

TaxWise Registration and Setup

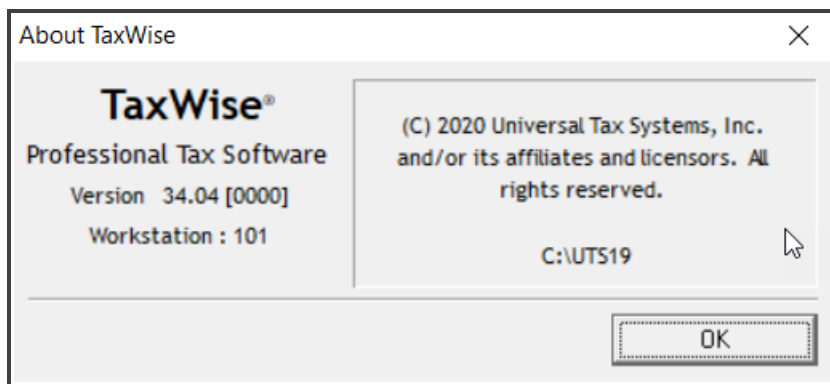
Updating TaxWise

TaxWise releases updates before tax season and periodically throughout the season. There are two types of updates for your software: program and module. Program updates are for program features, while module updates relate to the functions and calculations within the Federal, state, or bank forms.

Program Updates

To check the program version of TaxWise:

1. On the **Help** menu, click **About**.
2. TaxWise displays the About TaxWise dialog box:



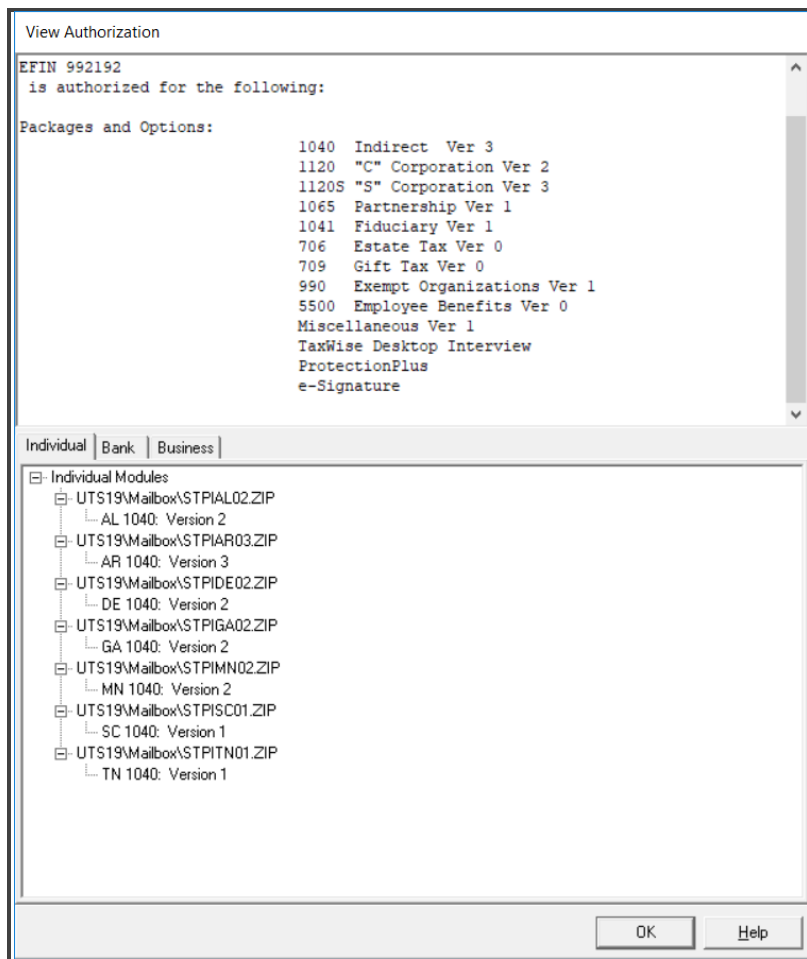
3. Compare this version to the latest update available on the TaxWise Solution Center.

