Professional Editions Setup Guide

FOR TAX YEAR 2017

V 1

TaxAct Professional Support Options

Online Support Center

For the fastest answers, search our online **Help Topics**

Technical Support

For account and software questions:

professional@taxactservice.com

(319) 731-2682

TaxPayer Support

For tax questions:

protaxhelp@taxact.com

(319) 731-2680

Sales

For order, payment and sales questions:

https://www.taxact.com/professional

prosales@taxact.com

(319) 536-3571

Sales hours:

Monday - Friday	8am - 5pm

Support Hours:

April (after IRS deadline) - January (mid-month)

Monday - Friday	8:00am - 5:00pm
Saturday & Sunday	Closed

January (mid-month) - April (through IRS deadline)

Monday - Friday	7:30am - 9:00pm
Saturday	8:30am - 5:30pm
Sunday	10:00am - 5:00pm
April file due date	Open until 12:00am

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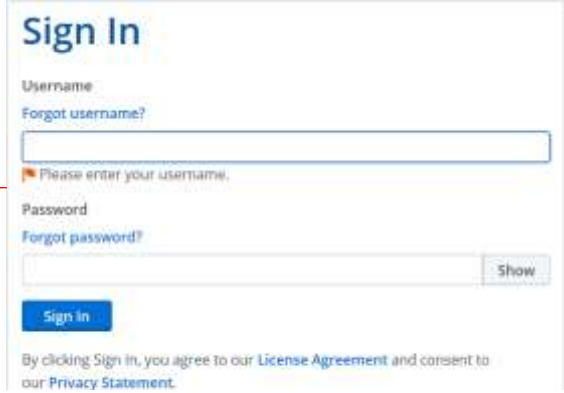
Download and Install



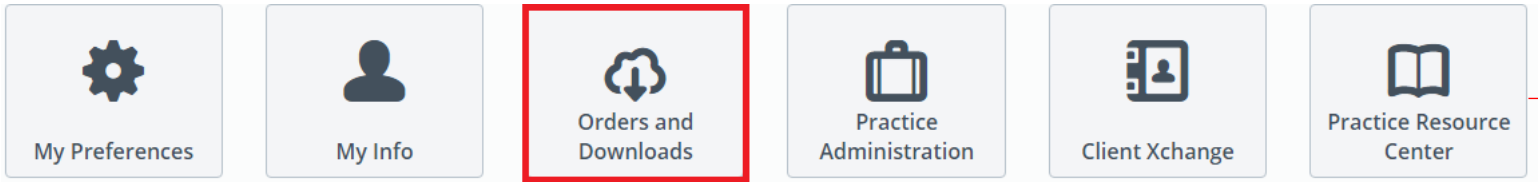
TaxAct Professional Editions can be installed by downloading the software from Practice Manager (your online TaxAct Account).

Enterprise Editions files can be shared on a network, either your own local server or online to TaxAct's secure servers.

Be sure to verify the system requirements before installing the software.

Download Installation File from Practice Manager

1. Go to *taxactprofessional.com* and click the **Sign In** button in the upper right corner.
2. Sign in with your Username and Password.
3. Click the **Orders & Downloads** tile.



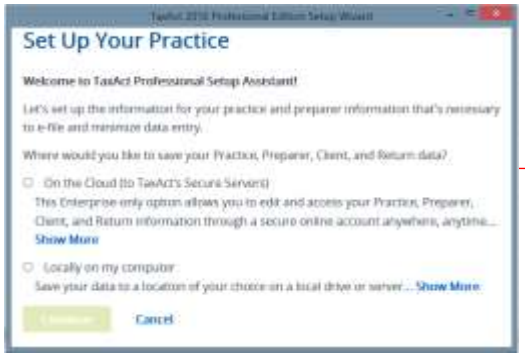
4. Select the "Downloads" link to the right of the product you wish to download.
5. If the installation does not automatically run, locate and double click the file icon to manually install the software. (Type CTRL+J in Internet Explorer, Firefox, or Chrome to help you locate your downloaded file.)

Install Your Software

1. Open the downloaded program file. On the initial screen, click **Next** to begin the installation.
2. Select the checkbox next to "I Accept the License Agreement", then click **Next.**
3. Accept defaults and click **Next**, or click **Browse** to change the destination location, then click **Next**.
4. Make sure the checkbox to receive Automatic Updates to the program remains selected, then click **Next.**
5. Click **Finish** in the next window
6. Repeat steps for all programs you wish to install (1040, 1041, 1065, etc.)

Share Files on a Network (Enterprise Editions Only)

The first time you launch the program, you will be prompted to set up your practice. At this point in the setup process, you need to choose whether to save shared files on your local network, or on TaxAct's secure servers.



1. Select the radio button next to the option you prefer.
2. Click **Continue**.

Online Network Option

If you choose the Enterprise-only Online Network Option, you can edit and access your Practice, Preparer, Client, and Return information through a secure online account anywhere, anytime. You'll need to sign in to Practice Manager each time you open the TaxAct software with this option, so please ensure you have a stable Internet connection before proceeding. This is

recommended if your practice has multiple preparers or if you want access to returns from multiple locations. See our Online Networking FAQ for more information.

Local Network Option

If you choose "Locally on my computer," your files will be saved to a location of your choice on a local drive or server. If you wish to share this data with multiple computers, this folder should be in a shared network location. See our Local Networking FAQ for more information.

Have questions about how to set up a local network? Refer to the Microsoft and TaxAct Support resources below:

Windows Support	https://support.microsoft.com/en-us/products/windows
TaxAct Support – Prior Year Network installations	https://www.taxact.com/support/22832/
TaxAct Professional Support	taxactprofessional.com/support

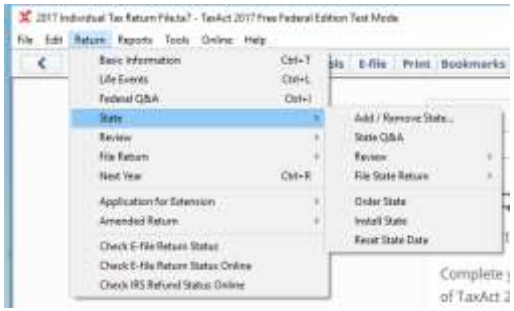
All users (whether storing data online or locally) are required to sign in with their TaxAct username and password upon software startup in order to authenticate the account. You will not need to sign in again until either 30 minutes of inactivity on your PC or after 24 hours (whichever is sooner).

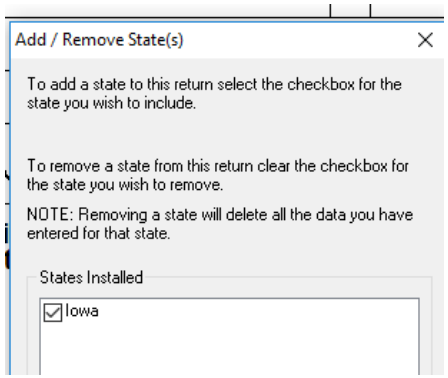
Install State Editions

1. Open a return, then click **Return > State > Install State.**
2. Select each state you wish to install or **Select All**
3. Click **Auto Install** to add the state modules with recommended settings.
   Or, click **Manual Install** to add states to an alternative location or to a network.

