



Get Started with the Hosted TaxClient Program

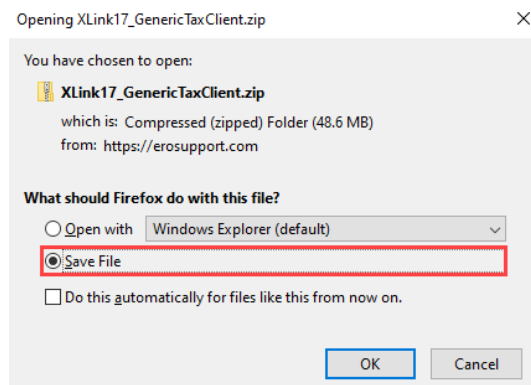
This guide provides important information and step-by-step installation and configuration instructions for **New Hosted TaxClient** users, plus instructions beginning on Page 6, for prior year **Hosted TaxClient** users on how to access the new tax year program, install the TaxClient program on a new computer, and add new preparers. All Hosted users will need to install the **TaxClient** and configure your **1040 Tax Program**.

If you have additional questions about this information, please contact our **Partner Support Team** at **404-793-1593**. You can also email us at **support@tbmpro.net**

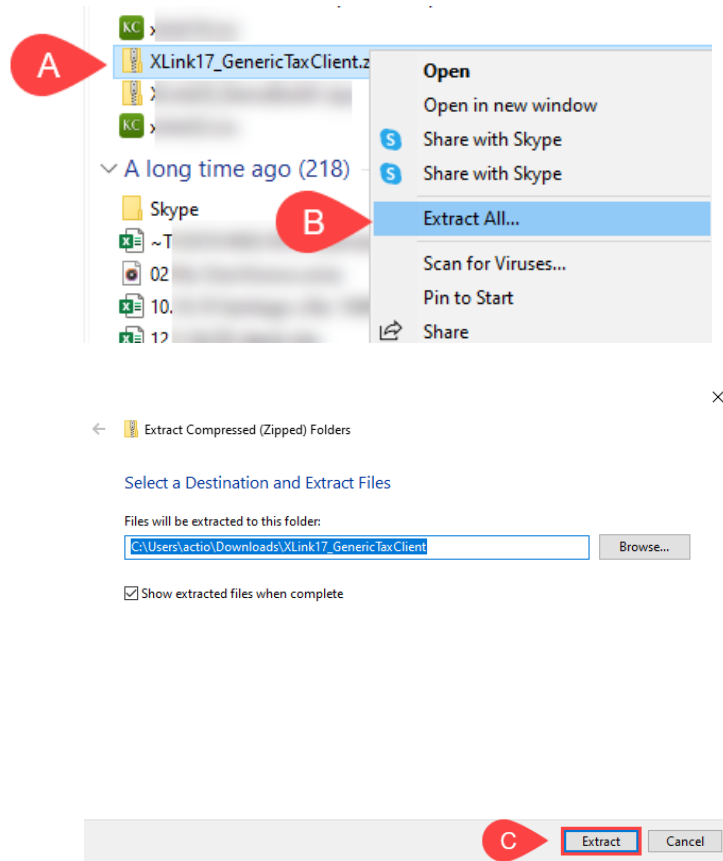
Setting Up a NEW Hosted TaxClient Office

The following step-by-step instructions are for a new **Hosted TaxClient** office.

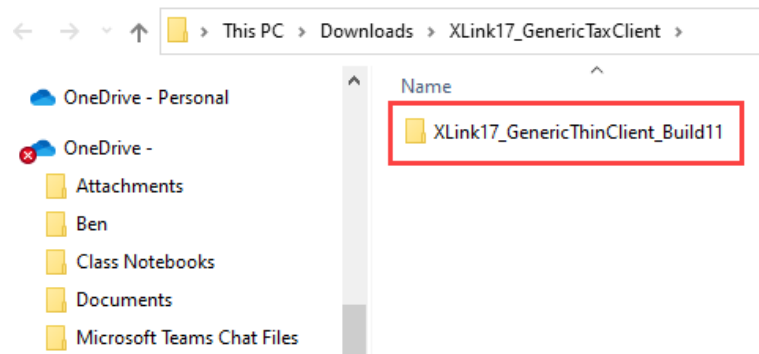
1. Once you are active in the TBM Enterprise Management Portal (EMP), **New Hosted TaxClient** Offices can expect an on-boarding call from the Partner Support Team within 24 hours.
2. You will receive an [email](#) within 24 hours from no-reply@mytaxofficeportal.com with the subject, **“Your MyTaxOfficeOnline Account has been Created”** containing your temporary password and instructions to finalize your User Setup. **Important!** Complete the instructions contained within this email **before** moving on to Step 3 – Hosted Login Information.
3. You can expect to receive an [email](#) within 24 hours from support@tbmpro.net with the subject, **“Hosted Login Information”** containing installation instructions.
4. Download the **TaxClient** [here](#).



