

TWT02CD Installation Instructions

1. Turn on your computer and printer and then insert TWT02CD into your CD drive.
2. Right click on the "My Computer" icon and select "Explore."
3. In the right window double click on your CD drive icon named "TWT02CD"
4. If you have Adobe Acrobat Reader (AAR) on your computer then go to step 5, otherwise double click on the "ADOBE-5 INSTALL" icon to install the program.
5. After installing (AAR), return to "Exploring My Computer" and right click on "TWT02CD INSTALLATION" and select print. Start with Step 6 and continue the installation.
6. Double click on the yellow folder labeled "02w" and then double click on the blue and white icon labeled "TaxWise02 Training Pgrm Setup."
7. Click "OK" then when asked for "Product Key" type 'TW2002' with no quote marks and then click "Next" then "Yes" then "Next". When asked, "Is this a Network installation," click "No" and "Yes" to start TaxWise.
8. If you have previous versions of TaxWise you will be asked some questions, select "No" to all of them.
9. You will next see the form shown below. Fill in all of the information as shown. When done click "Next" until you get to "Finish" and then click "Finish."

Setup Options

Company | General | Printer Setup | Indirect Transmitter | Direct Transmitter | Color Setup

Company Information

Look for the starburst on your Fulfillment Confirmation Slip

Electronic Filer Identification Number (EFIN). If you will be creating electronically filed returns. -OR- If you will NOT be electronically filing tax returns, enter the customer number given to you by UTS..... 265964

Your company's contact name

Your company's name RSVP

Your company's street address

Your company's City, State, Zip Code San Jose CA

Your company's telephone number

Your company's Federal Employer's Identification Number (EIN), if you have one.....

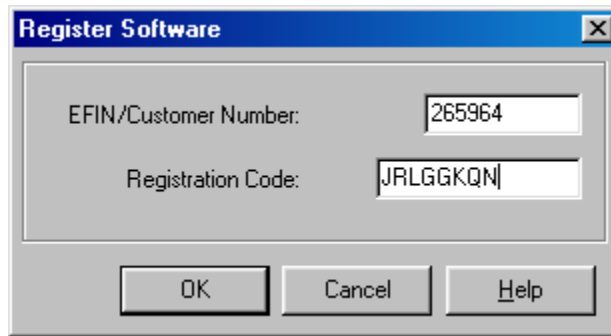
Service Bureau Identification Number (SBIN)

Name of your Company's Service Bureau, if applicable.....

Save as Workstation Defaults

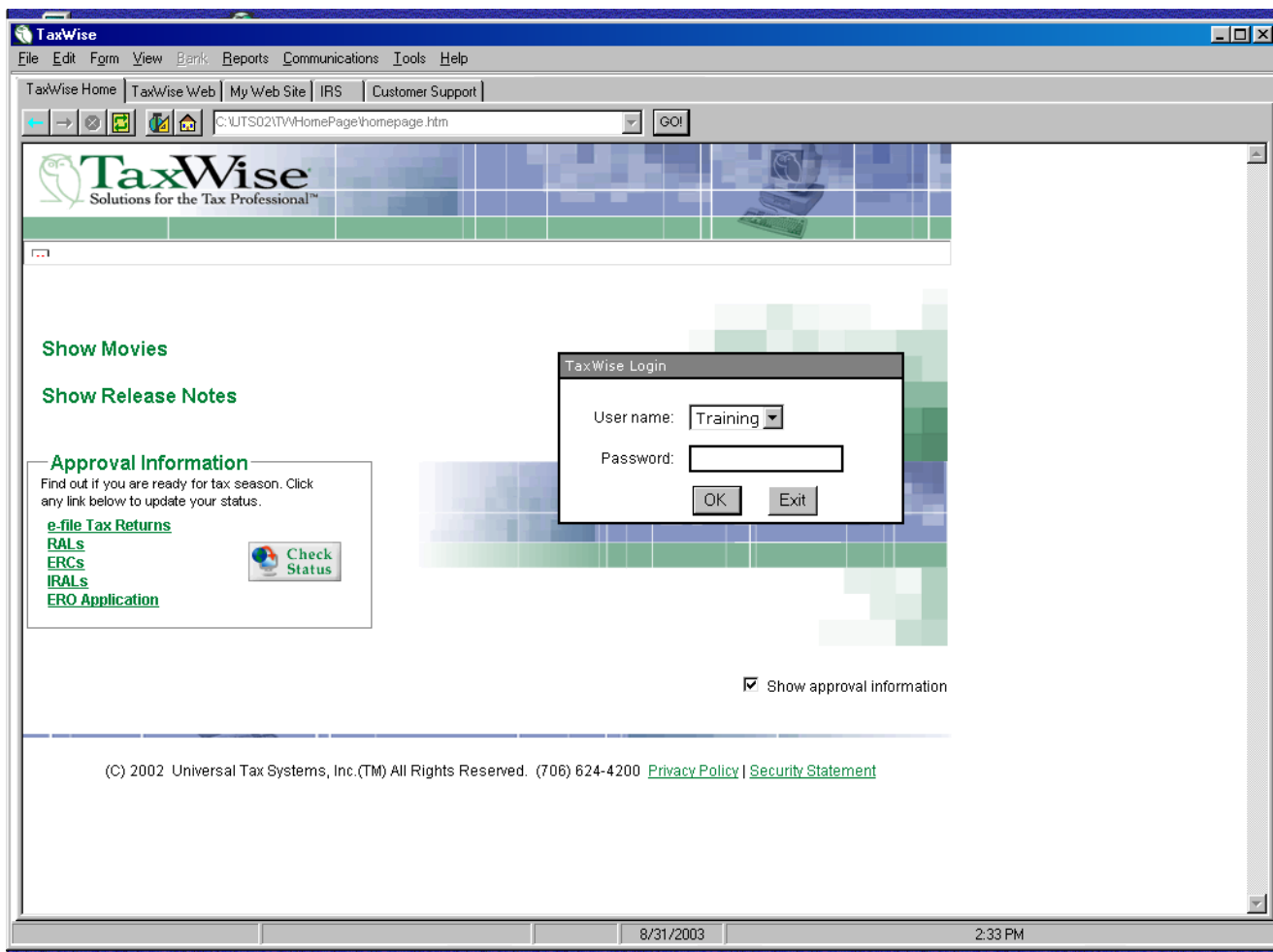
<< Back Next >> Cancel Help

10. You will now get the form shown below. Fill in the Registration Code JRLGGKQN as shown then click “OK.”



A dialog box titled "Register Software" with a close button (X) in the top right corner. It contains two input fields: "EFIN/ Customer Number:" with the value "265964" and "Registration Code:" with the value "JRLGGKQN". At the bottom, there are three buttons: "OK", "Cancel", and "Help".

11. If your computer attempts to connect to the Internet, click cancel.
12. You will get the screen shown below. In the box labeled “TaxWise Login” click “Exit.”



13. You should be back to the “Exploring My Computer” screen. In the upper left hand corner click the “Back” arrow once. While holding the control key down, left click on each of the following files: “TWT02CD INSTALLATION”, “refmanual” and “Short cuts.” Release the control key and right click on “TWT02CD INSTALLATION” and select “Send To” “My Documents.”

14. If you want, (but it is not necessary for this training) you can double click the "Cai7" icon to install the California State tax module and then double click the "Twupdall" icon to add the recent TaxWise program updates.
15. Installation is now complete so you can exit "Exploring My Computer." To start TaxWise, double click on the "TaxWise 2002" icon on your desktop or in the program list shown under "Start."