

Customer Support Site: The Download Page



2010 IRS Training

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DOWNLOAD OBJECTIVES:

In this lesson, we will cover:

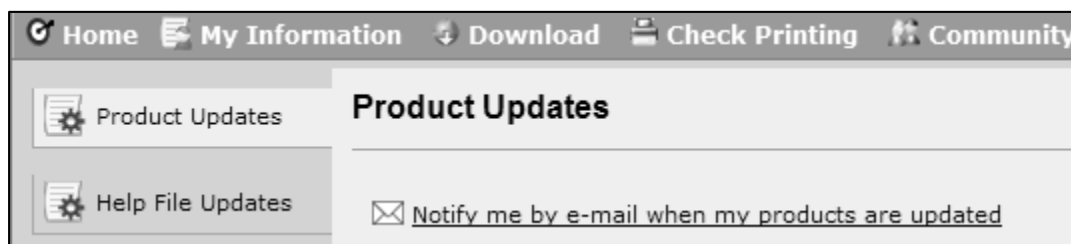
- Sign Up for Product Update Notifications
- Download Program, Federal, and State updates
- Download the current year TaxWise software

Product Updates

Users can download Program, Federal and State Updates through the Customer Support Site under the **Download** tab. Product notifications are sent to the email address on file when any updates are available. You have the opportunity to sign up to be notified when updates are posted to the customer support site. By default, the email address submitted with the software orders is automatically signed up to receive notifications when Program updates, federal updates and the resident state update are posted to the support site.

We strongly recommend that all site administrators sign up to receive email notifications if they were not the primary contact during the ordering process.

By default, the e-mail address sent with the order is set up to receive TaxWise and state notifications. To add a new e-mail address or select another state, use the following steps:



Click the **Notify me by e-mail when my products are updated** link.

TaxWise displays the **Product Update Notification** page.

If you want to add a new e-mail address, enter it in the box under **Email Address(es)**: and click the **Add** button.

Select the additional states by clicking in the box labeled with an “I” for individual.

We recommend that TaxWise and Help files be selected in the Product Updates section. In the Additional state Updates section check the box in the Individual column next to the states that you anticipate using during tax season. This will allow product notifications to be sent for each state checked.

Click the **Save** button.

Downloading Program Updates

To download **Program Updates**:

Click the blue arrow corresponding to the comprehensive update.

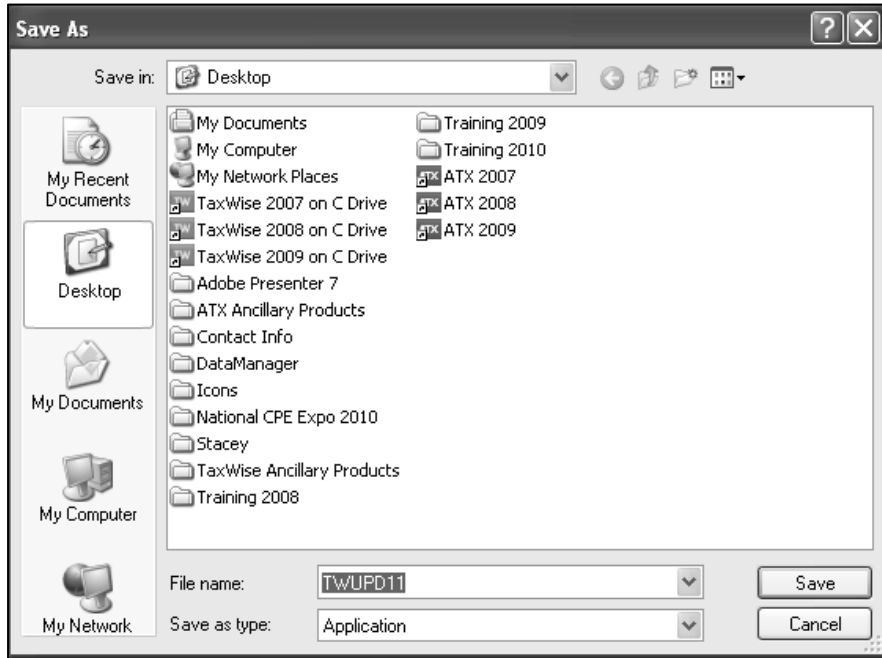
This page displays updates as comprehensive downloads. A comprehensive update includes all updates up to and including the current update.

Because comprehensive updates include more than one update in a single downloadable file. They can often take several minutes to download.



1. Click **Save**.

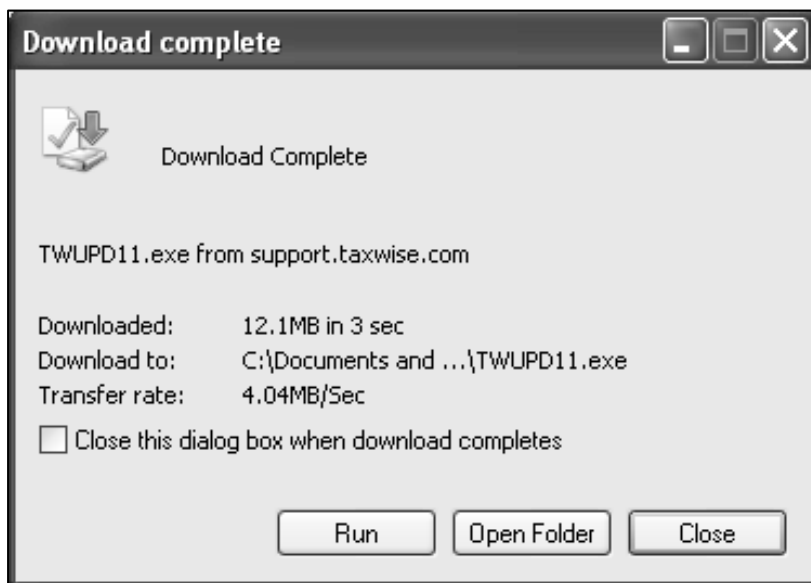
Windows displays the **Save As** dialog box:



2. Navigate to the location to which you want to save the file and click **Save**.

Saving the download to the Desktop makes finding the file much more convenient.

Windows saves the download to the chosen location and displays the **File Download** dialog box.



