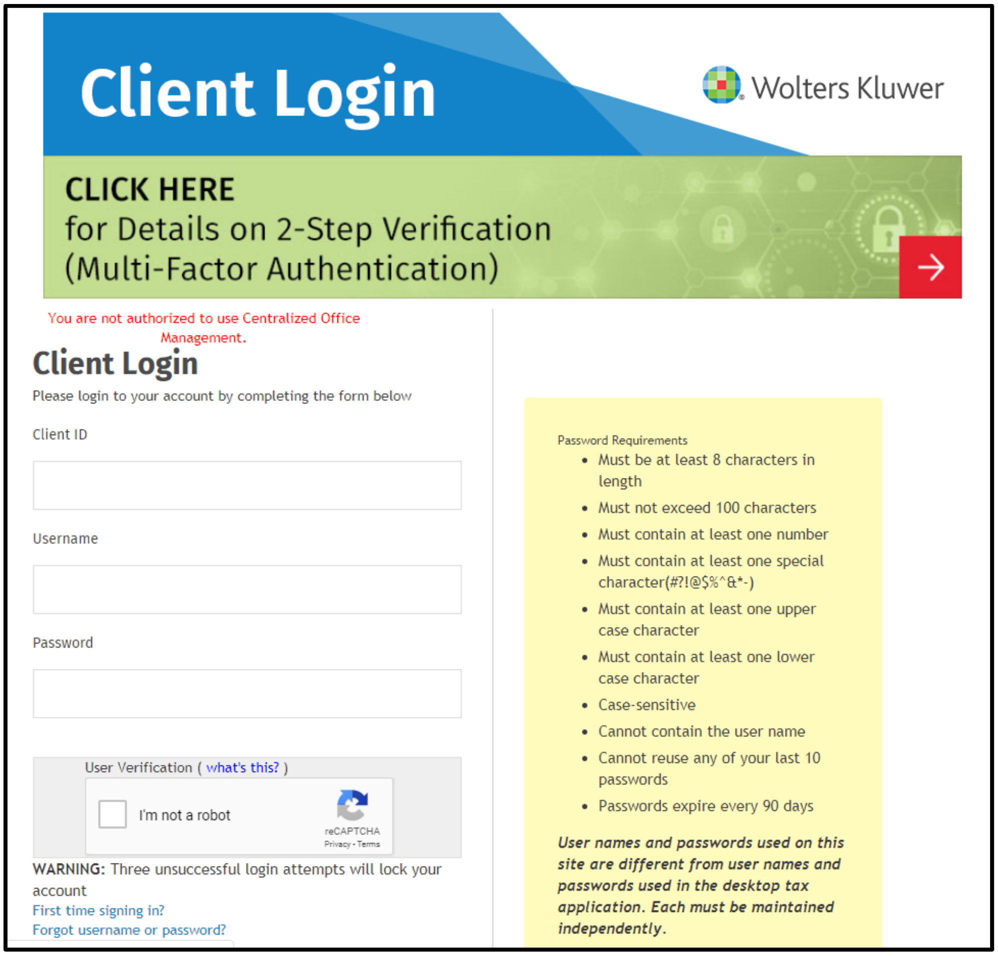
Central Office Manager (COM)

Customers who purchase TaxWise for multiple offices use Central Office Manager to set up additional offices and apply for Refund Settlement Solutions. Central Office Manager provides a cloud-based solution for managing offices from any location with an internet connection.

To access Central Office Manager:

