TaxWise® Online™ 2016

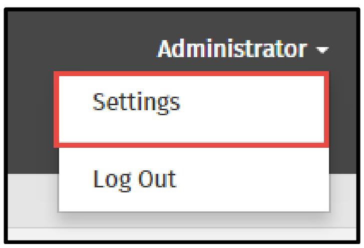
Templates

Creating templates for your returns and client letters saves time when completing returns by entering repetitive data that appears in every return. This also helps ensure certain information is consistent in returns and client letters.

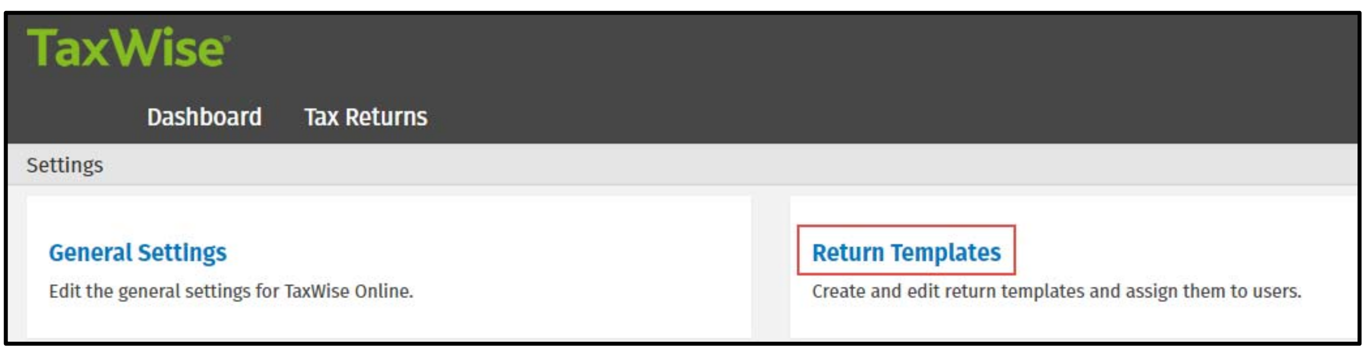
When logged in as the admin user or a user with the Return Template role, you can set up return templates for other users.

To do this:

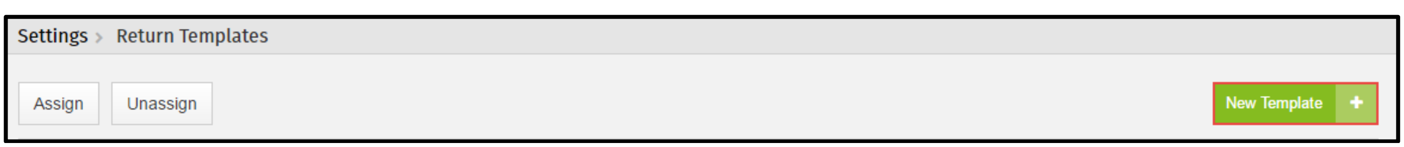
1. From the menu icon, click **Settings**.



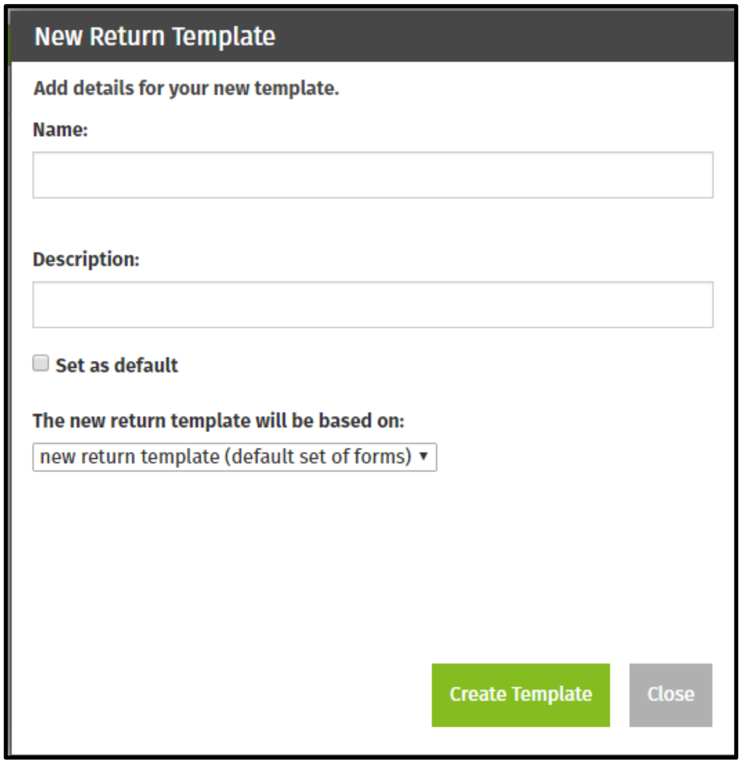
2. Click Return Templates.



