Web Reports

*A Detailed Guide to Web Reporting*

What is Web Reports?

Web Reports is an Online Reporting Tool for your tax office that gives you access to financial and other data pertaining to your business. This covers everything from Electronic Filing, Client Retention, Audit Trails, Taxes to Go, Bank Product information and more.

These reports are customizable, allowing you to fully manipulate the data and even export the information to Microsoft Excel. This guide will cover the different reports available and how to find the information you are looking for.

How to Get to Web Reports
From inside Account Hub:

From the main page of your Account Hub, select the App Switch square (the square in the top right corner of your Account Hub) then select Web Reports from the list. This will take you directly to the Web Reports home page.
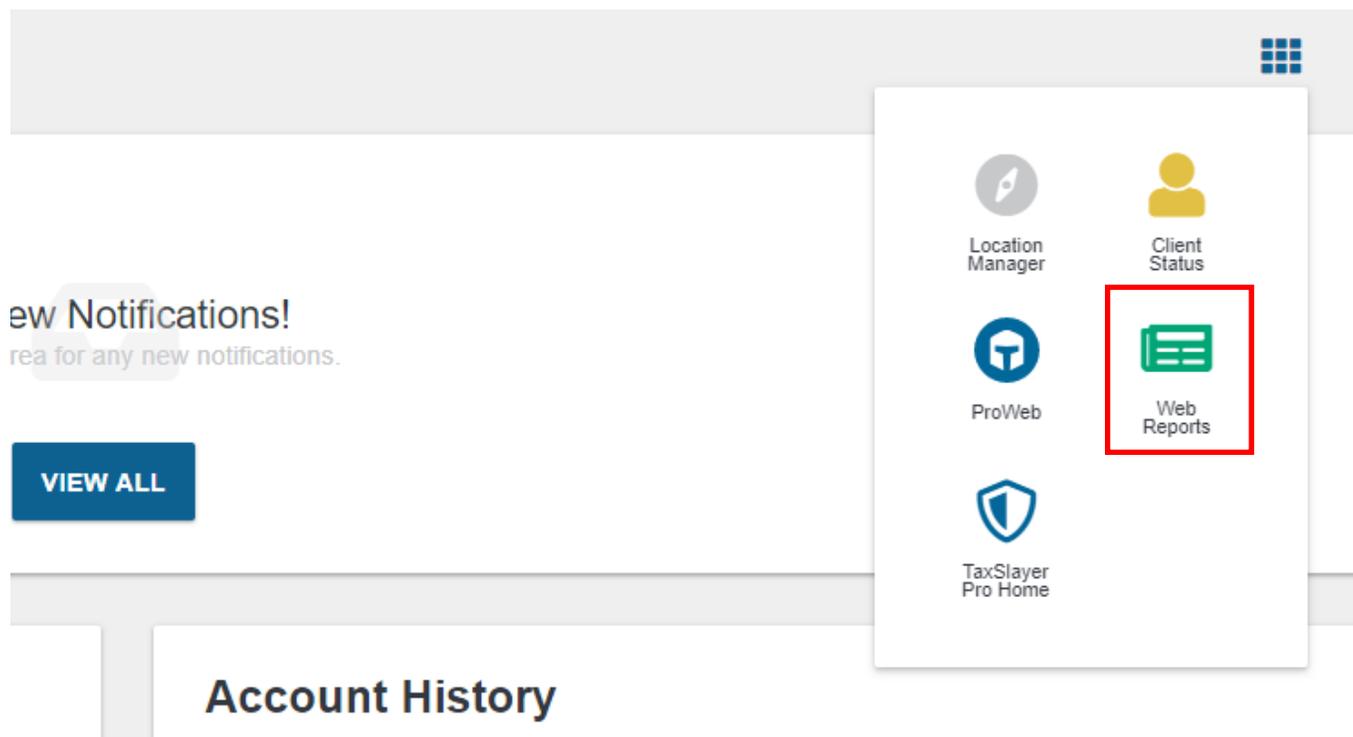
OR

From the Website:

You can go directly to the website: https://www.taxstatusnow.com/reports/web

This will take you to a login screen where you will use the same credentials as your Account Hub to login.