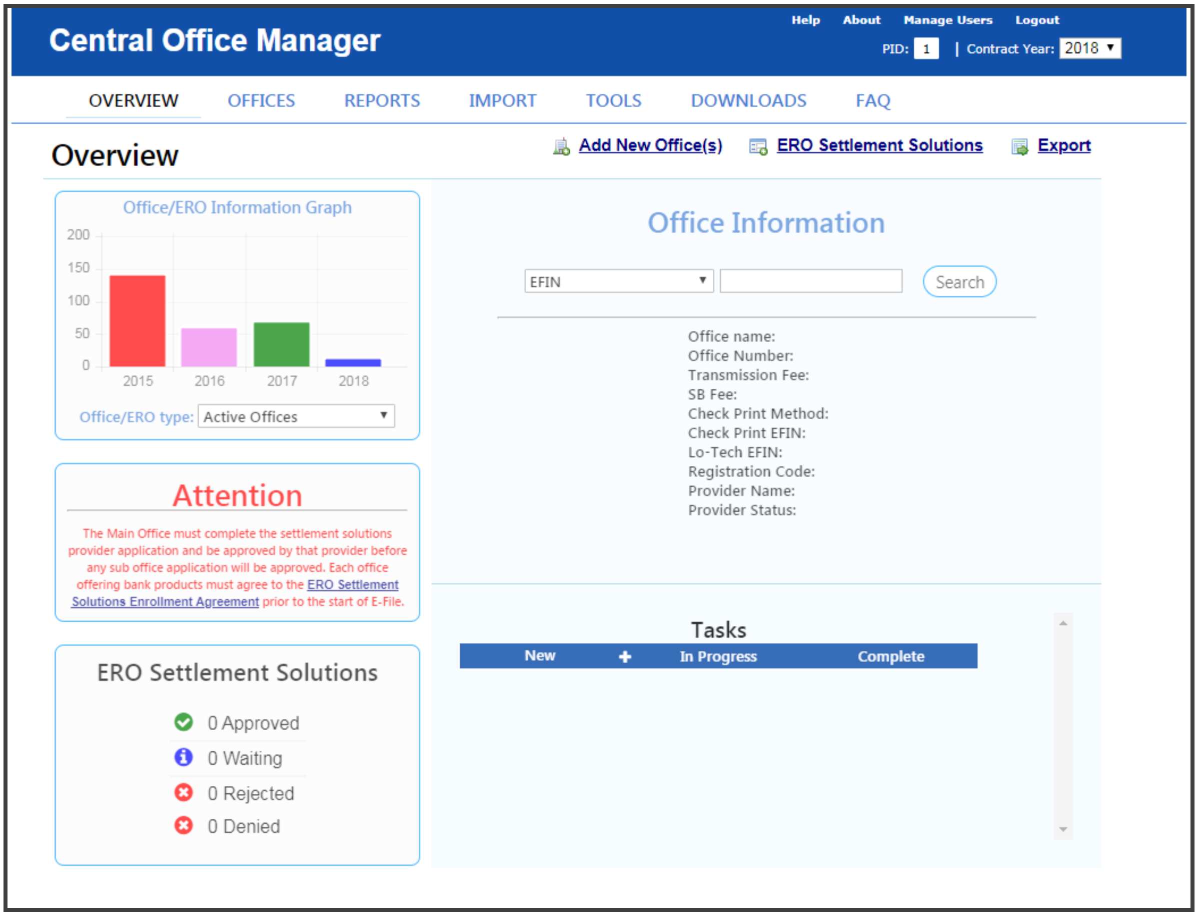
1. Navigate to **https://com.cchsfs.com.**
2. Log in using your Client ID, the username *Admin*, and your password.



Your login credentials use the same password you use for TaxWise Online and the Customer Solution Center.

3. Select the **I'm not a robot** check box, complete any additional reCaptcha prompts, and click **Login**.

4. Central Office Manager displays the Overview page.

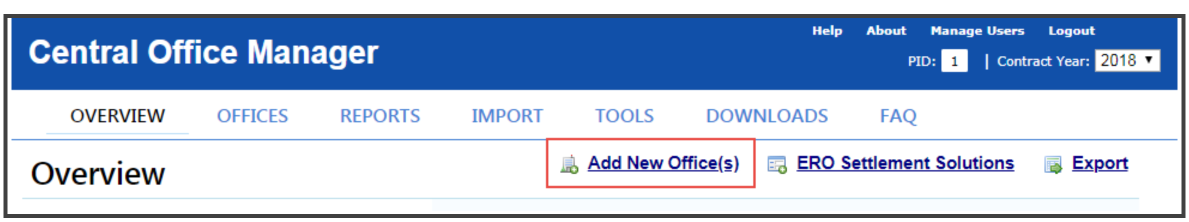


5. From this screen, you can add new offices, access the Reports tab, apply for ERO/Settlement Solutions and access tools to help manage your offices. Click the tabs along the top of the screen to navigate to the various pages.

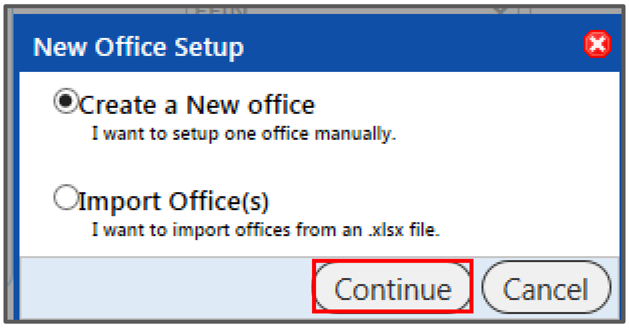
Adding New Offices

To add an additional office:

