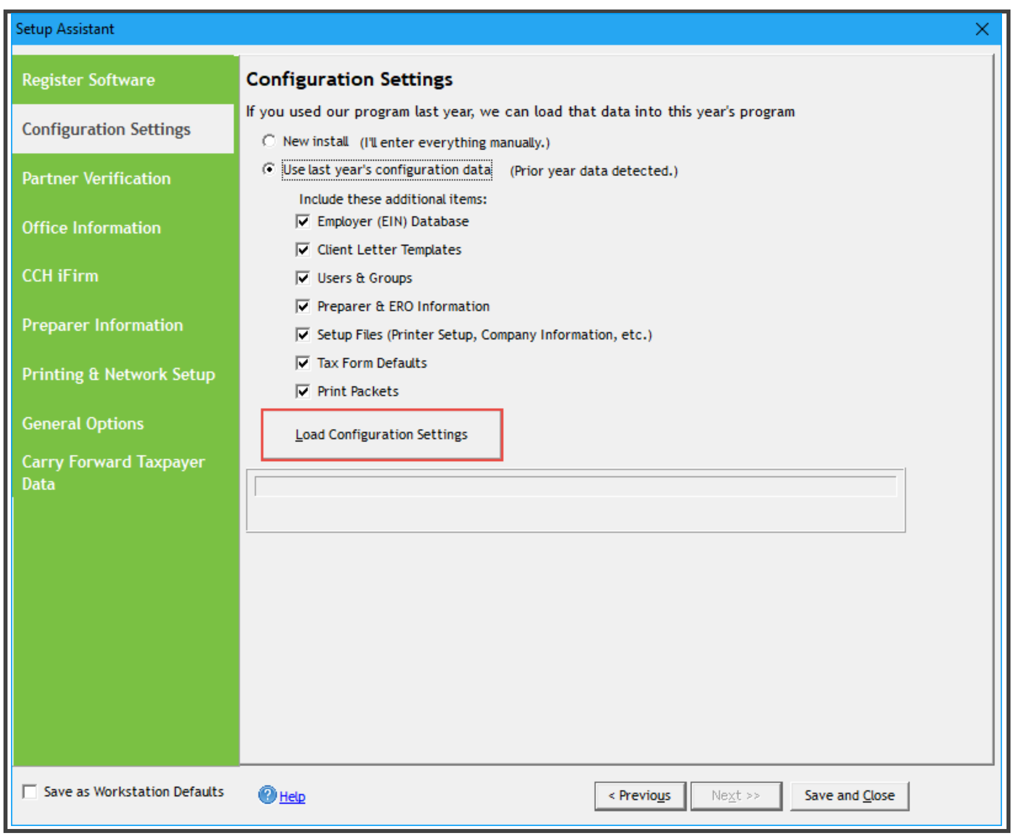
3. TaxWise displays you Client ID and the validation result. Click **Next**.



You will need this Client ID when contacting Customer Support.

Configuration Settings

Use the Configuration Settings section to carry forward data from last year's program into the current year. You must have the prior year's version of TaxWise installed to carry forward information.



TaxWise allows you to carry forward the following types of data from the previous year:

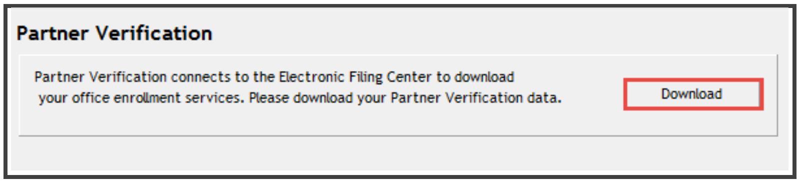
Data	Description
Employer Database (EIN)	A reference log of previously entered employer data, which can be used to reduce keystrokes
Client Letter Templates	A pre-prepared client letter for each tax package (except for MISC) that can be modified to suit your needs
Tax Form Defaults	A feature that allows you to set specific entries you want to carry through to every new return
Users & Groups	A tool used by the administrator to: ▪ Add usernames ▪ Assign, change or remove user passwords ▪ Create multiple groups with different access rights to TaxWise menu commands and actions ▪ Assign usernames to the group(s) to give them access rights needed to perform job tasks
Preparer & ERO Information	Characters that identify the preparer and ERO and enable TaxWise to enter the preparer information on the forms
Setup Files (Printer Setup, Company Information, etc.)	Files used to carry forward prior year tax return information into the current year
Print Packets	Customized print settings that specify which forms to print for various copies of the return

