



Tax Year 2022

**1040 Quick Start  
Guide**



## Introduction

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This Quick Start Guide describes the installation process for the *1040 Desktop Software*. The Quick Start Guide not only contains easy to follow instructions for installing and configuring the software program but also includes other important information about system requirements, configuring your security options, EFIN, preparers, printers and billing schedules plus instructions for transmitting, receiving software updates and much more. An optional Setup Wizard is also available to guide you through the steps required to setup your software.

Please review the updated System Requirements section on page 6, to confirm that your computer or network meets the minimum or recommended requirements.

For additional information, please refer to the Help files of the program, or contact Partner Support.

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## Before You Begin Electronic Filing

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### IRS

To prepare or assist in the preparation of Federal Tax Returns, you must obtain a Preparer Tax Identification Number (PTIN) from the IRS. You must also obtain an Electronic Filing Identification Number (EFIN) from the IRS if you plan to file tax returns electronically. For more information on obtaining a PTIN or EFIN, please visit the IRS website at [www.irs.gov](http://www.irs.gov).

### How to Reach Us

If you require assistance with software installation or other information contained within this guide, please **contact** Partner Support at **206-209-2653**, or email us at [help@erosupport.com](mailto:help@erosupport.com).

<b>Support Hours</b>					
All times Pacific					
<b>2023 Regular Hours</b>					
<b>Monday-Friday</b>		<b>Saturday</b>		<b>Sunday</b>	
4/18 - 12/29	7 AM - 4:30 PM	Closed		Closed	
<b>2023 Filing Season Hours</b>					
<b>Monday-Friday</b>		<b>Saturday</b>		<b>Sunday</b>	
1/2 - 1/20	7 AM - 7 PM	1/7 - 4/15	7 AM - 5 PM	TBD	7 AM - 5 PM
1/23 - 2/3	6 AM - 8 PM				
2/6 - 4/14	7 AM - 7 PM				
Monday, 4/17	6 AM - 8 PM				

Support Hours Listed Above are Subject to Change

## System Requirements

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Please review the system requirements for the *1040 Desktop Software*:

<b>Workstation and Standalone Computer</b>		
Operating System	Windows 10, Windows 11	
	<b>Minimum</b>	<b>Recommended</b>
Processor	2GHz or faster x86/x64 based CPU	2GHz or faster dual core x86/x64 based CPU
Memory	8GB (32bit), 8GB (64 bit)	16GB or more
Available Disk Space	1GB	250GB or more
Internet Connection	Dial-up Internet	Broadband Internet
Monitor Resolution	1024x768 or higher	
Printer	HP compatible laser printer supporting a Printer Control Language (PCL) or a GDI compatible printer. Please note this is due to bank requirements for properly printing checks.	
<b>Networks</b>		
The network system requirements are the same as the workstation and standalone computer requirements. For best results, the host computer should meet the recommended requirements listed above.		

## Installing 1040 Desktop Software

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The *1040 Software* may be set up as a standalone installation where the program will be used on one computer for completing and transmitting returns, or as a network installation where returns will be completed on multiple computers within the same office and transmitted from one or more computers on the network.

Whether you are installing on a standalone machine or a network, first install the software using the instructions found in the next section, "Standalone / Network Host Installation." Instructions for configuring network workstations can be found in the "Workstation(s)" section of this setup guide.


### Standalone / Network Host Installation

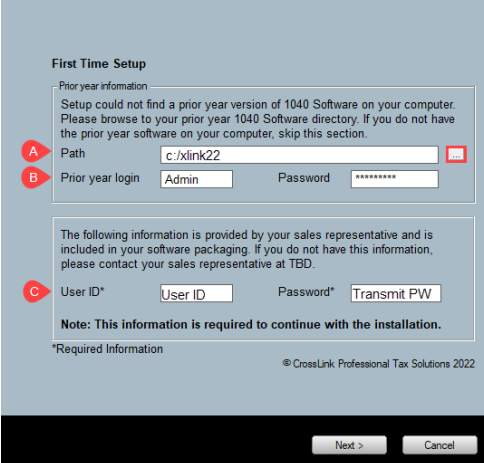
To install the program to a single computer or network host computer, follow these steps below:

1. Close all applications that are running on your computer.
2. Double-click the installation file. The Windows Installer will begin loading, and the Installation Wizard will open.
3. Follow the on-screen instructions in the Installation Wizard. (**Note:** The Installation Wizard will install the program to the *C:\Xlink23* folder of the hard drive by default. If the program will be installed on a **network server**, change the destination drive letter to that of the network server.)
4. When installation is complete, click on **Finish** to open the program and continue to the next section, Configuration Wizard.

## Configuration Wizard

When the program is opened for the first time you will be prompted to complete the initial configuration setup.


1. If the 2022 program (TY2021) is installed on the same computer, the prior year path will automatically display in the **Path** field.
  - a. Click the  button on the right to navigate to the path of the prior year program, if necessary. **Note:** If you did not use the 2022 program, or you do not want 2022 information to proforma forward into 2023, leave this field **blank**.
  - b. Enter the **Prior Year Login** and **Password** for the prior year program. **Note:** Leave this field **blank** if you did not enter a **Prior Year Path** from the step above.
  - c. Enter your **User ID** and **Password** in the fields, then click the **Next** button.



**First Time Setup**

Prior year information

Setup could not find a prior year version of 1040 Software on your computer. Please browse to your prior year 1040 Software directory. If you do not have the prior year software on your computer, skip this section.

A Path  

B Prior year login  Password

The following information is provided by your sales representative and is included in your software packaging. If you do not have this information, please contact your sales representative at TBD.

C User ID\*  Password\*

**Note: This information is required to continue with the installation.**

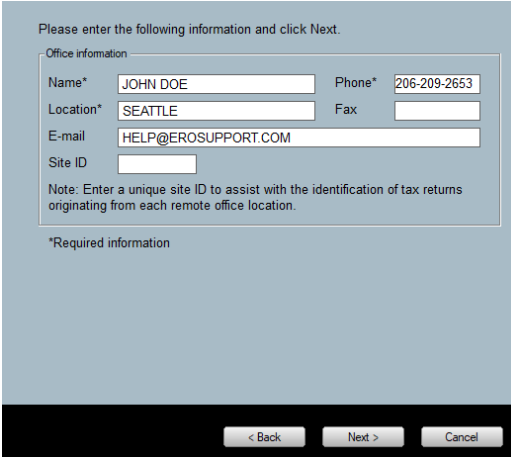
\*Required Information © CrossLink Professional Tax Solutions 2022

Next > Cancel

2. Enter required office information, including your **Name** (company name), **Phone**, and **Location** (your city). Enter your **E-mail** and **Site ID**, if desired.

**Note:** A **Site ID** is used to manage centralized check printing in multi-office configurations. **Call Partner Support at 206-209-2653** if you have questions about Site ID's.

Click **Next** to continue.



Please enter the following information and click Next.

Office information

Name\*  Phone\*

Location\*  Fax

E-mail

Site ID

Note: Enter a unique site ID to assist with the identification of tax returns originating from each remote office location.

\*Required information

< Back Next > Cancel

- In the **Admin Password** field, type the password you want to use for the Administrator account, and then type it again in the **Confirm Password** field.


**Important Note:** Please choose a password that you can easily recall. You will use this password when logging in to the program for the first time.

- In the **E-mail** and **Cell Phone** fields, type the e-mail and cell phone information for use with password recovery on your Administrator or “Admin” account.

Click **Next** to continue.

- Enter a default **Enhanced Encryption Password (optional)**. Continue reading below for more information.

**Note:** Adding an Enhanced Encryption Password provides an extra layer of security. Choose a password you are sure to remember, or keep it stored in a safe location.

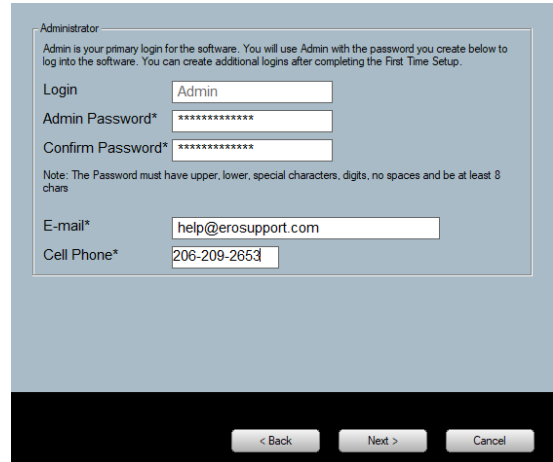
 **CAUTION:** Forgotten or lost Encryption passwords can lead to the loss of some or all your data.

Click **Next** to continue.

- The selection for **Will this copy be used to Transmit to Central Site** has been pre-configured and cannot be changed locally. Please call **Partner Support at 206-209-2653**, if changes are desired.

If you have the 2022 program (TY2021) installed, select **Yes** next to each item you want to proforma forward into the 2023 program.

Click **Next** to continue.



Administrator

Admin is your primary login for the software. You will use Admin with the password you create below to log into the software. You can create additional logins after completing the First Time Setup.