1. Click **Add New Office(s).**

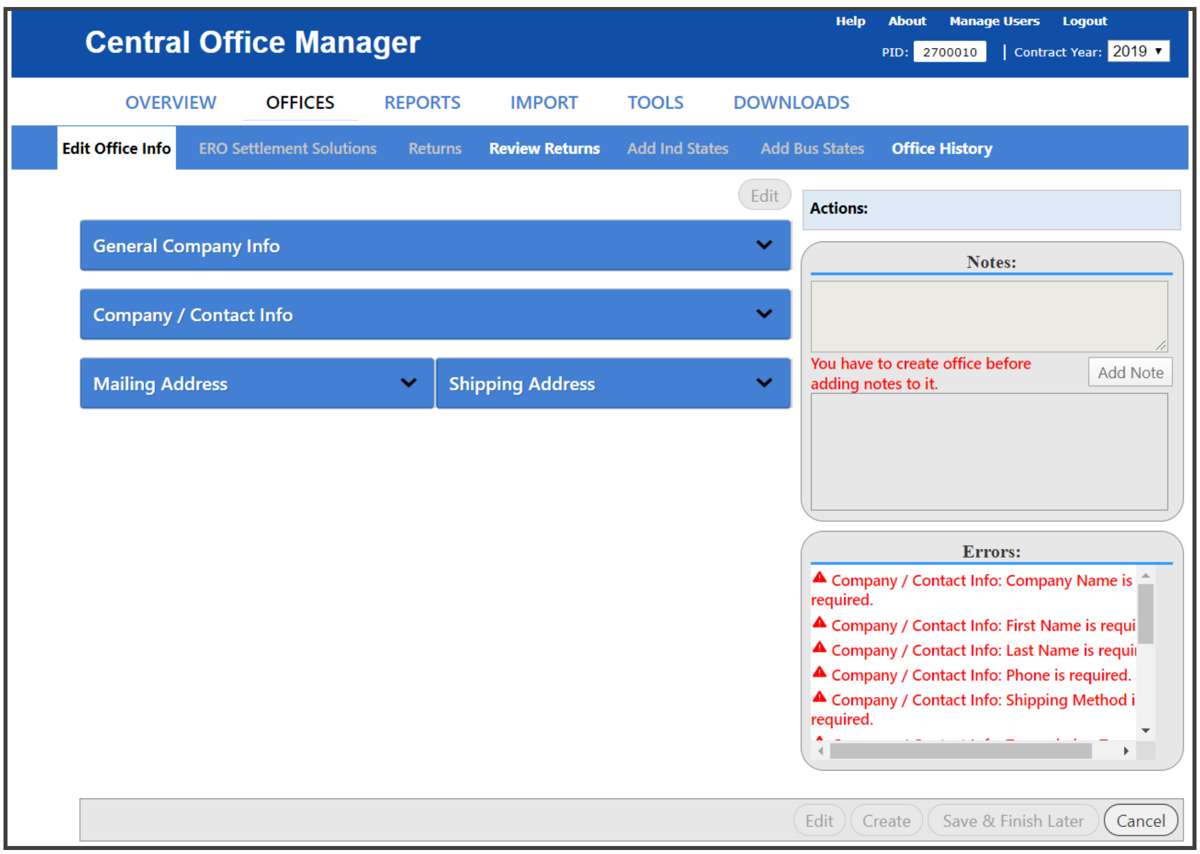


2. Click Create a New office, and then **Continue**.



If you are adding many offices, you can import the offices from a spreadsheet. The template to import offices is located on the **Download** page.

3. COM displays the **Edit Office Info** tab.



4. Expand each heading to complete the information for:
   - General Company Info
   - Company/Contact info
   - Mailing Address and Shipping Address

Fields with a red asterisk are required.

5. Once you have completed the required fields, click **Create**, or click **Save & Finish Later** to save the draft.

Your Client ID and Registration Code for TaxWise automatically populate on the General Company Info page once TaxWise processes the information. This generally takes an hour or less.