Adding or Removing State from a Return

1. Once a state has been installed, click **Return > State > Add/Remove State**
   to attach or remove the state from a return.





Installation FAQs

I downloaded the program file but can't find it on my computer. How do I find it?

Try any of the following:

- repeat the download process,
- use keyboard shortcut CTRL+J in your web browser, or
- find the Downloads menu item or icon on your Web browser.

You can also use Windows search to locate the installation file on your computer. TaxAct installation file names begin with "taXX" (where XX is the last two digits of the tax year).

Why am I getting an error when clicking on the installation file?

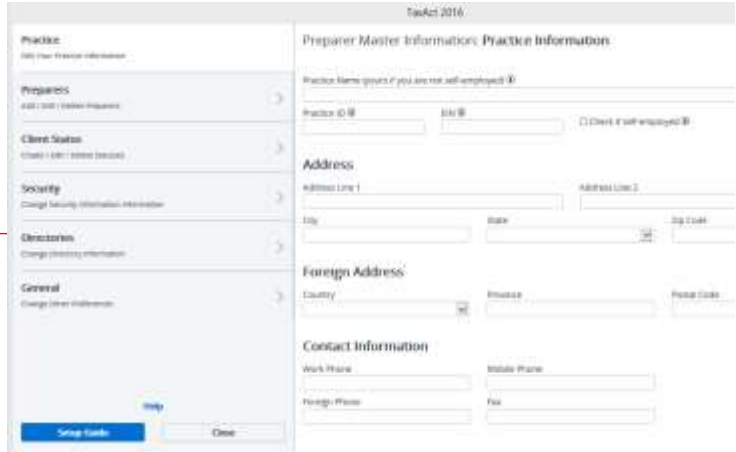
A temporary or partial file may have been created during the download process due to connection issues. This is usually designated with something added to the filename, such as "_part."

To avoid this problem, check your browser for progress messages, set your browser to run downloads directly, or use a different browser.

What are TaxAct's system requirements?

Operating Systems:	Windows 7, Windows 8 or 8.1, Windows 10
Processor:	Intel Pentium 4 or later, AMD Athlon 64 or later
RAM:	Refer to your operating system requirements
Hard Drive Space:	100 MB
Internet Access:	Required for all users to authenticate account during initial sign in to software (IRS requirement)
Monitor:	1024x768 or larger (16-bit color minimum)
Mouse:	Required
Printer:	Highly recommended
Web Browser:	Microsoft Internet Explorer 10.0 or higher

Set Up the Software



The first time you launch the software, the TaxAct Setup Wizard will walk you through steps.

You will be prompted to enter data for Practice, Preparers, Client Status, Security, Directories, and General Preferences.

For best results, complete every tab in the setup window before clicking the **OK** button.

To access each section individually after the initial setup, click **Preparer > Master Information**

Practice

Enter your practice information as you want it to appear on tax returns, labels, letters, and other correspondence. The information you enter can also be linked to each preparer (see Preparer Info tab, later). When finished entering your data, click Continue to **Preparer Information**.

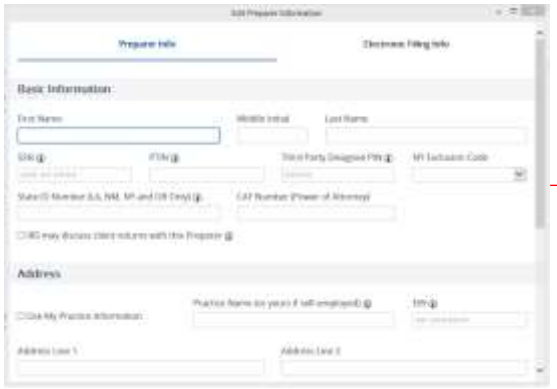
Preparers

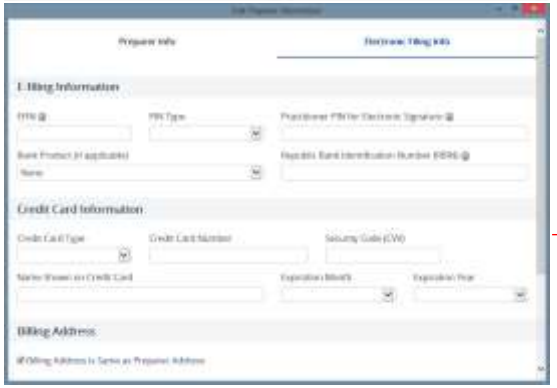
After completing the Practice information, the next step is to enter information for each Preparer in your practice. You must enter at least one preparer in order to continue the setup process. To access the full Preparers menu, click **Add New Preparer**.

Note: The first preparer you add should be yourself.

Preparers Tab

Click **Add New Preparer** to enter information, keeping the following in mind:





- Check the Use My Practice Information box (in the Address section) to link the preparer to the Practice address. Otherwise, enter the preparer's specific contact information.
- In the Basic Information section, selecting the "IRS may discuss…" option will populate the Third Party Designee field on the return with "PREPARER."
- **Note**: The first preparer you add should be yourself or the default preparer.
- Enter "None" if the IRS has not yet issued a CAF number (you must submit Form 2848, Power of Attorney and Declaration *of Representative* to the IRS to receive a CAF number).
- **Enterprise Editions online networking users**: Be sure to enter a valid email address for each preparer. This is necessary in order to invite preparers to your online network.

Local Network Option Only: To change the default preparer, select a name from the Default Preparer dropdown menu in the Preparers tab (**Preparer > Master Information > Preparers**). If you delete the Default and close the window, the next preparer in the list will become the Default.

Each practice is assigned a unique alphanumeric identification code called a "Practice ID". If you have multiple preparers in your practice, each preparer will have the same Practice ID. The Practice ID, EFIN and PTIN (or SSN) is synched with your TaxAct Account to streamline the e-file process.

If you need to locate your Practice ID, sign in to your TaxAct Account and look in the upper right corner (see screenshot below).

Electronic Filing Info Tab – E-Filing Info

An Electronic Filing Identification Number (EFIN) is required to e-file returns. To obtain an EFIN from the IRS, file Form 8633, *Application to Participate in the IRS E-file Program*.

IRS EFIN Requirements for Tax Professionals & Software Companies

The IRS requires tax software companies to collect and verify EFIN Tracking Numbers from its professional customers. Your Tracking Number appears on the IRS e-Services Summary in your IRS e-Services account.