Login: Admin

Admin Password\*: \*\*\*\*\*

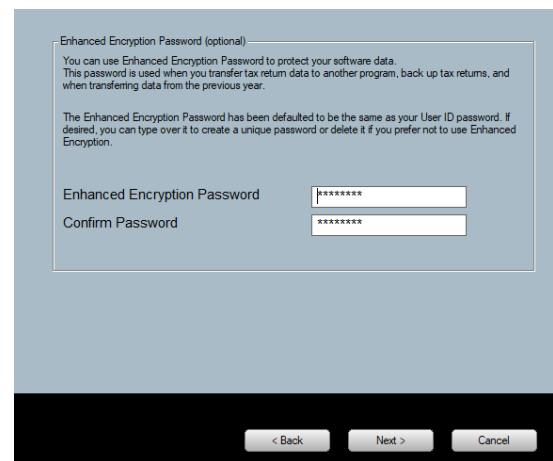
Confirm Password\*: \*\*\*\*\*

Note: The Password must have upper, lower, special characters, digits, no spaces and be at least 8 chars

E-mail\*: help@erosupport.com

Cell Phone\*: 206-209-2653

< Back   Next >   Cancel



Enhanced Encryption Password (optional)

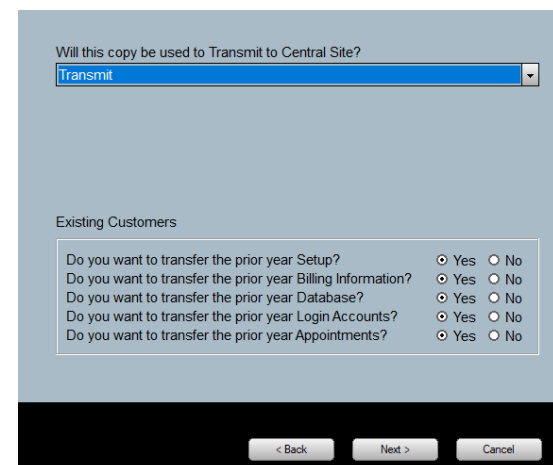
You can use Enhanced Encryption Password to protect your software data. This password is used when you transfer tax return data to another program, back up tax returns, and when transferring data from the previous year.

The Enhanced Encryption Password has been defaulted to be the same as your User ID password. If desired, you can type over it to create a unique password or delete it if you prefer not to use Enhanced Encryption.

Enhanced Encryption Password: \*\*\*\*\*

Confirm Password: \*\*\*\*\*

< Back   Next >   Cancel



Will this copy be used to Transmit to Central Site?

Transmit

Existing Customers

Do you want to transfer the prior year Setup?  Yes  No

Do you want to transfer the prior year Billing Information?  Yes  No

Do you want to transfer the prior year Database?  Yes  No

Do you want to transfer the prior year Login Accounts?  Yes  No

Do you want to transfer the prior year Appointments?  Yes  No

< Back   Next >   Cancel



- The following screen appears if you chose to proforma information from the prior year installation in **step 6** to the current year. If you do not see this screen, proceed to **step 8**.

Click the box next to each **Login ID** that you wish to proforma forward. Alternatively, click the **Select All** button below to select all the Login ID's.

Enter the **Default Password** that will be assigned to the Login ID's, and then click **Next**.

**Note:** The Default Password will be used as the initial password for each of the selected accounts in the 2023 program.

The screenshot shows a software installation window with a table of Login IDs. The table has three columns: Login ID, Login Name, and Access Level. The first row is selected, showing 'Prep 1' as the Login ID, 'Janet S.' as the Login Name, and 'ADMINISTRATOR' as the Access Level. Below the table, there is a text prompt: 'Please enter the default password for each Login Account selected above.' followed by a 'Default Password:' label and a password input field containing several asterisks. To the right of the input field is a 'Select All' button. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

Login ID	Login Name	Access Level
<input checked="" type="checkbox"/> Prep 1	Janet S.	ADMINISTRATOR
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

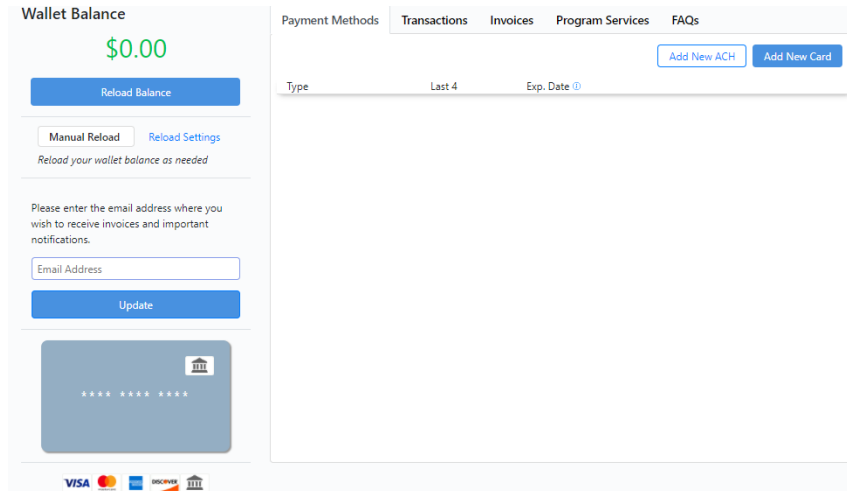
- Click **Finish** to launch the program.  
**Important Note:** If you are installing on a network, **Click New: I would like to Share the Installation folder across the network** check box.

### Wallet Setup (Optional)

Before the program starts for the first time, you will be prompted for payment information. Follow the on-screen instructions to complete **Your Wallet**. Completing the Your Wallet screen is optional and only required if you intend to use the integrated remote signature feature. Click [here](#) to open the related Here's-How-To Configure & Use the Remote Signature Software Feature document which also includes important changes for 2023 and has more information about the wallet.

By electing to use the Remote Signature feature integrated with the software program, the following terms and fees from the remote signature provider will apply:

- A \$5.00 per SSN fee applies (e.g., a joint return with both primary and spouse using remote signature = \$10.00 total fee). If the taxpayer signature is required more than once within the return (e.g., Forms 1040, 8879, State Return), only \$5.00 will be charged per taxpayer vs per Form, including if subsequent remote signature(s) are needed on the same and / or an amended return.
- A method of payment on file is required to be entered by you during software setup and / or prior to the first remote signature request.
- Remote Signature fees will be charged daily by the provider CPTS E-Comm via a 3rd party payment processor. This fee does not apply to taxpayer signatures obtained in-person via Signature Pad and On-Screen methods.
- If the Payment Method on File in your *Wallet* is unsuccessful at any time, the User associated with the *Wallet* will receive a **one-time email notification** and be immediately turned off from doing further remote signatures. Remote Signature services will be automatically re-enabled once unpaid remote signature invoices are paid via the *Wallet*.



## Workstation(s)

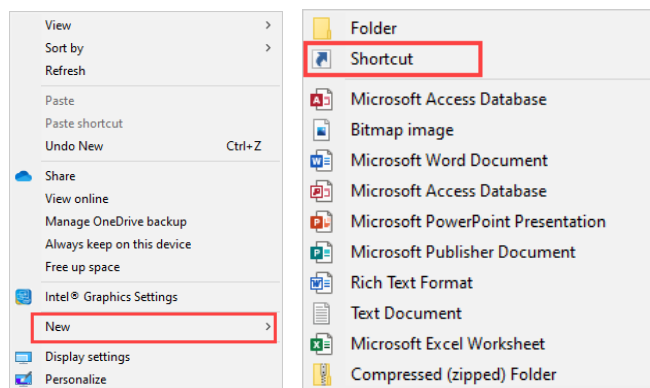
Before beginning, please ensure that you have completed the following:

- Installed the program on a host computer, where the taxpayer data will be stored. See the [“Standalone / Network Host”](#) section of this guide for installing on a standalone machine or network host.
- The installation folder is shared on the host computer so it can be written to by each workstation computer. Please call Partner Support if you did not choose to share the folder during installation and you need assistance with sharing the folder.

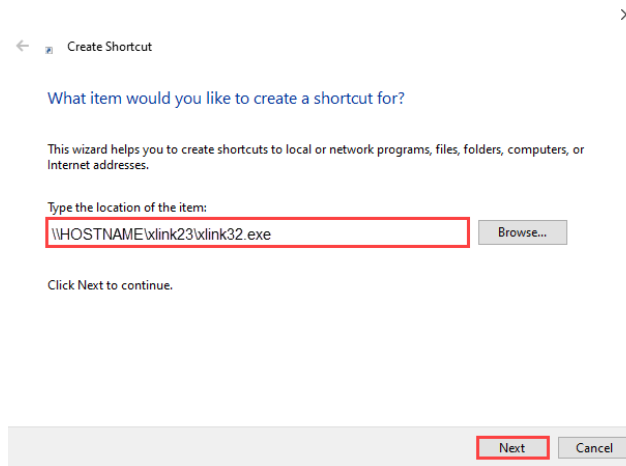
**CAUTION:** Do not install the program on the workstation. If the program is installed individually on each computer, the data will not be shared between the networked computers.

Begin by creating shortcuts on the workstation computer.

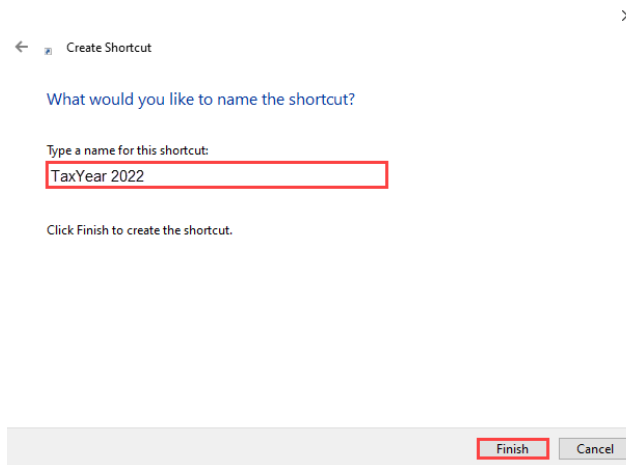
1. From the workstation computer, **right-click** on a blank space of the desktop, then choose **New**, and then **Shortcut**.