3. Click New Template.



4. TaxWise Online displays the New Return Template page. Type a name and description for the new template, select a template on which to base the new template, and click **Create Template**.



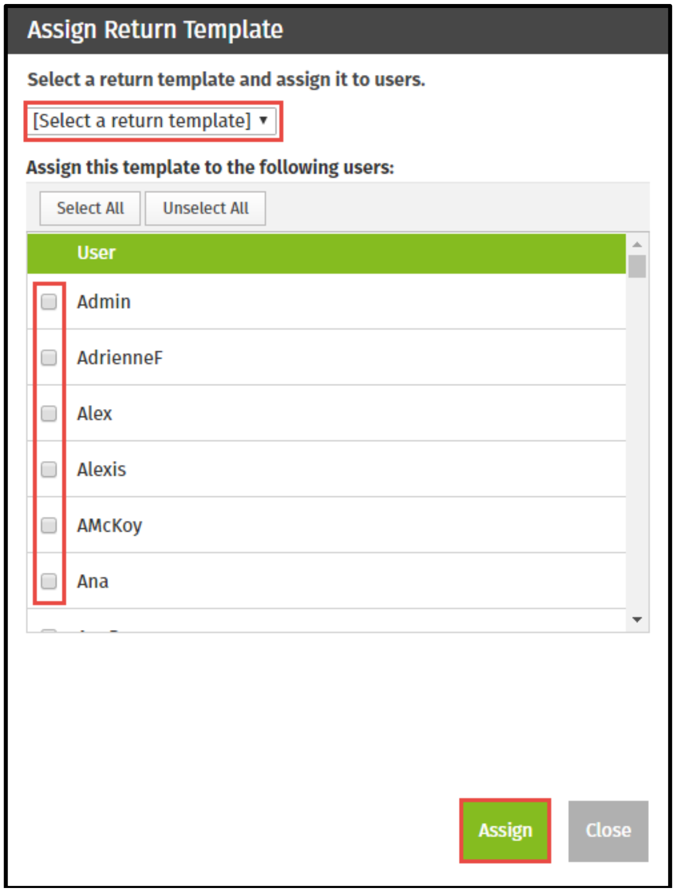
Select the **Set as default** checkbox to use this template as the default for all returns.

5. TaxWise Online adds the template to your list of available templates. To edit the template, click the Edit icon to the left.

To assign the template to other users:

1. Click the **Assign** button.

2. Choose the template from the list, select the users and click **Assign**.



TaxWise Online assigns the chosen template to the selected users.

Client Letter Templates

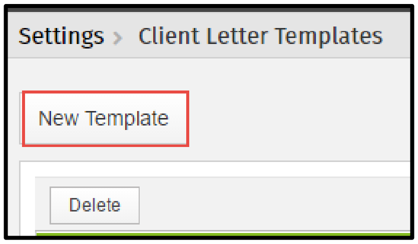
You can follow similar steps to create client letter templates.

After logging in as the admin user, or a user who has access to user settings:

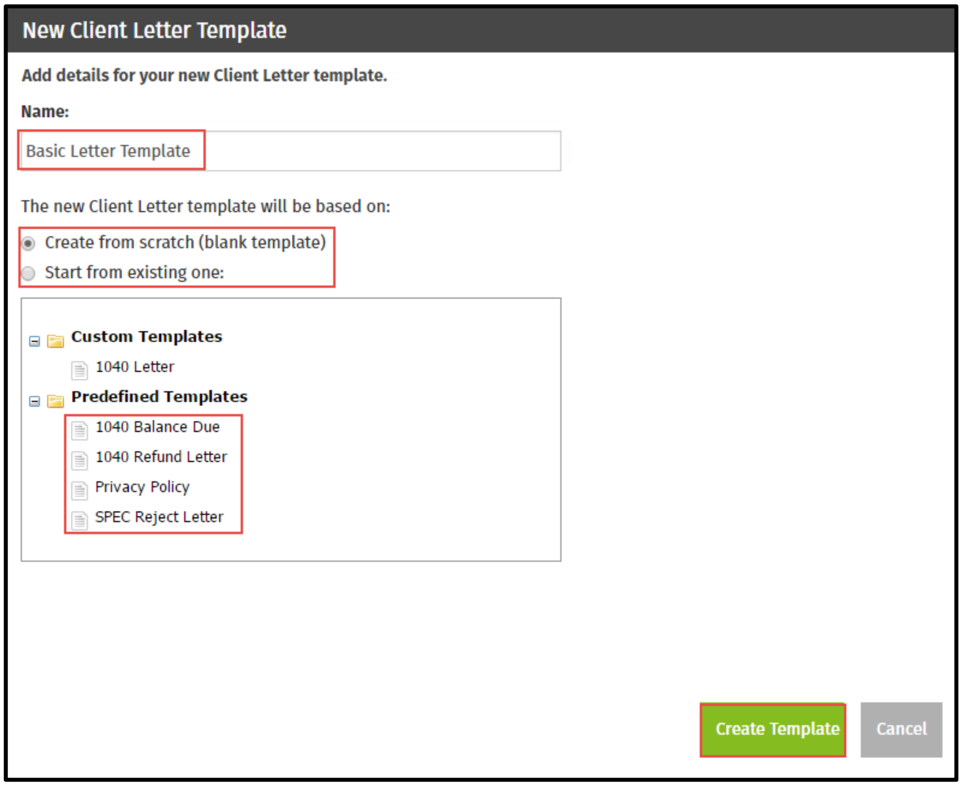
From the menu icon, click **Settings**.

1. Click **Client Letter Templates**.

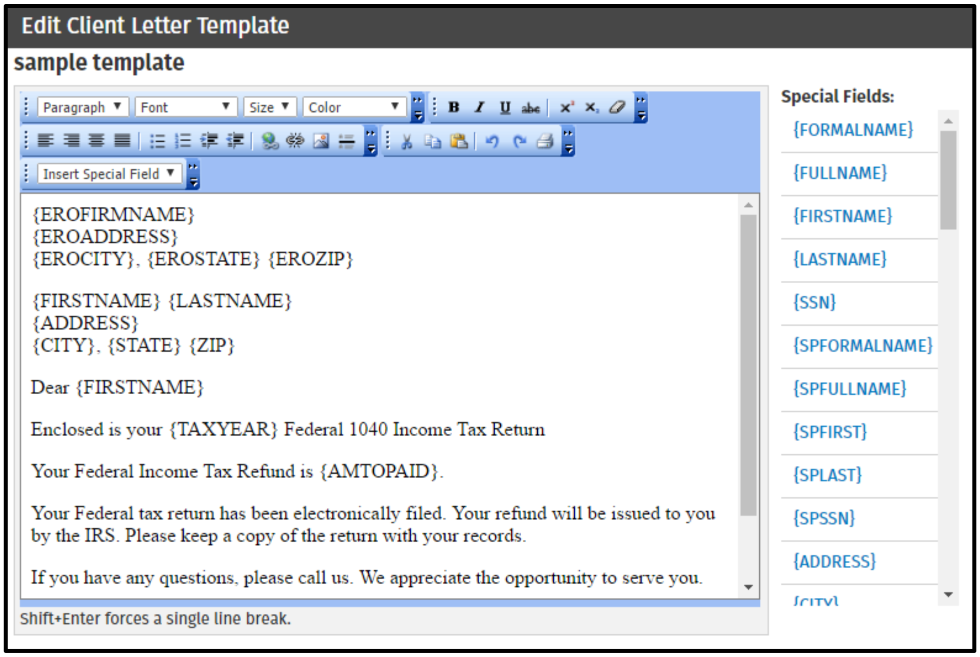
2. Click **New Template**.



3. TaxWise Online displays the New Client Letter Template. Type a name for the template, choose to create from scratch, or choose a pre-defined template, and click **Create Template**.



4. TaxWise Online displays the Edit Client Letter Template page:



5. From here, you can type text, use the formatting bar, or add variables to customize the letter.