



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.

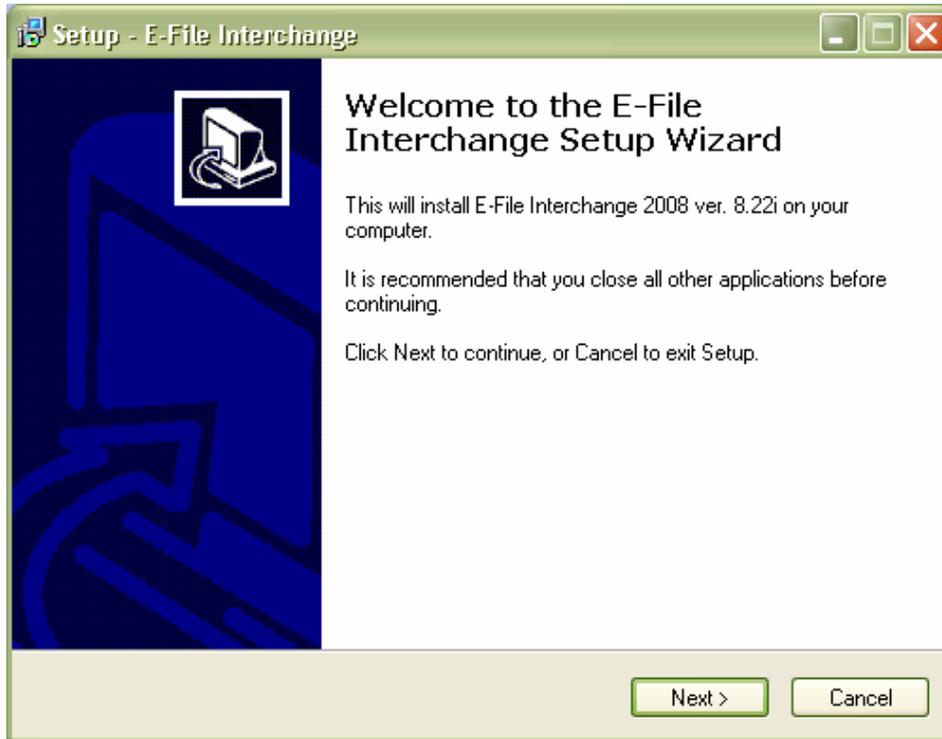


Installation

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

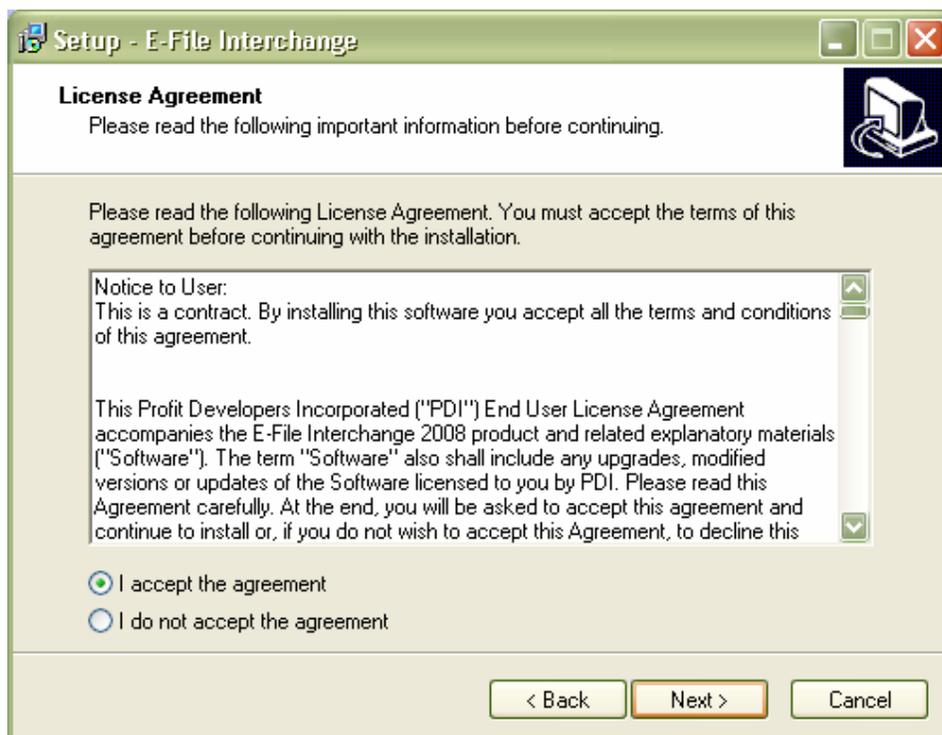
· Welcome Screen

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



