

Installing the efile Interchange Software

Installing from CD

Place the CD into the CD-Rom tray. The installation wizard should automatically start once the CD-Rom tray has closed.

Installing from Download

After visiting the website link to download the software, you will automatically be prompted with a download window. Depending on what operating system you are using (Windows 98, 2000, XP, ect.), you will have the option to **Open/Run** or **Save**.

• Open/Run: This option will download the software and run the installation when it's completed.

• Save: This will download the installation file to a specified location on your computer. When it is completed, you will need to locate the installation file and run it manually.

Note: When choosing to Open/Run using Windows XP Service Pack 2 or later, a warning may appear stating that the **Publisher could not be verified**. This warning message can be bypassed by clicking **Run**, which will resume the installation.

Open Fi	le - Security V	Varning	X
The pu run thi	ıblisher could n s software?	not be verified. Are you sure you want to	
	Name: Set	:up.exe	
	Publisher: Un	known Publisher	
	Туре: Арр	plication	
	From: C:\	Documents and Settings\maria\Desktop	
		Run Cancel	כ
🗹 Alwa	ys ask before ope	ening this file	
8	This file does no publisher, You s <u>How can I decid</u>	it have a valid digital signature that verifies its should only run software from publishers you trust. de what software to run?	

Installation

Once the installation wizard has started, move through the installation process by clicking **Next**. Be sure to read each screen carefully before moving on.

Welcome Screen

This screen will let you know what version of the software you are installing.



License Agreement Screen

Please read the agreement before selecting "I Accept the Agreement".

j🕏 Setup - E-File Interchange	_ 🗆 🗙
License Agreement Please read the following important information before continuing.	
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.	
Notice to User: This is a contract. By installing this software you accept all the terms and condition of this agreement.	s A
This Profit Developers Incorporated ("PDI") End User License Agreement accompanies the E-File Interchange 2008 product and related explanatory material ("Software"). The term "Software" also shall include any upgrades, modified versions or updates of the Software licensed to you by PDI. Please read this Agreement carefully. At the end, you will be asked to accept this agreement and continue to install or, if you do not wish to accept this Agreement, to decline this	s
 I accept the agreement I do not accept the agreement 	
< Back Next >	Cancel

Destination Location Screen

You will have the option to choose where the *e*file Interchange[™] program will be installed to. The default directory (C:\EFILE09) may need to be changed depending on where you intend to install the software. Typically it is best to save it to the default location.

🔂 Setup - E-File Interchange
Select Destination Location Where should E-File Interchange be installed?
Setup will install E-File Interchange into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
CAEFILE08 Browse
At least 25.0 MB of free disk space is required.
< Back Next > Cancel

Select Components Screen

The Federal and State components come standard with the program so they will automatically be selected, whether they are being e-filed through PDI or not. If you are filing business returns (940/941/1065/1120) through PDI, make sure the Business Returns component is selected. If you are doing Bank Products through PDI, make sure you select the appropriate bank from the list.

15 Setup - E-File Interchange			
Select Components Which components should be installed?			
Select the components you want to install; clear the components you do not v install. Click Next when you are ready to continue.	want to		
Federal and State Returns	21.1 MB		
Business Returns	44.6 MB		
Sank Products			
Refund Advantage Products			
Test Data			
🗸 🔽 Chase			
🔤 🔲 River City			
Current selection requires at least 69.5 MB of disk space.			
< Back Next >	Cancel		

• Start Menu Folder

We recommend this is left as the default of **Profit Developers**.

🥵 Setup - E-File Interchange
Select Start Menu Folder Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
Profit Developers Browse
< Back Next > Cancel

· Additional Tasks Screen

This screen will ask if you would like to create a desktop icon for your machine. We recommend that you do create an icon and select next.

🔂 Setup - E-File Interchange	
Select Additional Tasks Which additional tasks should be performed?	
Select the additional tasks you would like Setup to perform while installing E-File Interchange, then click Next. Additional icons: ✓ Create a desktop icon ✓ For all users ④ For current user	
< Back Next >	Cancel

· Install Screen

This screen will show what components are being installed. Select **Install** when you are ready for the installation process to begin. Once it has completed you will have the option to launch efile Interchange[™] or simply select finish.

🔂 Setup - E-File Interchange	
Ready to Install Setup is now ready to begin installing E-File Interchange on your computer.	
Click Install to continue with the installation, or click Back if you want to review or change any settings.	
Destination location: C:\EFILE08	
Setup type: Custom Installation	=
Selected components: Federal and State Returns Business Returns Bank Products Chase Bank Products	
l est Data Chase	
< Back Install	Cancel

· E-file Interchange Configuration Screen

Once the installation wizard has completed, you will have the option to enter your information to configure the software. At this point please enter the username and password you have been assigned by PDI. Also, please select your Tax Preparation software from the dropdown menu. Once completed select Save in the bottom right hand corner of the screen.

This will complete the installation of the *e*file Interchange Software.

🖌 E-File Interchange Config	uration			
Enter your settings now if you're ready to begin sending your retu If you'd like to send some demu returns first click Skip. You can always configure E-File Intercha from the Edit->Configuration ma	e urns. O PDI ange PD enu.	EFIN Username I Password	123456 12345601 password	
	Tax Software C:\Prowin08\08E	Intuit/ProSer TaxWare Demo Intuit/ProSer Intuit/ProSer	ies ies Network ies	
Skip		Saxon/Saxor Other Intuit/ProSer	n Tax ies Basic	

*e*file Interchange uses Adobe Reader® to utilize printing capabilities. To download this free software, please visit: <u>http://www.adobe.com/products/acrobat/readstep2.html</u>

Note: PDI does not currently offer a network version of the efile Interchange software. If you will be efiling from multiple computers please contact us, so your office can be setup accordingly.