- The Create Shortcut wizard will display. You will be prompted to **Type the location of the item**. Type '\\HOSTNAME\xlink23\xlink32.exe' where HOSTNAME is the name of the server computer, and then click **Next**.



- You will be prompted to **type a name for this shortcut**. Type 'Tax Year 2022' and **Finish**.



## Program Setup

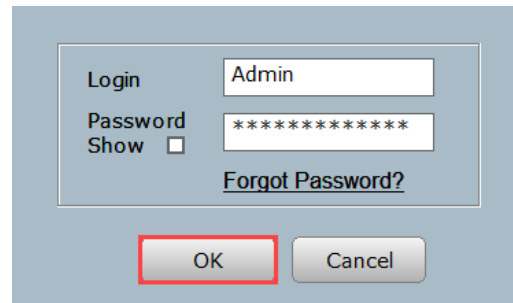
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The options in the program are preconfigured to meet the needs of most users. This section covers options that must be configured before you can submit tax returns and other areas that, while not required, could save you time throughout the tax season.

If you proforma the settings from your prior year program when installing the software, many of these settings will be configured with information carried over from that program.

## Logging into the program

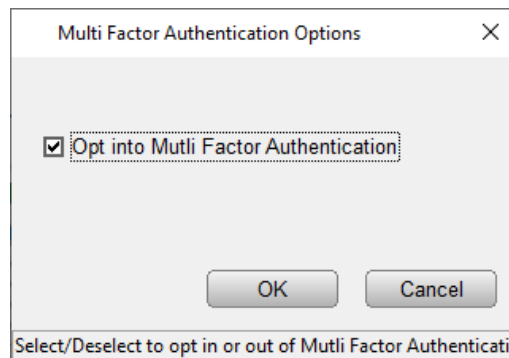
1. Open the program by double-clicking the 2023 program icon on your desktop.
2. Type **Admin** in the **Login** field.
3. Type the **Password** for the administrator account, and then click **OK**. **Note:** Use the password you configured in **Step 3 on page 8**.



## Multi-Factor Authentication (Optional)

After the first time Login, the program will present you with the option to enable **Multi-Factor Authentication** (MFA). MFA is an **optional** extra layer of security you can add to your account to prevent someone from logging in, even if they have your password. This extra security measure requires you to verify your identity using a randomized 6-digit code **each time** you log in to the program. If you want to opt in, follow the steps below, otherwise skip this section.

1. After opting in you will be required to download the [Microsoft Authenticator app](#) or another compatible authenticator app . The app creates Multi-Factor Authentication codes and scans the software QR codes necessary for MFA.



2. Scan the MFA QR code that populates during install to complete the authentication account set up on the downloaded MFA app from your mobile device.

## MultiFactor Authentication

This software uses multi-factor authentication for the login process to comply with the IRS Regulatory requirements. If you would like to use an authentication application to assist you during login, please download an authentication application from the Apple App Store or Google Play.

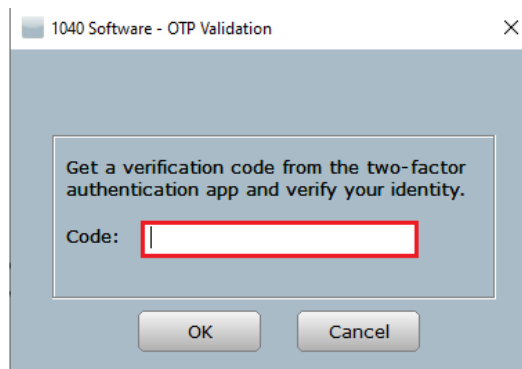


**Use your authentication application to scan the above QR code for use during the login process.**

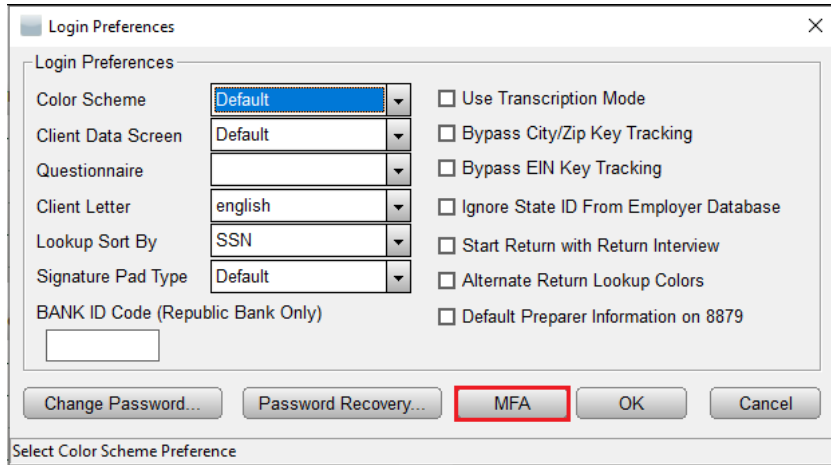
*Note: You may choose to skip this process.*

3. Once the Tax Software's QR Code has been scanned and linked to the Authenticator App, the app will begin generating six-digit codes. The code will update every 30 seconds to ensure security (this may vary depending on the Authenticator App chosen).

The Tax Software will then provide a **Multi-Factor Authentication** (MFA) code request after the login for any user that has opted in. The generated code will be the one seen on the MFA Application.

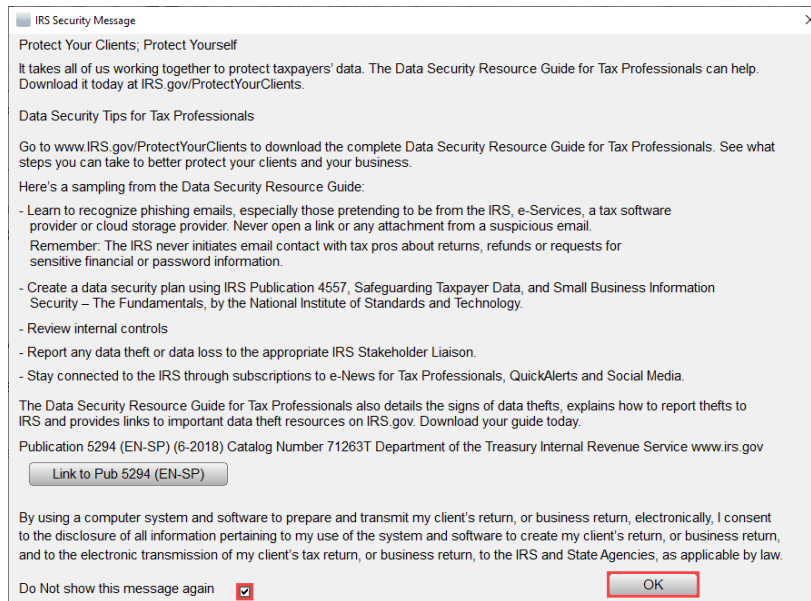


**Important Note:** The Multi-Factor Authentication can be disabled or enabled by clicking Utilities and then User Preferences menu bar. Click the MFA button to initiate the process.



## IRS Security Message

The IRS is requiring all tax software programs to show an IRS Security message upon entry into the software. **Read the message** and then click the **OK** button.



**Note:** Click the **Do Not show this message again** box if you do not want to see this message each time you log into the program.

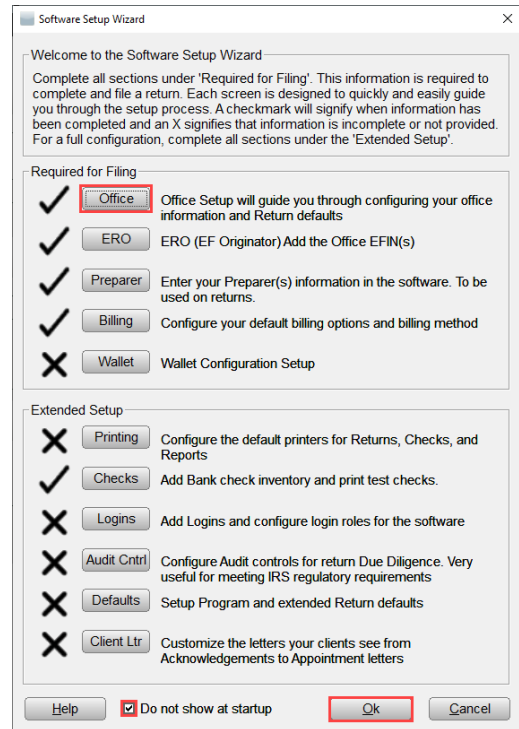
## Software Setup Wizard (Optional)

The Software Setup Wizard can guide you through the configuration steps required for completing and filing your first tax return. The wizard also includes “**Extended Setup**”, to help you configure your printer, checks, additional logins, etc. A checkmark next to a section indicates that configuration for that section is complete.

If you want to use the wizard instead of following this guide, begin by clicking on the **Office** button and then work your way downward after completing each section. Use the table of contents at the beginning of this guide to access detailed information about each section in the wizard.