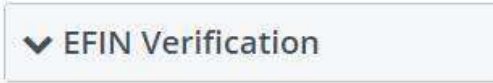
Please submit a copy of that IRS e-file application summary (including Tracking Number) to TaxAct for verification. Having your EFIN verified prior to the start of tax season will help avoid disruption to your e-filing services. ***All EFINs will need to be verified prior to e-filing.***

Generally, professionals who have been verified in a previous year will not need to be re-verified; however, it is possible TaxAct may request that you re-verify in order to e-file. You can check your EFIN verification status in your TaxAct Account. If your EFIN is rejected for any reason, we will notify you via email.

To submit your IRS e-file application summary or to check the status of your EFIN Verification:

1. Sign in to your TaxAct Account.
2. Click the Practice Administration Tile.

3. Click EFIN Verification to expand.



4. Enter your EFIN and the Tracking Number found at the bottom of your IRS e-file Application Summary.
   Reminder: To obtain a copy of your IRS e-file Application Summary, sign in to your IRS e-Services Account.

5. Click **Choose File** to locate and attach your IRS e-file Application Summary. (PDF is preferred, but .jpg, .bmp and .png files are also accepted.)
6. Check the box to indicate you are authorized to submit this information. Click **Submit**.
7. We will notify you via email if your EFIN information is rejected for any reason, and your verification status will be available in your TaxAct Account within 2 business days.

Electronic Filing Info tab – Credit Card

Credit card information is only required if you choose to pay e-file fees with each submission (Pay Per Return method). If no credit card information is entered, you will be prompted for credit card and billing information each time you e-file.

If your TaxAct order includes unlimited e-filing or you have prepaid for e-filing, you do not need to enter credit card information. Simply enter your EFIN, then click **OK.**

Tip: Double check that you've entered your credit card information correctly so that your e-files are not rejected due to insufficient prepaid funds.

Additional Enterprise Online Network Options

Permissions Tab

If you selected to store files "On TaxAct's secure servers (cloud-based)" during the installation process, you have the opportunity during setup to assign permissions to each preparer for any of the following:

Practice Administrator - The first preparer you add to your practice will be the Practice Administrator by default (this cannot be removed). The Practice Administrator permission can be given to other preparers in the practice by checking the box for "User is Practice Administrator" on the permissions tab in their preparer information. Anyone with the Practice Administrator permission will be able to:

- Invite other preparers to join the practice
- Modify other preparer's permissions
- Deactivate (or reactivate) preparers

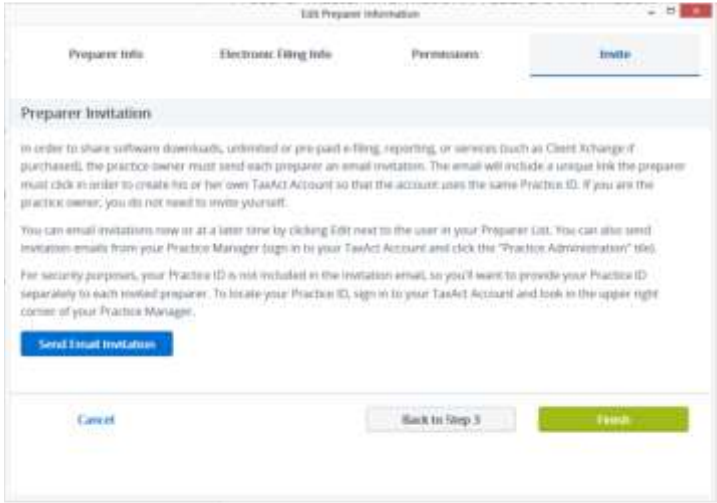
Permissions are divided into 2 categories: **Practice and Preparer Information** and **Client and Return Information**

Practice and Preparer Information

- Edit Practice Information – Allows user to update the Master Information for the practice
- Edit Preparer Information – Allow user to update the preparer Information for any preparers within the practice.
- Edit Client Status Options – Allows user to edit existing status, add new status, or delete status for Client Return Status and Client Pay Status
- Change General Filing Settings – Allow user to change Filing and Printing options from the General Master Information tab
- Change Miscellaneous Settings – Allow user to change Miscellaneous options from the General Master Information tab
- Change Calculation Settings – Allow user to change Calculation options from the General Master Information tab
- Edit Master Forms – Allows user to change Master Forms information, including Charge by Form, Billing Invoice, Instruction Letter, and Schedule K - 1 Letter (in application product versions)

Client and Return Information

- **Create New Returns** – User can create new client returns
- **Open Existing Returns** – User can open existing client returns that they have permission to view
- **Delete Existing Returns** – User can delete existing client returns that they have permission to view
- **Import Client Information** – User can import client returns from PDF or prior year TaxAct data
- **Export Client Information** – User can export client information in a customized or comprehensive comma separated (.csv) or tab delimited (.txt) file
- **Print Client Information** – User can print client returns, organizers, consent forms, labels, and reports
- **View All Clients in Practice** – Choose which clients a preparer can view:
  - Entire Practice
  - Only Assigned Clients



Invite Tab

To grant network access to other preparers in your practice, the practice owner must "Invite" them to join your practice via email (instructions below).

The email will include a unique link the preparer must click in order to create his or her own TaxAct Account so that the account uses your Practice ID. **Note:** If you are the practice owner, you do not need to invite yourself (you are automatically added to your practice's network).

Your invited Preparers will have access to the following areas of Practice Manager (listed by tile name) in their TaxAct Account:

- Orders & Downloads
- Professional Reports
- Practice Administration (EFIN Verification only)
- Client Xchange (if purchased by the Practice)
- Resources
- My Info
- My Preferences

Your invited preparers will not have access to the following tiles in Practice Manager:

- Preparer Invitation

To invite preparers:

1. Click the **Practice Administration** tile.
2. Click **Preparer Invitation.**
3. Complete and click the **Send Email Invitation** button.

Once all information in the Preparer Information setup is complete,
click **OK**.

Set Master Information Defaults (Professional Editions and Enterprise Editions Local Network option)

The Master Information feature consists of the following tabs:

- Practice
- Preparers
- Client Status
- Security
- Directories
- General

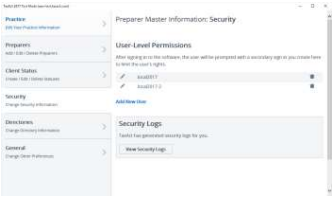
To access Master Information after the initial setup, click **Preparer > Master Information > Preparers**.

Client Status Tab

Click **Add New Status** to create a custom message to appear in the Return Status and Payment Status columns of Client Manager.

Security Tab

This tab presents options for setting password protection (See Protect Your Data, later). Click the **View Logs** button to list all recent activity.



Directories Tab

The Directories tab displays where your client documents are stored, and allows you to change directory locations.

General Tab

The General tab presents options for you to set preferences for filing, calculations, and miscellaneous preferences.

Set Master Information Defaults (Enterprise Editions Online Networking option)

The Master Information feature consists of the following tabs:

- Practice (after initial setup)
- Preparers (after initial setup)
- Client Status
- Directories
- General

To access Master Information after the initial setup, click **Preparer > Master Information > Preparers**.