1. Choose the data types you need to carry forward, and then click **Load Configuration Settings**.
2. When TaxWise completes the transfer of your data, click **Next**.

Partner Verification

Use the Partner Verification section to download your settlement solution elections. TaxWise requires an active internet connection to download election information from the Wolters Kluwer Electronic Filing Center. TaxWise populates this information to the **Non-Preparer Fee** section in a tax return.

1. Click **Download**.



2. Verify the information on this page, and then click **Next**.

For more information on applying to offer refund settlement solutions, review the video found **here**.

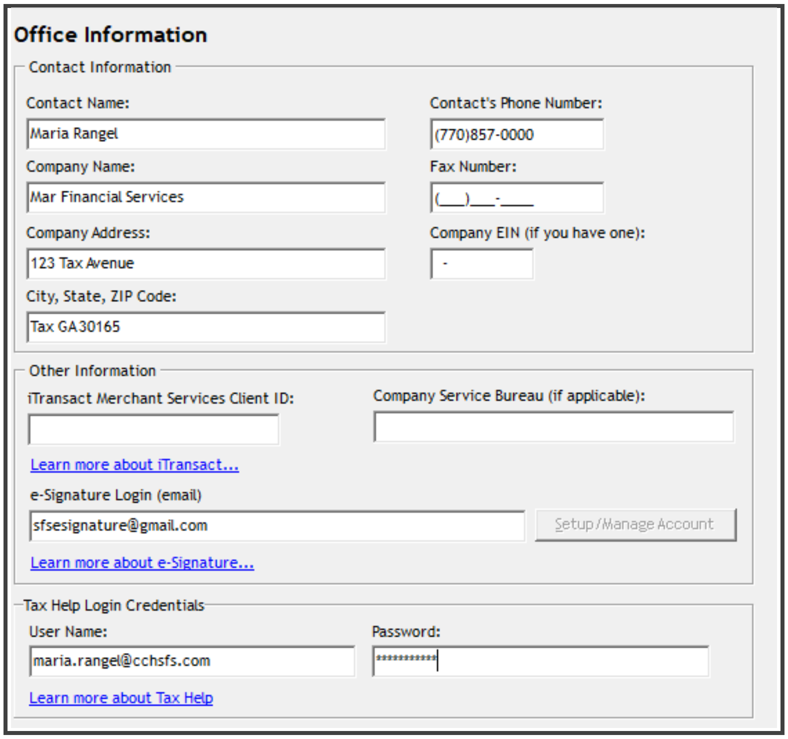
Office Information

Use the Office Information section to input your contact information and set up your iTransact Merchant Services client ID, if you use that service. You can also setup the e-signature feature and sync your AnswerConnect tax research tools on this screen.

1. Type your company information in the top section of this screen.

2. In the **e-Signature Login (email)** field, type the email address you want to use with the e-Signature feature.

3. In the **Tax Help Credentials** section, type your email address and password associated with your CCH AnswerConnect login.

