



Tax & Accounting

2023 ATX™ Quick Start Guide

Welcome to ATX 2023!

You can download the software from the MyATX Solution Center and get started.

Simply review the [ATX system requirements](#) and follow the instructions below.

To download ATX:

1. Go to the **ATX Solution Center**, enter <https://support.atxinc.com/> in your web browser.
2. Click either the **Downloads** button or click the **Downloads** menu, then select **Year**, then **2023**, and then **Tax Program**.
 - If you are not logged in, enter your **Client ID**, **User Name** and **Password**, and click **Login**.

💡 When logging in you will need to follow the [instructions for logging in](#) using 2-Step Verification.
3. Click the **Download link** for the ATX package you purchased. If asked, choose where you want to save the file, then click **Save**.
4. When the download finishes, you'll see it at the bottom of your browser window. Click the file name to open it.

Please follow these instructions:

1. Select the appropriate **Install Type**.
2. To access the [Tax Research Plugin](#), complete the plugin installation at the end of the ATX install.
3. If you are prompted to restart your computer, please do so. After the restart, the installation will continue automatically.
4. When you start the program for the first time, you will be asked for an activation code. To locate your activation code from the [MyATX Solution Center](#), click **Downloads**.

If you need additional help downloading and installing your ATX software, please visit [ATX Learning Portal – Installing](#) and watch the instructions (no login required).

Default Installation Locations

By default, ATX installs to a **Wolters Kluwer** folder. These are the locations:

- **Installation default:** C:\Program Files (x86)\Wolters Kluwer
- **Server default:** C:\Program Files (x86)\Common Files\Wolters Kluwer
- **Backup:** C:\ProgramData\Wolters Kluwer\ATX 2023 Server\ATX 2023 Backup
- **File Storage:** C:\ProgramData\Wolters Kluwer\ATX 2023 Server\ATX 2023 Files

If you had previously added exclusions for your anti-virus software for ATX 2022 or a prior year, then you will need to add these new exclusions in order for ATX to communicate to the electronic filing center.

- 💡 It's also a good idea to review any backup settings or folder access permission settings to ensure that they align with the folder structure.

Secure Login and Passwords

ATX conforms to the recommendations and best practices set forth in [IRS Publication 4557](#), Safeguarding Taxpayer Data.

ATX requires all users to establish a user account and password. Passwords must follow these guidelines:

- 8–20 characters
- At least 1 UPPER case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 punctuation or special character (ex. ? ! \$ & *)
- Spaces are allowed

Additional Security Requirements

- Passwords expire every 90 days: Users reset their own passwords.
- Failed Login restrictions: After five failed login attempts, users will be locked out of the system. Administrators will be able to unlock these users. Admin users who are locked out will be required to enter the product activation code to unlock the Admin account.
- Login required after 30 minutes of inactivity.
- Login required every 24 hours.

Main Information Worksheet

The **Main Information Worksheet** allows you to enter important information about your taxpayer in one location. Complete the **Main Information Worksheet** for every tax return. The information you enter on the **Main Information Worksheet** populates to appropriate fields on the tax return. Use this form to enter your clients' basic information, including:

- Name
- Tax Identification Number
- Address
- Filing Status, if applicable
- Other Filer Information

To use the Main Information Worksheet, do the following:

1. Select the return type.
2. Verify or change the selected **Federal Form**.
3. Click **Create Return**.
4. Enter the client's demographic information.
5. Click the **State Info** tab.
6. Select the **State**.
7. Select the **Form Residency**, if applicable.
8. Verify or change the selected **State Form**.
9. Click **Create State Return(s)**.

💡 How do I use the Main Information Worksheet?
<https://support.cch.com/sfs/solution/000132661>

Steps to Ensure QuickBooks® Authentication

For customers who use the QuickBooks® Online Import feature, Windows® updates are needed to avoid issues authenticating your QuickBooks® Online account with ATX. To check to see if you need Windows updates, use the following steps:

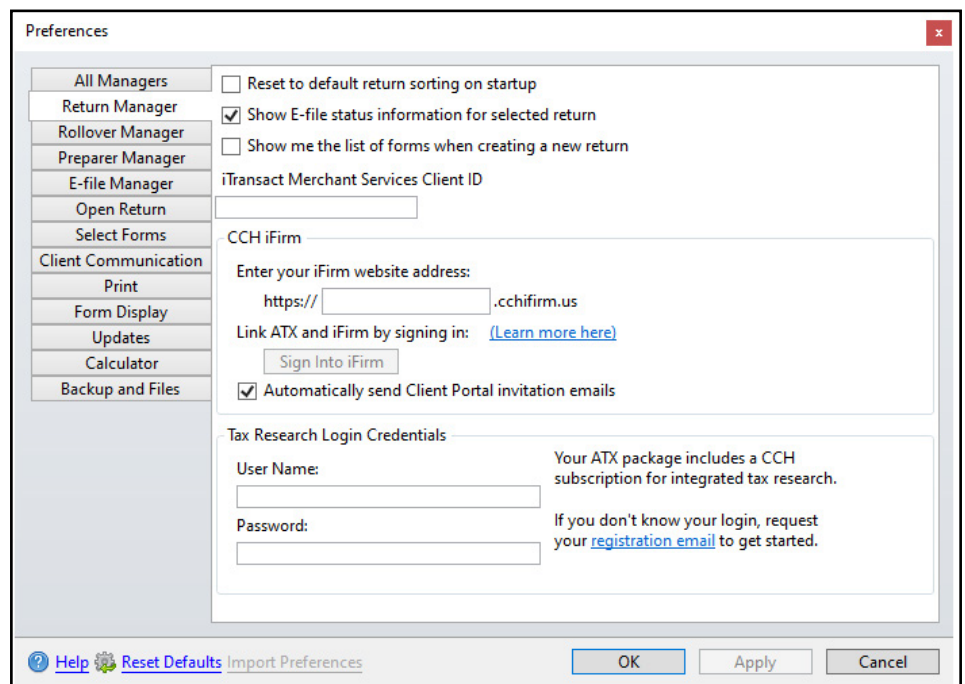
1. Click **Start**, and type **update** in the search box. From the results, select “**Check for Updates**”.
2. Click **Check for updates**, and then wait while Windows® looks for the latest updates for your computer.

Your computer system will automatically check for any Windows® updates that need to be applied. We recommend installing any updates listed as Important. For customers who are already up to date no further action is needed.

Linking ATX with CCH iFirm®

To enable CCH iFirm integration in ATX, you will first need to associate ATX with your CCH iFirm website by following this series of steps:

1. Click the **Preferences** button on the toolbar; then, click the **Return Manager Preferences** tab.



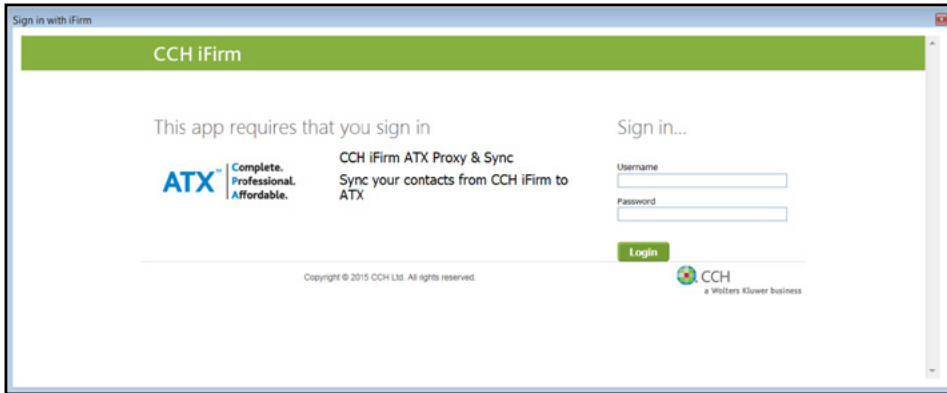
The screenshot shows the 'Preferences' dialog box with the 'Return Manager' tab selected. The 'CCH iFirm' section is expanded, showing the following options:

- Reset to default return sorting on startup
- Show E-file status information for selected return
- Show me the list of forms when creating a new return
- iTransact Merchant Services Client ID: [Empty text box]
- CCH iFirm: Enter your iFirm website address: [https:// \[\] .cchifirm.us](https://[] .cchifirm.us)
- Link ATX and iFirm by signing in: [\(Learn more here\)](#)
-
- Automatically send Client Portal invitation emails

The 'Tax Research Login Credentials' section is also visible, with fields for 'User Name' and 'Password'. A note states: 'Your ATX package includes a CCH subscription for integrated tax research. If you don't know your login, request your [registration email](#) to get started.'

2. In the CCH iFirm section enter your **CCH iFirm Website Address**; then, press **Enter** or **Tab** to enable the **Sign into iFirm** button.

3. Click **Sign Into iFirm**. The **Sign in with CCH iFirm** dialog box displays.

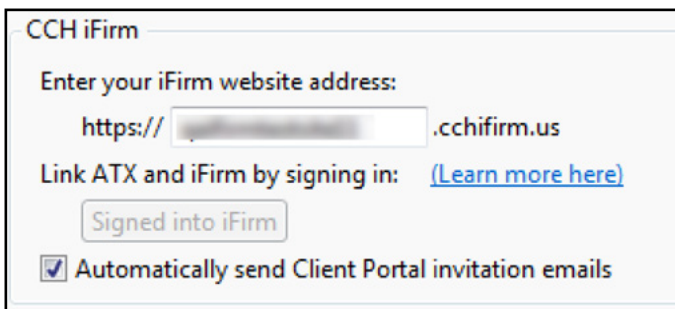


4. Enter your CCH iFirm username and password; then, click **Login**.

NOTE: Do not enter the Admin credentials.

