

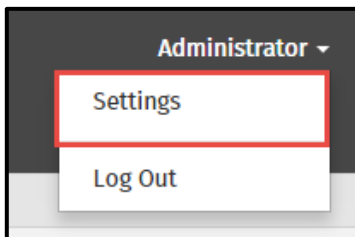
Templates

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.

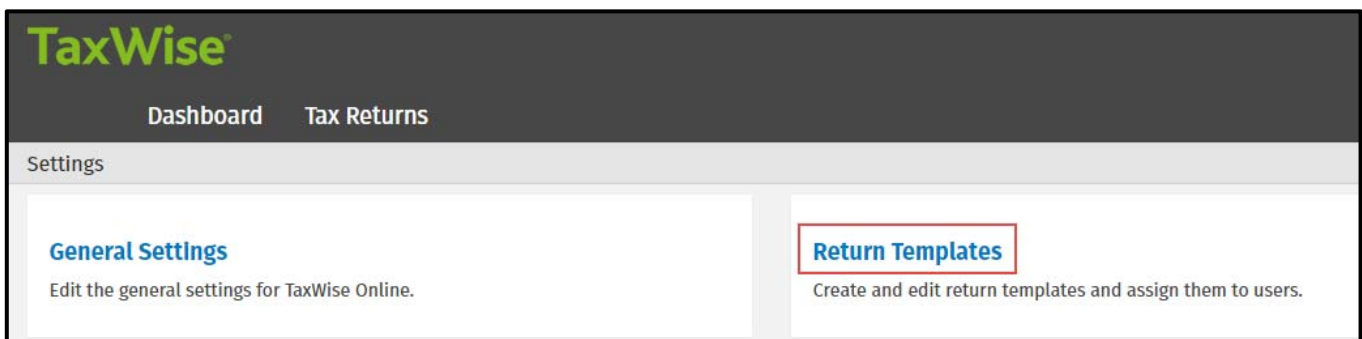
When logged in as the admin user or a user with the Return Template role, you can set up return templates for other users.

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**.

New Return Template

Add details for your new template.

Name:

Description:

Set as default

The new return template will be based on:
new return template (default set of forms) ▼

Create Template Close

- i* 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.

Delete	Edit	Publish	Name
			1040 Basic Template

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**.

Assign Return Template

Select a return template and assign it to users.

[Select a return template] ▼

Assign this template to the following users:

Select All Unselect All

User

- Admin
- AdrienneF
- Alex
- Alexis
- AMcKoy
- Ana

Assign Close

TaxWise Online assigns the chosen template to the selected users.

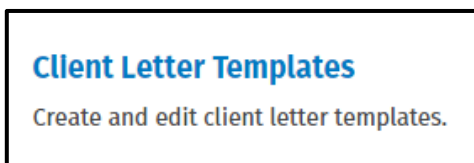
Client Letter Templates

You can follow similar steps to create client letter templates.

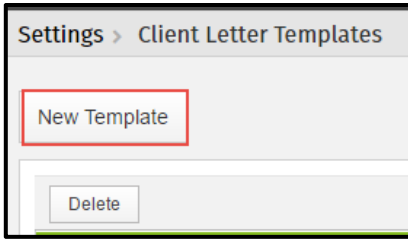
After logging in as the admin user, or a user who has access to user settings:

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

1. Click **Client Letter Templates**.



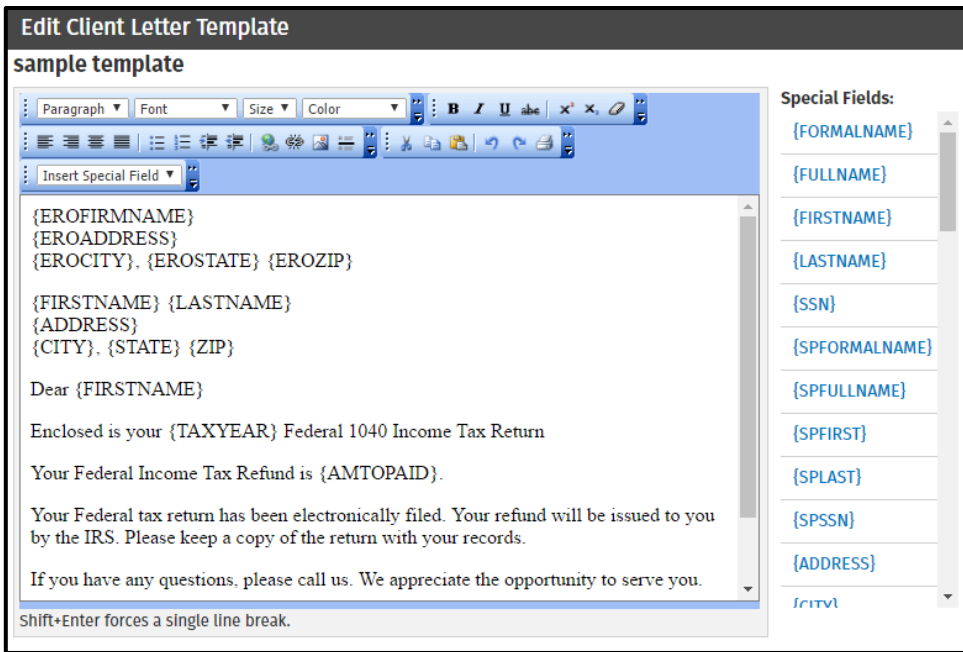
2. Click **New Template**.



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**.

A screenshot of the 'New Client Letter Template' form. The title is 'New Client Letter Template'. Below the title is the instruction 'Add details for your new Client Letter template.' The 'Name:' field contains 'Basic Letter Template'. Below this is the section 'The new Client Letter template will be based on:' with two radio button options: 'Create from scratch (blank template)' (selected) and 'Start from existing one:'. Below this is a list of templates under two categories: 'Custom Templates' (containing '1040 Letter') and 'Predefined Templates' (containing '1040 Balance Due', '1040 Refund Letter', 'Privacy Policy', and 'SPEC Reject Letter'). At the bottom right, there are two buttons: 'Create Template' (highlighted in green) and 'Cancel'.

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.