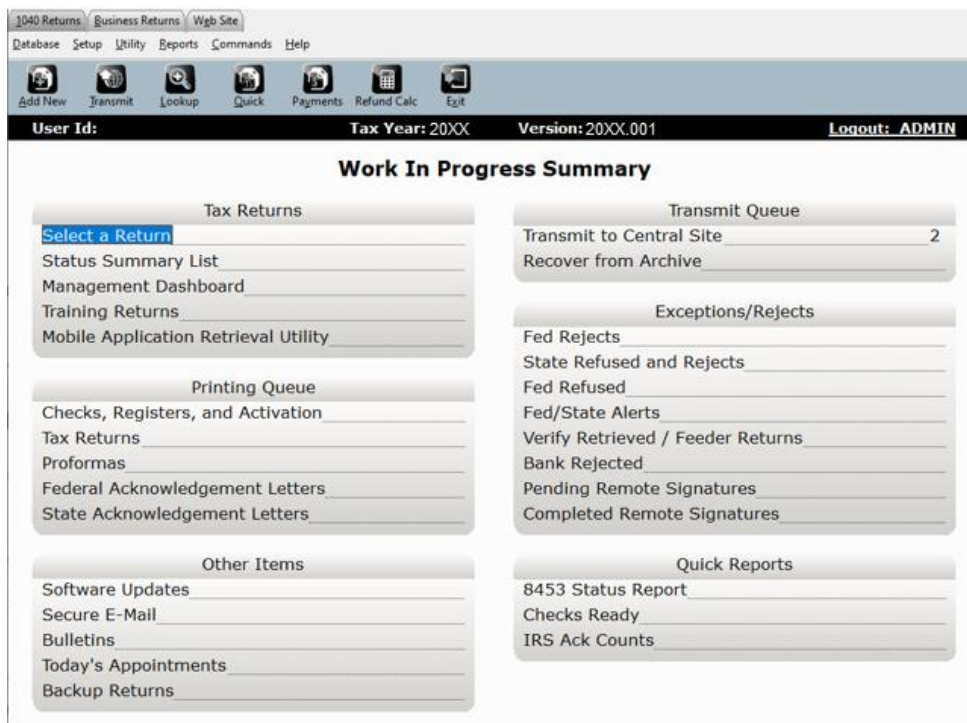
**Note:** This feature can be disabled by checking the box **Do not show at startup**.

1. To begin configuration without using the wizard, click the **OK** button and then continue reading below.



## Work In Progress

The program will open to the **Work In Progress Summary (WIP)** screen each time you login to the program.



## Navigation Tabs

By default, the program will open to the 1040 Returns tab. To access the **Business Return** section of the program or the **Website** section, click the respective tabs.



## Menu Bar

The selections available in the **Menu Bar** vary depending on your location inside the program. To access a menu item, click the menu item to open the display list. (**Note:** To access a menu item using only your keyboard, press and hold **ALT** down on your keyboard, and then press the underlined letter in the menu item you wish to open. For example, to open the **D**atabase menu, press and hold **ALT**, then press the letter **D**.)



## Toolbar

Use the **Toolbar** to quickly access frequently used features. Like the menu bar, the tools available are dynamic, and will change depending on your location inside the program.



## Information Bar

The **Information Bar** contains information relevant to you. The information displayed here varies depending on your location inside the program.



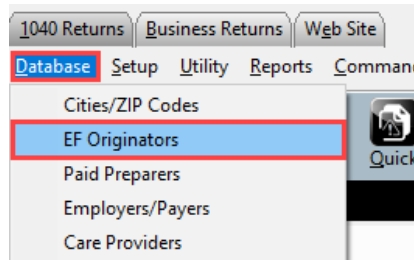
## Configuring Your EFIN

EFIN configuration will print on the Electronic Originator section of *Form 8879*.

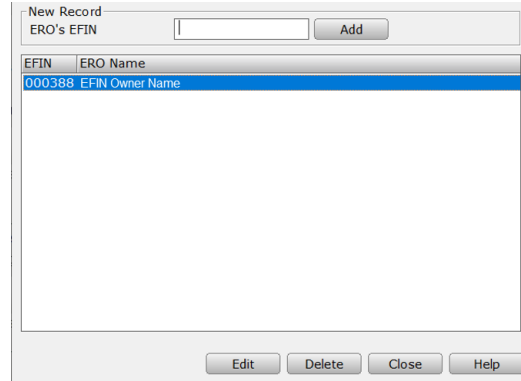
**To configure your EFIN within the program:**



1. Click on **Database**, then **EF Originators**.



2. Type your EFIN in the **ERO's EFIN** field, then click **Add**. If your EFIN is already present in the screen below, double-click on it to access the EFIN record.



3. Complete the required information as you would like it to appear at the bottom of *Form 8879*. Refer to the field definitions below for more information.

- a. **Self-Employed:** Check if ERO is self-employed.
- b. **Special Fee Process:** Will automatically be checked if the ERO is processing returns in Arkansas, Illinois, Maryland, Maine, or New York. These states require the ERO to charge the same fee for both financial and non-financial products.
- c. **Electronic Filer ID:** ERO's EFIN
- d. **SSN/PTIN:** Enter the EFIN owner SSN or PTIN.
- e. **EIN:** Enter the ERO's EIN/Federal Tax Identification Number.
- f. **ERO's Name:** The ERO's first and last name
- g. **Firm's Address, City, State, Zip:** Enter the items as you would like them to appear on the bottom of the *8879*.
- h. **Master EFIN:** This is auto filled by the Central Site, if applicable.
- i. **Service Bureau:** This is auto filled by the Central Site, if applicable.

 A screenshot of the 'New Record' dialog box with various fields filled out. 
 - 'Self-Employed' checkbox is unchecked.
 - 'Special Fee Process' checkbox is unchecked.
 - 'EFIN Number' is 000388.
 - 'SSN/PTIN' is P01234565.
 - 'EIN' is 912312312.
 - 'ERO's Name\*' is EFIN Owners Name.
 - 'Firm's Address' is 143 STREET.
 - 'City' is STOCKTON, 'State' is CA, 'ZIP' is 95219.
 - 'Office Phone' is 2062092653, 'Master EFIN' is 000020.
 - 'Cell Phone' is 2062092653, 'Cell Phone Carrier' is T-MOBILE.
 - 'Service Bureau' is empty, 'PIN' is empty.
 - 'Registered State of EFIN' is CA, 'RAC Bank' is empty.
 - 'Registered Phone of EFIN' is empty.
 - 'ERO State Identification Number' section has two rows: State 1 and State 2, each with an 'Identification' field.
 - 'ERO's Signature' field is empty.
 - Buttons at the bottom include 'Delete Signature', 'RemoteSign', 'Capture Signature', 'Advanced...', 'Save', and 'Cancel'.

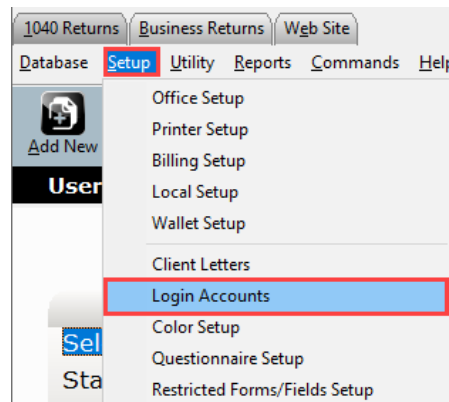
- j. **PIN:** Type the 5-digit ERO signature PIN you would like to use on *Form 8879*.
- k. **Registered State of EFIN:** The state in which your EFIN is registered.
- l. **Registered Phone of EFIN:** The phone number listed in your EFIN registration with the IRS.
- m. **RAC Bank:** This is auto filled by the Central Site as the season nears. If the incorrect bank is present here, contact Partner Support.
- n. **ERO State Identification Code:** If you have a State-issued ID number which allows you to prepare returns in that state, enter the two-letter State Code and State ID.
- o. **ERO's Signature:** You can save time by capturing the ERO signature here instead of manually signing each *8879*. **Click the Capture Signature** button if you have a supported signature pad installed, then **sign** using the pad. Alternatively, **click the RemoteSign** button and follow the on-screen instructions. Contact Partner Support for additional assistance.

## Configuring Your Preparer and Login Accounts

In this section, you can create and manage login accounts and their passwords. Create limits or allow access to certain functions of the program for groups of users by using **Access Levels**. It is important for each user to have a unique Login ID and Password and is required if more than one person is preparing returns for the software to operate optimally.

Paid Preparer information will populate to the bottom of Federal Form 1040.

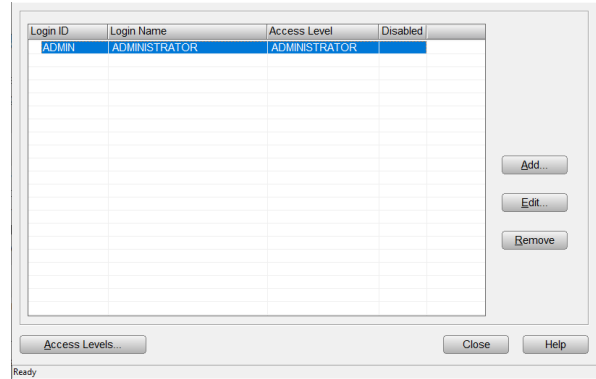
1. From the WIP screen, click **SETUP** in the Menu Bar, then click **Login Accounts** to open the Login Accounts window.



### Login Accounts Window

2. From this window you can **Add**, **Edit**, or **Remove** user accounts, and enter the **Access Levels Window**.

- Click **Add** to open the Login Preferences window, allowing you to create a new login. If you select an existing user and click **Edit**, the Login Preferences window will open which allows you to change the settings for that user, including the password.
- Select a user and click **Remove** to delete the selected user from the system. This cannot be undone. Consider disabling the preparers access to the program in their Login Preferences.
- Click **Add**, to create a new preparer, then follow the steps below.



## Login Preferences Window

In this section, the new and existing users passwords, access levels, and Preparer Shortcut ID can be set or changed along with any of the Login Preferences. **Note:** Once a Login ID is created, it cannot be changed. To create a new user, enter the information below.