3. Click **Close**.

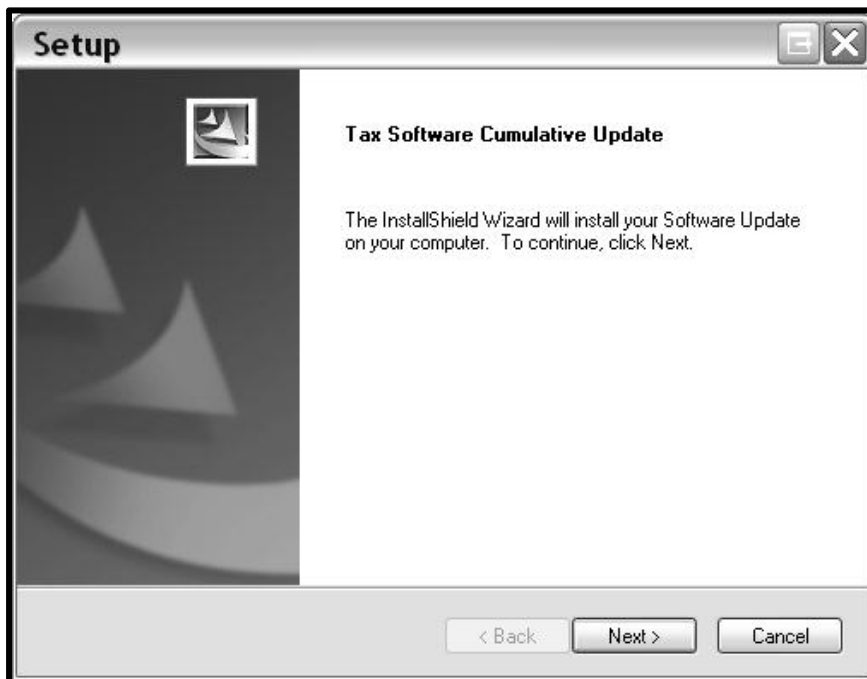
TaxWise must be closed to install updates.

To install a federal update, use the following steps:

1. Navigate to the **Desktop** or other location where you saved the downloaded file.
2. Double-click the file that you downloaded.

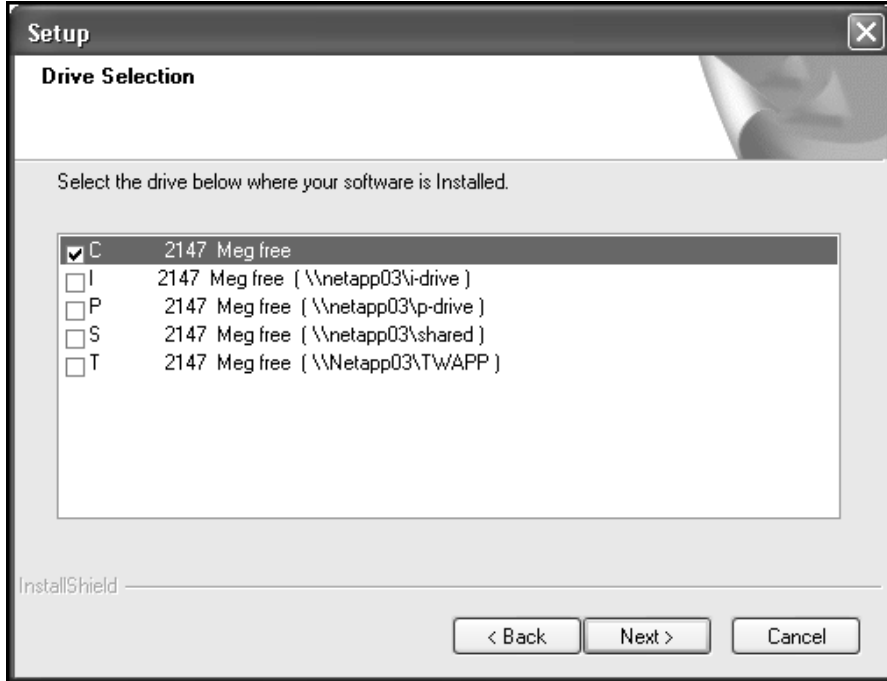
The filename format is TWUPDXX where XX is the update number.

Windows displays the **Setup** dialog box:



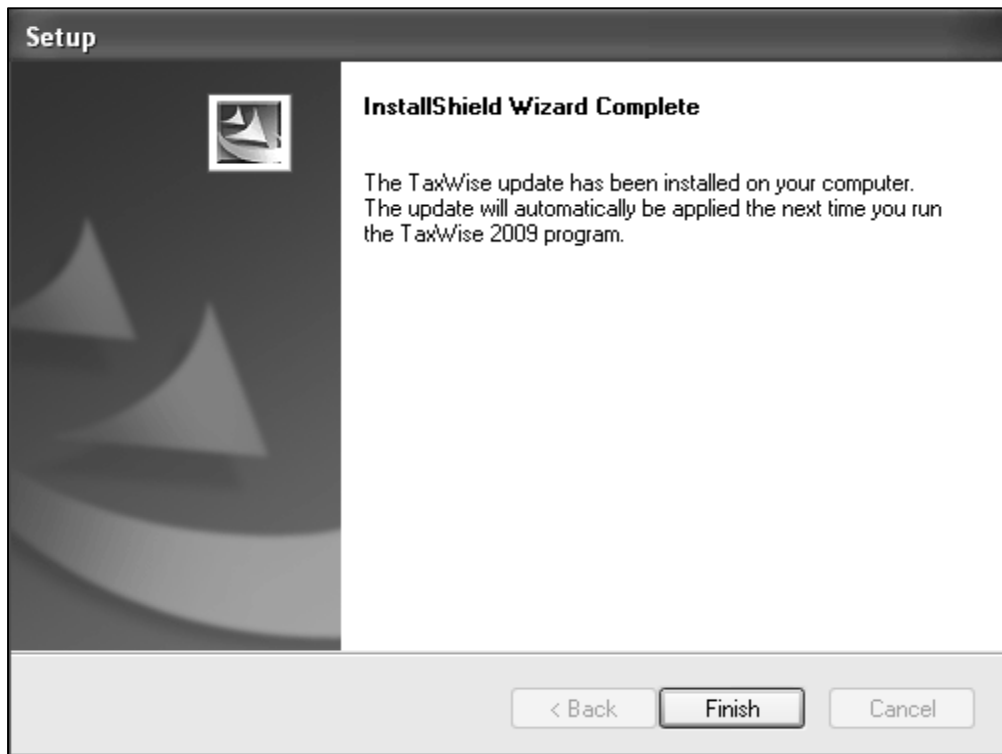
3. Click **Next**.