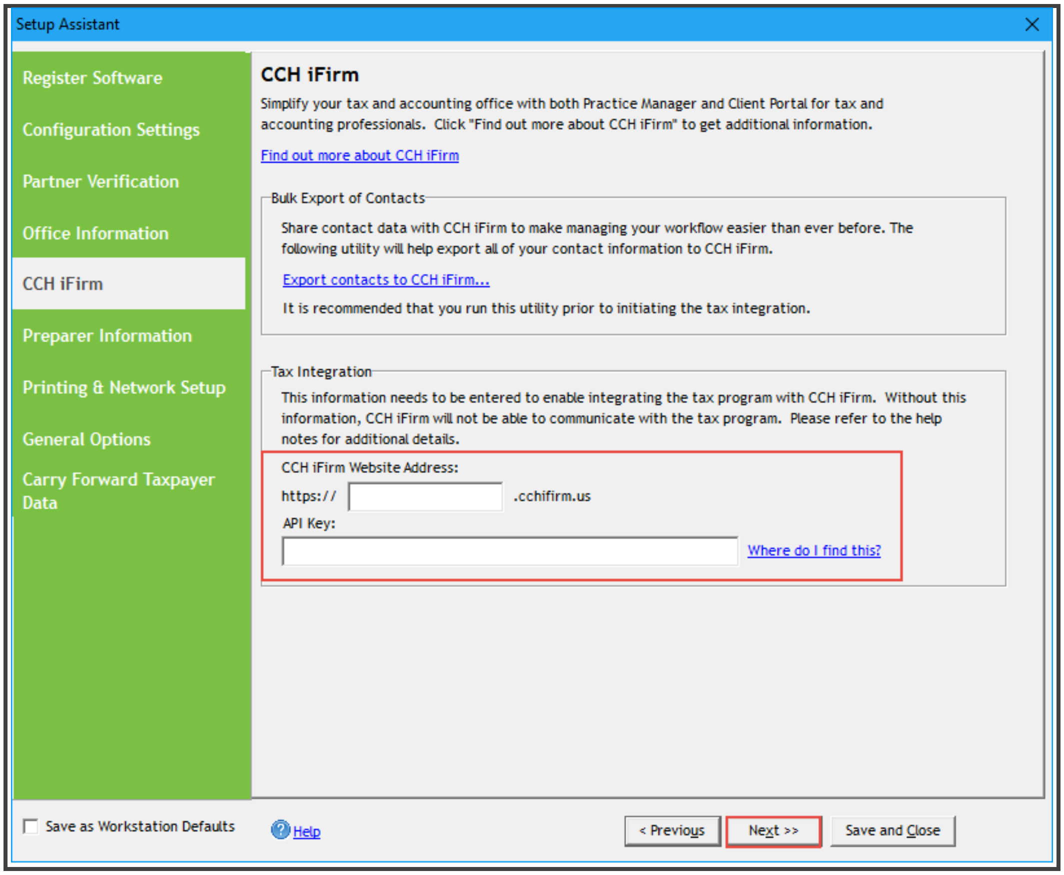


For more information on completing the setup for e-Signature, click **here**.

CCH iFirm

The CCH iFirm screen allows you to enter details so you can take advantage of current and upcoming integration tools, such as exporting contact information for your clients from TaxWise into CCH iFirm.

1. To sync your programs, type your CCH iFirm website address and the API key in the CCH iFirm section of Setup Assistant. Click **Next**.



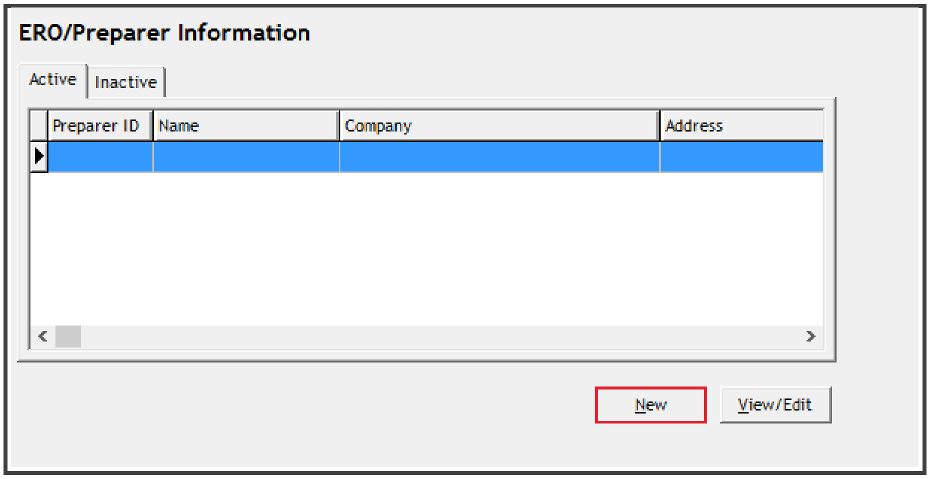
You can locate the API key inside your CCH iFirm program. Click the **Where do I find this?** link for more information.

