



Welcome to Tax Notebook Toolkit!

Welcome to Tax Notebook Toolkit, the powerful web based tool that handles all Tax Notebook™ administrative tasks customizing, creating and tracking your Tax Notebooks. The Toolkit is also used to upload your client Pro Forma data servers and download completed Tax Notebook data back to your local office.

Use the URL below as a link on your website, or provide this information to your clients to type in their browsers.

<https://www.taxnotebook.com/TNPRIOR/tnstart.asp?welcome=KY7511286>

Processing and System Requirements

- [Click here](#) to view general processing and system requirements for Tax Notebook and Tax Notebook Toolkit.

Setting up and Using Toolkit

Before your staff can use Tax Notebook Toolkit, an Administrator must define the users, office groups and prepare be defined from Configure Firm / User Access in Tax Notebook Toolkit or from ProSystem fx under Customer Service Administrator. Office groups and preparers **must** be uploaded from Configure Firm / User Access.

1. Use the **Configure Firm** tab to specify firm information, such as your company's name, address, and logo, as well as your Toolkit account.
2. Use the **Customize** tab to modify the Interview Setup, Checklist and Tax Notebook Welcome Page for each type of
3. Use the **Process** tab to create Tax Notebooks for your clients using profiles, checklists, and welcome pages created. This tab is also used to create returns from the Notebook data.
4. Use the **Status** tab to check the completion status of the Notebooks you have created for your clients. Also use this the data entered in client Notebooks, or to print reports.

Access to Tax Notebook Graphics and Sample Promotional Literature

- [Click here](#) to download web clip art that you can use to link to Tax Notebook from your website.
- [Click here](#) to view and download sample engagement letters and promotional flyers that you may use for presenting to your clients.

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