Client Status Tab

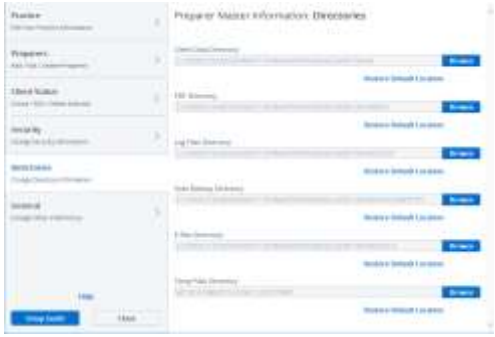
Click **Add New Status** to create a custom message for the Return Status and Payment Status columns of Client Manager.

Directories Tab

The Directories tab displays where certain documents, such as returns, temporary files, and checked-out files are stored.

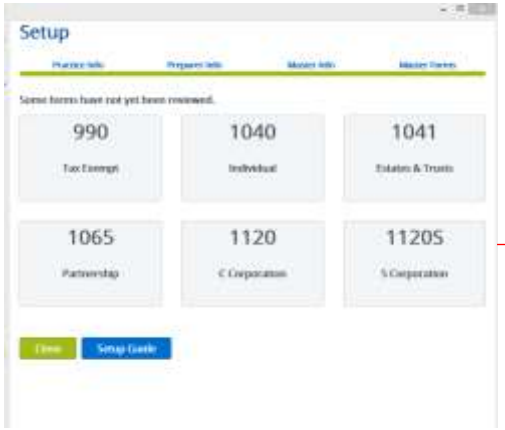
General Tab

From here, you can set preferences for filing, calculations, and miscellaneous preferences.



Set Master Forms Defaults

Once you make all of your Master Info selections, the Setup Wizard prompts you to set defaults for various forms you use in your practice.



To complete the Master Forms setup:

1. Click the appropriate program tile.
2. More options appear on the screen, which could include:
   - Charge By Form
   - Billing Invoice
   - Instruction Letter
   - Schedule K-1 Letter (applicable product versions only)

Once you have completed the setup for each form, a green checkmark will appear on the tile so you can easily see which you have not yet completed.

Charge by Form

This feature allows you to set default billing rates by form. You can add forms and charges not listed on the blank lines at the bottom of the list.

Use the Select Type dropdown menu to switch between federal forms and state forms.

Master Billing Invoice Tab

This is where you can:

- Assign custom invoices
- Select the Charge by Form method or list a flat preparation fee
- Charge a separate electronic filing fee
- Create custom fees
- List separate charges for preparation of Federal and State returns
- Apply a local sales tax amount
- Add comments as needed

Master Instruction Letter Tab

From here, you can set preferences for the formatting and content of your filing instruction letters, including:

- Letterhead
- Date parameters
- How to refer to your practice (e.g., "me" or "us")
- Whether to include your name in the signature area

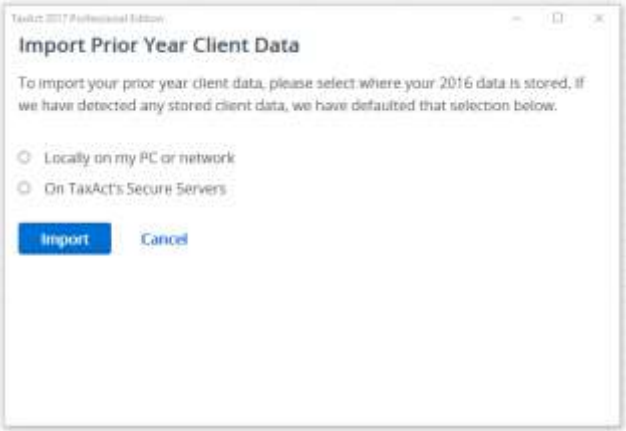
To access Master Form Data, click **Preparer > Master Information > Master Form Data**.

Copy Master Information to Client Returns

TaxAct allows you to apply Master Information changes to an individual return or to all returns. You can choose to select by form type or by clients.

Click **Preparer > Master Information > Copy Master Form Data to Clients(s).** Click **Copy Master Form Data** to apply changes. Changes to Master Information can be applied to select returns or all existing returns.

Import Last Year's Client Returns



The November, 2017 update will include the ability to import information from last year's returns into TaxAct Professional Editions.

You can import:

- Prior year returns created with TaxAct
- PDFs from other supported tax preparation software.

PDF Import is not yet available in the early release version of TaxAct Professional

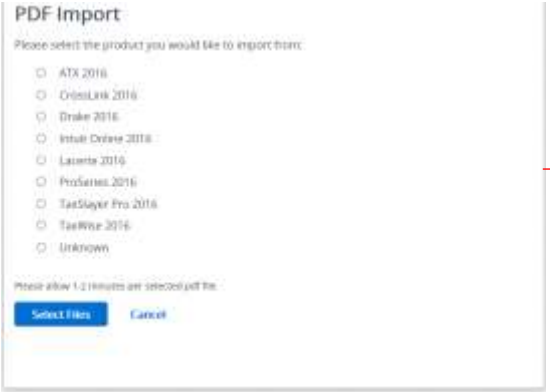
Import TaxAct Returns

1. Click **File > Import > TaxAct 2016 Client Return(s)**.
2. Click **Select All** to import all returns in the directory, then click **Import**.

You will receive a message when the import process is complete. The return(s) will be added to the Client Manager with a status of "Imported."

Import from Portable Document Format (PDF) (Available November 2017)

TaxAct imports key data from PDFs of 1040 returns prepared by many software programs:



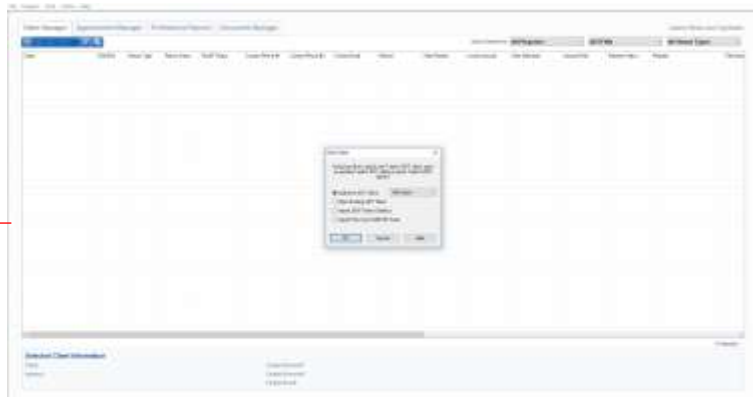
- ATX™
- CrossLink®
- Drake®
- Intuit® Tax Online
- Intuit Lacerte®
- Intuit ProSeries®
- TaxAct Preparer's Editions
- TaxSlayer Pro™
- TaxWise®

To import returns in PDF form:

1. Click **File > Import > Prior Year 1040 PDF Data**.
2. Locate the file on your hard drive. Select the PDF files you'd like to import.
3. Use the "Select All" button to import all of last year's returns.
4. Click **Import**. The client's Basic Information is shown. Review the information and make any necessary corrections, then click **OK**.