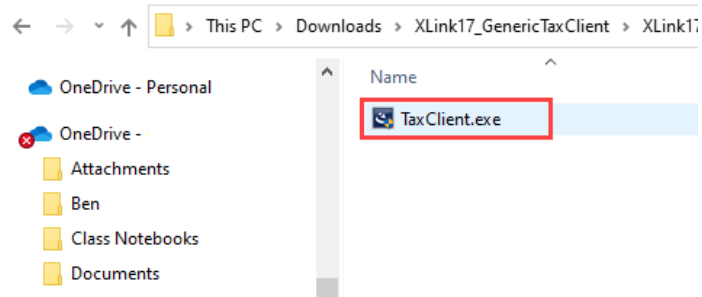
5. Extract the Compressed (Zipped) Folders:
 - a. Right Click on the **file name**
 - b. Left Click on **Extract All**
 - c. Click the **Extract** button



6. Open the unzipped folder

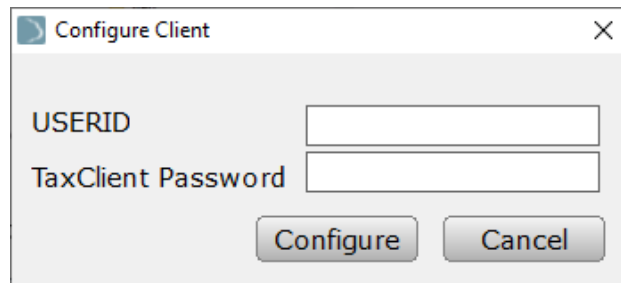


7. Double-click "TaxClient"

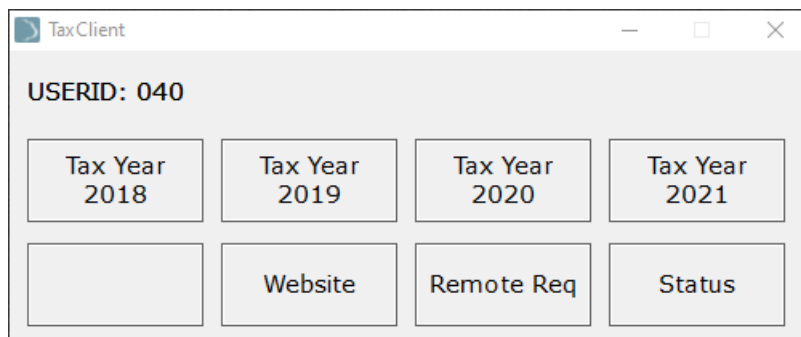


8. Follow the on-screen prompts to complete the installation of the **TaxClient**.

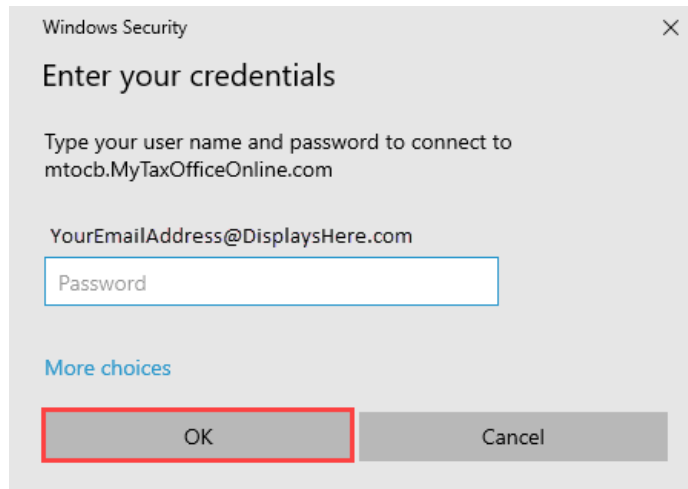
9. On the **Configure Client** window, enter your credentials provided in the email sent by help@erosupport.com.