Preparer Information

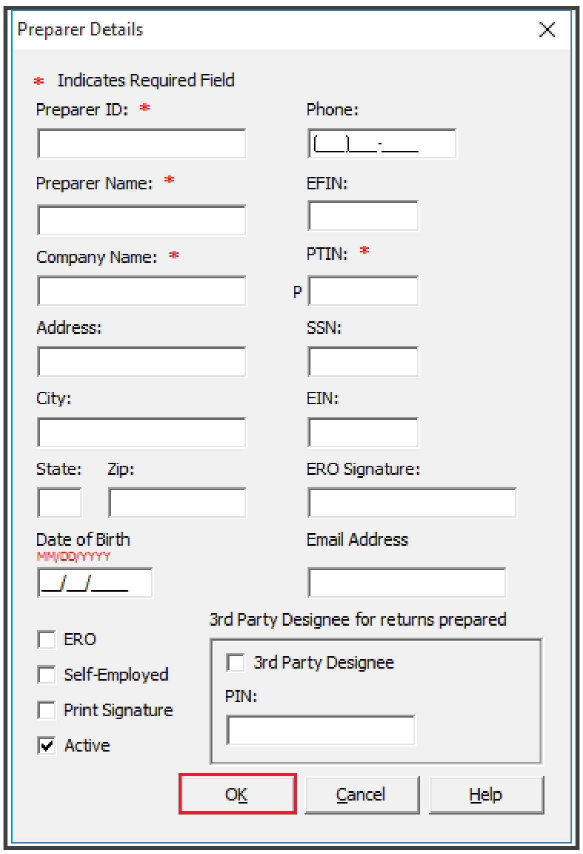
Use Setup Assistant to create and manage your ERO and preparer information for TaxWise.

To add a new ERO or preparer:

1. Click **New**.



2. TaxWise Setup Assistant displays the **Preparer Details** dialog box. Complete the preparer information, and then click **OK**.