Applying to Offer Refund Settlement Solutions

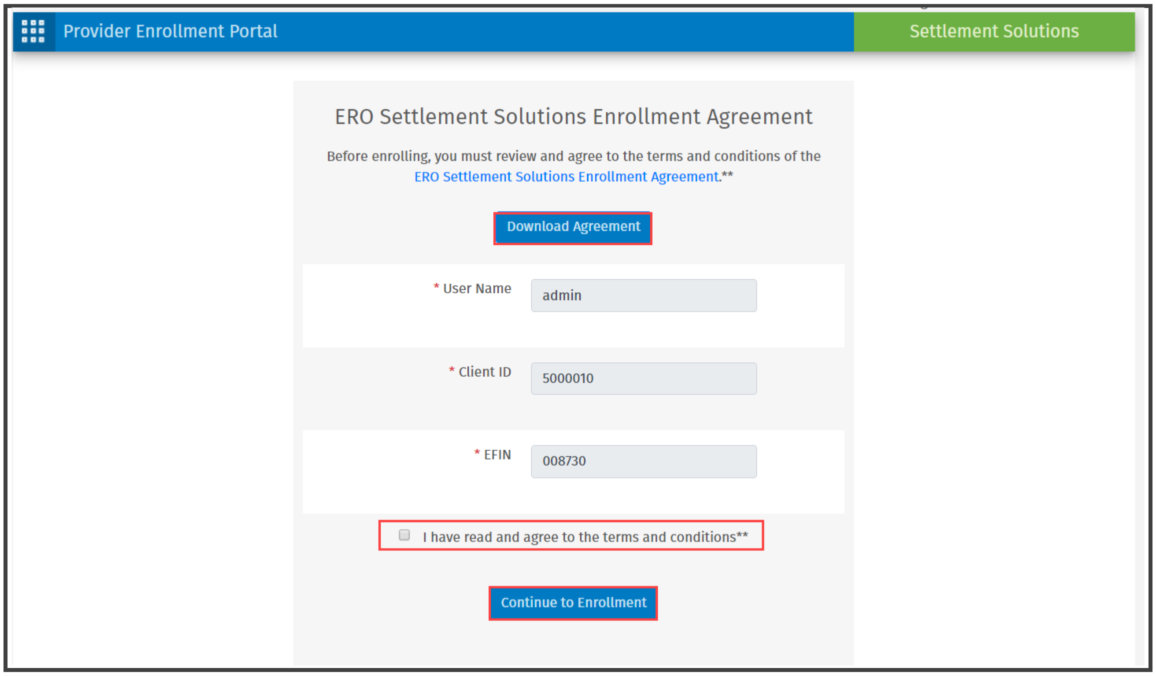
After you create an office, you can apply to offer refund settlement solutions with one of our banking partners.

You must complete and submit the ERO Settlement Solution for your main office before submitting those for your add office(s)

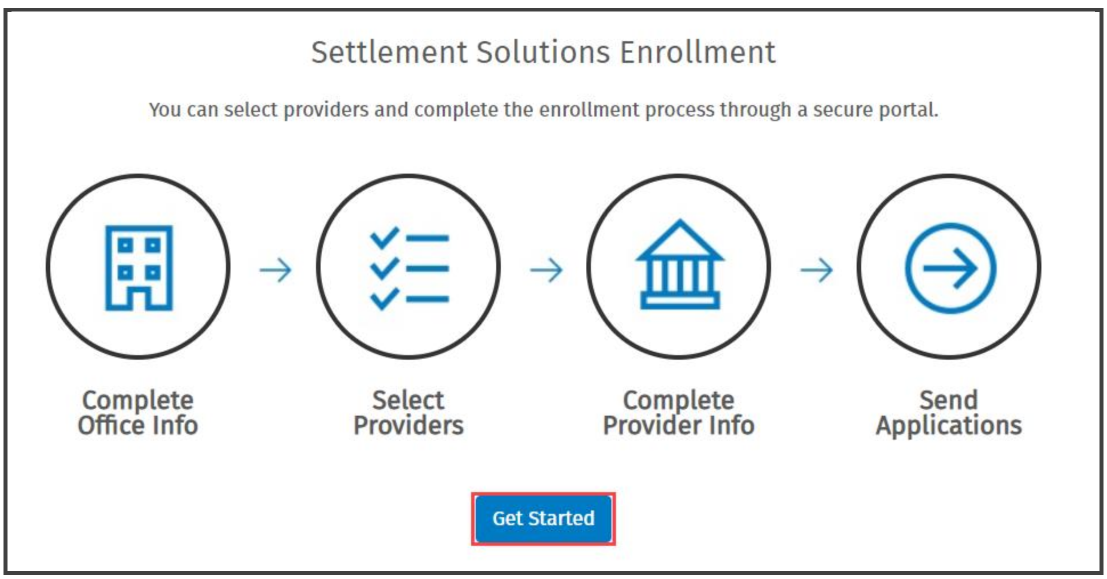
To do this:

1. From the Overview screen, click the link to open the **ERO Settlement Solutions Portal**.

2. Download and review the **ERO Settlement Solutions Agreement** and verify your office information on this screen.
3. Select the checkbox indicating you agree to the terms, and then click **Continue to Enrollment**.



4. Next, click **Get Started** to complete a little more information about your office, choose the banking partner you want to work with, and submit your application.