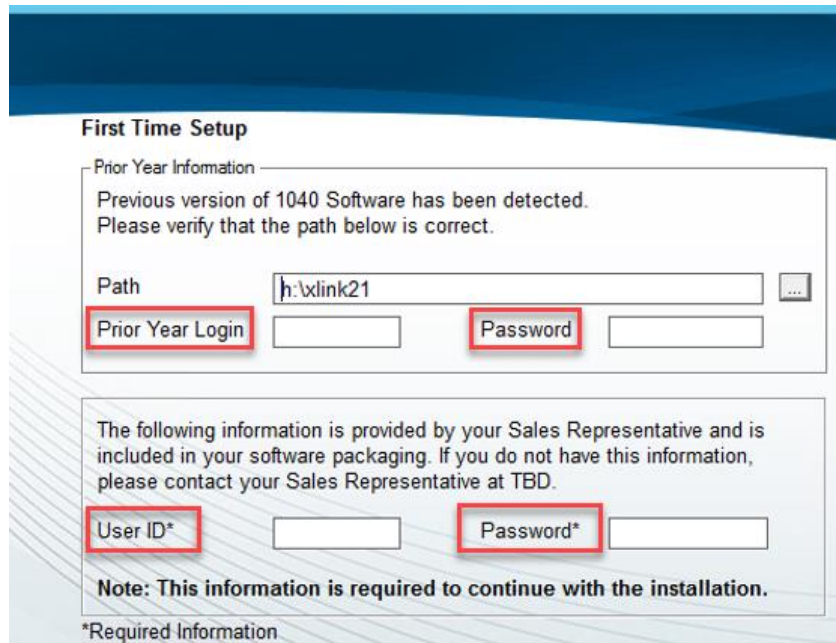
10. **Click the oldest Tax Year button you need to configure first.**



11. Log in to the **TaxClient** using your credentials.



12. On the next screen, **enter the Prior Year Login (ADMIN), Admin Password** and your **User ID** and **Transmission Password**.



Note: Your **User ID** and (Transmission) **Password** is required to continue with the installation. If you do not know or have forgotten your Transmission Password, log in to your EMP and go to **Office Information**.

Software Identification Information

EFIN	
Master Identifier	
Master User ID	
Transmission Password	
MSO CL User ID	

Note: **Service Bureaus** and **Multi-Offices**, go to the Office Management Grid (OMG) and **click** Enrollment to view your Office Information.

Office Management

Search:

User ID
 Company Name
 EFIN
 EFIN by Owner
 Contact Name
 Telephone Number
 Master Identifier
 Account Manager
 Acumatica Customer Id

Status: Site type: Bank Partner: Enrollment Status: Software Type: Transmit Type:

Show 10 entries

Status	Company	Master Identifier	User ID	Parent ID	Contact	EFIN	Software Type	Transmit Type	ERO Type	Selected Bank	Bank App Subm.Date	Enrollment Status	View/Edit Enrollment	Total SVB Fee	Total Trans Fee	BP e-File Fee	DOC / EF Fee	Action	
Active						H			Service Bureau - SVB			Approved							ACTIONS

Enrollment:

Enrollment EFIN: Bank:

Office Information

- Office Information
- Affiliate Configuration
- Bank Selection & Fee Setup
- Fee Payment / Update Account(s)
- Bank Enrollment
- Enrollment Summary

- Manage EFINs/Bank Application

Site Information

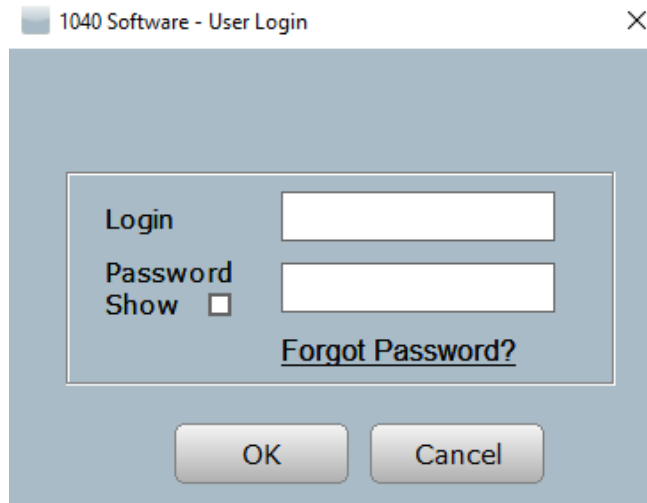
Company Name	
Primary Contact First Name	
Primary Contact Last Name	
Physical Address	
City, State, Zip	
Office Phone	