Windows displays the **Drive Selection** page of the **Setup** dialog box:



4. Select the drive on which you want to install the update and click **Next**.

Windows displays the **InstallShield Wizard Complete** page of the **Setup** dialog box:



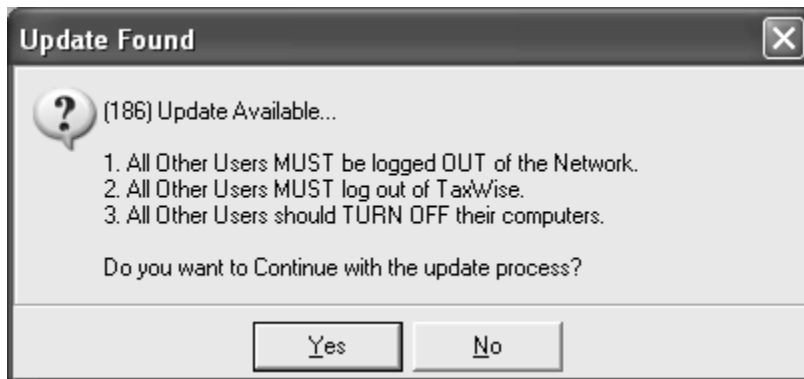
Windows displays the **Release Notes**:



View and/or print the update's release notes for future reference or you can go back to your **Downloads** page on the **Customer Support site**, later, select the book next to the blue arrow and read or print from there.

Open TaxWise.

TaxWise displays the **Update Found** dialog box:



1. Click **Yes** to apply the updates.

Downloading Federal Updates

To download **Federal updates**:

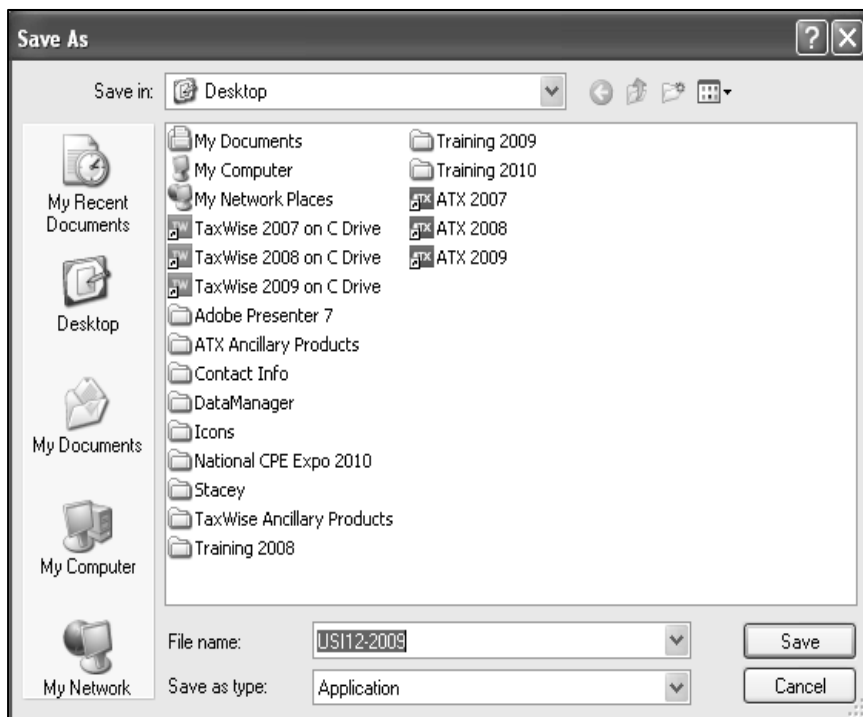
Click the blue arrow corresponding to the individual update for the specific package.

Windows displays the **File Download** dialog box:



Click **Save**.

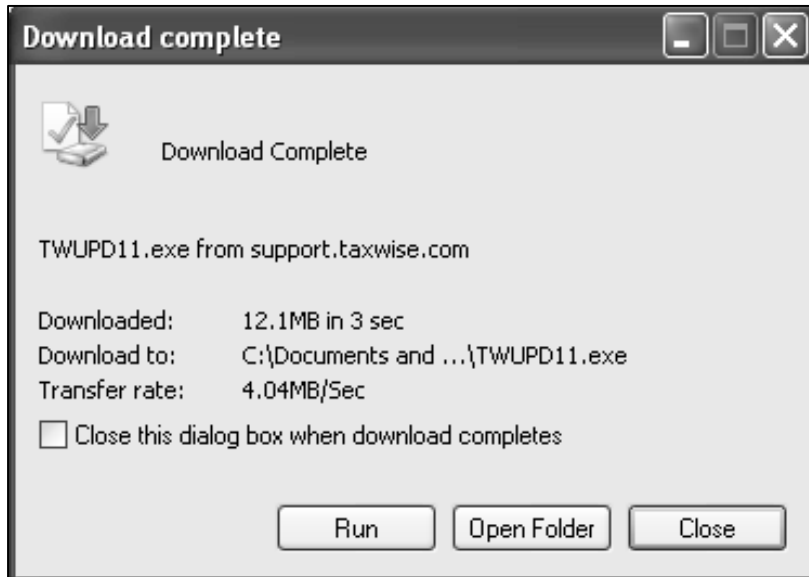
Windows displays the **Save As** dialog box:



Navigate to the location to which you want to save the file and click **Save**.

Saving the download to the **Desktop** makes finding the file much more convenient.

Windows saves the download to the chosen location and displays the **Download Complete** dialog box.



Click **Close**.

To install a federal update, use the following steps:

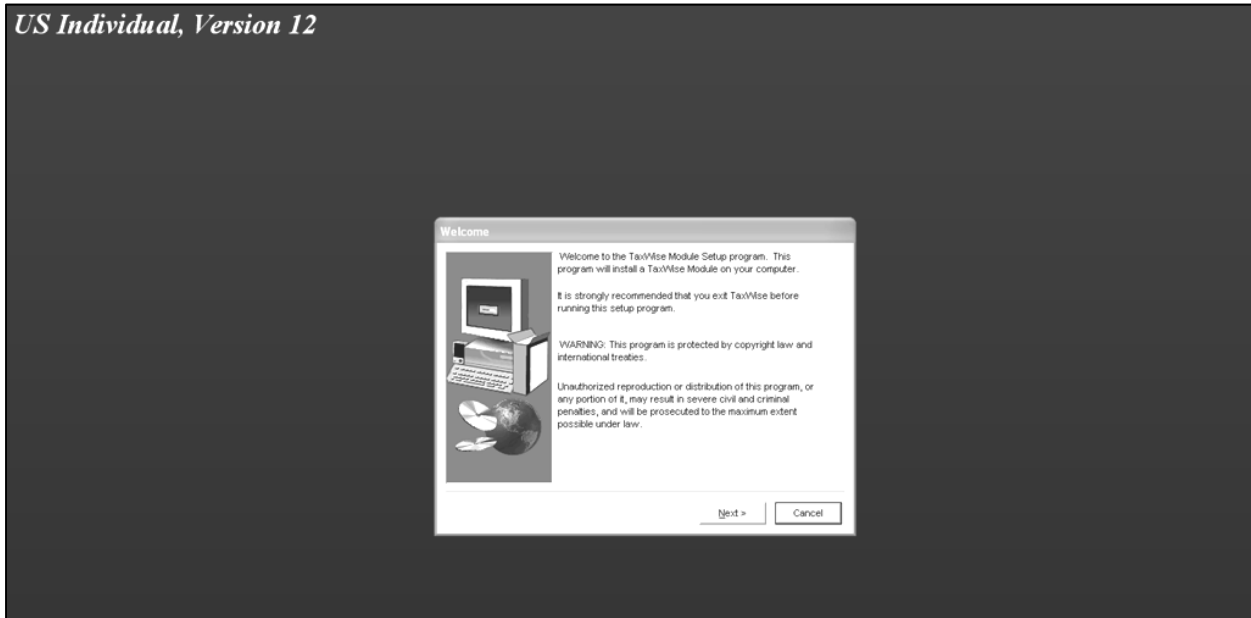
Navigate to the **Desktop** or other location where you saved the downloaded file.