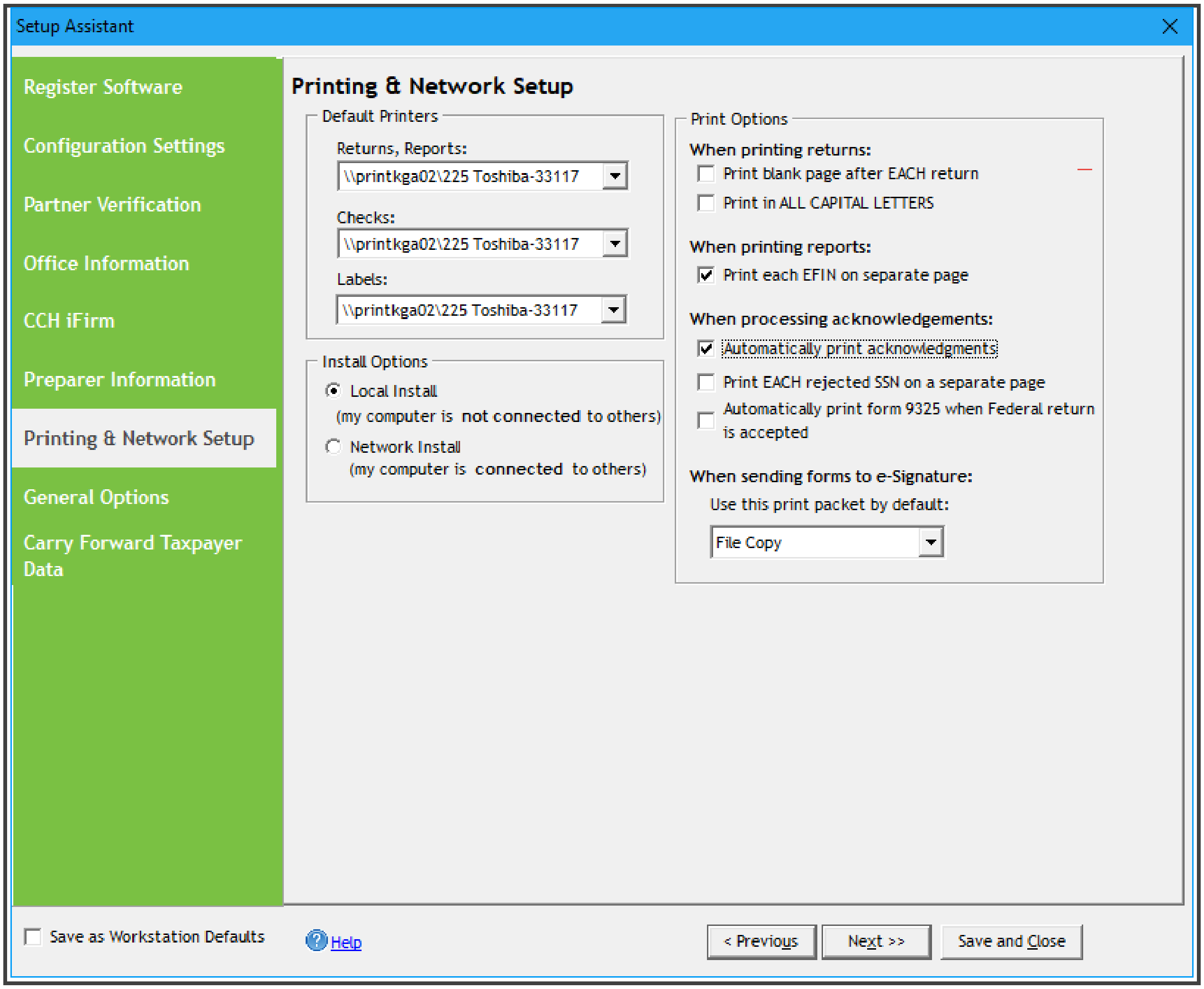
3. Setup Assistant returns to the ERO/Preparer window.
4. Repeat these steps to add all your preparers.

You must complete all fields with a red asterisk. The **Preparer ID** field is a reference to the preparer, and can be first name, initials, or any other combination that helps you identify the preparer.

5. Click **Next**.

Printing & Network Setup

Use the Printing & Network Setup section to set your print options for TaxWise.



The chart below describes the options available on this screen:

Option	Description
Default Printers	Select a printer from each drop-down menu to determine how each document type will print.
Install options	Indicate whether you are using a network or local (stand-alone) installation.
Print blank page after each return	If you print multiple returns at one time, choose this option to place a separator page after each return.