Software Identification Information

EFIN	
Master Identifier	
Master User ID	
Transmission Password	
MSO CL User ID	

Bank Status

13. Follow the on-screen prompts to complete the installation of the 1040 **tax program**.
14. Log in to the **1040 tax program**.

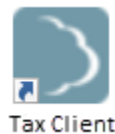


You have now completed the setup and installation of your new Hosted TaxClient program! If you later decide to add a new preparer or need to install TaxClient on a new computer, refer to the **How to Add a New Preparer** and **How to Install TaxClient on a New Computer** instructions below for existing Hosted TaxClient users.

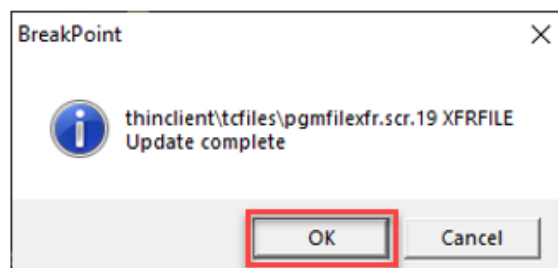
Prior Year Hosted TaxClient Users:

How to Access the New Tax Year Program

1. Click **TaxClient** icon on the Desktop.



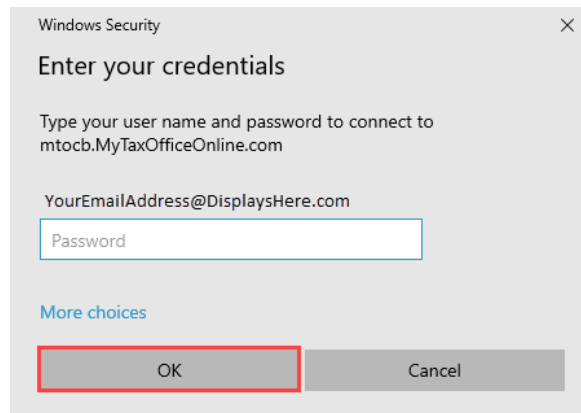
2. This message appears, **Click OK**.



3. Click the new 1040 Software **Tax Year 2021** button.



4. Log in to the **TaxClient** using your existing credentials.



Important Note: If you have forgotten your password, contact Partner Support to request instructions for resetting your Hosted TaxClient password. For security reasons, **every 180 days**, you will receive an email from no-reply@mytaxofficeportal.com instructing you to change your password. If you fail to update your password, you will be unable to access the TaxClient program. Refer to the “**Hosted Login Information**” [email](#) from help@erosupport.com for instructions on resetting your password or contact Partner Support for assistance.

5. Next, you will configure the Tax Year 2021 software by following the on-screen prompts. More information can be found in the **Configuration Wizard** section on page 6 of the [Tax Year 2021 Quick Start Guide](#).

Note: Your **User ID** and (Transmission) **Password** are required to continue with the installation. If you do not know or have forgotten your Transmission Password, refer to instructions contained within **Step 12** (Page 5) of this document.

How to Add a New Preparer

1. If you are a **current** Hosted TaxClient user **adding a new preparer**, you must email or contact Partner Support and provide us with the first/last name and email address for the new preparer.
2. You will receive an email within 24 hours from no-reply@mytaxofficeportal.com with the subject, **“Your MyTaxOfficeOnline Account has been Created”** containing the temporary password and instructions to finalize the User Setup for your new preparer.
3. Next, go to the [Setting Up a NEW Hosted TaxClient Office section](#) above, and follow instructions starting at **Step 11** (Page 4). Note: If the new preparer is installing TaxClient on a new computer, see below.

How to Install TaxClient on a New Computer

- If you are a **prior year** Hosted TaxClient user and installing the Hosted TaxClient on a **new computer**, go to the [Setting Up a NEW Hosted TaxClient Office section](#) above, and follow instructions starting at **Step 4** (Page 1).