Expert PR Taxes 2015

Install and Configure
November 2016

Table of Contents

Introduction

Objective

Just as CEGsoft is dedicated to simplify the interactions between humans and technology through the creation of programs that are easy to use, this manual will guide the user to configure and work with Expert PR Taxes, in a simple and effective manner.

To make this a friendly process, we used visuals and a simple language that will help the user recognize and identify the processes needed to meet their employment goals in the set time.

Definitions

- **EPRT:** Expert Puerto Rico Taxes abbreviation.
- **Template:** Documents with instructions for converting data to the format of Expert PR Taxes.
- **Convert:** Transfer customer information of the previous tax year and convert it to the new one.
- **Import:** Transfer converted information from an Excel document.
- **Registration:** Process of activating an EPRT licenses acquired to have unlimited access to the module.
- **Files:** Documents created from the program Expert PR Taxes.

Installation

This section will guide the users to begin using and configuring the modules per their needs.

Activate your CEG Pass Account

To download EPRT, use EPRT licenses, perform electronic filing and access your CEG Pass account, the user needs to activate this account.

1. After our sales agents create your CEG Pass account, you will automatically receive an email titled **"Account Created"**. This will provide your user name and allow you to create a password. These credentials will allow you to login to your CEG Pass account.

2. Navigate to https://www.eprt.com/
3. Press the **"Log In"** link in the upper right corner of the page.
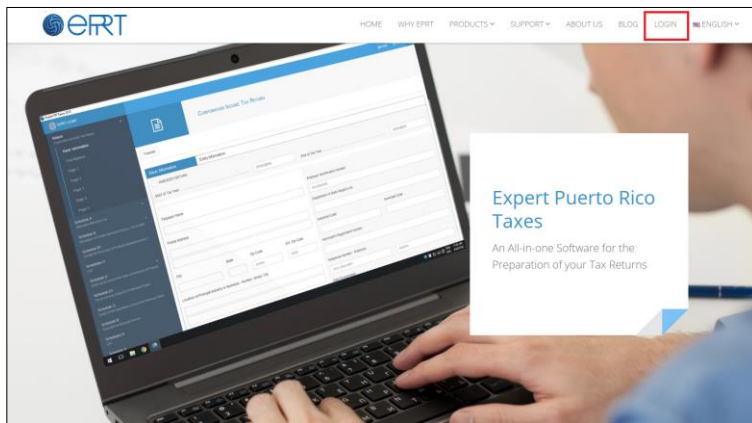
4. This will take you to the CEG Pass login page, where you can use your email and password to login.

Notes:
- Your username will always be the email address that is associated with the CEG pass account.
- We recommend that you copy and paste the temporary password into the login page due to it having mixed alphanumeric characters.

Change Your CEG Pass Password

Once you login to your account, change the temporary password to one you can easily remember.

1. Click **"My Account"** on the left menu.
2. Click **"Security Options"**.
3. On the fields on the **"Change Password"** section, write the **"Current"**, **"New"** and "**Confirmed"** password.
4. Click the **"Change My Password"** button to save your new password.

Download and Install Expert PR Taxes

To begin using the programs, the user must download and install it in the computer. To do this follow these steps:

1. Open your internet browser and go to
   https://www.cegsoft.com/CEGPass/Sales/Downloads.aspx
2. Login to your CEG Pass account.
3. Select a tax year from the list.
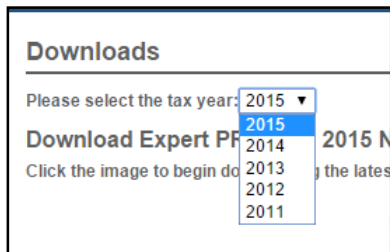
4. Click the "**Download**" link to download the online version of the installer or the **"Click here to Download"** link under **"Redistributable Full Download"** for the offline version**.**
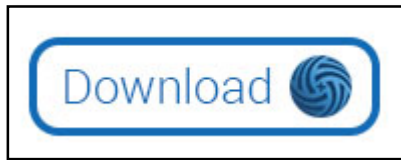
5. After the download is complete, click the **"Run"** button on the **"Open File – Security Warning"** window if prompt.
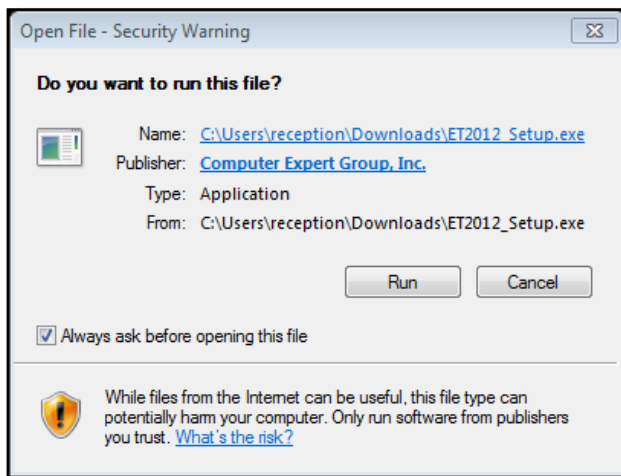