Double-click the Update file you downloaded.

To easily identify this file, you will see a **ZIP** file with XXX describing the package type with the version number and year. An example of an **Individual Federal** update would be USI12-2009.



Windows displays the **Welcome** dialog box:



Click **Next**.

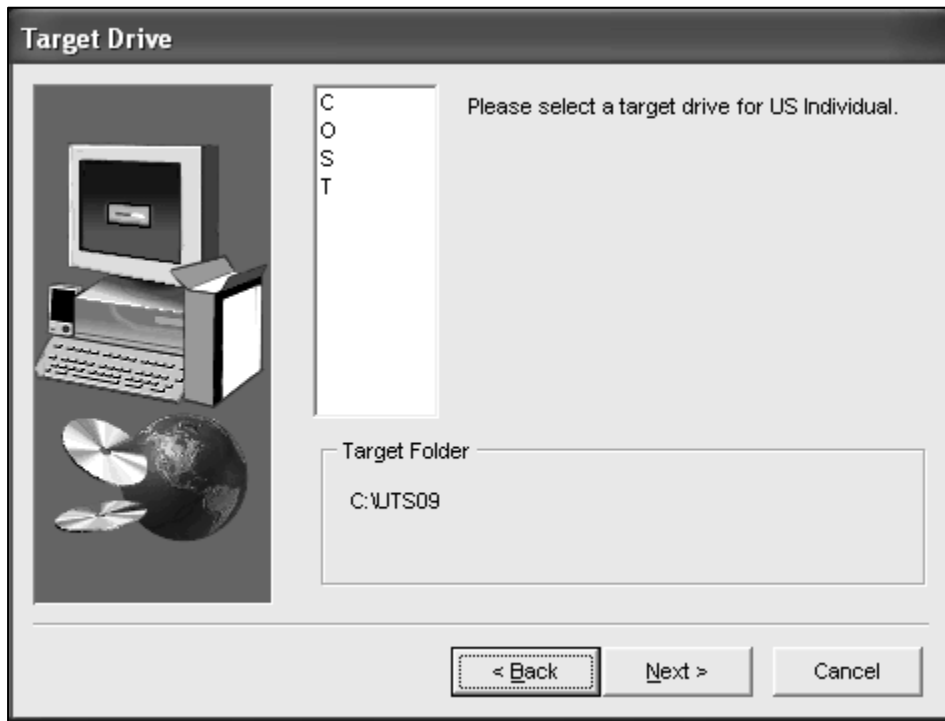
Windows displays the **Installation Option** dialog box:



If you want to make an installation disk for another computer, click **Continue**.

Clicking **Continue** takes you back to the **Installation Option** dialog box, from which you can choose to save the update to a disk or install to this computer then select a different drive to install.

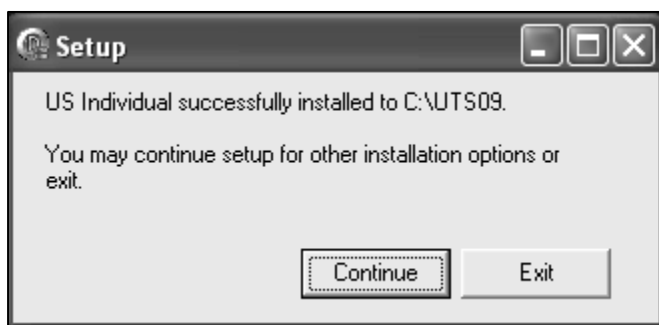
If you do not want to make an installation disk or install to another drive, click **Exit**.



Select the drive on which you have your program installed to.

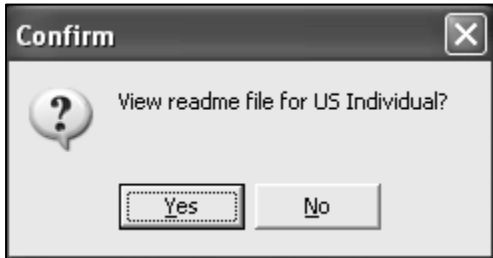
Click **Next**.

Upon completion, Windows will display the **Setup** dialog box:

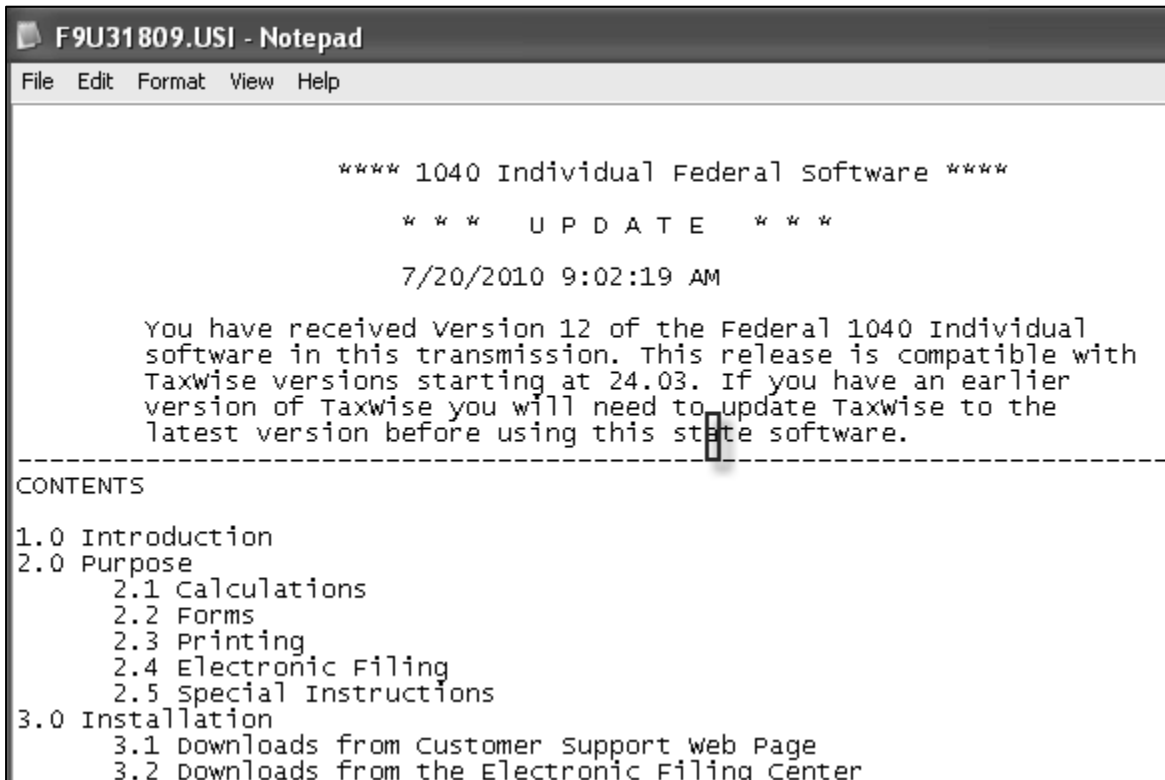


You may continue setup for other installation options or exit.

Once you exit the **Confirm** dialog box will display:



Click **Yes** to view the readme file for update details:



Downloading State Updates

New for Tax Year 2010, you will have the ability to download the updates for multiple states at one time. Select the **Add to Queue** link next to the states. Select the link for each state you want to download. You will then select the download link. You will be prompted to download the state updates. Once downloaded, you will follow the same instructions for installing the state updates.

To download **State Updates** for initial installation, use the following steps:

1. From the **Product Updates** page, click the **State Updates** link.

The Customer Support site displays the **Product Updates** page for states.

The products you add to your package determine what can be downloaded from this page.

2. If you need to add states to your package, click the **Add a State** link.

The Customer Support site displays the **Product Information** page:

TaxWise CCH Small Firm Services
a Wolters Kluwer business

Home My Information Download Check Printing Community Support Print Help Manage Users Change User

My Office Electronic Filing Bank Products Product Info Billing Detail My Subscriptions Appointments Reports

Product Information

Displaying Information For EFIN: My Office Switch to EFIN: My Office

Taxwise Software Reg Code: **U9LW-77N8-UGPC-JX77-VFC8**

Individual States Purchased: 45
- [Add states to my package](#)
- [Go to state updates](#)

Business States Purchased: 51
- [Add states to my package](#)
- [Go to state updates](#)

Year	Product	Activation Code
2009	TaxWise 1040 Power Pkg	
2009	TaxWise Business Delaware	
2009	TaxWise 1040 Montana	
2009	TaxWise 1040 Dist/Columbia	
2009	TaxWise Business Georgia	
2009	TaxWise Business Florida	
2009	TaxWise Business South Carolina	
2009	TaxWise Business Missouri	
2009	TaxWise 1040 Colorado	
2009	TaxWise 1040 Arkansas	
2009	TaxWise Business Alabama	

3. Click the **Add states to my package** link.
4. Select the check box next to the state you want to add.
5. Click **Add States**.

The process can take up to 15 minutes for the state to be available for download.

6. Click the **Go to state updates** link.

The Customer Support Site displays the **Product Updates** page.

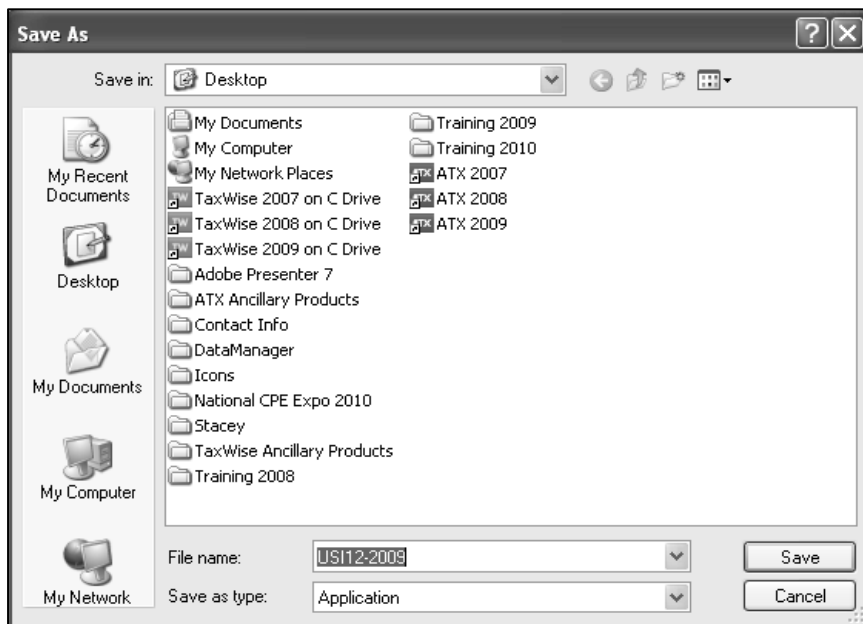
7. Click the blue arrow that corresponds to the state to download.

Windows displays the **File Download** dialog box:



8. Click **Save**.

Windows displays the **Save As** dialog box.



9. Navigate to the location to which you want to save the file and click **Save**.

Saving the download to the desktop makes finding the file much more convenient.

Windows saves the download to the location chosen and displays the **File Download** dialog box.

10. Click **Close**.

You must have all returns closed to install your updates.

To install state updates, use the following steps:

Navigate to the desktop or other location where you saved the downloaded file.

1. Double-click the state update icon.

The file name for the state update files is **AAI#-year** where **AA** is the two letter state abbreviation, **I** indicates that the update is Individual, and **#** is the update version number.