💡 If your firm is using the [2-Step Verification](#) process, select your preferred option for receiving the authentication code and complete the required information. If you are not using the 2-Step Verification process, go to Step 5.

5. The **Sign in with iFirm** dialog box displays an acknowledgement asking if you want to allow access to CCH iFirm from ATX.
6. Once signed into CCH iFirm the **Sign into iFirm** button changes to **Signed into iFirm**.



7. ATX and CCH iFirm work together to simplify your office workflow. As a Client Portal subscriber, you'll have the ability to upload tax return PDFs from ATX to Client Portal. During the upload process, CCH iFirm creates a portal for the client if required. When the Automatically send Client Portal invitation emails preference is selected, CCH iFirm will send a portal invite to the taxpayer's email address that is entered in the return. This will allow the taxpayer to register for their portal. For more information please see [ATX Help](#) or the [CCH iFirm Help Center](#).
8. Click **Apply** to save the change; then, click **OK** to close the **Preferences** dialog box.

Tax Research from ATX

Your ATX Software includes Online Tax Research. ATX packages include a tax research subscription in CCH® AnswerConnect and complimentary access to the [CCH® Browser Search Plugin](#).

When you enter your Tax Research credentials into ATX, you can access **Tax Research**, **IRS Publications**, and the **U. S. Master Tax Guide®** quickly from an open return.

If you have not received or have misplaced your Tax Research registration email, please [request a new one](#). You will be prompted to log in using your ATX Solution Center credentials. If you have forgotten your password, go to <https://answerconnect.cch.com> and click the **Forgot Password** link.

To enter your Tax Research credentials in ATX:

1. Click **Preferences**.
2. From the **Return Manager** tab, under the **Tax Research Login Credentials** section, enter your **User Name** and **Password**.
3. Click **OK** to apply your changes.

Client Accounting Suite

To download Client Accounting Suite from the MyATX Solution Center:

1. Enter <https://support.atxinc.com/> in your web browser.
2. Click the **Downloads** menu and select **Client Accounting Suite**.
 - 💡 When logging in you will need to follow the [instructions for logging in](#) using 2-Step Verification.
 - If you are not logged in, enter your **Client ID**, **User Name** and **Password**, and click **Login**.
3. Click the 23.0 **link**. If asked, choose where you want to save the file, then click **Save**.
4. When the download finishes, you'll see it at the bottom of your browser window. Click the file name to open it.

Please follow these instructions:

- If you've purchased Client Accounting Suite, enter the code provided in your registration/activation code email or on the Solution Center by clicking **My Information > My Products**.
- The installation will place a shortcut icon on your desktop for each module: Client Write-Up, Accounts Payable, Accounts Receivable and Payroll. Double-click an icon to open that module.
- **Updating** — Regulatory updates to Client Accounting Suite are released throughout the year as needed. It is not necessary to update the program to evaluate it, but you may do so if you wish.

W-2/1099 or Payroll Compliance Reporting

Your ATX purchase includes Payroll Compliance Reporting and it must be installed separately. You can download from the MyATX Solution Center.

Downloading

To download the W-2/1099 or Payroll Compliance Reporting products from the MyATX Solution Center:

1. Enter <https://support.atxinc.com/> in your web browser.
2. Click the **Downloads** menu, **Year, 2023**, and **Payroll Program**.

💡 When logging in you will need to follow the [instructions for logging in](#) using 2-Step Verification.

– If you are not logged in, enter your **Client ID**, **User Name** and **Password**, and click **Login**.

3. Click the Download link for the Payroll Compliance that you purchased. If asked, choose where you want to save the file, then click Save.
4. When the download finishes, you'll see it at the bottom of your browser window. Click the file name to open it.

If you need additional help installing your W-2/1099 or Payroll Compliance Reporting software, please visit our [W-2 or Payroll Compliance WebHelp](#).

Secure Login and Passwords

W-2/1099 or Payroll Compliance Reporting conforms to the recommendations and best practices set forth in [IRS Publication 4557](#), Safeguarding Taxpayer Data.

The software requires all users to establish a user account and password. Passwords must follow these guidelines:

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Contact Us

We invite you to evaluate our full suite of solutions that are designed to meet the needs of tax professionals. Contact your Account Manager at **800-495-4626** to learn more about Research, Learning, and Firm Management options that can help to grow your business.

If you need assistance with products you have already purchased, please call Customer Care at **800-638-8291**.

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Visit [TaxNA.WoltersKluwer.com](https://www.taxna.wolterskluwer.com) for more information.