6. Click the **"Install"** button on the **"Expert PR Taxes – Install Shield Wizard"** window to install the program's prerequisites.
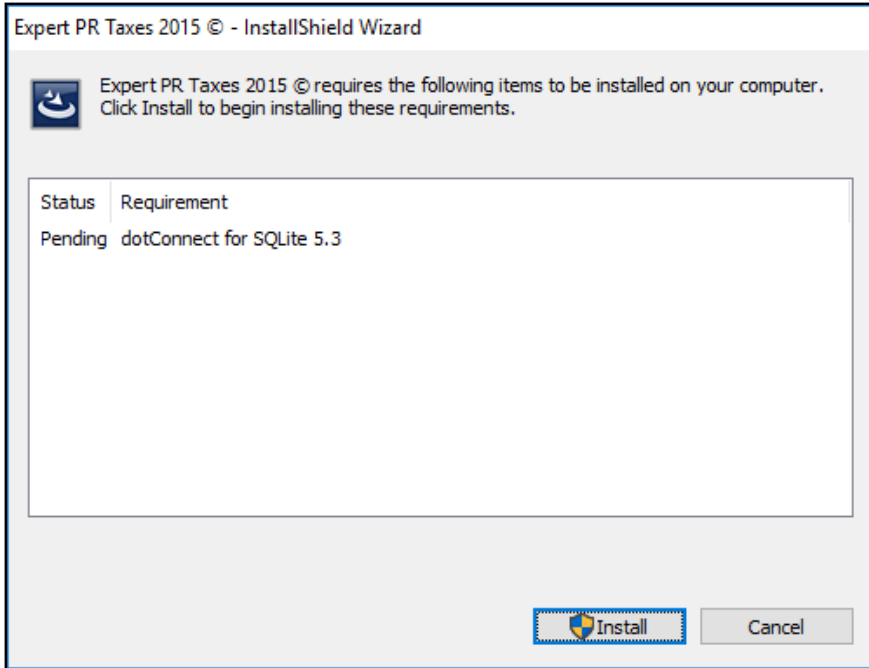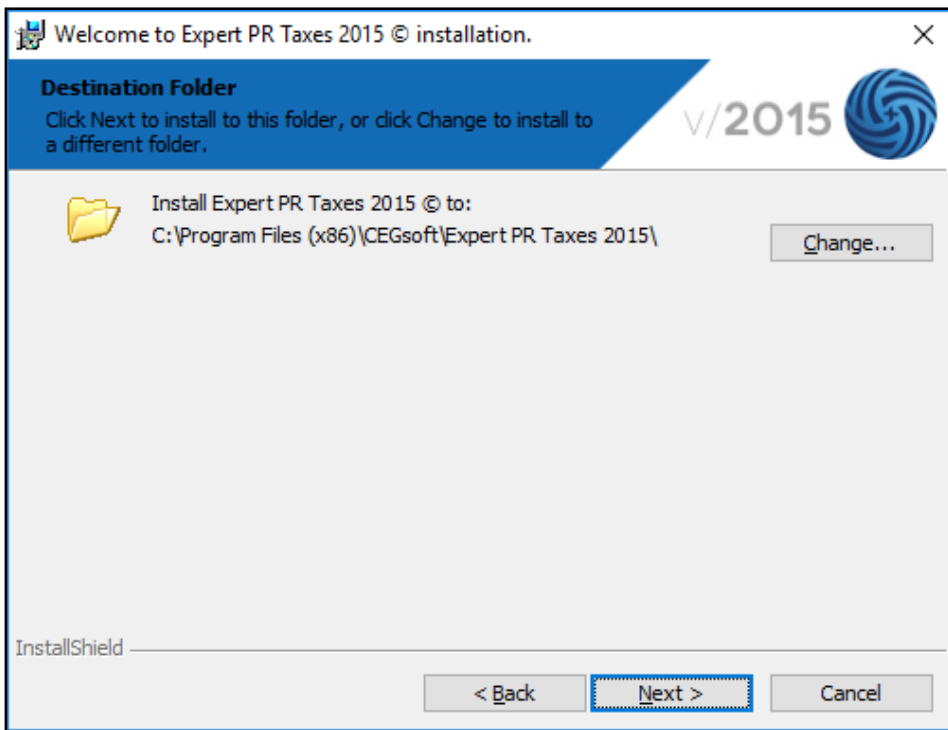
7. Once the installation of the prerequisites is done, the wizard will start downloading the EPRT program.

