

The Custom letter will be in Zip Format when you download it. You will need to unzip it and then you will have the
MN1_ERO_TRACKING_LETTER.CL

How to include a Custom Letter into TaxWise

Example: MN1_ERO_TRACKING_LETTER.CL

1. Mount your TrueCrypt volume that contains TaxWise 2011 (P: for this example)
2. Navigate to P:\UTS11\Cletters
3. Paste a copy of your custom letter into this directory.

How to include a custom letter into all returns (Tax Form Defaults)

Use Edit Tax Form Defaults on the Tools menu and add the letter to your default return.

1. Select Add Form/Display Forms List and enter Letter in the Look for box.
 2. Press Enter. TaxWise displays the Select Form: Client Letter window.
 3. Select NEW Client Letter and click OK.
 4. Select the letter you want to include and click OK. TaxWise displays the letter template in the workspace.
 5. Press F10 to close the letter or click another form in the Tree to go to that form. The letter is listed in the Tree with a blue check mark. The blue check mark indicates that the letter will print with the return.
- If your letter does not print, make sure you are printing a Print Packet that includes the letter or that is set to print all completed forms.