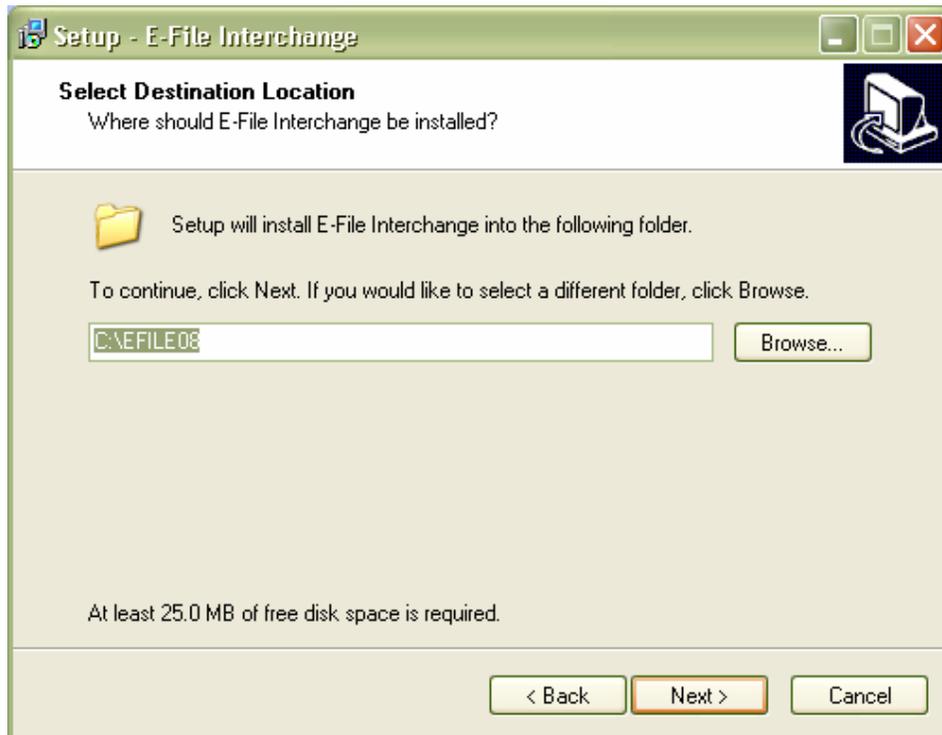
· License Agreement Screen

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



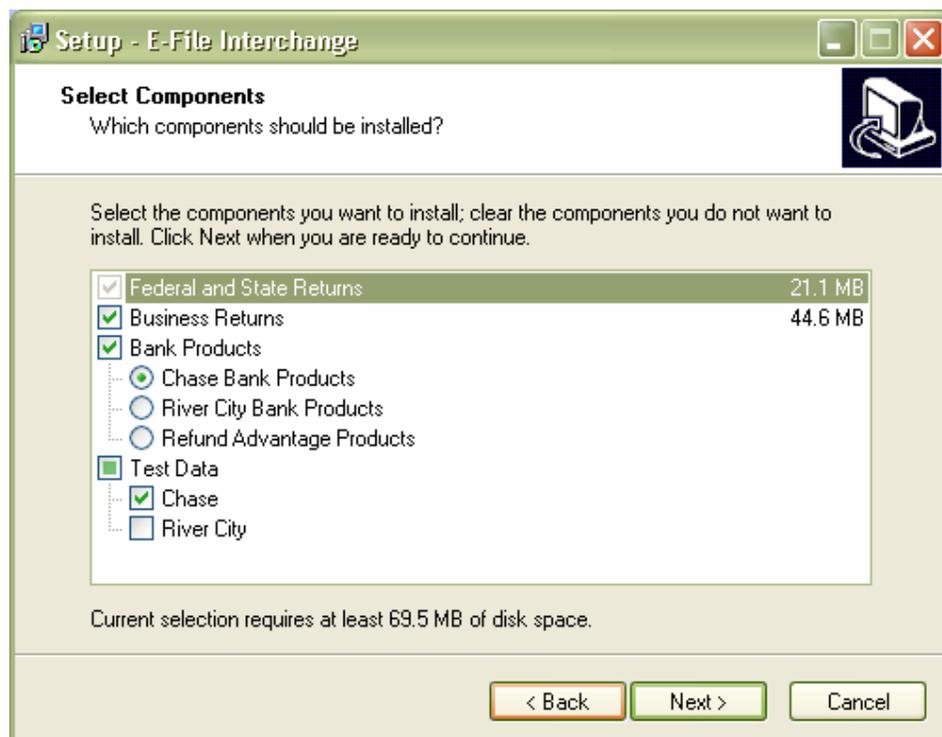
• Destination Location Screen

You will have the option to choose where the efile 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.