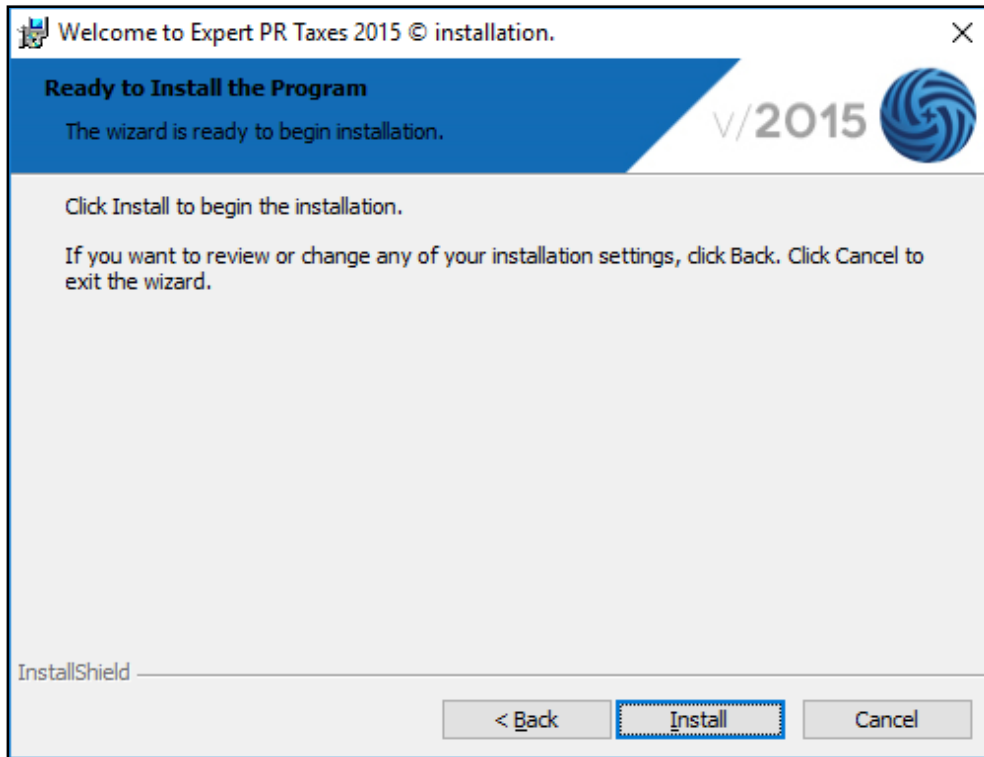8. After the download is done, click **"Next"** on the **"Welcome"** screen.

9. Select the **"I accept the terms in the license agreement"** option
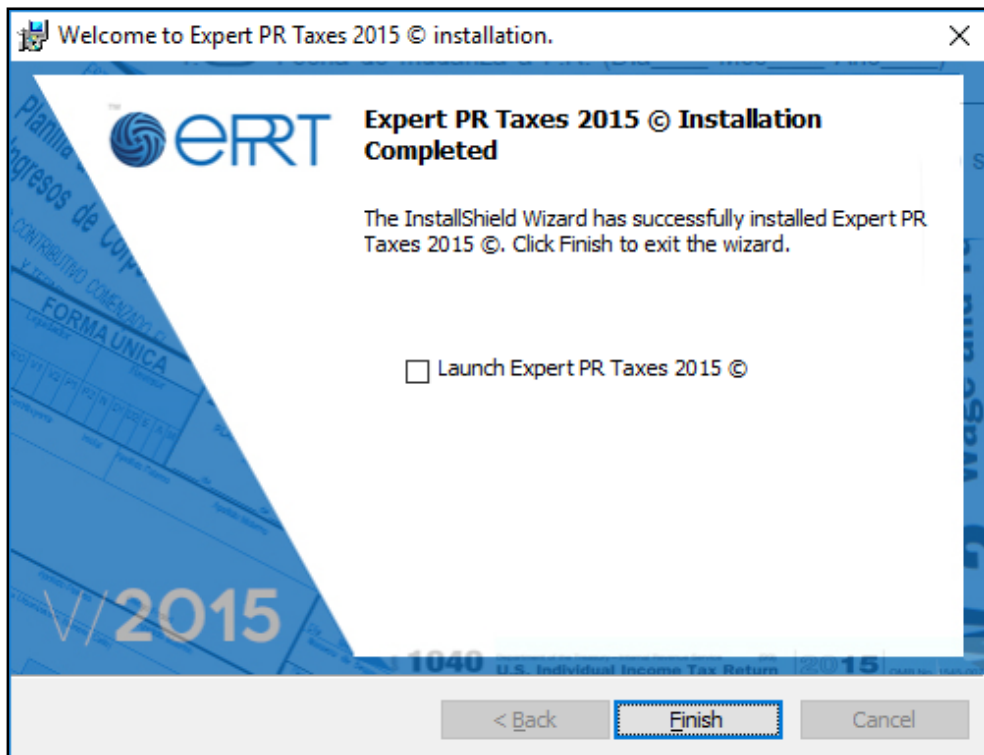
10. Click the **"Next"** button to continue.
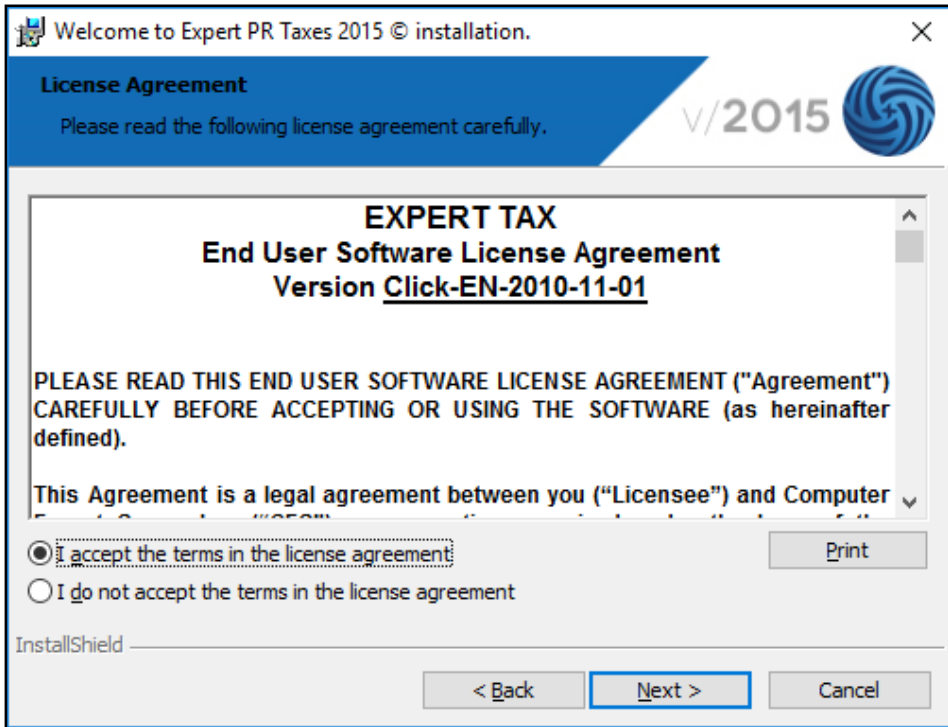
11. Click **"Next"** on the **"Destination Folder"** screen to continue.