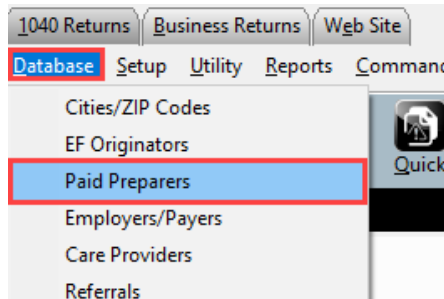
## Login Detail

- Login ID** – The user will enter their ID into the program login box to access the software.
- Login Name** – This will be displayed on the WIP (Work in Progress screen) in the software.
- Email Address** – Enter email address for password reset.
- Cell Phone** – Enter cell phone number for password reset.
- Password and Confirm Password** – This is what a user will key into the program login box to access the software after entering their **Login ID**.
- Access Levels** – Controls how the user can access certain functions of the program  
*See instructions below for customizing access levels.*
- Preparer Shortcut ID** – Allows for selection or creation of a **Preparer Shortcut ID**. If you already have created the Preparer Shortcut ID to use with this login, it can be selected from the drop-down menu. **Note:** If you need to create a new Preparer, enter a unique code in the ID box, then click the **New** button. Refer to the [Adding and Configuring Preparer](#) section below.
- Additional checkbox options are available. Hover your mouse over the option for more details.



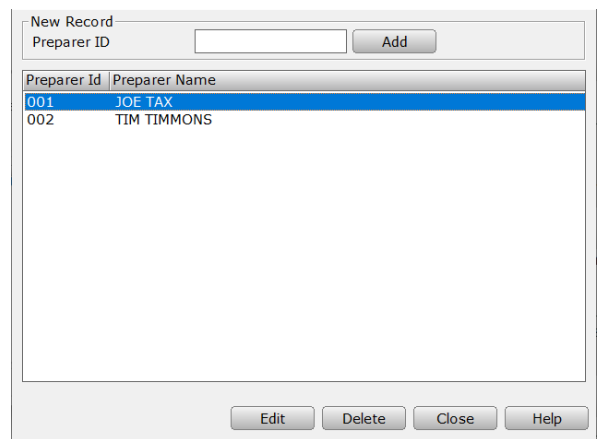
## Adding and Configuring Preparer Information

1. Click on **Database**, then **Paid Preparers**.



2. Type a Preparer ID in the **Preparer ID** field, then click **Add**. If a Preparer ID is already present in the screen below, double-click it to access the Preparer ID record.

**Note:** Each preparer must be assigned a Preparer ID. It can be any combination of letters and numbers between 3 and 7 characters.



3. Complete the required information as you would like the preparer information to appear at the bottom of Federal *Form 1040*.
  - a) If **Self-Employed**, check self-employed option.
  - b) Input **Preparer's SSN** (Do not use dashes).
  - c) If a **Third-Party Designee PIN** applies, input 5-digit pin to auto-populate to the return.
  - d) Input **Preparer's Name**.
  - e) Input the **Preparer's PTIN**.
  - f) Input the business **EIN**, if applicable.
  - g) Input the **Firm's Address, City, State, and Zip**.
  - h) Use the drop down to identify the **Preparer Type** of certification.
  - i) Input **CAF** number, if applicable.
  - j) Input **Office Phone** number.
  - k) If the preparer has their own EFIN, input the EFIN in the **Electronic Filing ID** field.

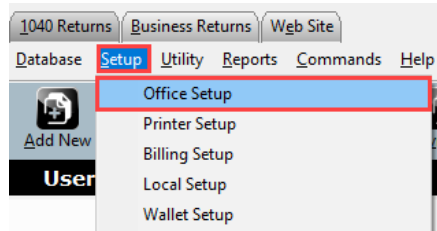
The 'New Record' form is populated with the following information:

- Preparer's ID: 002
- Self Employed:
- Preparer's SSN: [Empty]
- Third Party Designee PIN: [Empty]
- Preparer's Name\*: TIM TIMMONS
- PTIN\*: P12345678
- Firm's Name\*: TIMS TAXES
- EIN: 123456789
- Firm's Address\*: 200 MAIN ST
- City\*: ATLANTA
- ST\*: GA
- ZIP\*: 30345
- Preparer Type: Certified Public Accountant
- CAF: [Empty]
- Office Phone\*: 3334446666
- Electronic Filing ID: 000105
- Cell Phone: 3334446667
- Cell Phone Carrier: [Empty]
- Email: tim@timstaxes.com
- PIN: [Empty]
- (\* = Required Fields)
- State Identification Number:
  - State 1: [Empty]
  - Identification: [Empty]
  - State 2: [Empty]
  - Identification: [Empty]
- Paid Preparer Signature: [Handwritten Signature]
- Buttons: Delete Signature, RemoteSign, Capture Signature, Save, Cancel

- l) Input **Cell Phone** number (will also be used for Remote Signature, *TextLink*, and SMS).
- m) Use the drop down to select **Cell Phone Carrier** associated with cell phone number.
- n) Input **Email** address.
- o) Input the **PIN**. The PIN is a 5-digit Personal Identification Number chosen by the Paid Preparer to be used on *Form 8879*.
- p) Input **State Identification Number**, use state abbreviation to identify the state associated with State ID.
- q) To establish the **Paid Preparer Signature**, click the **Capture Signature** button if a supported signature pad is installed, then **sign** using the signature pad. Alternatively, click the **RemoteSign** button (a message will be sent to the provided Cell Phone. Follow on screen instructions to complete the process).

### Office Setup

Office setup configuration of the program can be set by clicking **Setup**, then clicking the **Office Setup** menu option.



### Registration Tab

Complete the software registration tab by inputting the information described below.

**Note:** This information may have been carried forward from the prior year.

- a. Input **User ID** received by the software provider.
- b. Input the Company **Name**.
- c. Input **Location** address.
- d. Input office contact **Phone** number.
- e. Input preferred **Email** address.
- f. **Transmitting Computer**, Do not change unless instructed to do so by Partner Support.
- g. **Transfer Incomplete Returns**: This option will set returns including incomplete returns, to be transferred to the transmitting computer.
- h. In the **Receipt Numbers** section, select if receipts will be a requirement, if receipts are to be auto assigned, and set receipt tracking ranges.
- i. **Verification Settings** are set to monitor the integrity of a submitted return. Use radio buttons to identify prevention of transmission for fatal errors, warnings, or all errors/warnings.
- j. **Shrink Verify List on Enter**: Select this box if you want the Errors on the Verify Error List to disappear as they are remedied during the verification of a Return.
- k. Click the **APPOINTMENT ADDRESS** button option to add the Firm address to the calendar appointment letter.

### E-Filing Tab

Configure E-Filing defaults and tax preparation requirements, including but not limited to, the IRS e-file Signature Authorization and the Electronic Bank Application.

- a. Input the location **Default EFIN** (Electronic Filing Identification Number).

- b. **Default SBIN** Not required
- c. The **IRS TeleTax Number** Pre-defined.
- d. If processing returns in NY or ME, **select the No Cross Collection in NY/ME** check box.
- e. If not sending acknowledgment letters to clients, select the **Discard ACK Letters** check box.
- f. Select the **Auto Generate PINs** check box to automatically generate PIN numbers on *Form 8879*.
- g. To create a verification return retention message for returns not including preparation fees, select the **Require Preparation Fee** check box.
- h. Select **Leave the Tax Return Status at Acknowledged for Bank Products** to leave the tax return status of an electronically filed return that has an associated bank product as Acknowledged until the bank product has been funded.
- i. Use the drop-down menu option to select when the system will **Prompt to File State Electronically**.

### Overrides Tab (Optional)

This tab is optional. Information entered here will always appear in *Forms 1040* and/or *8879* and cannot be altered from within the return.

- a. Enter the first set of fields (**Company Name, EIN, Address, City, State, ZIP, and Self-Employed check box**). This will override other information entered and appear on all *1040forms*.
- b. Enter the second set of fields (**ERO'S Name, EIN, Firm Address, City, State, ZIP, Self-Employed check box, and SBIN**) for the information you wish to appear on every *Form 8879* you prepare.
- c. Input **State ID**.
- d. To activate verification of State ID, Check the **Required** check box.
- e. Use the **Auto-Add State Return** drop down menu options to automatically



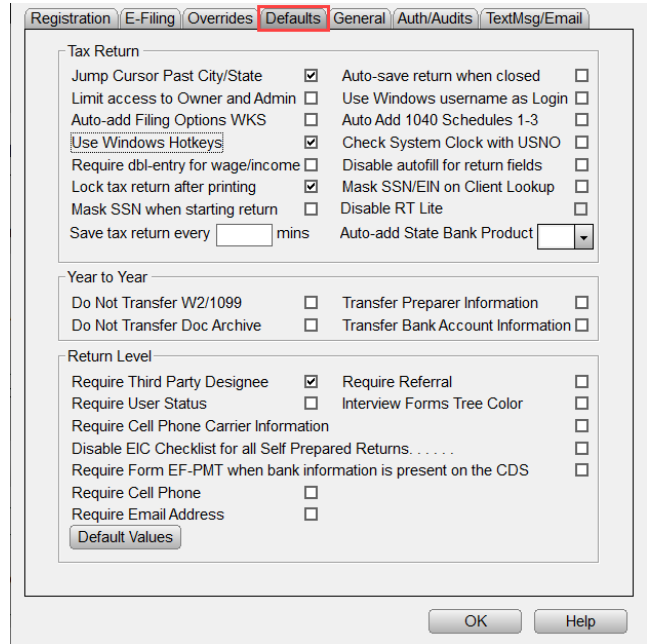
add a State Return based on the ERO provided address or the taxpayer residence address from the Client Data Screen.