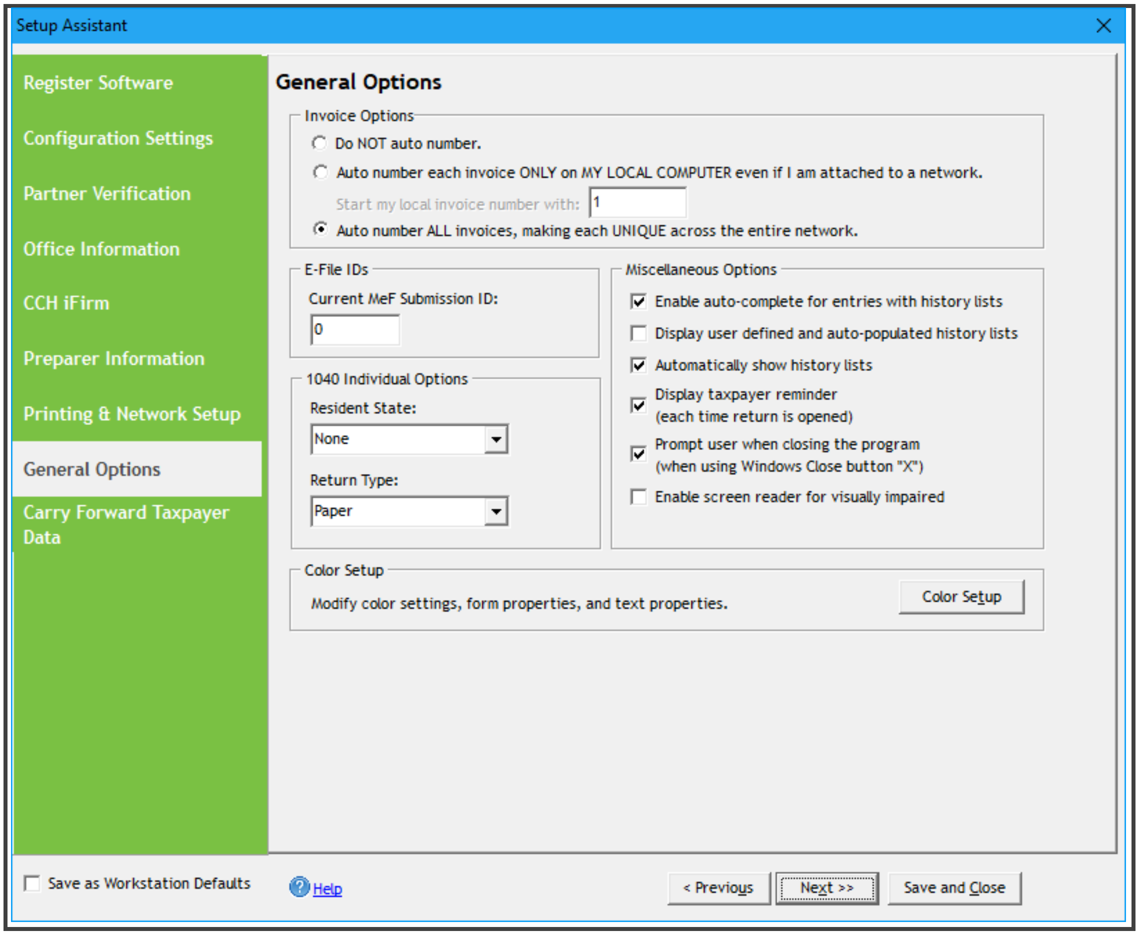
Print in all capital letters	This option prints all entries in capital letters, regardless of how you type them.
Print each EFIN on a separate page	If you have more than one EFIN transmitting in your office, this option allows you to print reports showing each EFIN on a separate page.
Automatically print acknowledgments	If you select this option, acknowledgment reports automatically print at the conclusion of auto-processing.
Print each rejected SSN on a separate page	If you have rejected returns, you can print the report for each rejected client separately to save in the client file.
Automatically print Form 9325 when Federal return is accepted	Select this option to automatically print Form 9325, *Acknowledgment and General Information for Taxpayers who File Returns Electronically*, for each accepted return at the time you process the acknowledgment.

1. Modify the print options to suit your office needs and click **Next**.

General Options

Use the General Options section to set the following information for TaxWise:

- Invoice options
- e-File IDs
- 1040 individual options
- Color setup
- Miscellaneous options



The first section allows you to indicate how you want to handle the numbering of invoices. Select the option you prefer.

The **E-File IDs** section automatically updates each time you create an e-file. If you plan to e-file from multiple non-networked computers, set this number at least 100 apart for each computer.

In the **1040 Individual Options** section, you can choose a state to automatically load with each new return. You can also choose whether most of your returns will be paper filed, e-filed, or have a bank product attached. Select the appropriate options from the drop-down lists.