12. Click **"Install"** to start the installation process and see the status screen.

13. Click **"Finish"** after the process is completed.

Initial Configuration Wizard

This section will help the user navigate through the **"Initial Configuration Wizard"**. It will help the user register EPRT licenses to use the modules.

Configure the Application

These steps will help the user configure the program according to the desired preferences.

1. After the installation is done Expert PR Taxes icon will appear on the desktop and the Start menu. Double click the icon to open the application.

2. Once the application loads, it will show the **"Initial Configuration Wizard"**. On the **"Welcome"** screen, **"Select the desired language"** and click **"Continue"**.
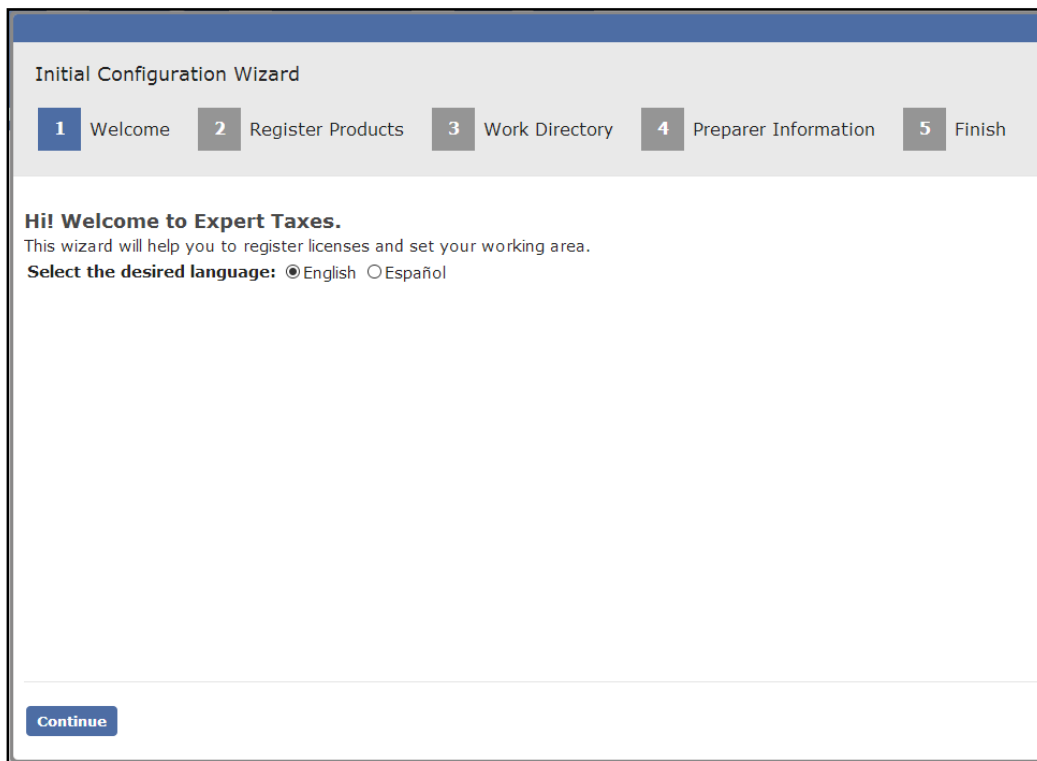
3. On the **"Register Products"** screen, enter your CEG Pass account credentials and click **"Log In"**.

4. Select a **"Tax Group"** from the list if required.
5. Check the **"I agree with the terms of the License Agreement"** option.

6. The screen will show the licenses available. Click the **"Register"** button on the right side of any license to active it. The button will grey out and change to **"Unregister"**, which means the license is active and can be unregistered if needed.