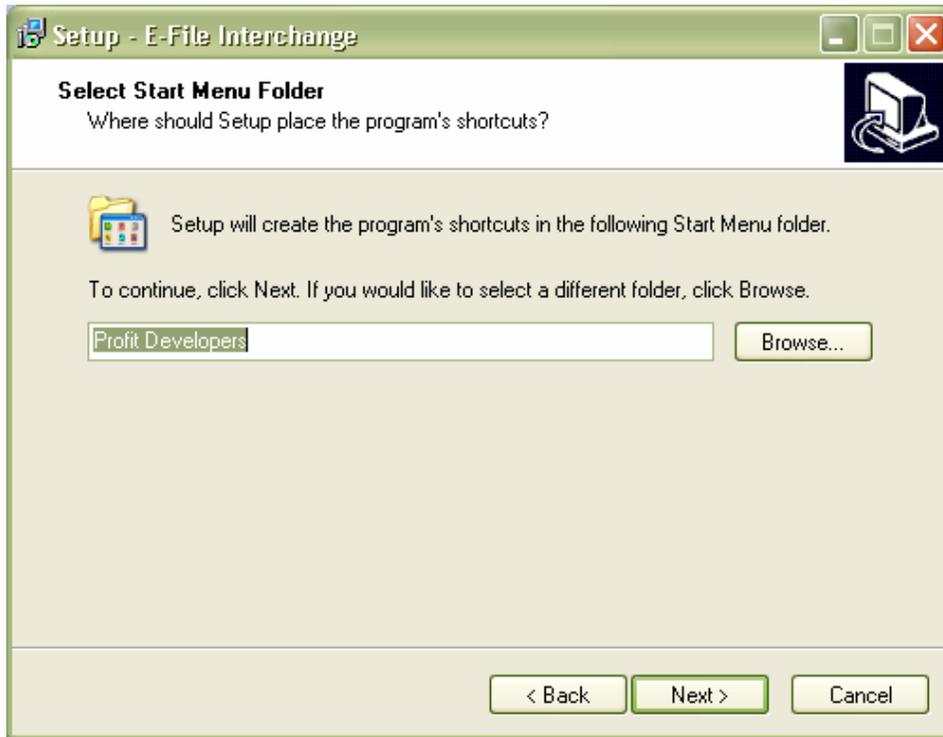
• Select Components Screen

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.