You will receive confirmation when the import process is complete. The return(s) will appear in Client Manager with a status of "Imported."

Add/Edit Client Returns



You can add, edit, and delete client records in the Client Manager, which displays all current client information and the status of each return.

To access Client Manager after the initial setup process, click **Preparer > Client Manager**.

From within a return, click the **Clients** button.

Navigating Client Manager

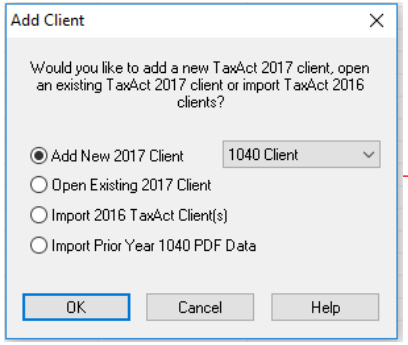
The information fields in Client Manager will populate as you add returns.

To open a return, double click the desired client record. To add or edit a client's information or return, click the client name in Client Manager. Once the record is selected, you can find additional menu items in two ways:

1. Right click the client record to access the menu, or
2. Use the Quick Link buttons:
    - Add a Client
    - Open Currently-Selected Client Return
    - Edit Currently-Selected Client Information
    - Delete Currently-Selected Client Return
    - Search for a Client
    - Open Client Manager Print Center
    - View Preferences

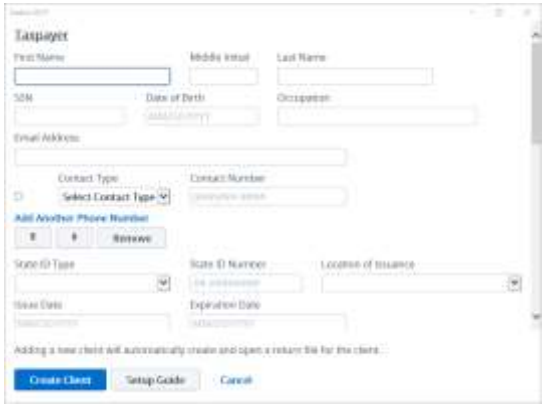
Add a Client (and associated return)

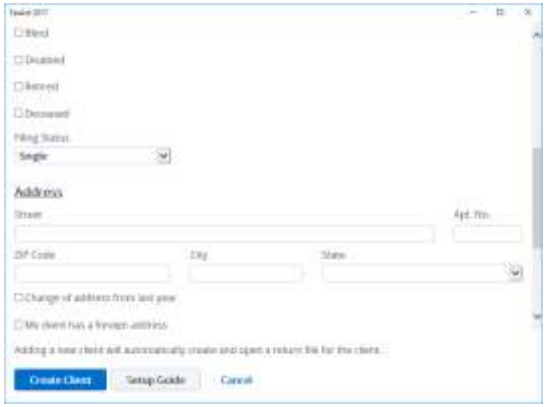
1. Click the **Add a Client** button. *If you didn't complete the Master Forms section of the setup process, you may be prompted to do so. It is recommended to fill out all Master Forms prior to adding clients*.
2. Select Add New 2017 Client to complete the new client contact and basic information portion of the return, then click **OK**.
    a. Click the **Client** tab and fill out the basic information for the client.
    b. Click the **Preparer** tab to assign a preparer, set the Return Status and Payment Status, and make any notes related to the Preparer assignment.
    c. Click **OK to save the client record and create a new return.** (Turn on the auto-save feature if prompted).

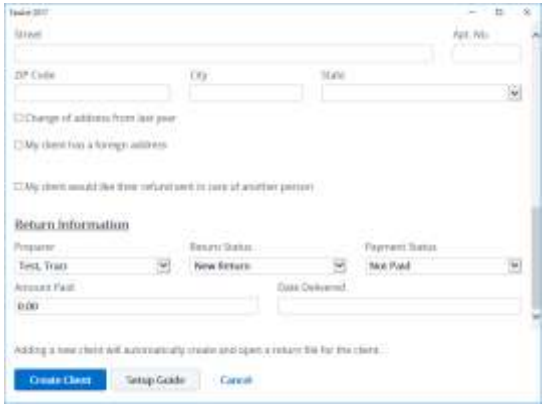


***New for 2017** – Enter the zip code to automatically populate City, State, and County information!

***New for 2017** – More fields to help manage more client data!







Edit Existing Client Return

1. Click the client record in Client Manager.
2. Click the **Open Client Return** button or menu listing, or double click the client record. The return opens in Forms Explorer, where you may edit or review forms directly. To switch to the Q&A interview method, click the **Q&A** button in the toolbar near the top of the page.

***New for 2017** – Enter the zip code to automatically populate City, State, and County information!

E-file Client Return(s) (Available in January, 2018)

E-file Center

When you're ready to e-file a client return, we recommend using the E-file Center, where you can submit single or multiple returns.

From here, you can also view e-filing information for other preparers in your practice and navigate to e-file and refund status reports.

To access the E-file Center, you must be in a client's return. Click on the **E-file** button in the navigation menu.

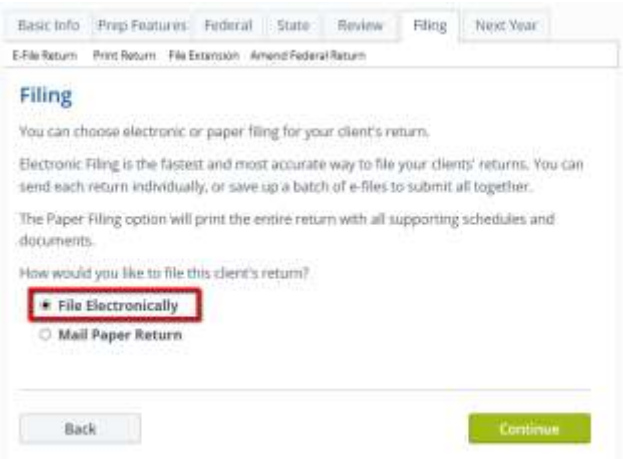
E-file a single return

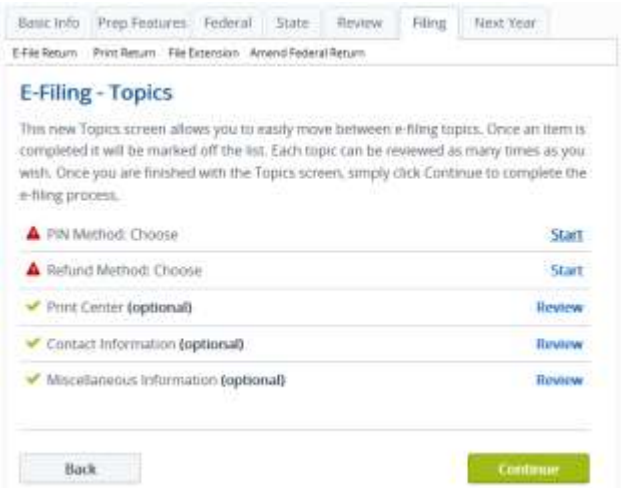
1. From the E-file Center, click the first link, **Submit Electronic Filing Return**. This will open to a screen in the Q&A.
2. Select **File Electronically** and click **Continue**.
3. **When e-filing your first 2017 return:** If you have not entered your Practice ID, EFIN or PTIN (or SSN) in Preparer Info, you will be prompted to confirm or enter the missing information. You will also need to have your EFIN verified before you can proceed through the e-filing steps.
4. If you've enrolled in Protection Plus Audit Assistance, you will also indicate whether you want to purchase Protection Plus for your client and complete the subsequent entry screens.