7. Click **"Continue"**.

Initial Configuration Wizard

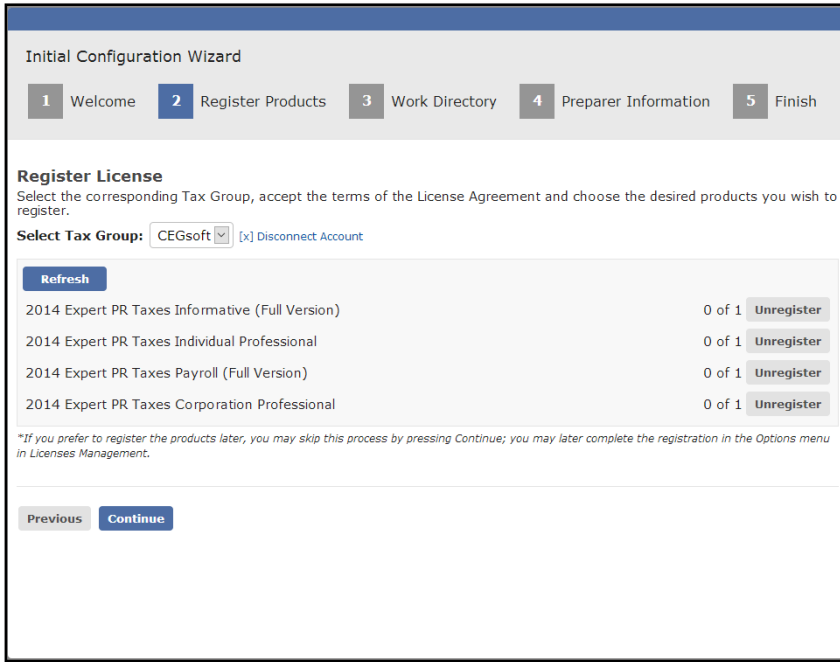| 1 Welcome | 2 Register Products | 3 Work Directory | 4 Preparer Information | 5 Finish |

Register License
Select the corresponding Tax Group, accept the terms of the License Agreement and choose the desired products you wish to register.

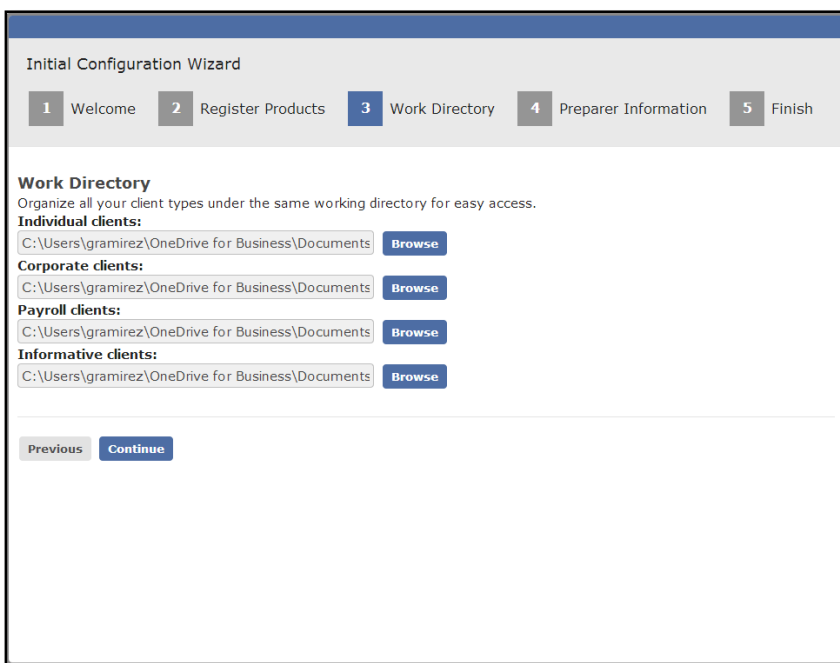**Select Tax Group:** CEGsoft [x] Disconnect Account

Refresh

2014 Expert PR Taxes Informative (Full Version)	0 of 1	Unregister
2014 Expert PR Taxes Individual Professional	0 of 1	Unregister
2014 Expert PR Taxes Payroll (Full Version)	0 of 1	Unregister
2014 Expert PR Taxes Corporation Professional	0 of 1	Unregister

*If you prefer to register the products later, you may skip this process by pressing Continue; you may later complete the registration in the Options menu in Licenses Management.

Previous Continue

8. On the **"Work Directory"** screen, click the **"Browse"** button search for the desired folder where your client files will be located if required.

9. Click **"Continue"**.

Initial Configuration Wizard

| 1 Welcome | 2 Register Products | 3 Work Directory | 4 Preparer Information | 5 Finish |

Work Directory
Organize all your client types under the same working directory for easy access.
Individual clients:
C:\Users\gramirez\OneDrive for Business\Documents Browse
Corporate clients:
C:\Users\gramirez\OneDrive for Business\Documents Browse
Payroll clients:
C:\Users\gramirez\OneDrive for Business\Documents Browse
Informative clients:
C:\Users\gramirez\OneDrive for Business\Documents Browse