Downloads

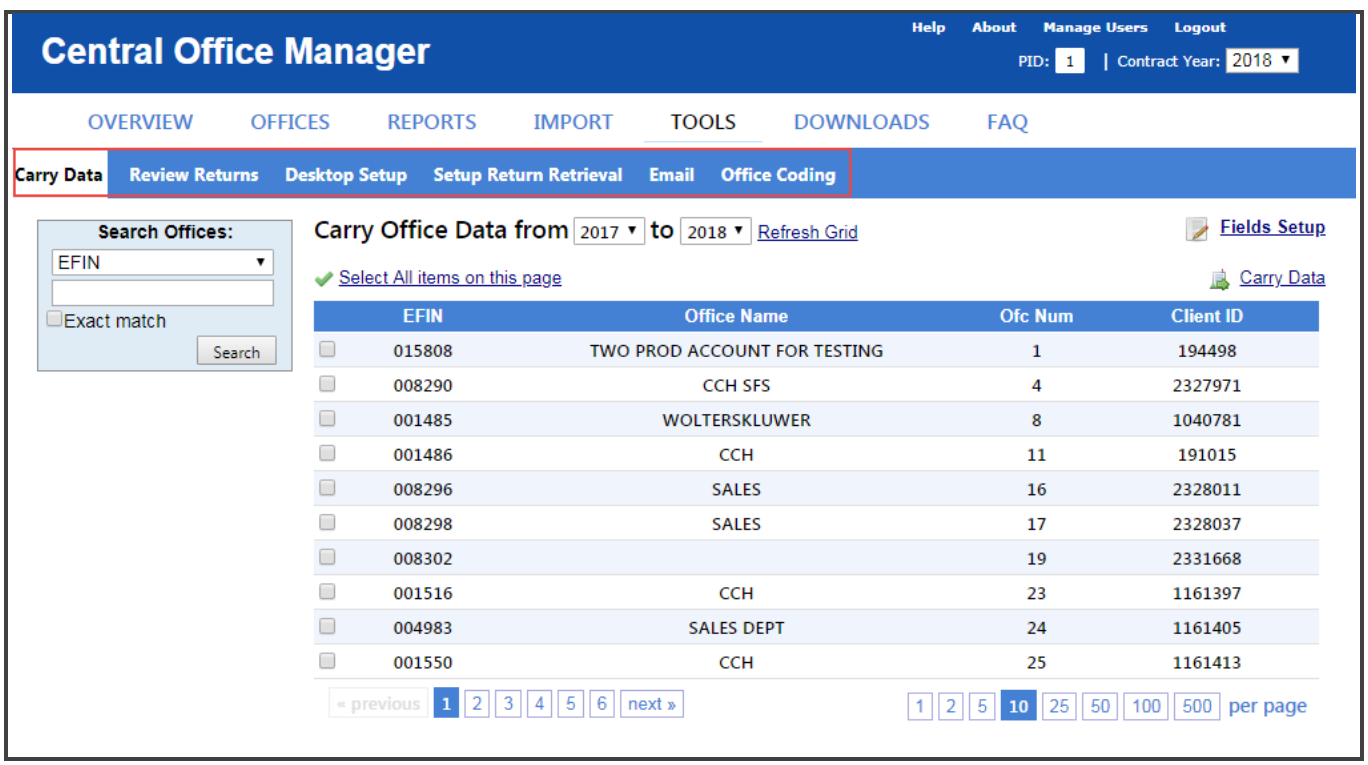
On the Downloads page, you can find helpful resources, including templates for importing multiple offices, as well as a Settlement Solution Checklist and Release Notes.

1. Click **Downloads** at the top of the page. COM displays the available Office Import Template, the CCH SFS Settlement Solutions agreement, and the Release Notes:

Tools

From the Tools page, you can carryforward data from the prior year of TaxWise into the current year for multiple offices at once. You can also review returns from multiple offices and send setup information to sub-offices.

1. Click the tabs along the top of the **Tools** page to view each section.



EFIN	Office Name	Ofc Num	Client ID
015808	TWO PROD ACCOUNT FOR TESTING	1	194498
008290	CCH SFS	4	2327971
001485	WOLTERSKLUWER	8	1040781
001486	CCH	11	191015
008296	SALES	16	2328011
008298	SALES	17	2328037
008302		19	2331668
001516	CCH	23	1161397
004983	SALES DEPT	24	1161405
001550	CCH	25	1161413

Help

To view the Help files for COM:

1. Click the **Help** link at the top of the page.
2. COM displays the Help content on a new internet browser tab. Browse the table of contents or type a keyword to search.