5. A screen titled E-Filing-Topics will appear, where you can navigate to specific e-file topics (see list below). You can return to this screen at any time by clicking "Back" or continuing through all the screens for a topic.

   The list of topics is client-specific and depends on the details of that client's return such as whether there is a refund or liability. Topics include:

   - **PIN Method** – In this required step, choose Self-Select PIN or Practitioner PIN via Form 8879, then enter related information.
   - **Refund Method** – If client is receiving a refund, you must choose bank products, direct deposit or check, then enter the required information for the refund method. If client owes money to the IRS or state, you must choose how they will pay – direct withdrawal, credit card (pay now or pay later) or paper check.
   - **Print Center (optional)** – From here, you can print your client's federal and/or state return and filing instructions. You can also print state forms from here, including Form 8453 and other e-file signature documents.
   - **Contact Information (optional)** – Go here to designate an email address and/or mobile phone number if you or your client would like to receive e-file status notification.
   - **Miscellaneous Information (optional)** – Enter In Care Of information here.





6. After completing the E-Filing Topics, complete the screens to "sign" your client's return. (Information required for signature depends on whether Self-Select PIN or Practitioner PIN was chosen.)

7. Then begin TaxAct Alerts, which check the return for potential errors, omissions and tax-saving opportunities. Make any necessary changes to the return.

8. If your client's return has any fees associated with it, the E-filing – Payment Method screen will appear where you must select whether to pay the client's fees from your prepaid account (see instructions below) or by a credit card. **Please note**: if you purchased a bundle that includes unlimited e-filing, you will not be prompted for payment.

9. Continue through the next screens to submit the e-file.

To set up a prepaid account, you must enter the information in Preparer Master Information. (Click **Preparer** in the main menu, select Master Information, then Preparers. Click **Edit** next to the preparer name. In the Edit Preparer Information window, click the **Electronic Filing Info** tab and enter the credit card information.)

E-file multiple returns as a batch

Batch e-filing is a convenient tool that allows you to complete client returns while you wait for receipt of payment.

In order to batch e-file client returns, you must prepare returns for submission by completing steps 1 through 8 above for each return. Any fees associated with returns for batch submission must be paid when completing step 8 above for each return.

1) Complete steps 1-8 above (for e-filing a single return).
2) Continue through the "Submit Return" screen.
3) On the "Create and Submit" screen, choose "Submit Later" in order to place that return into a holding directory.

When you are ready to submit a batch of returns:

1) Click **Preparer** in the main menu, then select "Submit Client E-files". (You can also navigate here from the E-file Center by clicking the second link, Submit (Batch) Electronic Filing Returns.)

2) A popup window with all client returns that are ready for submission will appear. Check the returns you would like to submit.

   Note: You can also "delete" a return pending transmission in this window. Deleting simply removes the file from the holding directory – it does not delete the return or alter the information in the return. If you delete a file from the holding directory, you must again complete steps 1-8 above for e-filing a single return.

3) After selecting at least one return, the Submit button will be enabled. Click **Submit** to transmit the selected returns.

4) When submission is complete, a confirmation window will appear. You should also receive an email notification from TaxAct indicating the returns have been received.

Other Return Actions

Delete a Client Return

1. Click the client record in Client Manager.
2. Click the **Delete Selected Return** button.
3. Click **Yes** to delete BOTH the tax return file and the client information stored in Client Manager. Click **No** to cancel.

Search for a Client

Click the **Search** button and enter text. Click **Next**.

Print Information in Client Manager

Click the **Open Client Manager Print Center** button. (See Print Returns, Labels, Reports, and Invoices, later).

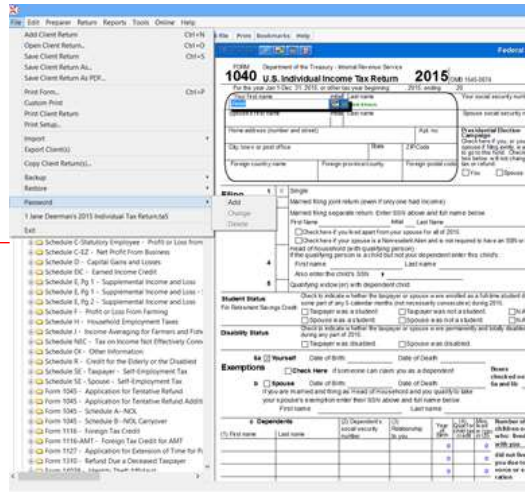
View Preparer Preferences

1. Click the **View Preferences** button.
2. Choose settings for your Client Manager, Electronic Filing Manager, and specify general preferences.

Work on Files Offline (Local storage only)

All users will be required to authenticate themselves upon initial software startup by signing in with their TaxAct Account username and password with an active Internet connection. After the initial sign in, local storage users may work offline. When an Internet connection is not detected by the software, you will see a window with a work offline option available. Some features will not be available while working offline. To access those features, you may need to close your software and re-open to sign in online.

Protect Entered Data



TaxAct offers several methods for you to keep your client returns safe and secure, including:

- Password protection
- Full backup and restore features

Enterprise Editions Online Networking users: Your practice is issued a TaxAct Account and the practice administrator can set individual permissions for each preparer. All data you enter is backed up automatically, so there is no need to run manual backups.

Password-Protect Client Returns (Enterprise Local Storage Only)

In Client Manager, double click to open return.

1. In the main menu, click **File > Password > Add.**
2. Enter a password in the fields provided, then click **OK**.

Reminder: Document all of your passwords in a safe location.

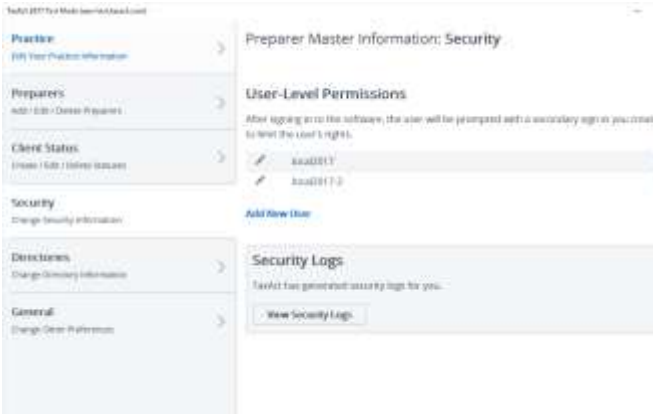
If you choose not to add a password to the return, click **Cancel** to exit.