Previous Continue

10. On the **"Preparer Information"** screen, enter the preparer's information on the fields provided.

11. Click **"Continue"**.

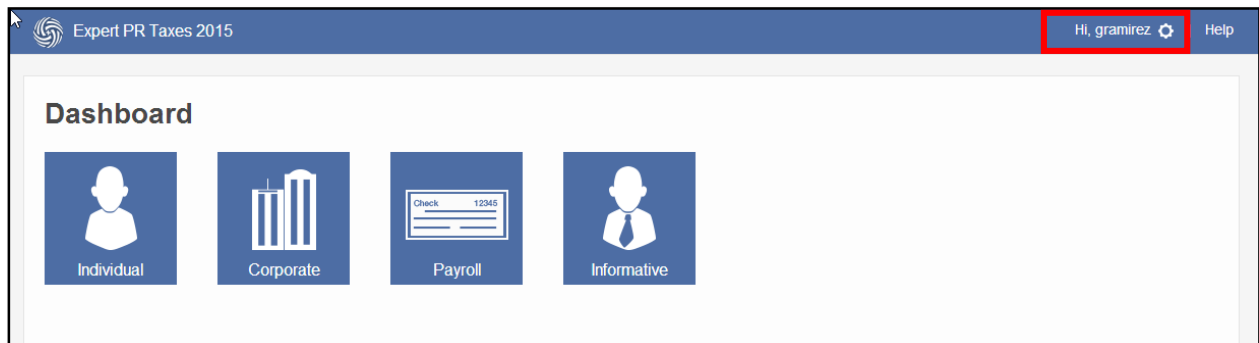12. On the **"Finish"** screen, click the **"Finish"** button to end the wizard.
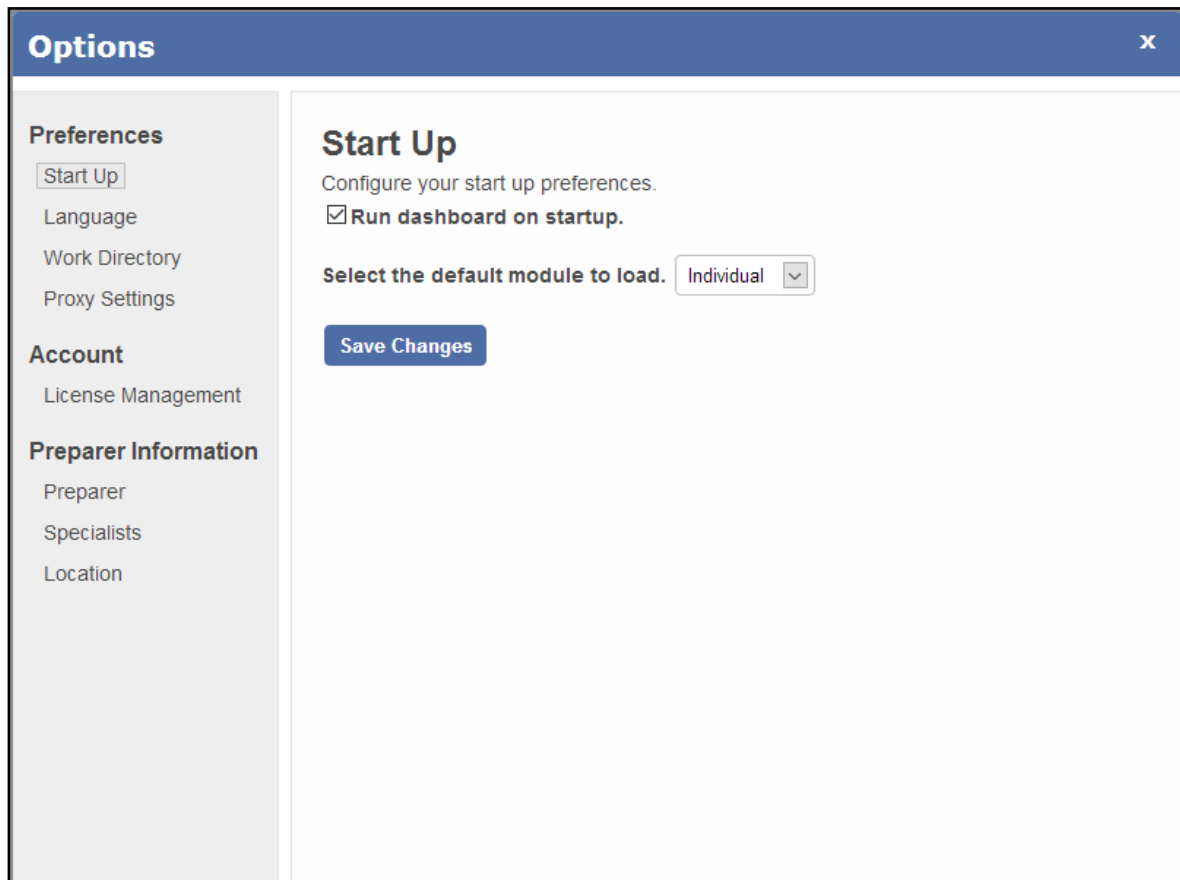
Options Menu

This section will help the user to use the EPRT options menu for further configuration of the application.

To access the menu just click the gear icon on the top right on the **"Dashboard"** screen next to the welcome message.
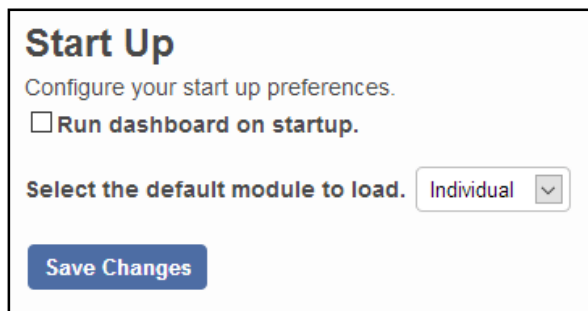

This will pop up the **"Options"** screen.

Preferences

In this section, you can configure everything regarding the user's workflow and how the application will behave.

Start Up

Here you can set how the application behaves on startup.

1. If you want to load a specific module directly on the startup and not show the dashboard, uncheck the **"Run dashboard on startup"** option.
2. **"Select the default module to load"** on the list of modules if the first option was unchecked.
3. Click the **"Save Changes"** button.