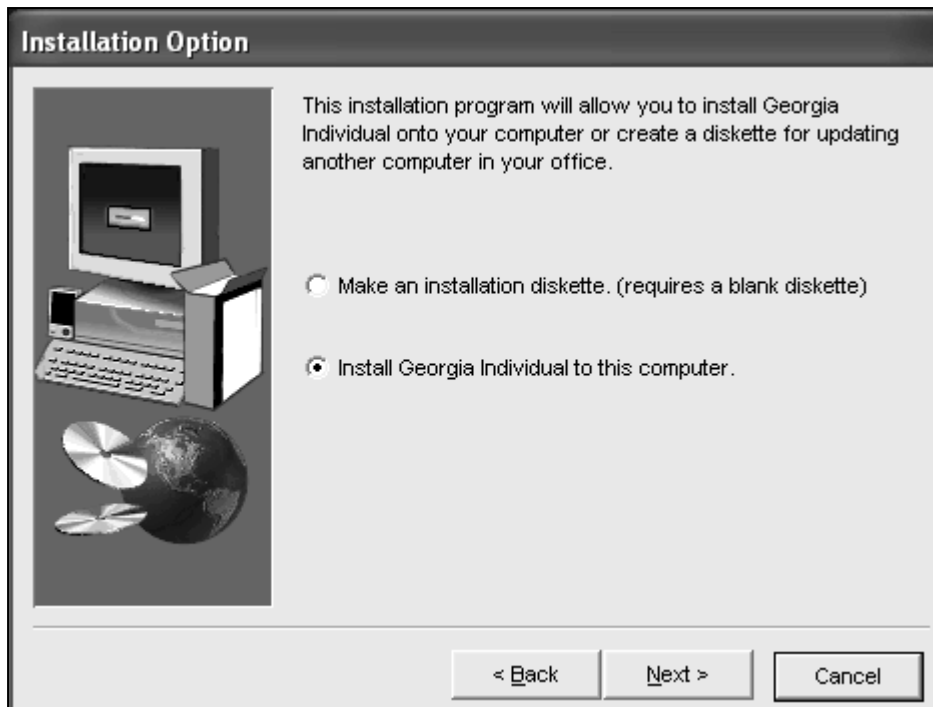


Windows displays a **Setup** dialog box similar to the following:



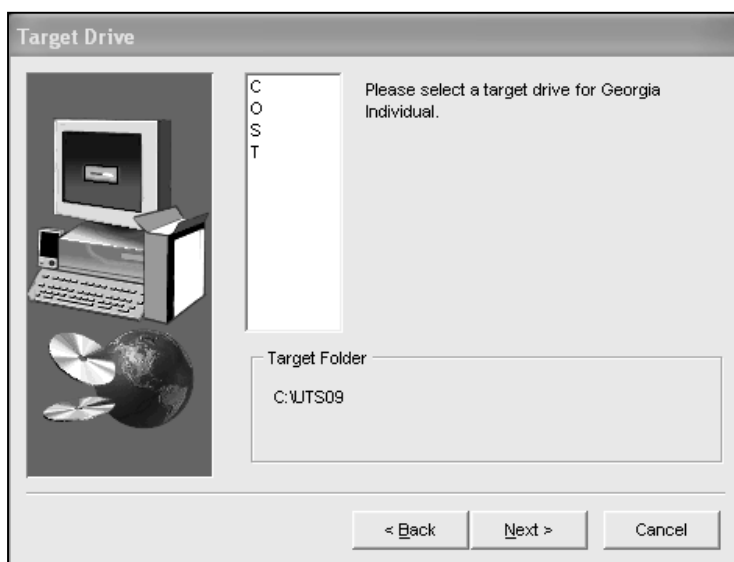
2. Click **Next**.

Windows displays the **Installation Option** dialog box:



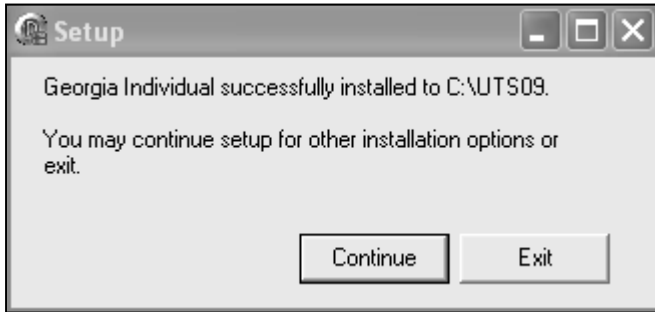
3. Select to install the update to this computer and click **Next**.

Windows displays the **Target Drive** dialog box:



4. Select the drive to install the updates to and click **Next**.

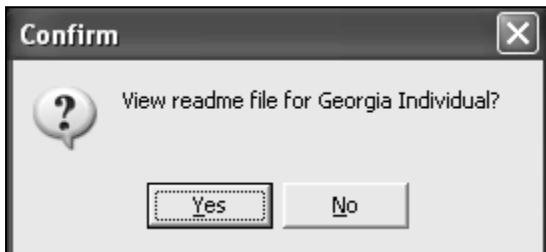
Windows displays the following dialog box:



5. If you want to make an installation disk for another computer, click **Continue**.

Clicking **Continue** takes you back to the **Installation Option** dialog box, from which you can choose to save the update to a disk or install to this computer then select a different drive to install. If you do **not want** to make an installation disk or install to another drive, click **Exit**.

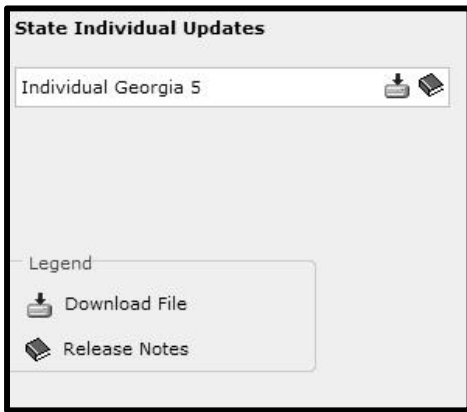
Windows displays the **Confirm** dialog box:



6. Click **Yes** to view and/or print the update's release notes.



If you click **No** but later would like to view and/or print the release notes, **click** the green book located next to the update on the **State Updates** page:



Installing Help Files

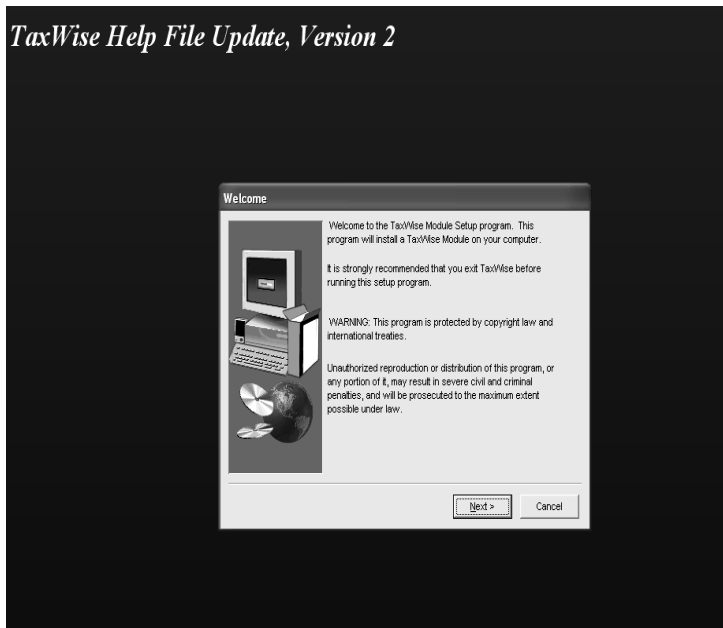
You must close TaxWise to install updates.

To install help updates, use the following steps:

Navigate to the Desktop or other location where you saved the downloaded file.