After logging in to Web Reports you will land on this page:

Different Reports in Web Reports

There are over 20 reports included within Web Reports to engulf any data you may need for your business. These reports include:

Summary Reports: These reports will populate a summary of information and statistics based on the selection

- *Federal Return Summary:* Reports all information and statistics for each filed Federal Return

- *State Return Summary:* Reports all information and statistics for each filed State Return

- *State Detail Summary Report:* Reports transmission data for each filed State Return

- *Summary Report:* Reports all information and statistics for a particular group or EFIN

- *Summary Report By Date:* Reports all information and statistics for a particular group or EFIN by date

- *Electronic Filing Summary:* Reports information and details for each individual transmission (federal and state separately)

Pro Web Reports: These reports will populate return information created and sent in TaxSlayer ProWeb

- *Pro Web Returns - Return Report:* Reports basic information for every return created in ProWeb

- *Pro Web Returns - Detailed Return Report:* Reports detailed information for every return created in ProWeb

- *Pro Web - Audit Report:* Reports all returns with EIC, Schedule C and C-EZ and Schedule F

Production Detail Reports: These reports will populate production information for your office and EFINs

- *Office Production Detail Reports - Electronic:* Reports detailed information on Electronic Returns

- *Office Production Detail Report - Paper:* Reports detailed information on Paper Returns for ProWeb only

Return Reports: These reports will populate return information for returns that have been submitted

- *Submitted Returns:* Reports on all Submitted and Bank Return statistics. This report will show a cumulative sum of all returns submitted organized by Office. Also, the Submitted Returns report is only useful until Hub Testing begins. It reports on returns collected during stock piling. As soon as the returns have been sent to the IRS, you will need to run the Federal Return Summary Report for data on them.

- *Returns Awaiting Acknowledgements:* Reports on all returns waiting for an acknowledgement

- *Extension Report:* Reports on all filed extensions

Customer Reports: These reports are for those with multiple offices and sub EFINs

- *Bank Approvals:* Reports bank application statuses by EFIN

- *Customer Contact Report:* Reports customer contacts at additional locations

- *Customer Order Code Report:* Reports all EFIN validation codes for sub offices

Miscellaneous Reports: These reports will populate information for miscellaneous categories

- *Taxes to Go Report:* Reports users and information regarding the Taxes to Go app imports

- *Bank Invoice Report:* Reports invoicing data for all ancillary products

- *Text Report:* Reports return data used to send texts

Saved Reports: These reports are customized reports you create

- *View Saved Reports:* View and export custom reports

How to Run a Report

To run a report in Web Reports, simply click on the report title you want to view. After you have chosen which report to run, you will be taken to this screen:

From this page you set up the parameters for your report. This includes:

- **Date Type / Start and End Date**: These filters give you the ability to choose a date range for the reports and a date type. The date types include Transmit Date, Ack Date, and Funded Date.

- **Tax Year**: This allows you to select which tax year will populate in the report. Currently, Web Reports allows the user to select back to year 2016.

- **Return Type**: This section allows you to select returns based on if they have a bank product or not. Return types include: All Returns, Bank Returns, or Non-Bank Returns.

- **Group Selection**: This feature allows multi-office owners to pull reports from all their offices within a group at once.

- **EFIN Selection**: This filter allows the user to choose between just one EFIN or multiple EFINs.

After you have set the parameters for the report, you are ready to click run. There are two ways to run the report– Run and Run for Export:

Run Report

This option will generate a detailed list of all the information the report contains. You will still be able to export the report after running it.

Run Report For Export

This option will generate the first 10 lines of information and the rest will need to be exported.