Language

Here you can change the language of the application if necessary.

1. Select the language from the options.
2. Click the **"Save Changes"** button.
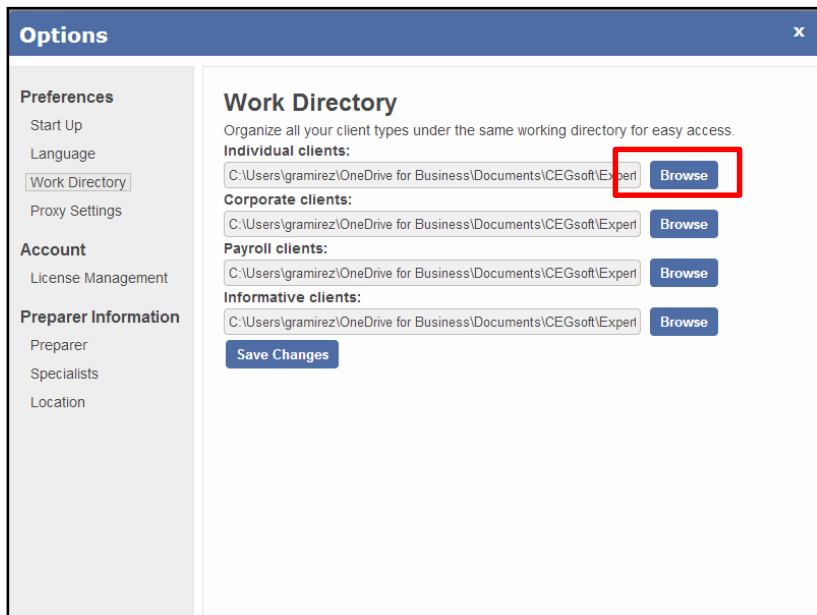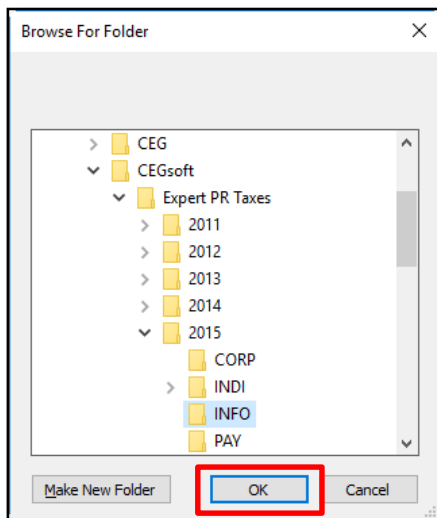
Work Directory

In this section, the user can change where EPRT reads the client files for each module.

Note: Expert PR Taxes creates a default directory on the user's "**Documents**" folder when installed. You can either keep the default directory or change it on this screen.
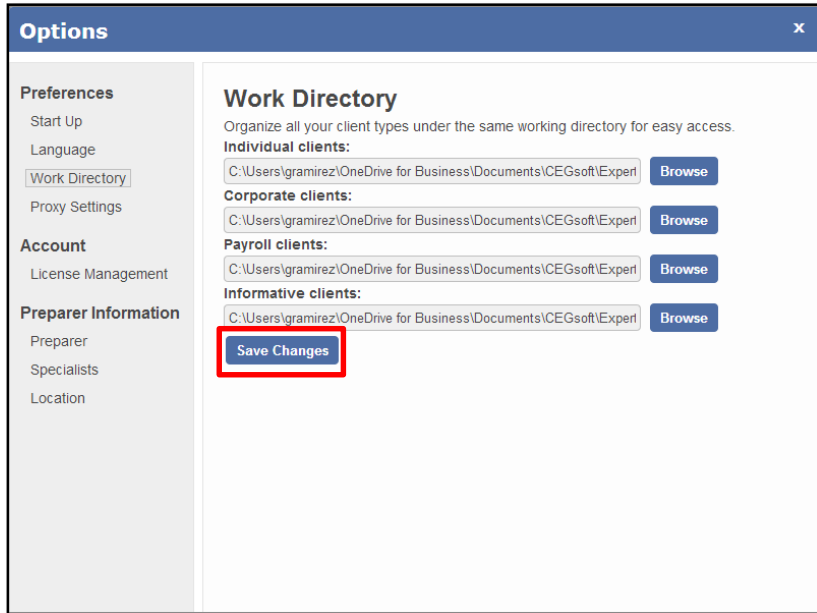
1. Click the **"Browse"** button on the module to change.

2. On the **"Browser for Folder"** window, locate the folder where the client files are to be stored and select it.
3. Click **"Ok"**.

4. After changing the directories, click **"Save Changes"** to apply the changes.
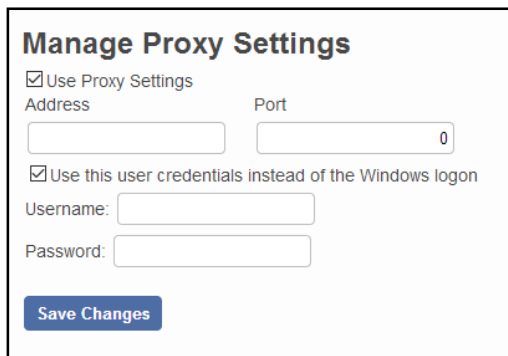

Proxy Settings

If the user's Company uses a Proxy on the network, the user can set it in this section. The company's IT department can provide the user with the specific values of the settings.