Review the chart below for descriptions of the miscellaneous options:

Option	Description
Enable auto-complete for entries with history lists	Allows you to type the first character, or first few characters, and TaxWise auto-completes the box
Display user-defined and auto-populated history lists	Allows you to view user-defined history lists

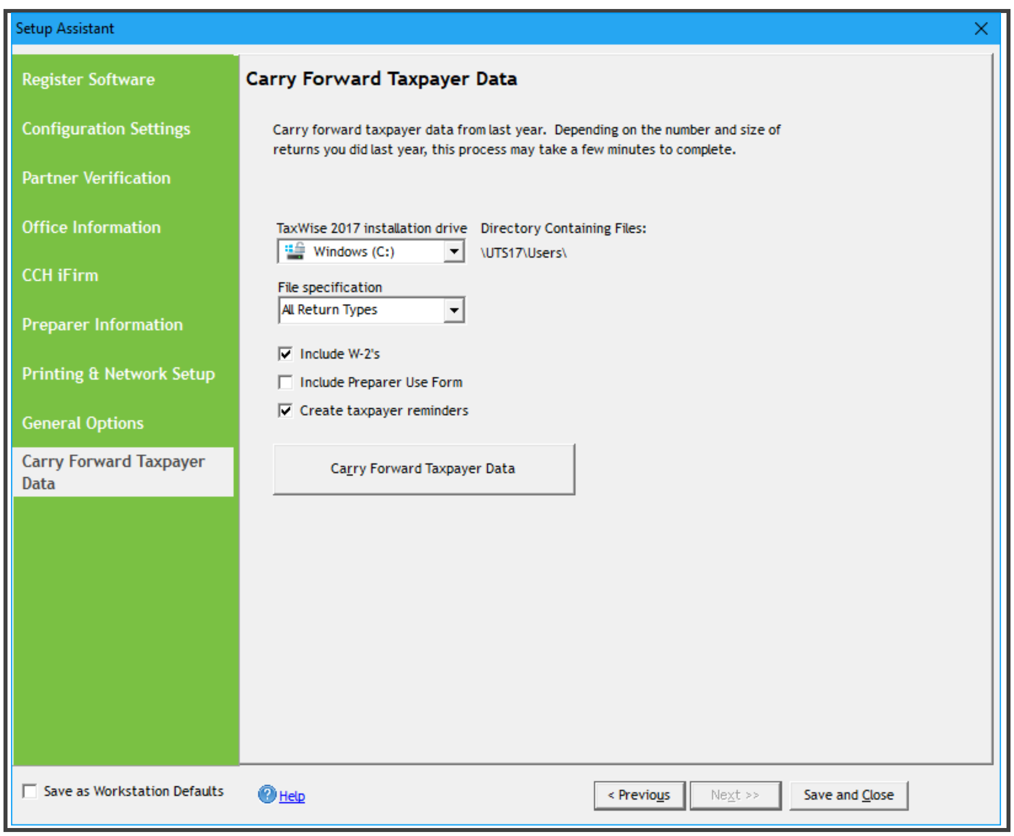
Automatically display history lists	Allows a history list to open automatically when you are on a box
Displays taxpayer reminder (each time return is opened)	Allows taxpayer reminders to display each time a return opens
Prompt user when closing the program (when using Windows Close button "X")	Allows TaxWise to display a confirmation box when you close the program
Enable window reader support for visually impaired	Allows the JAWS reader (if installed) to announce the box location in TaxWise for visually impaired users

2. Select the options you want to use and click **Next**.

If you use multiple non-networked computers, preset the Submission ID on each computer before tax season, or designate one computer as the transmitting computer.

Carry Forward Taxpayer Data

Use the Carry Forward Taxpayer data section to pull data from the prior year into a file that you can import into the current year's program.



