

Taxprep Forms

Troubleshooting

2017 Versions

Client filter and customized diagnostic templates offered with the Troubleshooting Memos

To assist you in identifying clients that could be affected by the described problems, a downloadable client filter and customized diagnostic template is associated with most *Troubleshooting Memos*. These templates allow you to display a diagnostic in the returns that have tax situations that were the subject of a *Troubleshooting Memo* and provide access to a list of clients affected by the problems described.

Installing the client filter and diagnostic template

To find the predefined folder for customized client filters or diagnostics, proceed as follows:

1. Launch *Taxprep*.
2. On the **Tools** menu, click **Options and Settings**.
3. Under **Options**, click **File Locations**.
4. Verify the predefined location for the filters and diagnostics. After the installation, the default location is usually the following: **My Documents\CCH\Taxprep Forms 2017\Filter and Diagnostics**.
5. Copy the downloaded file to this location.
The client filter will be available in the Client Manager, while the diagnostic will display in the relevant returns.

Note: The table below lists all of the client filter templates and diagnostics, which allows you to download them separately, depending on the troubleshooting memos and FAQs that relate to you. To download all templates in a single operation, click the **Download all templates** button, then copy all zipped files into the folder **My Documents\CCH\Taxprep Forms 2017\Filter and Diagnostics**.

[Download all templates](#)

Publication	Problem	Affected Version	Corrected Version	Identifier (to download the client filter and diagnostic template, if applicable)
Week of June 17, 2018	The network version of the Taxprep Help has not been displaying since the last Windows 7 and Windows 10 updates	Network versions	Version 2018 1.0	TF2017-002
Week of January 7, 2018	Transmission - Display of error message “The configuration is incomplete for transmitting this type of slip. Complete the mandatory fields.”	Versions 2017 1.0 and 2017 1.1	Version 2017 2.0	TF2017-001

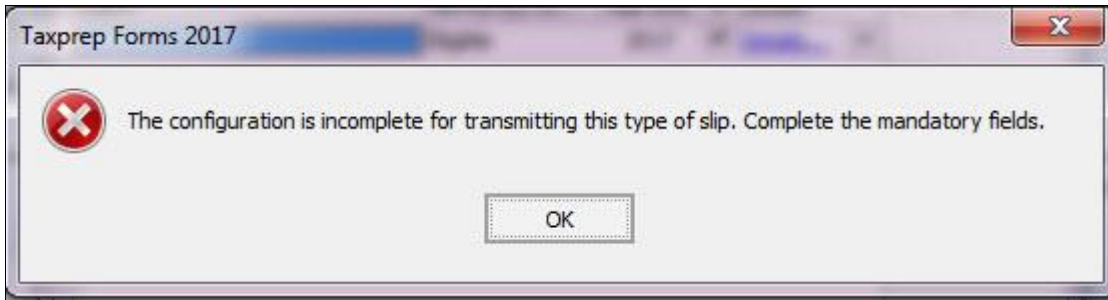
Electronic transmission

Troubleshooting memo TF2017-001

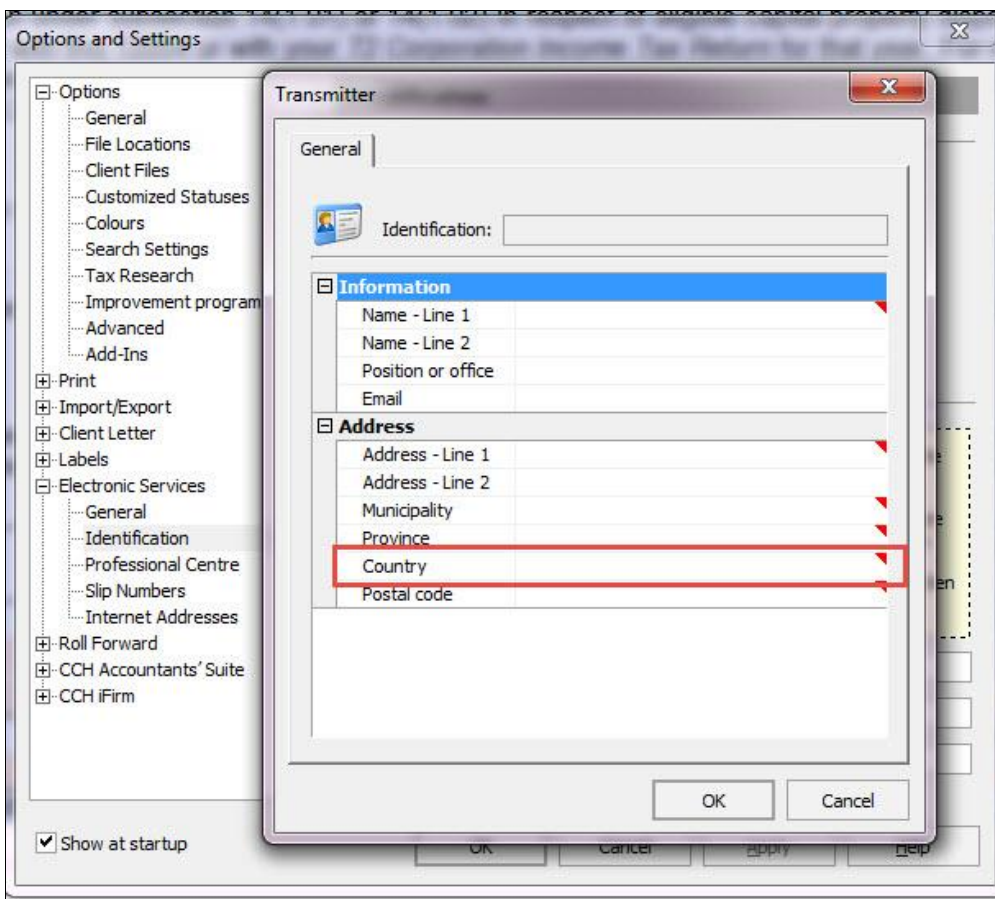
Transmission - Display of error message “The configuration is incomplete for transmitting this type of slip. Complete the mandatory fields.”

Problem:

When the user tries to transmit, the following error message displays:



This error message displays because the information relating to the transmitter’s identification is incomplete in the **Identification** pane of the "Electronic Services" section of the options and settings. It occurs because the value in the “Country” field is not saved correctly when retrieving the configuration.



Solution:

To correct the problem, proceed as follows:

1. In the **Tools** menu, select **Options and Settings**.
2. Under **Electronic Services**, click **Identification**.
3. Click the button of the "Transmitter" field to open the **Transmitter** dialog box.
4. If the "Country" field is empty, click the field to display the list of countries and select the country that you want to define.
5. Click **OK** to save the change. **Note that you must perform this step even if no change has been made to the "Country" field.**
6. Click **OK** in the **Options and Settings** dialog box to save the change.

Important: Perform these steps in order for the information to be saved correctly when the next versions of *Taxprep Forms* are installed.

Network version

Troubleshooting Memo TF2017-002

The network version of the *Taxprep* Help has not been displaying since the last Windows 7 and Windows 10 updates

Problem:

Three updates performed by Microsoft on May 8, 2018, had repercussions on the use of Help files when the latter are used from a network location. Therefore, the Help no longer displays correctly if you are using a Windows 7 or Windows 10 operating system.

Solution:

To use the *Taxprep* Help, copy your network CHM Help files to your local disk. However, note that the contextual Help will no longer be available with this solution.

This situation will be corrected in future version of *Taxprep*.