To change the Proxy settings:

1. Click on the **"Use Proxy Settings"** option to enable it and display the fields.
2. Fill the **"Address"** and **"Port"** fields.

3. If the proxy credentials are different from the user's Windows logged in account, check the **"Use this user credentials instead of the Windows logon"** to make the **"Username"** and **"Password"** fields visible and enter the values.
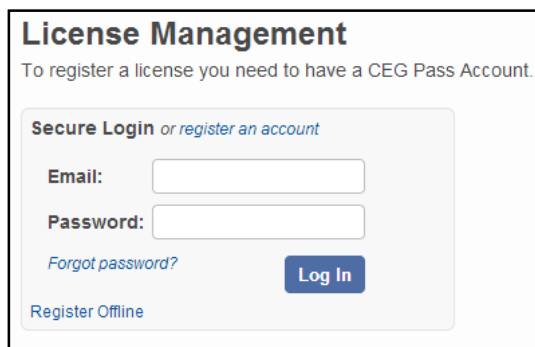4. Click **"Save Changes"** to apply the changes.

Account

The Account section lets the user manage the licenses for the application.

License Management

In this section, the user can manage the licenses for the EPRT modules. There are two options for registering the licenses.

Option 1- Register Online

1. On the **"License Management"** screen, enter the user's CEG Pass credentials in the **"Secure Login"** box. These will be the user's email and password.
2. Click the **"Login"** button.

3. Select a Tax Group from the list if required.
4. Check the **"I agree with the terms of the License Agreement"** option.

5. The screen will show the licenses available. Click the **"Register"** button on the right side of any license to active it.

6. The button will grey out and change to **"Unregister"**, which means the license is active and can be unregistered if needed.

Option 2 - Register Offline

This option requires the user to contact our support team so they can provide a valid activation code.

1. Click the **"Register Offline"** on the bottom of the **"Secure Login"** box.

2. Check the **"I agree with the terms of the License Agreement"** option.

3. On the **"Register Offline"** screen, notice the **"Computer Key"** and provide it to the CEGsoft support representative.
4. Select a module to register from the list.
5. Enter the **"Activation Code"** provided by the CEGsoft support representative.
6. Click **"Register"**.

Preparer Information

In this section the user can set or change the preparer and specialist information.

Preparer

Here you can set or change the information regarding the preparer firm or company that will be displayed in the returns and forms through the application.

1. Select **"Preparer"** from the side menu on the **"Options"** screen.
2. Enter the requested information on the fields available.
3. Click **"Save Changes"**.

Specialists

In this section, the user can add one or more accounting specialists that are working for the firm or Company. This information is needed in some of the returns and forms through the application.

To add a Specialist:

1. Select **"Specialists"** from the side menu on the **"Options"** screen.
2. Click the **"Add Specialist"** button to add a specialist line.
3. On the new line, enter the **"Name"**, **"PTIN"** and **"Registration No."** as it applies.
   a. **PTIN**: Preparer Tax Identification Number provided by the IRS.
   b. **Registration No.**: Specialist number provided by the Department of Treasury of Puerto Rico.
4. If you need to delete one of the lines, click the **"Remove"** link on the right of the specialist line.
5. Click **"Save Changes"** to apply the changes.

Location

In the section, you can select the location of the file where the preparer and specialist information is stored. This is helpful for large firms or companies with multiple users granting them the ability to share a single file.

To change the **Default Directory**:

1. Select **"Location"** from the side menu on the **"Options"** screen under **"Preparer Information"**.
2. Click **"Browse"**.

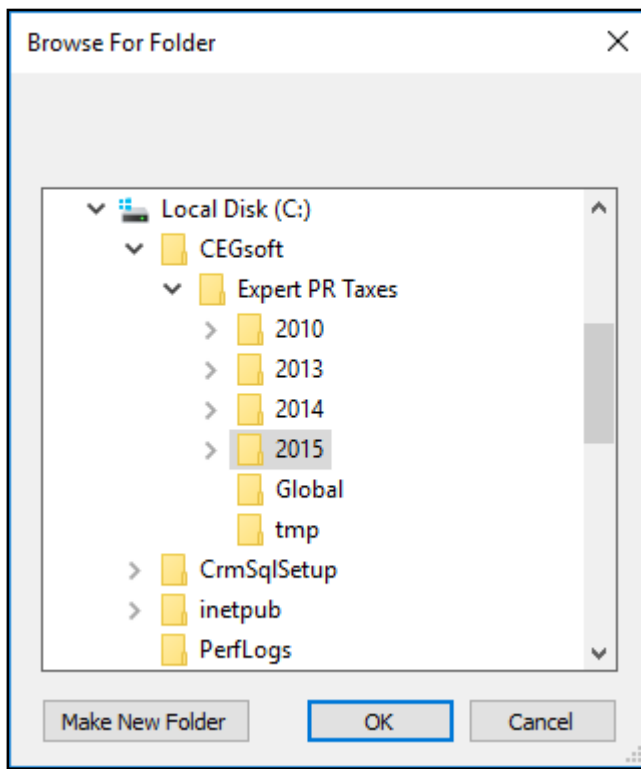3. Locate the folder where the file is stored and click **"Ok"**.

4. Click **"Save Changes"** to apply the changes.