- f. Use the **Default Taxpayer's phone number** drop down menu option to select number utilized for reports.

### Defaults Tab (Optional)

Use the **Defaults Tab** to set application-level settings, configure year to year transfer information, and set return-level requirements.

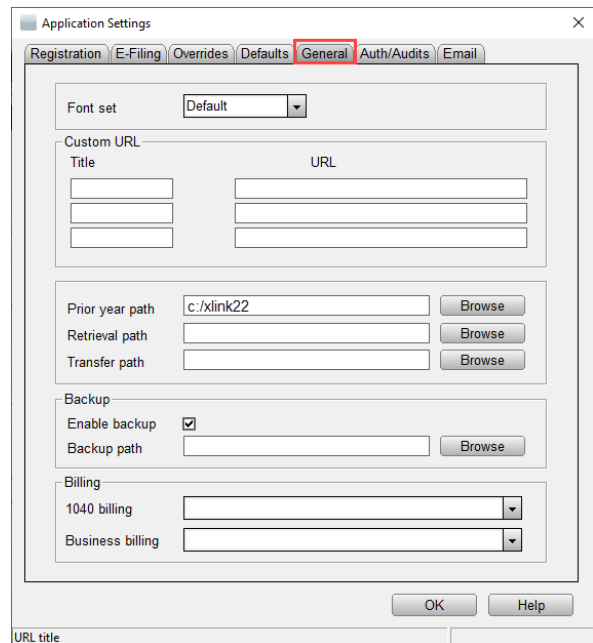
- a. Use **Tax Return Settings** to personalize program functions for return processing. Set options by selecting preferred program controls.
- b. **Year to Year Settings** can be configured to exclude transfer information for *W2/1099* and scanned documents. Also, selection can be made to include year to year preparer information.
- c. **Return Level Settings** can be configured to require third party designee, user status, and referral information.
- d. Click the **Default Values Button** to easily view the list of fields that have default values set, if any. You can easily remove the set values here too.



### General Tab (Optional)

The **General Tab** will allow selection of font set, specification of return and backup path, also billing selection.

- a. Use **Font Set** drop down menu option to configure font size.
- b. Add additional Navigation Tabs to the program using the **Custom URL** settings.
- c. Set return location path for **Prior Year**, **Retrieval**, and **Transfer** returns.
- d. Enable **Backup** by selecting the **Enable Backup** option and specifying the **Backup Path**.
- e. Use the **Billing** drop down options to select specified billing schedule for *1040* and Business billing.



## Auth/Audits Tab

This section contains authorization codes which enable access to additional program features. Codes are configured automatically during transmission to the Central Site.

**Note:** Non-transmitting computers must be configured manually by applying credentials from the transmitting location. Contact Partner Support for assistance.

Use the **Tax Return Audits** settings to configure additional diagnostic verifications. Diagnostic verifications assist in meeting IRS regulations and due diligence requirements for a variety of filing situations. Activate as many or as few audits as needed.

- a. To activate a tax return audit, click on the corresponding button under the **Tax Return Audit** section. The program will open a window like the one shown on the right.
- b. Place a check mark in the box next to each verification rule to be activated.
- c. Repeat steps for other audit sections needed in your office setup. You can remove an audit at any time by unchecking the corresponding box.

Registration | E-Filing | Overrides | Defaults | General | **Auth/Audits** | TextMsg/Email

Authorizations

Secure Offsite Storage

TextLink Plus

Tax Return Audits - Form 1040 (Individuals)

Use the following buttons to configure Diagnostic validation checks to assist you in satisfying the IRS Regulatory requirements.

Earned Income Credit

Head of Household

Schedule A

Additional Schedules/Forms

American Opportunity Credit

Tax Alerts

OK Help

## TextMsg/Email

This tab contains the configuration settings necessary for text messaging and sending emails through the software.

- a. **Enter you Google Email Address and Password** if you already have a Google email account.
- b. If you do not have a Google Email account, **Click Register for a FREE Google e-mail account**. Then follow the on-screen instructions.
- c. **Advanced-SMTP Settings (Optional)** enter information in this area, if needed for customer server configuration.

Registration | E-Filing | Overrides | Defaults | General | Auth/Audits | **TextMsg/Email**

TextLink was designed to allow you to contact your Customer base through the Text Messaging feature of their cell phone. This service is free for you to use and only requires use of a Google email account or other SMTP account.

\*New: This feature has been expanded to include the capability to Email a PDF copy of the Tax Return to your customers.

NOTE: Your customer must have a Text Messaging plan on their cell phone to receive your message(s). Standard Text Messaging rates apply.

Mail Settings

Email

Password

Register for a FREE Google e-mail account

Advanced - SMTP Settings (Optional)

Server URL

Server Port

Include EFIN and Receipt Number in Text Message

TextLink must be activated before first use. Click below to Activate TextLink

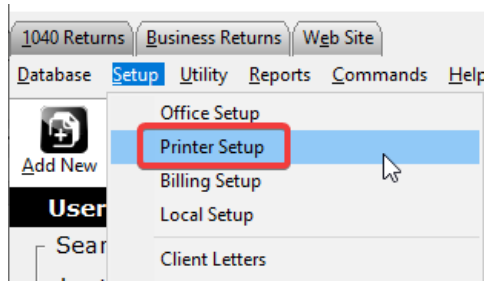
Activate TextLink / Email

\*NOTE: Admin Privileges are required to complete the Activation Process. If you are not an Admin, click on the Help button for additional instructions.

OK Help

## Printer Setup

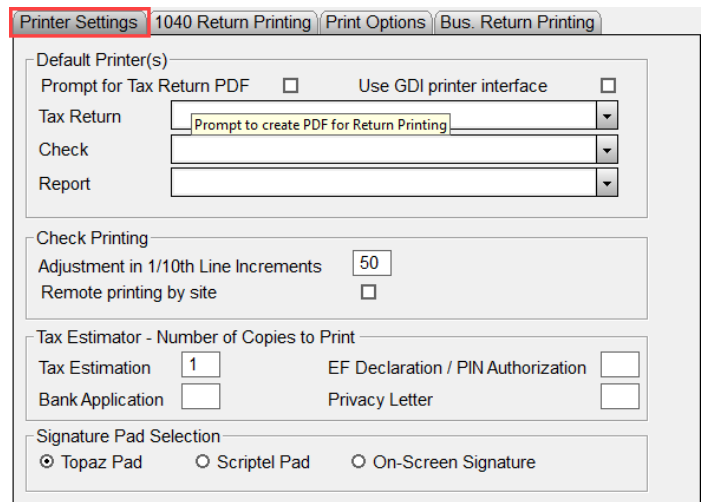
Printer setup configuration of the program can be set by clicking **Setup**, then clicking **Printer Setup** menu option.



### Printer Settings Tab

The settings located on this tab allows for selection of default printers to be used by the program.

- a. **Prompt for Tax Return PDF** causes a prompt to appear when printing a return and allows for the tax return to be created as a PDF document.
- b. **Use GDI Printer Interface** allows the program to use a GDI printer for printing returns.
- c. **Tax Return, Check, Report** drop down menus allow selection of a printer for each function.
- d. **Check Printing - Adjustments** are done in increments of one-tenth of a line if you need to adjust the text on a check. Increasing the number by one raises the text one-tenth of a line whereas decreasing the number lowers it.
- e. **Check Printing - Remote Printing by Site** will enable the ability to print checks at remote sites.
- f. **Tax Estimator – Number of Copies to Print** increases or decreases the numbers to the desired number of copies.
- g. **Signature Pad Selection** allows the selection of signature pad types.



## 1040 Return Printing Tab

It is possible to print multiple copies of a tax return, as a print packet, with a single click when printing the final tax return. This screen is where print packets are defined.

The column headings on this tab indicate the various components within the packet. Place a checkmark next to each item in the column that you want printed as part of the return packet.

**Note: “Send to Printer,” must be checked, otherwise the forms selected for printing WILL NOT be printed.**

Items denoted with an “X” will always print with a return set. A dash (-) denotes forms that cannot be printed with a return set.

Print Order	Preparer	Client	e-Filed	Federal Only if Not E-Filed	State
8453 / 8879	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	X	-	-
Client Data Screen	<input type="checkbox"/>				
Bank Fee Estimate	<input type="checkbox"/>	<input type="checkbox"/>			
Filing Options	<input type="checkbox"/>	<input type="checkbox"/>			
Engagement Letter	<input type="checkbox"/>	<input type="checkbox"/>			
Federal Client Letter	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
State Client Letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
ACA Letters	<input type="checkbox"/>	<input type="checkbox"/>			
Diagnostics	<input type="checkbox"/>	-			
Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Bank Application	<input type="checkbox"/>	<input type="checkbox"/>			
Tax Comparison	<input type="checkbox"/>	<input type="checkbox"/>			
Tax Summary	<input type="checkbox"/>	<input type="checkbox"/>			
Income Summary	<input type="checkbox"/>	<input type="checkbox"/>			
Federal Return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	X	-
State Return(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	X
Payment Voucher(s)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Federal Asset Detail	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>	-
State Asset Detail	<input type="checkbox"/>	<input type="checkbox"/>	-	-	<input type="checkbox"/>
Worksheets	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Overflow Detail(s)	<input type="checkbox"/>	<input type="checkbox"/>			
Privacy Letter	<input type="checkbox"/>	<input type="checkbox"/>			
Referral Coupons	-	<input checked="" type="checkbox"/>			
Appointments Letter	<input type="checkbox"/>	<input type="checkbox"/>			
Consent Form	<input type="checkbox"/>	<input type="checkbox"/>			
Water Mark	-				
Send to Printer/PDF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Send to Archive	X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send to E-Mail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Print Options Tab

This Tab contains all other print related settings. A description of each setting can be viewed by hovering the mouse cursor over the settings name.