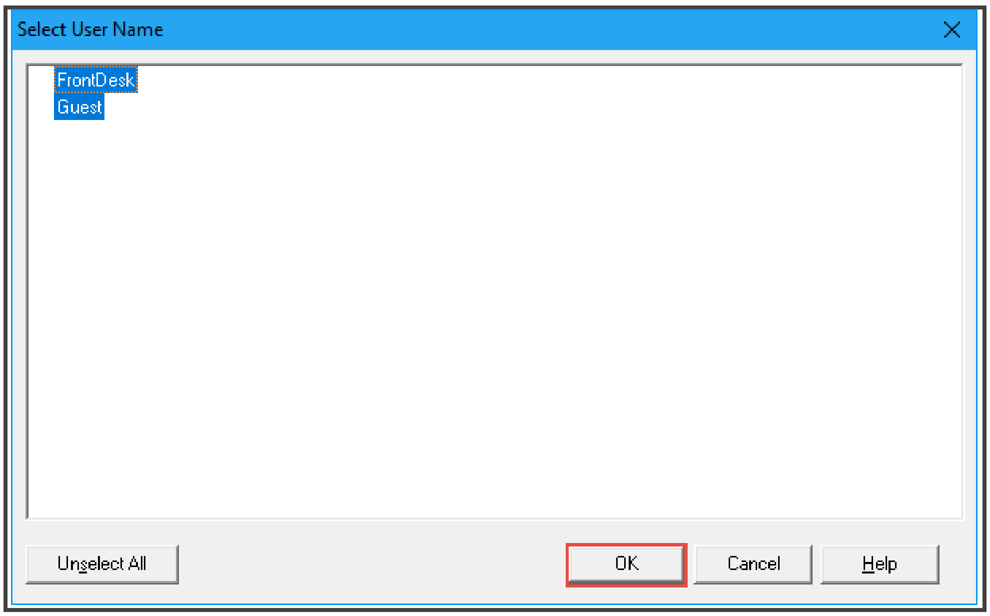
To carry forward prior year data:

1. Select what you want to carry forward from either 2017 Tax Return Files or 2017 Admin Tax Form Defaults.

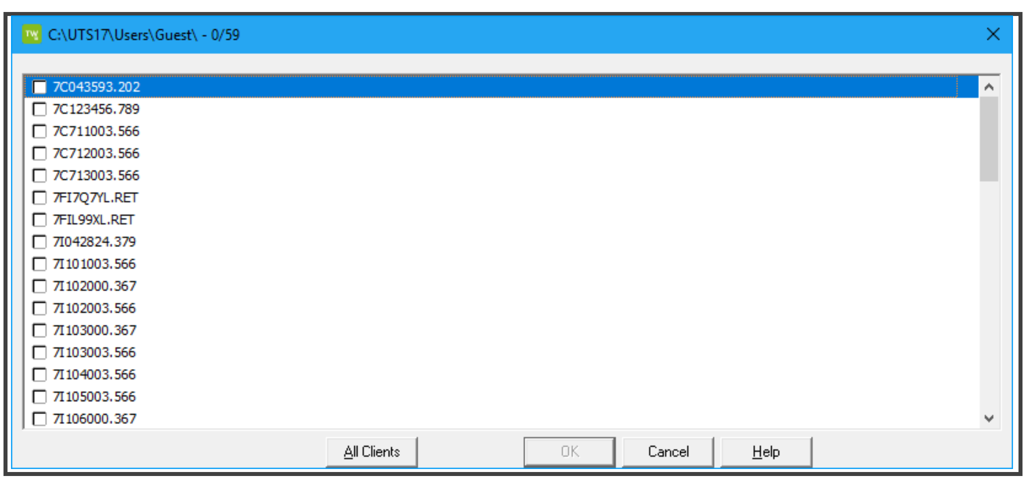
2. Select the prior year TaxWise installation drive.

3. Select the files to carry forward and click **Carry Forward Taxpayer Data**.

4. TaxWise displays the **Select User Name** dialog box. Click user folders to select each user or click **Select All** and click **OK**.



5. TaxWise displays the **Select Returns** dialog box:



6. Select the appropriate check box next to the returns you want to carry forward or click All Clients and click **OK**.

7. TaxWise displays the status box when the carry forward function is completed. Click **Save and Close** on the Setup Assistant dialog box.