Module Updates

Check for module updates by using View Authorization to see if your program has the latest updates and to view the following information:

View Authorization	Description
Client ID	Displays the client ID associated with the EFIN you used to register the program(when you register TaxWise with your EFIN and registration code, TaxWise loads the client ID)
EFIN	Displays the EFIN you used on the Register Software tab of the Setup Assistant
Package and Options	Displays federal packages available and the federal version of each package
Individual Tab	Displays installed individual states and the state version
Bank Tab	Displays installed banks and the bank version
Business Tab	Displays installed business states and the state version

1. To view authorizations, go to the **Help** menu, and click **View Authorization**.
2. TaxWise displays the **View Authorization** dialog box containing a list of your modules and the version you currently have:

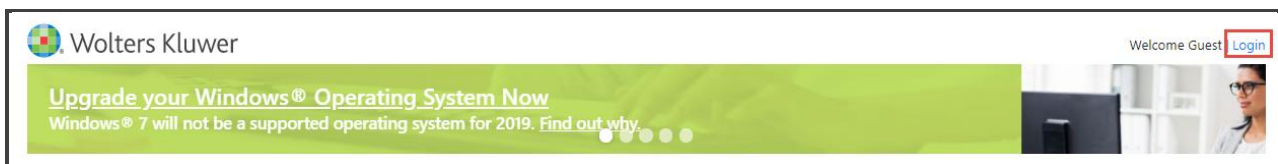


Updating from the Customer Solution Center

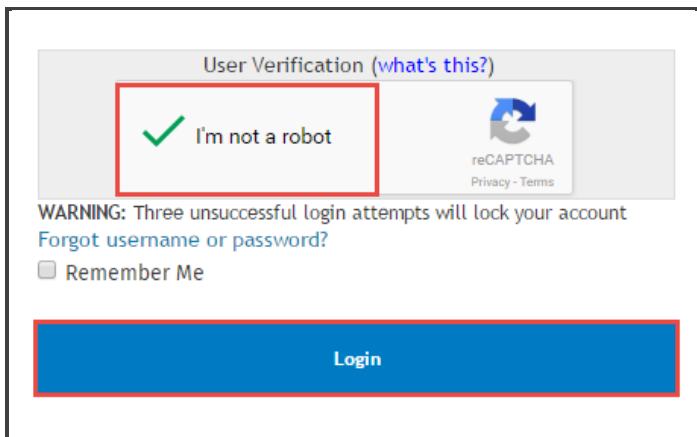
Before you begin updating from within TaxWise, you must first download the modules and states that are relevant to you. After downloading these the first time, you can download any future updates from within your software.

To download Federal modules:

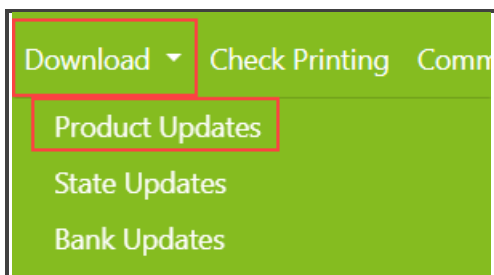
1. Navigate to support.taxwise.com.
2. If you are not already logged in, from the landing page, click **Login** located at the top right.



3. Login using your **Client ID**, the username *Admin*, and the password you created previously.
4. Complete the reCAPTCHA check box for user verification if prompted and click **Login**.



5. The TaxWise Solution Center displays the home page. On the **Download** menu, click **Product Updates**.



6. The TaxWise Solution Center displays the Product Updates page, listing the comprehensive program update, as well as any Federal module updates currently available.

Product Updates

[Program Updates](#) | [State Updates](#) | [Bank Updates](#) | [W2/1099 Updates](#)

[Notify me by e-mail when my products are updated](#)


Your initial installation of TaxWise is found by choosing the menu 'Download' then 'TaxWise Software'. Click that link, then select the year. Your registration code is displayed on screen. Once installed, you can download program and module updates from inside TaxWise or you can click these links below.