- Batch Printing Options** allow you to configure if returns print individually or in a batch.
- PDF Printing Options** are used to configure where PDFs are stored, and what options are used in their creation.
- Current Form/Bank App Options** control what prints out with an individual form or bank app.
- Referral Coupons** section has options to set the coupon amount and expiration date.
- The remainder of the options can be used to fine tune what is printed with a return based on the office needs.

Batch Printing Options  
 Batch Print on Ctrl+P  Print Immediate    
 Batch Print on Ctrl+T

PDF Printing Options  
 Path  Browse    
 Use External PDF Reader  Use SSN/EIN for file name    
 Always encrypt generated PDF  Always email doc

Current Form/Bank App Options  
 Asset Detail w/Bus Activities  Overflow Detail(s)    
 Print Worksheets  No payment voucher with 8879

Referral Coupons  
 Coupon Amount  Expiration Date

Print Preparer Copy Only if Verified w/Error  Print Page Numbers    
 Print Payment Voucher w/Paper Returns  Print Site ID on Each Page    
 Completed on Print Final for Paper Returns  Print field values in BOLD    
 Print Tax Summary With Bank Documents  Print Copy Separation Pages    
 Add Printed Preparer's Name to Main Form  No Print Final on Invoice Due    
 Print 8879/8453 with Bank Documents  Exit Tax Return on Print Final    
 Do Not Print 1040ES with Final Return  Do Not Print Page 2 of Invoice    
 Do Not Print Itemized Form Billing  SSN Masking for EF    
 Disable Income Summary Signatures  PTIN Masking for EF    
 Opt-out Completed Return Transfer  EIN Masking for EF    
 Print Invoice w/ 8879/8453 EF Documents  8879 Last Printed Verify    
 Print date on page 1 of 1040 return  Exclude Privacy Letter    
 RTN/DAN number masking for EF IRS DD  Signature Block  Preview    
 Always print E-Signed Documents  Black Out

## Bus. Return Printing Tab

It is possible to print multiple copies of a tax return, as a print packet, with a single click when printing the final tax return. This screen is where print packets are defined.

The column headings on this tab indicate the various components within the packet. Place a checkmark next to each item in the column that you want printed.

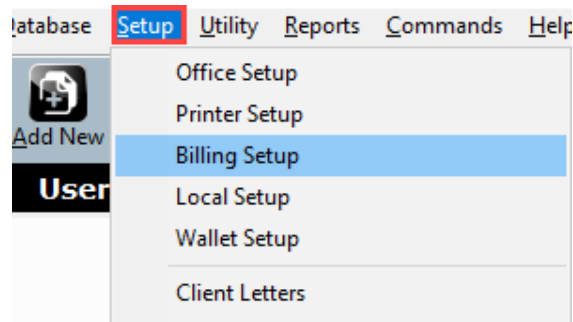
**Note:** “Send to Printer,” must be checked, otherwise the forms selected for printing **WILL NOT** be printed as part of the return packet.

Items denoted with an “X” will always print with a return set. A dash (-) denotes forms that cannot be printed with a return set.

	Preparer	Client	e-Filed	Federal Only If Not E-Filed	State
8453 / 8879	X	X	X	-	-
Client Data Screen	<input type="checkbox"/>				
Engagement Letter	<input type="checkbox"/>	<input type="checkbox"/>			
Federal Client Letter	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
State Client Letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Schedule K-1 Letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Diagnostics	<input type="checkbox"/>	-			
Invoice	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Financial Statements	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Federal Return	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	X	-
State Return(s)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	X
Asset Detail	<input type="checkbox"/>	<input type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Worksheets	<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Overflow Detail(s)	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Privacy Letter	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
Water Mark	-	<input type="checkbox"/>			
Send to Printer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send to Archive	X	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send to E-Mail	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Billing Setup

Billing can be configured by clicking **Setup**, then clicking the **Billing Setup** menu option.



## General Tab

In this section, information that will be displayed on the invoice and other billing configuration options are set.

- Billing Scheme** is a drop-down menu that allows selections of a billing scheme to edit.
- Click **Save As...** and enter a scheme name to create a new billing scheme, otherwise **Click OK** to save to a scheme you have already created.
- General Office Information** in this section is for entering the business name and location for it to appear on the invoice
- The main billing settings are below **General Office Information**. They affect how invoicing will occur. Hover the mouse above the input box or check box for a description of the item.

Billing Setup

Billing Scheme: 1040 Billing ID: 1001 [Delete] [Save As...]

General | Form Billing | Worksheet | Line Items | Discounts | Custom Charges | Custom Settings | PPR Settings

General Office Information

Office Information to be printed on each billing invoice Company Information from Office Setup [LOAD]

State Sales Tax Rate [ ] Tax Preparation Discount [ ]

Self Prepared Flat Fee [ ] Default Hourly Rate [ ]

No Prior Year Balance on Invoice  Disable Invoicing

Don't Bill for Sch A when using STD Deduction  Bill For EF Forms Only

Turn Off Default Bank App Disbursement Options  Collect Tax on Billings?

Prevent transmit on returns with balance due fees  No Prior Year Preparation Fee on Invoice

Disable Invoice Warning Errors  Validate the Prior Year Balance

\* To apply the updated billing scheme to an existing or current return, press CTRL+U while in the return

[OK] [Help]

## Form Billing, Worksheet, and Line Items Tabs

These three tabs set the prices for itemized billing. **All three tabs are configured in the same manner.** Refer to the following guidelines below for any selection of the three tabs.

- The **Form Billing** drop down box allows selection of US-Federal forms and State forms for itemized billing pricing.
- Under the **Base QTY** column, enter the number of forms that the **Base Price** amount will include. For example, in the screenshot to the right, a taxpayer with 1, 2, or 3 *W-2*'s would be charged a total of \$45.00 for all of the *W-2*'s. A taxpayer with 4 *W-2*'s would be charged \$55.00 (\$45.00 for 3 *W-2*'s and \$10.00 for each additional *W-2*.)

Billing Setup

Billing Scheme: [ ] Billing ID: [ ] [Delete] [Save As...]

General | Form Billing | Worksheet | Line Items | Discounts | Custom Charges | Custom Settings | PPR Settings

Form Billing

US-Federal

Form	Name	Base Qty	Base Price	Per Item
RET 1040	US Individual Income Tax Return			
RET SCH 1	Additional Income and Adjustments to Income			
RET SCH 2	Tax (AMT, 8962 and Other Taxes)			
RET SCH 3	Nonrefundable Credits, Other Payments, Refundabl...			
FRM W-2	Wage and Tax Statement	3	45.00	10.00
FRM W-2G	Certain Gambling Winnings			
FRM W-4	Employee's Withholding Allowance Certificate			
FRM W7	Application for Individual Taxpayer Identification			
FRM W7 COA	Certification of Accuracy for IRS ITIN			
FRM W-2PR	Puerto Rico Withholding Statement			
FEC RECORD	Foreign Employer Compensation / Pensions			
K-1 (1041)	Beneficiary's Share of Income, Deductions, Credits			
K-1 (1065)	Partner's Share of Income, Deductions, Credits			
K-1 (1120S)	Shareholder's Share of Income, Credits, Deductions			
WKS NOL	Net Operating Loss Worksheet			
SCHA	Itemized Deductions			
SCUB	Interest & Dividend Income			

\* To apply the updated billing scheme to an existing or current return, press CTRL+U while in the return

[OK] [Help]

- c. To charge per form individually, enter an amount in the **Per Item** column only.

### Discounts and Custom Charges Tabs

Defining custom discounts and charges can be applied to the invoice in a tax return. The **Discounts** and **Custom Charges** tabs are configured in the exact same manner. Select the desired tab and follow the instructions above to configure itemized billing.

- a. **Discounts** - first create a unique name for the discount. Then enter either a discount percentage or a discount amount in dollars.
- b. **Custom Charges** are set up in like manner as discounts; however, you can only enter a dollar amount.

### Custom Settings Tab

Ancillary products offer value to clients and potential revenue opportunities for the ERO. By including an Add On (Mark Up) to ancillary products, you can increase your revenue with each return. This section covers the ancillary products and services, and how to include an Add On.

- a. Place a check mark in the **Auto Add Financials** column to add the ancillary product to each tax return that includes a bank product.
- b. Place a check mark in the **Auto Add Non-Financials** column to add the ancillary product to each tax return that does not include a bank product.
- c. In the **Add On Fee /Mark Up Amount** column, type the desired Mark Up for each ancillary product.

Form	Auto Add Financials	Auto Add Non-Financials	Base Fee	Add On Fee/Mark Up Amount
iProtect			53.95	
Audit Assistance, Protection Plus			44.95	
Remote Signature Fee			5.00	

**Important Note:** If you have already pre-set configurations for these affiliate partner programs during enrollment, disregard the steps above unless you want to make changes.

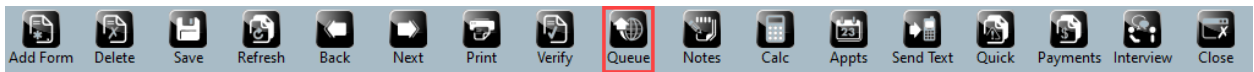
## Transmitting and Updating

This section will cover how to transmit a return to the IRS, and how to process system updates.

### Queueing and Transmitting Returns to the IRS

Following are the steps provided for transmitting Federal and State Returns electronically.

- a. While inside a return, verify *Form 8879* is attached and complete.
- b. Click the **Queue Button** located in the toolbar.