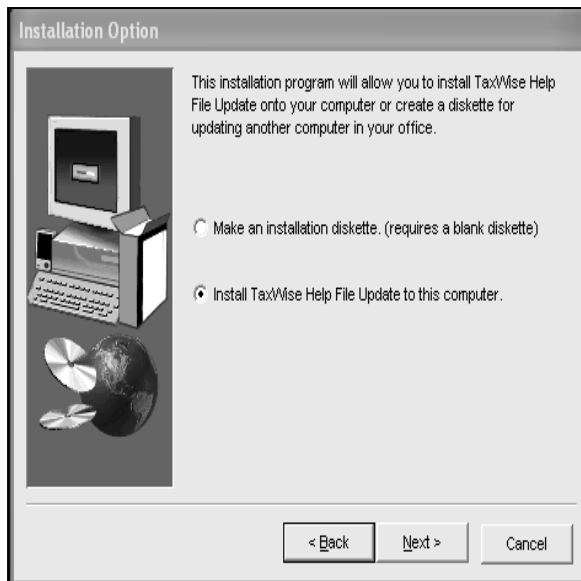
1. Double-click the help update icon.

Windows displays the **Setup** dialog box:



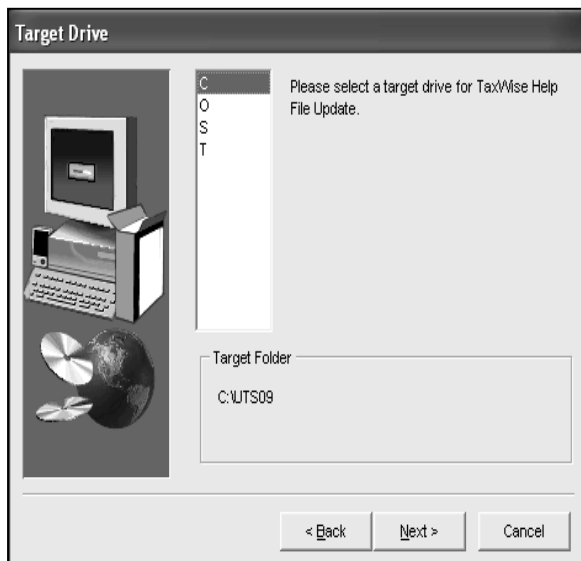
2. Click **Next**.

Windows displays the **Installation Option** dialog box:



3. Click **Next**.

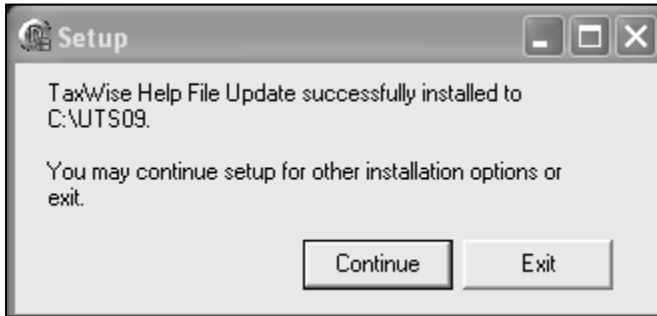
Windows displays the **Target Drive** dialog box:



4. Select the drive to install the updates and click **Next**.

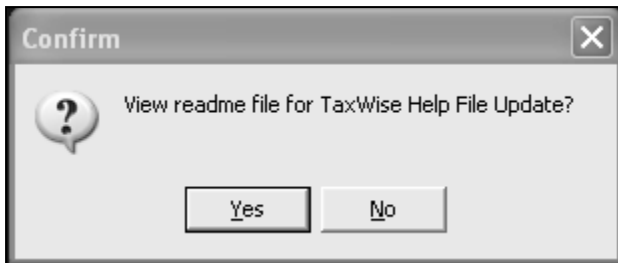
Due to the speed of the installation, this will normally just flash on the screen and disappear.

Windows displays the **InstallShield Wizard Complete** page of the **Setup** dialog box:



5. Click **Exit**

Windows displays the **Confirm dialog window** or select **Continue** to download more files



Do one of the following:

6. Select **Yes** to view and print the readme or select **No**.
7. To print the release notes, click the **File** menu and select **Print**.
8. If you do not want to print the release notes, click the **Close** button.

Downloading TaxWise Software

To download the **Current Year Software** from the **Download** page:

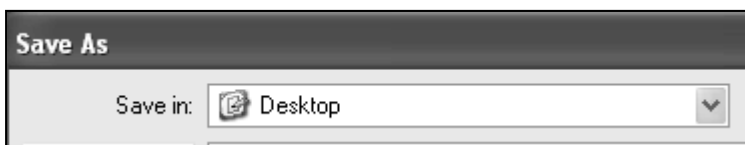
1. Click the TaxWise IRS Software link and follow the on screen prompts to install the software.



Your **Registration Code** is displayed.



2. Click **Save**.



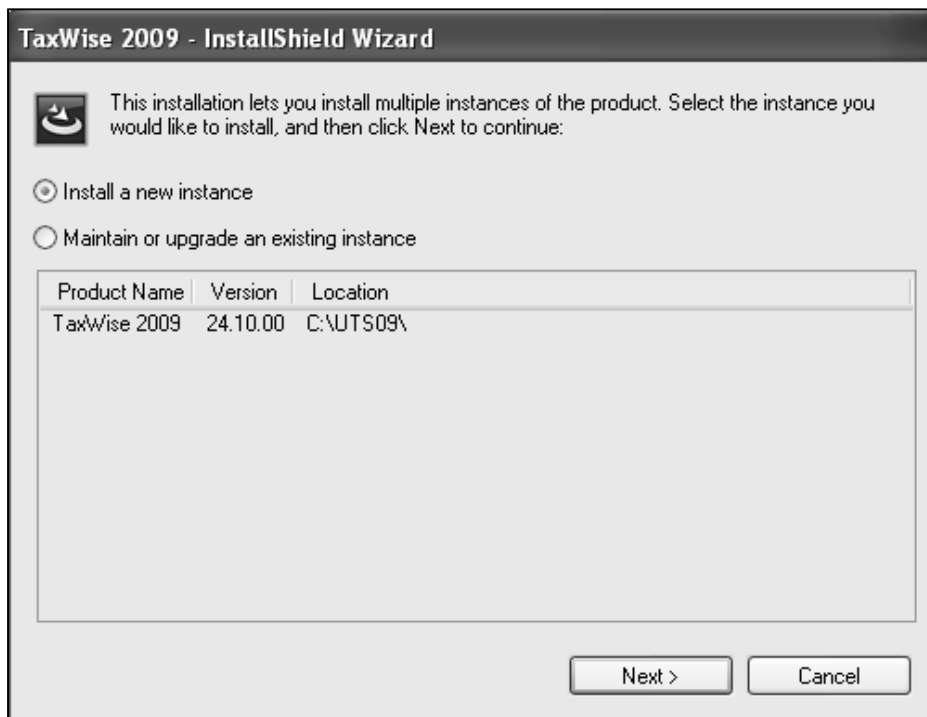
3. Save to your **Desktop**.