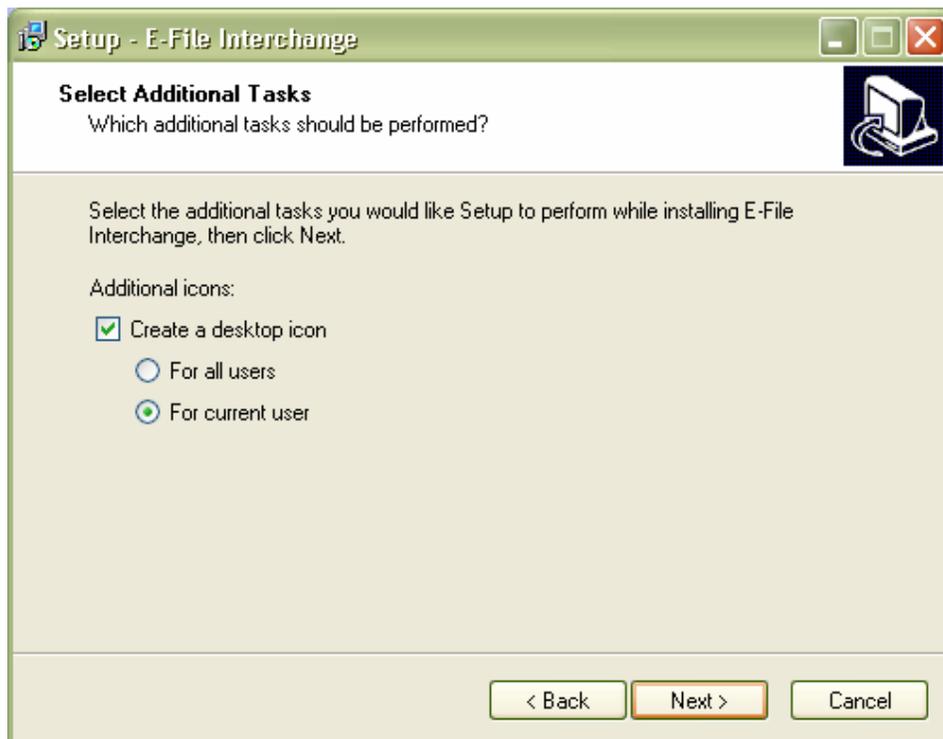
• **Start Menu Folder**

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



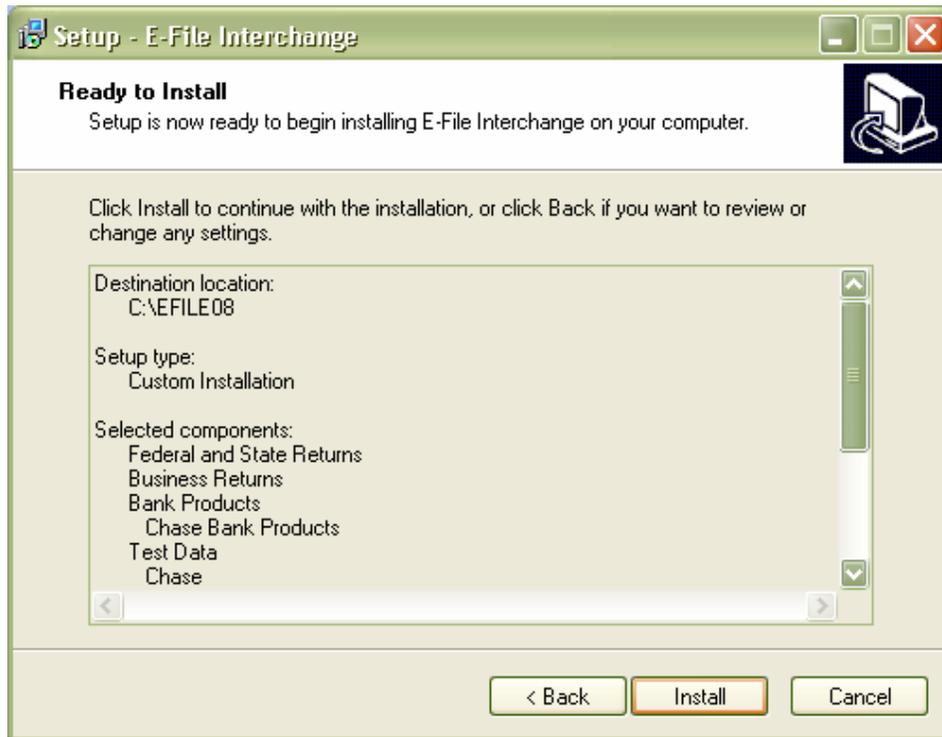
• **Additional Tasks Screen**

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.



• **Install Screen**

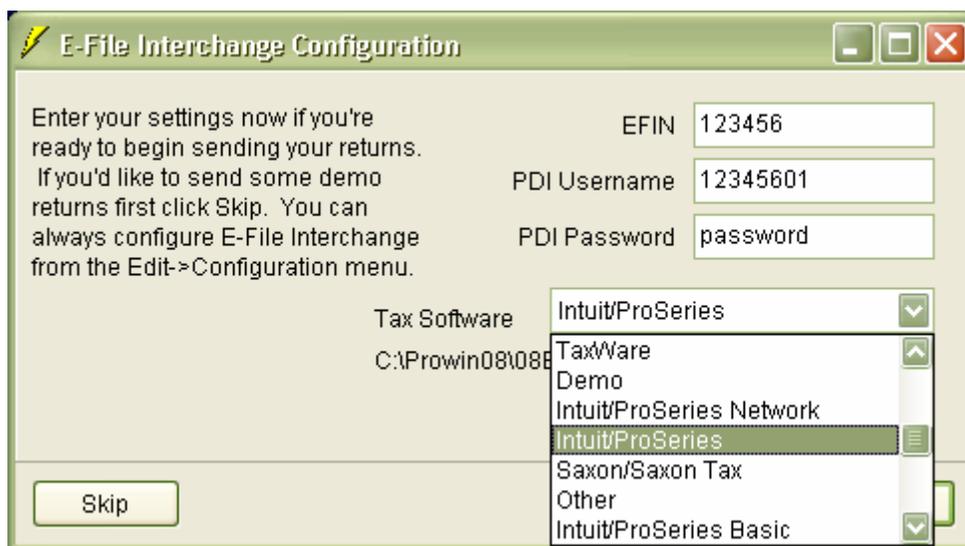
This screen will show what components are being installed. Select **Install** when you are ready for the installation process to begin. Once it has completed you will have the option to launch efile Interchange™ or simply select finish.



• **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 efile Interchange Software.



eFile Interchange uses Adobe Reader® to utilize printing capabilities.

To download this free software, please visit: <http://www.adobe.com/products/acrobat/readstep2.html>

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