**Note:** The program verifies the Federal and State Return for errors before transmission. Review any errors in the return. If there are no errors, the "Transmission" dialog appears.

- c. The program automatically selects the Federal and State return for transmission if the electronic filing information is completed in each return. Click **Queue**. The program then takes you to the WIP (Work in Progress screen).

Check the Packages to Queue for the next transmission

Queue	Package	AGI	Total Tax	Refund	Bal Due	Electronic Filing
<input checked="" type="checkbox"/>	Queue Federal	14400		885		
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

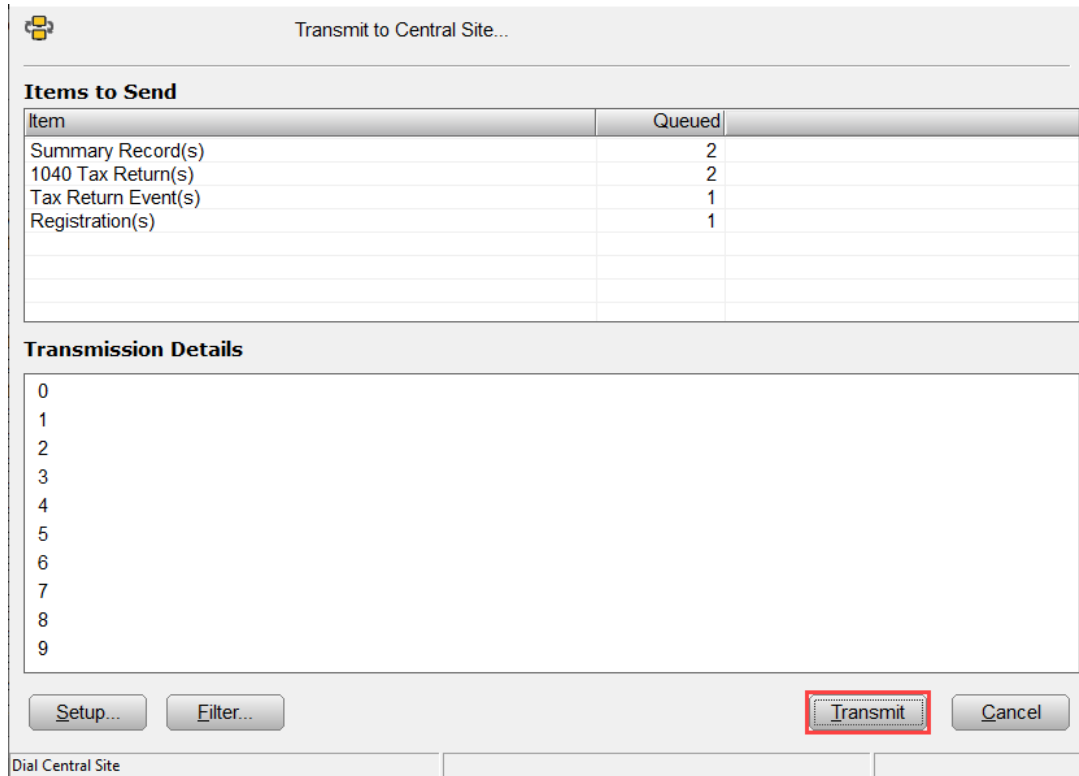
Submit for Diagnostics

- d. Click **Transmit** on the toolbar.



- e. On the "Transmit to Central Site" or "Transmit to Main Office" dialog, click **Transmit**, and the program sends the Federal and State Tax Return to the Central Site.





Updating the 1040 software

**Steps to Install Updates on a Transmitting Computer:**

- a. If on a network, close the program on all workstation computers.
- b. In the program, click **Transmit** on the toolbar.



- c. On the **Transmit to Central Site** dialog, click **Transmit**.

Transmit to Central Site...

---

**Items to Send**

Item	Queued
Summary Record(s)	2
1040 Tax Return(s)	2
Tax Return Event(s)	1
Registration(s)	1

**Transmission Details**

0

1

2

3

4

5

6

7

8

9

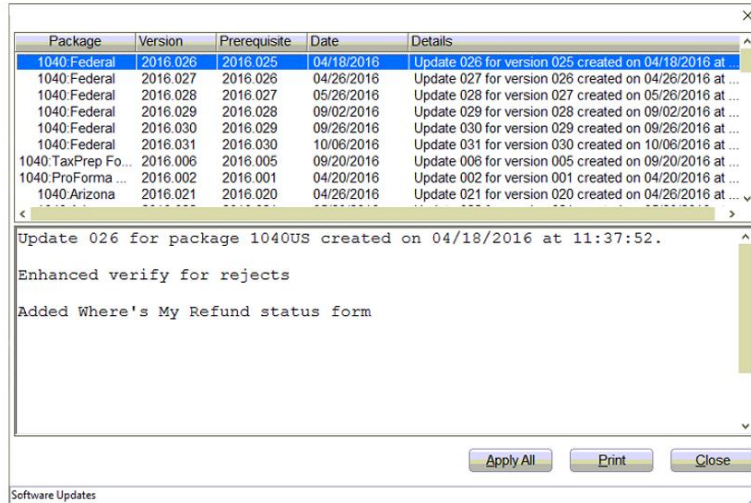
Dial Central Site

- d. When the transmission is complete, click **Software Updates** on the **WIP (Work in Progress)** screen). If the link for Software Updates is unavailable, no updates are available for install, and the program is up to date with the features and tax law changes.

**Work In Progress Summary**

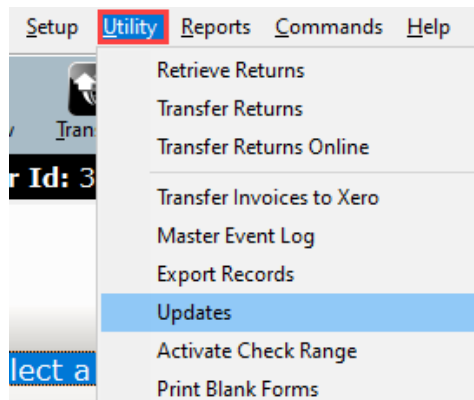
<p style="text-align: center;"><b>Tax Returns</b></p> <p><a href="#">Select a Return</a></p> <p>Status Summary List</p> <p>Management Dashboard</p> <p>Training Returns</p> <p>Mobile Application Retrieval Utility</p> <hr/> <p style="text-align: center;"><b>Printing Queue</b></p> <p>Checks, Registers, and Activation</p> <p>Tax Returns</p> <p>Proformas</p> <p>Federal Acknowledgement Letters</p> <p>State Acknowledgement Letters</p> <hr/> <p style="text-align: center;"><b>Other Items</b></p> <p><span style="border: 1px solid red;">Software Updates</span></p> <p>Secure E-Mail</p> <p>Bulletins</p> <p>Today's Appointments</p> <p>Backup Returns</p>	<p style="text-align: center;"><b>Transmit Queue</b></p> <p>Transmit to Central Site</p> <p>Recover from Archive</p> <hr/> <p style="text-align: center;"><b>Exceptions/Rejects</b></p> <p>Fed Rejects</p> <p>State Refused and Rejects</p> <p>Fed Refused</p> <p>Fed/State Alerts</p> <p>Verify Retrieved / Feeder Returns</p> <p>Bank Rejected</p> <p>Pending Remote Signatures</p> <p>Completed Remote Signatures</p> <hr/> <p style="text-align: center;"><b>Quick Reports</b></p> <p>8453 Status Report</p> <p>Checks Ready</p> <p>IRS Ack Counts</p>
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- e. Click **Apply All**, and the program installs all available updates.

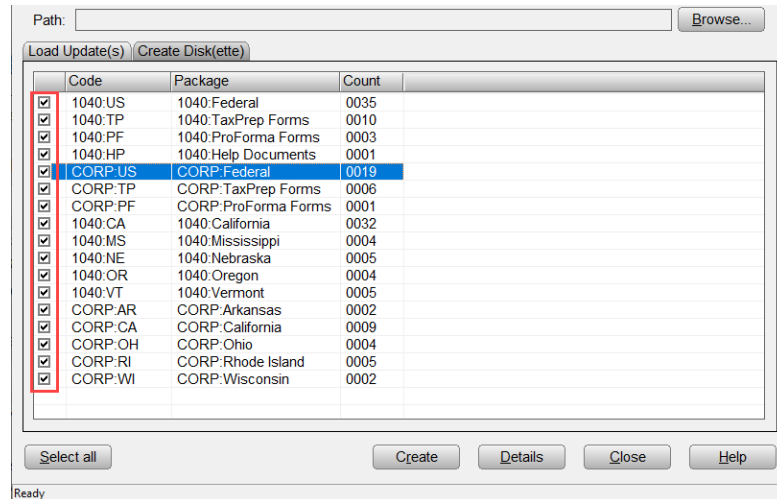


**Steps to Install Updates on a Non-transmitting Computer:**

- a. From a transmitting computer, create a backup disk. To create a backup disk, follow these steps:
- b. On the **Utility** menu, click **Updates**.



- c. Click **Browse** and choose the location where you want to save the update files. You must back up updates to removable media such as a floppy disk or Flash drive.
- d. Select the updates to back up, and then click **Create**.



- e. From the non-transmitting computer, insert the backup disk into the USB or disk drive.
- f. On the **Utility** menu, click **Updates**.
- g. On the **Load Update(s) Tab**, click **Browse**. Browse to the location of the backup disk, and then click **OK**.
- h. Select the updates to install, and then click **Load**.

### How to Reach Us

If you require assistance, please **contact** Partner Support at **206-209-2653**, or email us at [support@utaxsoftware.com](mailto:support@utaxsoftware.com).