How to Customize and Filter a Report

Once you run the report, the following page will allow you to manipulate and customize the report to fit your needs. Each report in Web Reports has a **Column Selection** feature. Inside this feature are different categories that are featured within the report:
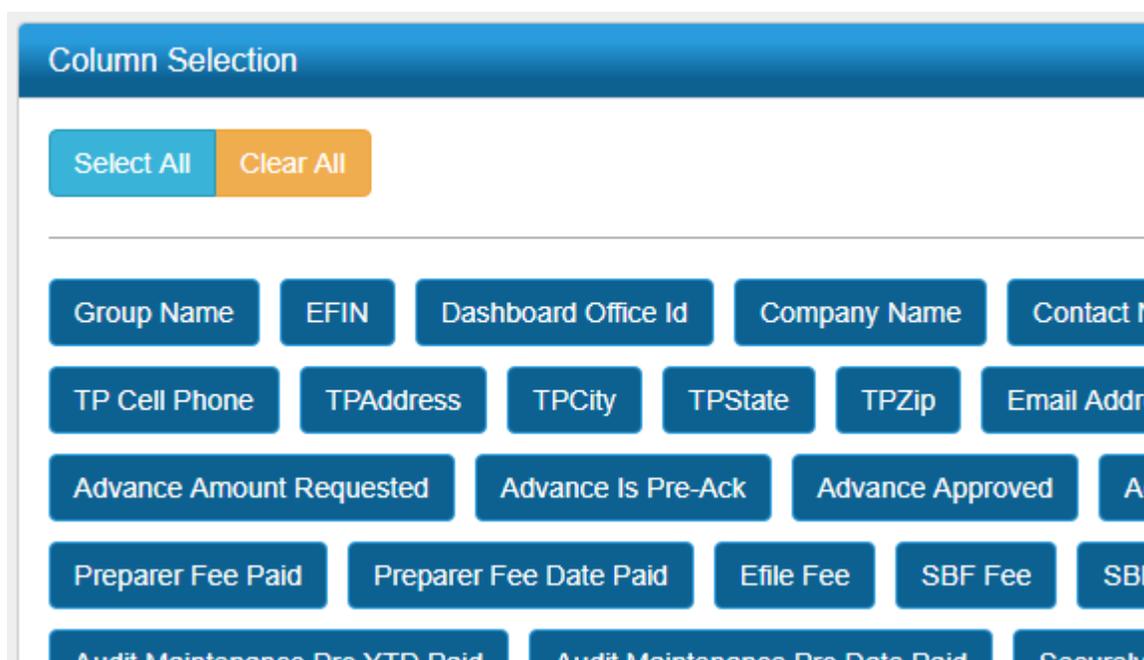
Each of the items featured in the report can be toggled ON / OFF simply by clicking on them. When clicked, the ones removed from the report will show in RED and the ones remaining in the report will show BLUE:

Items are removed and added real-time to the report, meaning you will not have to refresh the page to see the changes.
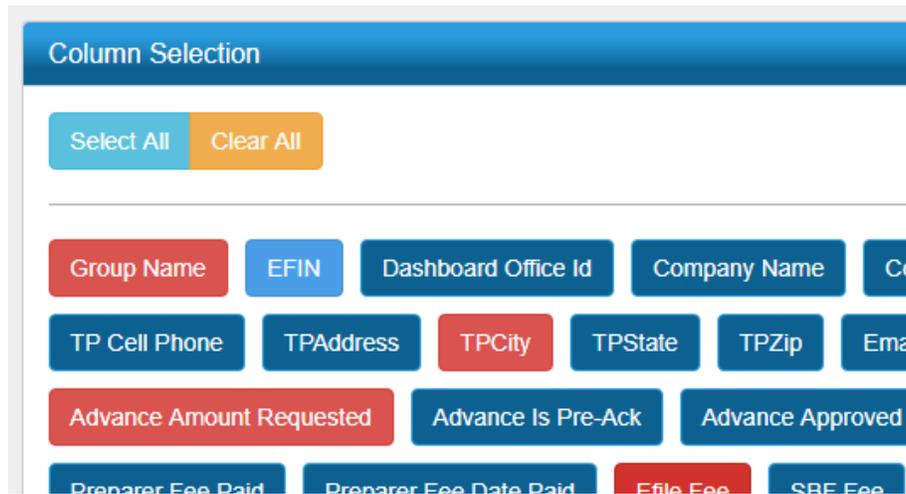
Once you have made your Column Selections, your report will look like this:

Drag a column and drop it here to group by that column

Company Name	Preparer	Last Four	Product	Transmit Date	Prep Fee	AGI	SCHEDULEC
TaxSlayer Inc	1	0002	Desktop	1/31/2018	$0.00	$0.00	NO
TaxSlayer Inc	995	0003	Online	1/26/2018	$302.00	$74,348.00	NO
TaxSlayer Inc	995	0507	Online	4/25/2018	$2.00	$31,774.00	YES
TaxSlayer Inc	995	1002	Online	2/10/2018	$250.00	$42,305.00	NO
TaxSlayer Inc	995	1111	Online	2/2/2018	$34.00	$25,000.00	NO
TaxSlayer Inc	995	1122	Online	2/10/2018	$117.00	$30,151.00	NO
TaxSlayer Inc	995	1234	Online	2/7/2018	$12.00	$25,000.00	NO
TaxSlayer Inc	995	1374	Online	2/23/2018	$550.10	$23,332.00	NO
TaxSlayer Inc	995	2100	Online	3/30/2018	$-8.00	$90,000.00	NO
TaxSlayer Inc	995	2222	Online	2/10/2018	$0.00	$12,000.00	NO
TaxSlayer Inc	995	2222	Online	1/17/2018	$300.00	$30,000.00	NO
TaxSlayer Inc	995	2236	Online	3/6/2018	$34.00	$35,000.00	NO
TaxSlayer Inc	995	3333	Online	2/7/2018	$300.00	$40,000.00	NO
TaxSlayer Inc	995	3693	Online	2/22/2018	$32.00	$73,407.00	NO
TaxSlayer Inc	995	4321	Online	1/18/2018	$3.00	$25,000.00	NO
TaxSlayer Inc	995	4545	Online	5/10/2018	$200.00	$40,000.00	NO
TaxSlayer Inc	3	6498	Desktop	5/31/2018	$100.00	$44,025.00	NO
TaxSlayer Inc	995	6666	Online	5/1/2018	$200.00	$40,000.00	NO
TaxSlayer Inc	995	6789	Online	5/22/2018	$100.00	$50,000.00	NO
TaxSlayer Inc	995	7777	Online	4/27/2018	$200.00	$30,000.00	NO
TaxSlayer Inc	995	8282	Online	1/17/2018	$0.00	$35,000.00	NO
TaxSlayer Inc	995	8888	Online	5/14/2018	$300.00	$42,000.00	NO
TaxSlayer Inc	995	8888	Online	5/24/2018	$200.00	$40,000.00	NO
					Sum:$3,528.1	Sum:$1,122,5	

Please Note: Any category with monetary values will automatically total at the bottom of the report unless the Run for Export option was selected.

After you have made your choices from the Column Selection, you will then be able to filter the report. To filter the report by the categories, simply hover over the title and click the down arrorw that appears:

EFIN	▼	Company Name	Last Four	P

This will bring up a menu for you to choose how to filter the data:

Company Name ▼	Last Four	Product	Tra
TaxSlayer Inc	A↓ Sort Ascending		
TaxSlayer Inc	Z↓ Sort Descending		
TaxSlayer Inc	A×ᶻ Remove Sort		
TaxSlayer Inc	Group By this column		
TaxSlayer Inc	Remove from groups		
TaxSlayer Inc	Show rows where:		
TaxSlayer Inc	contains ▼		
TaxSlayer Inc			
TaxSlayer Inc	And ▼		
TaxSlayer Inc	contains ▼		
TaxSlayer Inc			
TaxSlayer Inc	Filter Clear		
TaxSlayer Inc			

In addition to filtering, you can also sort the different categories into groups. For example, if you are looking for a report to show how many returns each preparer in your office created, you can create a group for preparers. To create the groups, you will hold down the mouse over the column category you want to group, and drag it up to the grey area that says "Drag a column and drop it here to group by that column" like so:

p it here to group by that column	Preparer		
y Name	Preparer	Last Four	Product	Transm

Preparer ✕			
EFIN	Company Name	Preparer	Last Four
▸ **Preparer: 1 (1)**			
▸ **Preparer: 995 (22)**			
▸ **Preparer: 3 (1)**			
▸ **Preparer: 999999 (2)**			
▸ **Preparer: 116546 (1)**			

You can drag up as many columns as you need this way to further filter your report.

Once you have the groups created, you will be able to see all of the data sorted by that column.

How to Export a Report

If you want to further manipulate the report, or perhaps just want to save a copy of it, you will want to **Export** the report. This can be done by clicking the Export button at the top right of the page:

Clicking Export will download a CSV file of the current Report to your local machine:

From here, you can open the Report in Microsoft Excel to further modify.

How to Save a Report

If you would like to save the modify report you created to run it again another time, you can do this by clicking **Save Report** in the top right of the page.

This will bring up a pop-up for you to name the saved report. This report will now show under the Saved Reports option on the main page of Web Reports.