The Comprehensive Update link (below left column) contains all program updates issued for the current year. You also need to download the Federal Module updates, located on the right column of this page. Bank, Fee Collect, or state modules are accessible by clicking the links in the top right area of this page.



If you see no Comprehensive Update link below, the menu 'Download' then 'TaxWise Software', and select the year you wish to install. You can also view your registration code on that left link.



Please select a year to download:

TaxWise Comprehensive Updates

TaxWise 2019 Program Update 34.04 (Required) (2/5/2020)  

Federal Updates



1040 Individual 6.0 (4/14/2020)  



1041 Fiduciary 5.0 (4/21/2020)  



1065 Partnership 4.0 (4/21/2020)  

1120 C Corp 4.0 (4/21/2020)  

1120 S Corp 4.0 (4/21/2020)  

709 Gift Tax 3.0 (4/21/2020)  

990 Exempt Organizations 4.0 (4/21/2020)  

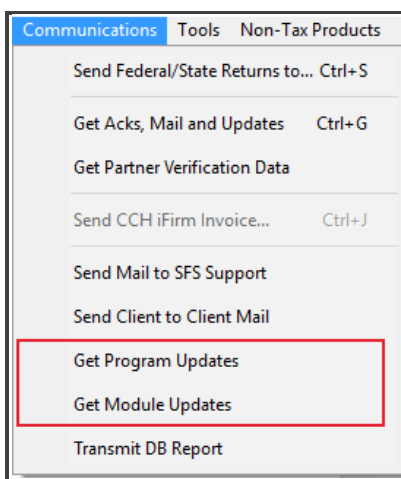
Miscellaneous 4.0 (4/21/2020)  

7. Click the download icon for any updates you need to download and install.

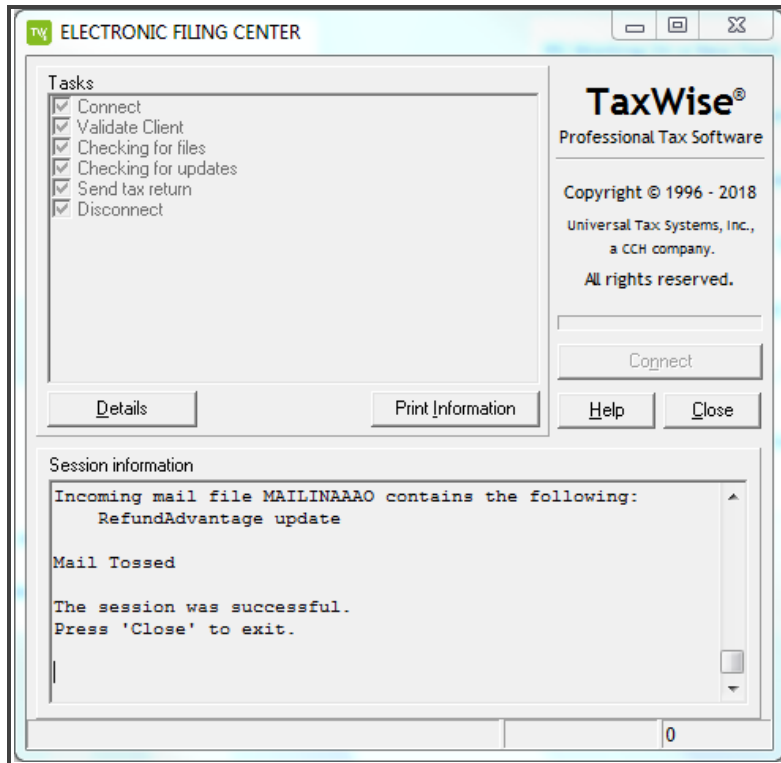
Communication Menu Update Options

To get updates from within TaxWise:

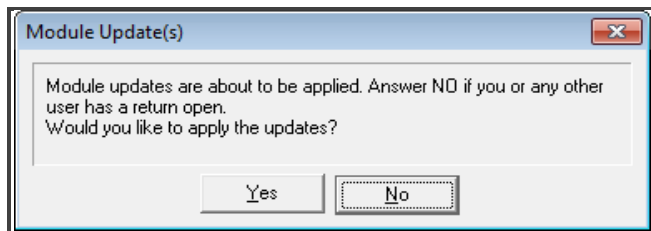
1. On the **Communications** menu, click **Get Program Updates** or **Get Module Updates**.