Set Individual Usernames, Passwords & Permissions (Enterprise Local Networking only)

You will be required to sign in each time you open the software and after 30 minutes of inactivity on your PC or every 24 hours (whichever comes first).

The IRS Security Summit's new requirements apply to all professional tax products across the industry, including TaxAct Professional's solutions. For more information, view our FAQ on TaxAct Professional, IRS and State Agencies Expand ID Theft Safeguards.

Use the password protection features to limit which returns each preparer can access.



Note: Make sure to document all passwords for future reference.

You can also set permissions for editing master information at a user level.

1. Click **Preparer > Master Information > Security.**
2. Select User-Level Permissions to require a password for each user.
3. Click **Add New User.**
4. Enter a Username and Password.
5. Set user rights, then click **OK**.
6. Repeat steps for each user.

Practice Administrator - The Practice Administrator permission can be given to other preparers in the practice by checking the box for "User is Practice Administrator" on the permissions tab in their preparer information. Anyone with the Practice Administrator permission will be able to add, edit, and remove users on the Security tab in Master Information.

Permissions are divided into 2 categories: **Practice and Preparer Information** and **Client and Return Information**.

Practice and Preparer Information

- **Edit Practice Information** – Allows user to update the Master Information for the practice
- **Edit Preparer Information** – Allow user to update the preparer Information for any preparers within the practice.
- **Edit Client Status Options** – Allows user to edit existing status, add new status, or delete status for Client Return Status and Client Pay Status
- **Modify Directories** – Allows user to change where the files are stored locally
- **Change General Filing Settings** – Allow user to change Filing and Printing options from the General Master Information tab
- **Change Miscellaneous Settings –** Allow user to change Miscellaneous options from the General Master Information tab
- **Change Calculation Settings –** Allow user to change Calculation options from the General Master Information tab
- **Edit Master Forms –** Allows user to change Master Forms information, including Charge by Form, Billing Invoice, Instruction Letter, and Schedule K-1 Letter (in application product versions)

Client and Return Information

- **Create New Returns** – User can create new client returns
- **Open Existing Returns** – User can open existing client returns that they have permission to view
- **Delete Existing Returns** – User can delete existing client returns that they have permission to view
- **Import Client Information** – User can import client returns from PDF or prior year TaxAct data
- **Export Client Information** – User can export client information in a customized or comprehensive comma separated (.csv) or tab delimited (.txt) file
- **Print Client Information** – User can print client returns, organizers, consent forms, labels, and reports
- **E-file/Online Backup Returns** – User can e-file client returns or back up returns online (Enterprise Local storage users only)

Back Up Client Returns to Your Local Computer

Performing regular backups of client information, returns, and preparer information is important. To utilize TaxAct's backup and restore functions, follow these easy steps.

1. Click **File > Backup > Client Return(s)**.
2. Select **Local** and click **Next**.
3. Check the box next to the return(s) you want to back up and click **Next**. (Notes: Click **Select All** to check all returns. Choose by return type in the drop down list.)
4. To change the backup file location, select **Browse** and choose the location using the directory tree.
5. Click **Finish**. The backup process is complete when a confirmation message appears.

To back up Preparer Info, click **File > Backup > Preparer's Information > Local,** specify a backup directory and click **Select Folder**. When performing future backups, you will be prompted to overwrite the files that already exist. Be sure to save the most recent versions.

Enterprise Editions: Back Up Client Returns on TaxAct's Secure Servers

Using online networking? You don't need to back up your data – it's automatically saved to TaxAct's secure servers!

Networking locally? We recommend backing up your data both on your computer (following the above instructions) **and** on TaxAct's secure servers as an extra level of protection:

1. Click **File > Backup > Client Return(s)**.
2. Choose **Online**, then click **Next**.
3. Enter your TaxAct Account username and password.
4. Select the return(s) you want to back up. (Notes: Click **Select All** to check all returns. Sort by return type in the drop down list.)
5. To back up preparer information, check the box next to Backup Preparer Master Information.
6. Click **Finish** to upload the files. The backup process is complete when a confirmation message appears.

Restore Client Returns from Backup Files Saved Locally

1. Click **File > Restore > Client Return(s)**.
2. Choose **Local**, then click **Next**.
3. Browse to your backup location, then select the files to restore. To restore all returns, click **Select All**. Click **Next**.
4. Browse to the restore location. Default is **C:\TaxAct\TaxAct 2017 Professional Edition\Client Data**. Click **Finish**.

A confirmation message will appear when files have been restored.

Restore Client Returns from Backup Files Saved on TaxAct Servers (Enterprise Editions Only)

Note: *Online data restore for 2017 Professional Enterprise Editions will be available early January 2018. Step-by-step instructions below will be updated as needed at that time.*

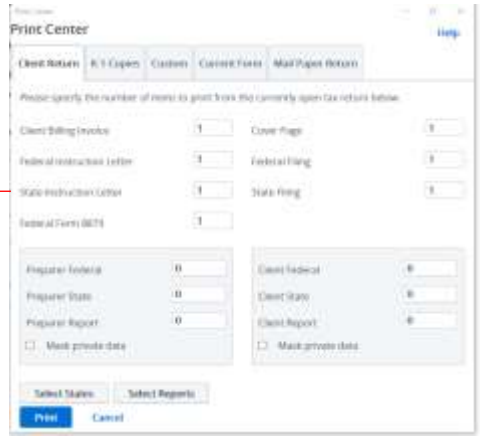
1. Click **File > Restore > Client Return(s)**.
2. Select the Online radio button, then click **Next**.
3. Select the return(s) you want to restore. To restore all returns, click **Select All**.
4. To restore Master Information at the same time as client returns, check the Restore Preparer Master Information box, then click **Next**.
5. Click the **Authorize** button. This will send an email to the address associated with your account.
6. Leaving the TaxAct Restore Wizard open, click the link in the e-mail. Follow the steps to enter the authorization information into TaxAct and submit.
7. Return to the TaxAct program and click **Next**.
8. Browse to the restore location. Default is **C:\TaxAct\TaxAct 2017 Professional Edition\Client Data**. Click **Finish**.

You may be prompted to overwrite any files of the same name that exist. Be sure you are restoring from the correct file before proceeding.

A confirmation message will appear when files have been restored.

Print Returns, Labels, Reports, and Invoices

The Print Center



The Print Center offers multiple printing options in one convenient place. Multiple documents can be printed in one job.

The Print Center also consolidates the printing of client returns, organizers, consent forms, labels, and blank forms.