Navigate to the Desktop or other location where you saved the downloaded file.

Double-click the setup icon, which is similar to the following illustration:



4. The Install Wizard defaults to: **Install a new instance**. Select the appropriate radio button.

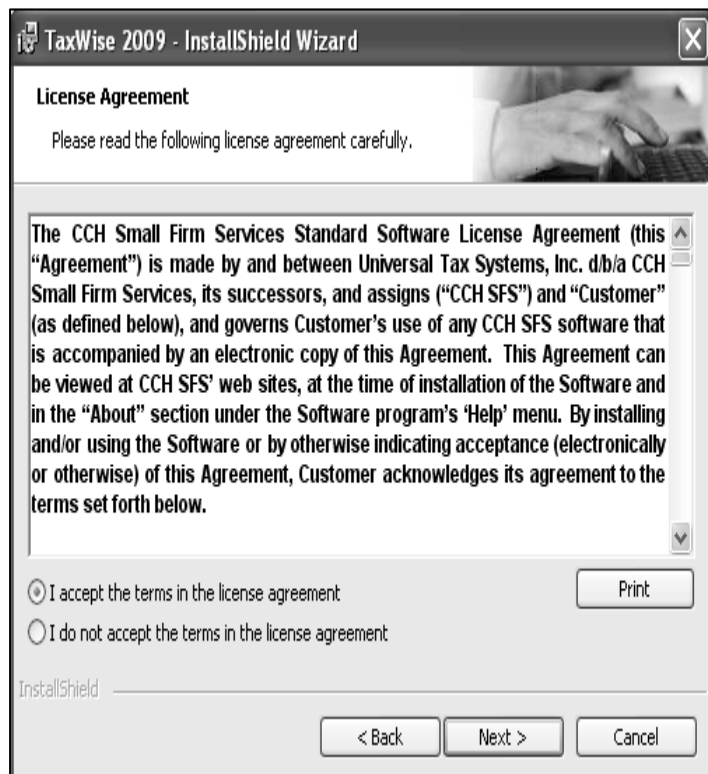


5. Click **Next**.



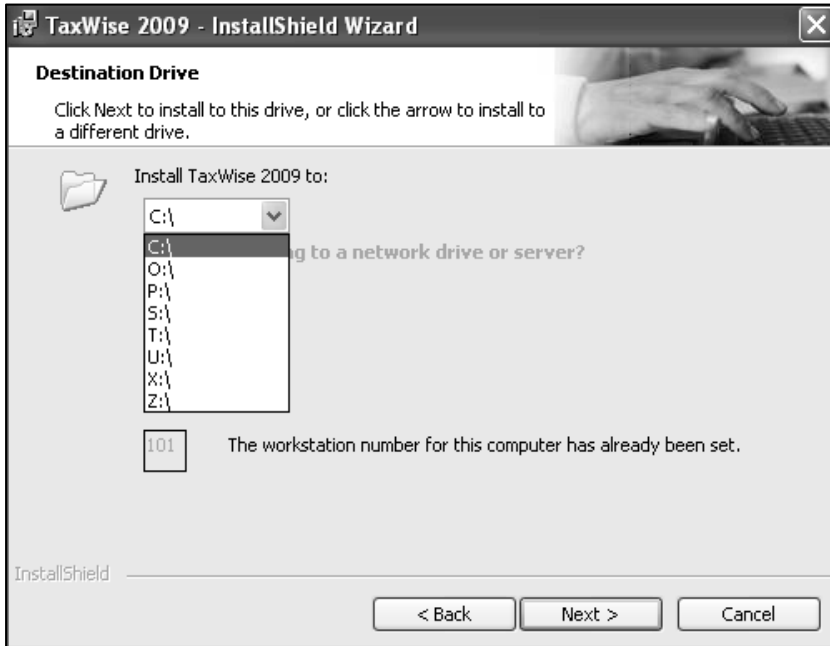
6. Choose **English** or **Spanish** and click **OK**.

7. TaxWise will display the Install Wizard.
8. You must accept the terms in the license agreement to continue installation.



9. Click **Next**.

10. Choose the drive you want to install **TaxWise** to.



11. Click **Next**.

TaxWise is now ready to install.

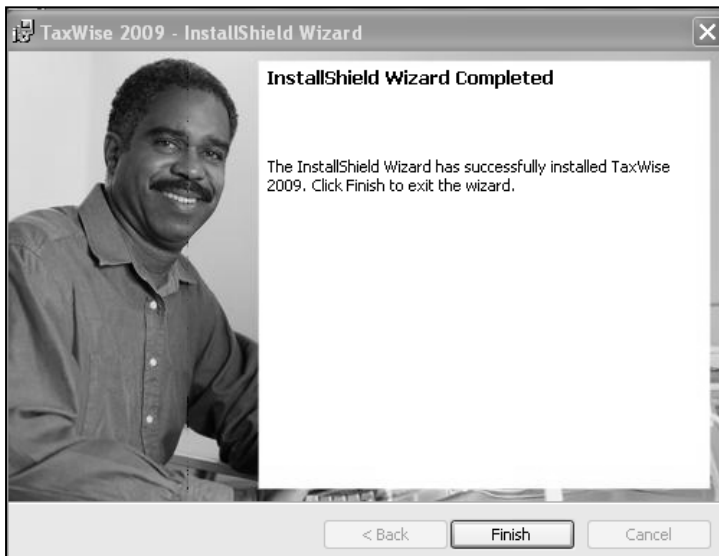


12. Click **Install**.

13. The **InstallShield Wizard** displays the progress of the **TaxWise** software installation.



The **InstallShield Wizard Completed** dialog box informs you when installation is complete.



14. Click Finish to exit the wizard

The **Download** page also includes **Prior Year Software** for the two previous tax seasons.

Prior Year Software:

Note: The registration codes displayed below are generic codes used by all customers. After installing the prior year program, start TaxWise and enter the generic EFIN. When prompted for the registration code, enter the code for the tax year you have installed. You will not be able to e-file returns with these prior year programs.

2008 Registration Code: CSXA-CAAB-YAVG-JBAA-HAN8 / EFIN: 070743

2007 Registration Code: QQF4-2223-QAM8-EB22-PF2C / EFIN: 070743

The **registration codes** displayed below are generic codes used by all customers. After installing the prior year program,

- Start TaxWise and enter the generic **EFIN, 070743**, on the Company Information setup screen.

When prompted for the **registration code**,

- Enter the code for the tax year you have installed.

You will not be able to e-file returns with these prior year programs.