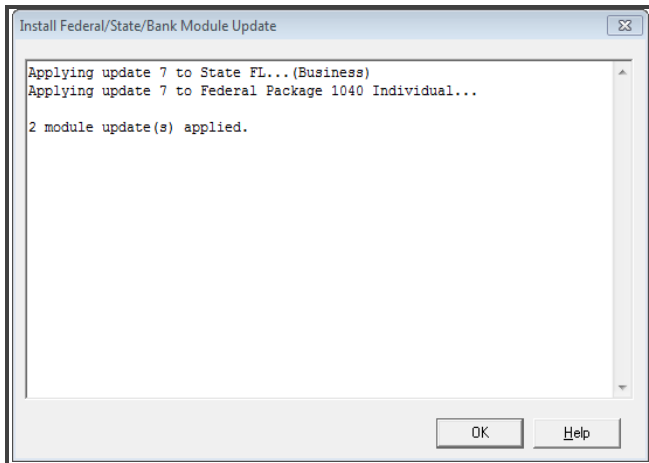
2. TaxWise displays the Electronic Filing Center dialog box, which connects to the Electronic Filing Center and downloads available updates:



3. Once the communication session finishes, click **Close**.
4. TaxWise displays the **Module Update(s)** dialog box:



5. Click **Yes** to apply the module updates right away or click **No** if you or any other user has a return open, and you want to apply the updates later.
6. TaxWise displays the **Install Federal/State/Bank Module Update** dialog box:



TaxWise applies each update individually. If you have several updates to install, TaxWise may take several minutes to apply them.

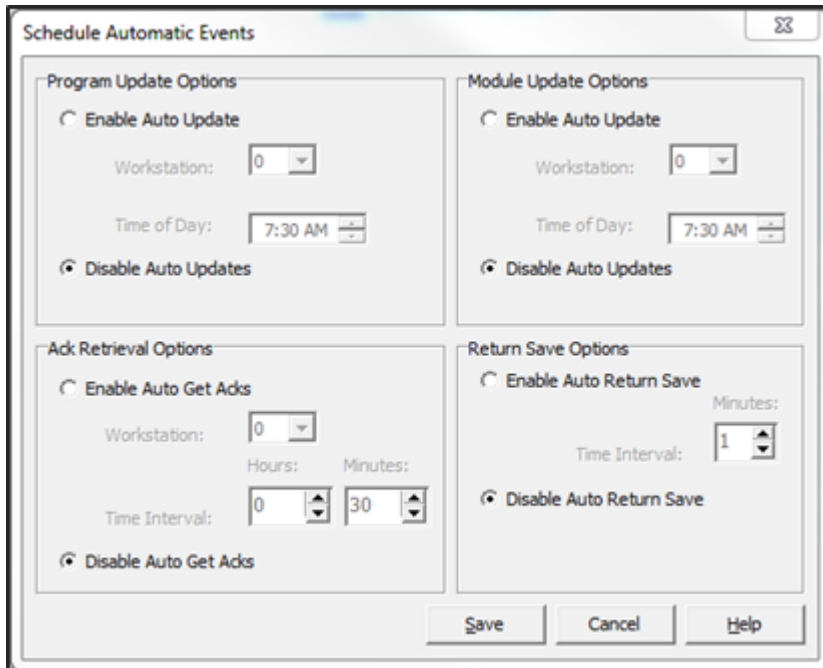
7. Click **OK**.

Schedule Auto Events

The Admin user can schedule specific times at which TaxWise will automatically perform tasks for you, including updates. This allows you to focus on working with your clients instead of managing your software. You can schedule TaxWise to automatically:

- Update your program and modules
- Download acknowledgments
- Save returns

1. On the **Tools** menu, click **Schedule Auto Events**.



2. Click the radio buttons to enable or disable each function and choose the times at which you want those functions to take place.
3. Click **Save**.