

## Setup Assistant

Setup Assistant displays the first time you open TaxWise after installation to walk you through setting up your software. If you choose not to complete the assistant at that time, you can log in as admin and complete or edit the Setup Assistant from the Tools menu.

**i** Although non-admin users can access the Setup Assistant, full functionality is enabled for the admin user only.

**Registering your software** – The first screen in the Setup Assistant is where you will register your software by entering your EFIN and registration code. Your Client ID (CID) will automatically display after you validate the code.

**Configuring your carry forward settings** – Use the Configuration Settings section to carry forward data from last year's software to the current year. Ensure both versions of TaxWise are installed to the computer. You can bring forward:

- Your Employer (EIN) Database
- Client Letter Templates
- Groups & Users
- Preparer & ERO Information
- Setup Files
- Tax Form Defaults

After making your carry forward selections, click **Load Configuration Settings** to bring forward your data to TaxWise 2016.

**Verifying your partners** – Use the Partner Verification area to download settlement solution elections and fees, as well as additional partner services, such as Versicom and Protection Plus. By downloading your settlement solution fees automatically on this screen, you no longer have to enter the fees manually in the Price Sheet in the software, saving you time and possible EFC mis-matched fee rejects.

**Keying your office information** – On the Office Information screen, you must enter your office's contact information, including the:

- Company name
- Address
- City, state and ZIP code

If applicable, you can also enter additional information on this screen, such as phone numbers, company EIN or iTransact information.

**Structuring your users and groups** – The Groups & Users section allows you to create, modify and delete users and security groups. Default Users and Security Groups cannot be deleted. The functionality in this area is similar to the Security Manager from previous years.

**Creating your preparers** – The Preparer Information screen allows you to create, modify and delete preparers. Required information for a new preparer is indicated with a red asterisk. You can also select which preparer is the default Preparer and/or ERO, as well as set up Third Party Designee information.

**Formatting your printers and network setup** – Use the Printing and Network Setup section to manage your printing and networking options, such as default printers and printed return selections.

**Setting up other general options** – The General Options area includes options for:

- Invoicing
- e-file submission IDs
- Default states and return types
- Color setup
- Other miscellaneous options to customize your software experience

**Carrying forward your taxpayer data** – Carry Forward Taxpayer Data is the last section in the TaxWise Setup Assistant. Use this page to carry forward taxpayer data from the prior year. Depending on the number and size of returns from last year, this process may take a few minutes to complete after you click **Carry Forward Taxpayer Data**. Once the data carry forward is complete, you can finish the Setup Assistant.