You can access the Print Center in any of the following ways:

- Select any Print command under the **Preparer** top menu,
- From within a return, click the **Print** button found in the toolbar under the main menu.
- From within a return, click **File** > **Print Client Returns**

Print a Client Return

Before printing, make sure to set your printer preferences by following these steps:

1. Click **File**, **Print Setup**.
2. Select your printer and modify property settings if needed. (Default printer settings will generally allow you to successfully print documents from TaxAct), then click **OK**.

When printer preferences are set, continue with printing:

1. Click **Preparer**, **Print Returns**. This will open the Print Center window (see image above).
2. Click the **Client Returns** tab. Select the return(s) to print, or click **Select All** to print all returns at once.
3. Enter quantities for each desired document.
4. Click **Select States** or **Select Reports** to print related materials, then click **Print**.

Print Consent Forms (Available early January 2018)

TaxAct's bank partners require taxpayers to sign an agreement document before transactions can be processed. To print the document(s) with client returns:

1. Click **Preparer** > **Print Consent Forms**. The Print Center window opens.
2. Click the **Consent Forms** tab.
3. Select the Client and Bank.
4. Enter the desired number of copies, then click **Print**.

Print Client Organizers

What is a Client Organizer?

The Client Organizer is a portfolio of client return information designed to help you obtain tax information in advance. Imported returns will include prior year tax information to compare with the current tax year.

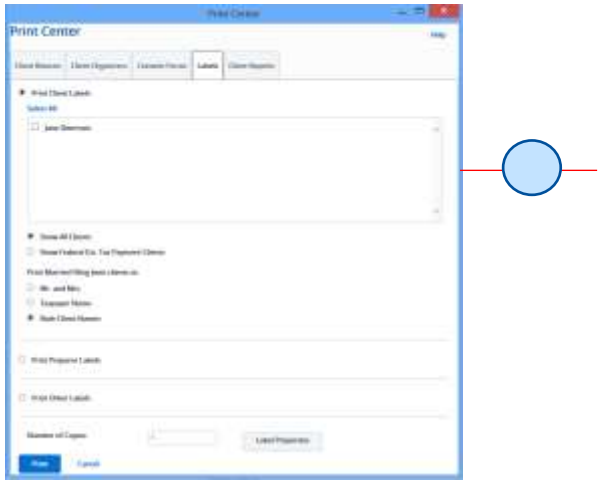
The Client Organizer portfolio includes:

- A Cover Sheet
- Personal Information
- Income
- Deductions
- Payments

To print Organizers, click **Preparer** in the top menu, then **Print Organizers.**

1. Select the clients for whom you want to create Organizers.
2. Select the **Print Applicable Organizers** radio button to print only the documents that directly apply to the client's return. To choose specific Organizer documents to print, select **Print Selected Organizers** instead.
3. Select the items to include in the organizer, then click the **Print** button.

From the Print Center, click the **Labels** tab.



You have three options:

- **Print Client Labels**,
- **Print Preparer Labels**, and
- **Print Other Labels**.

Client Labels

1. Select the client(s).
2. Select **Show All Clients** or **Show Federal Estimated Tax Payment Clients**.
3. Choose options for printing Married Filing Joint clients.

Preparer Labels

To print return address labels:

1. Choose the preparer.
2. Edit the address shown if needed.

Print Other Labels

You can customize address labels for other uses, such as paper-filed returns, tax payments, and personal messages to include on client correspondence.

Setting Label Properties

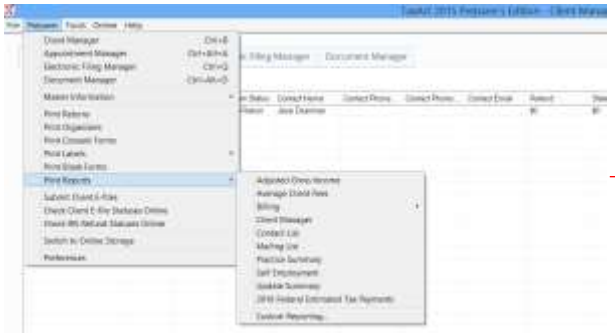
To format any of labels, click **Label Properties.**

1. Set the print job based on your printer type and label size.
2. Click **Set Font** to access a list of available fonts and modify the text style and size.
3. Once you have set your preferences for the labels to print, click **Print**.

Print Reports

You can print any of the following reports in the Client Reports menu:

- Adjusted Gross Income
- Average Client Fees
- Billing (All, Paid, or Unpaid)
- Client Manager
- Contact List
- Mailing List
- Practice Summary
- Self-Employment
- Update Summary
- 2018 Federal Estimated Tax Payments



Custom Reporting

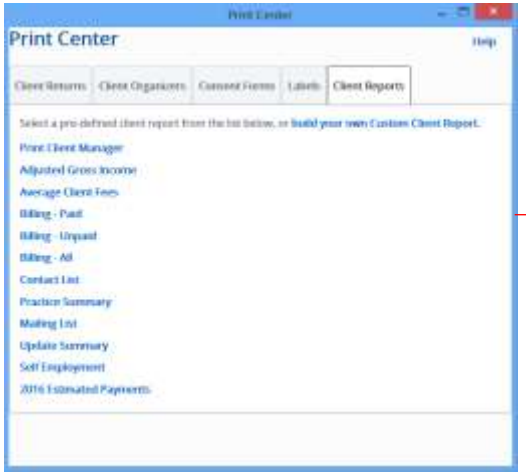
Choose this option to select which clients and information fields you'd like to export to a CSV file.

To change the display order, click the appropriate field name within the **Fields Included** box. Then click on **Move Up** or **Move Down** until the fields are in your preferred order.

Print Invoices and Billing Statements

Available reports include:

- Print Client Manager
- Adjusted Gross Income
- Average Client Fees
- Billing – Paid
- Billing – Unpaid
- Billing – All
- Contact List
- Practice Summary
- Mailing List
- Update Summary
- Self-Employment
- 2018 Estimated Payments



1. From within Client Manager, select a client.
2. Click the **Open Print Center** Quick-Link Button. 
3. Click the **Client Reports** tab, and then choose the desired report.

Additional Resources

Professional Reports

TaxAct Professional Reports are accessible from your TaxAct Account (Practice Manager) or from within your Professional Edition software. TaxAct Professional Reports provides you with summary and detailed information about e-files by status, EFIN, PTIN and settlement type.

Refer to the Professional Reports Guide to learn how to access the reports and navigate through the system.

Client Xchange

Client Xchange is a convenient and secure website portal that enables you and your clients to safely exchange tax information from any device with internet access. Easily upload and download all the tax information you and your clients need to share in seconds – from photos of Form W-2s and receipts, to CSV files of stock transactions and PDFs of client organizers and final tax returns.

If you are a single-preparer office, sign in to your account and click on the Client Xchange tile to purchase. Otherwise, talk to your practice owner today about purchasing Client Xchange. (In order for all preparers in a practice to have access to Client Xchange, it must be purchased by your practice owner.)

Refer to this guide to help set up your Client Xchange website, invite clients and manage files.