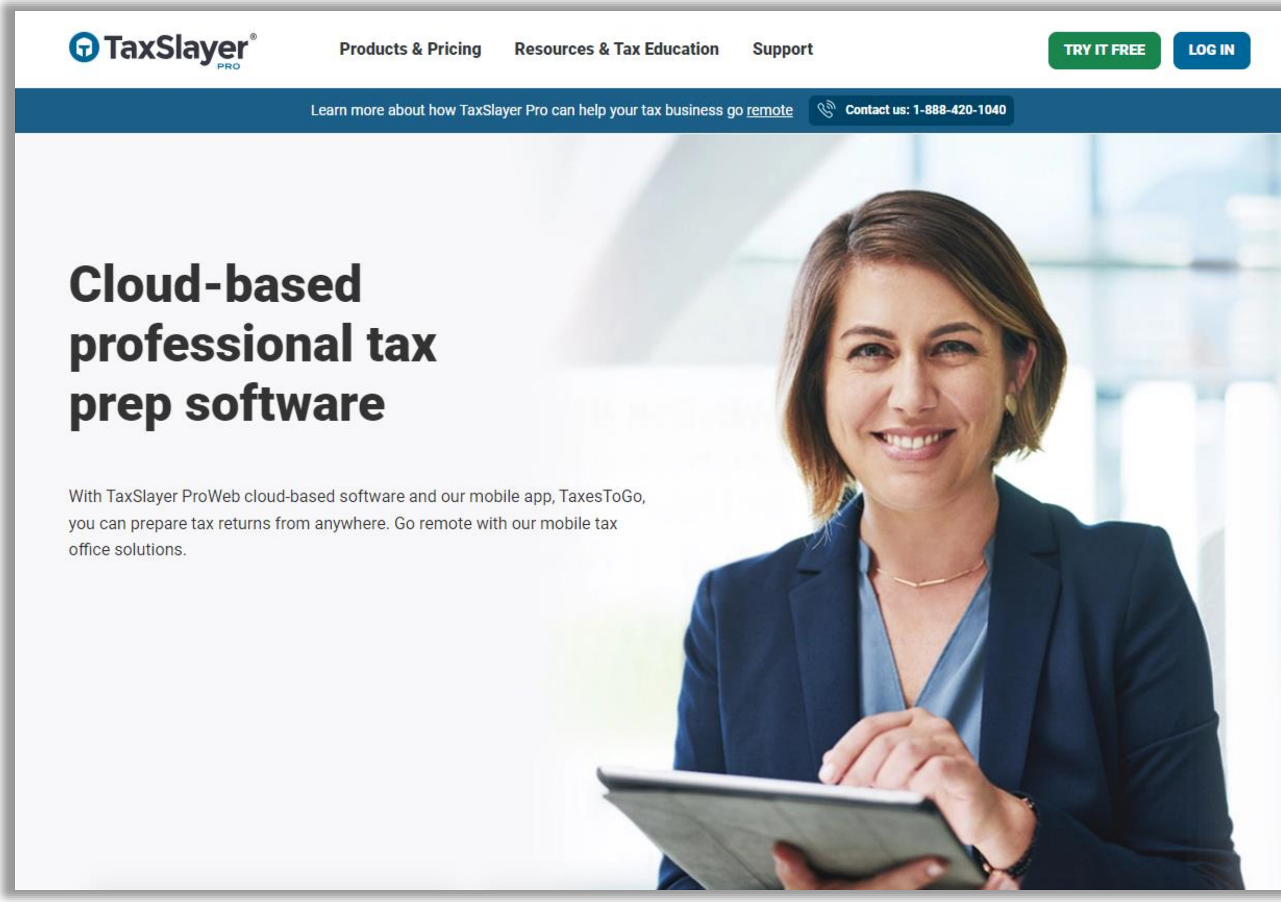
Account Hub Basics for Affiliates

Contents

Welcome to Account Hub

TaxSlayer works with Affiliates to customize our program to fit your needs. Account Hub is the primary resource for your tax business. You can stay up to date on alerts, configure company information, complete banking enrollment, and manage your locations. From Account Hub you can customize the branding for your Taxes to Go app, access Web Reports and web-based Client Status. Throughout this document you will find links to knowledgebase articles. These are articles designed to make using TaxSlayer Pro even easier.

Your location's individual access to Account Hub can be tailored to your business model. Employees can be granted anything from total access to none at all.



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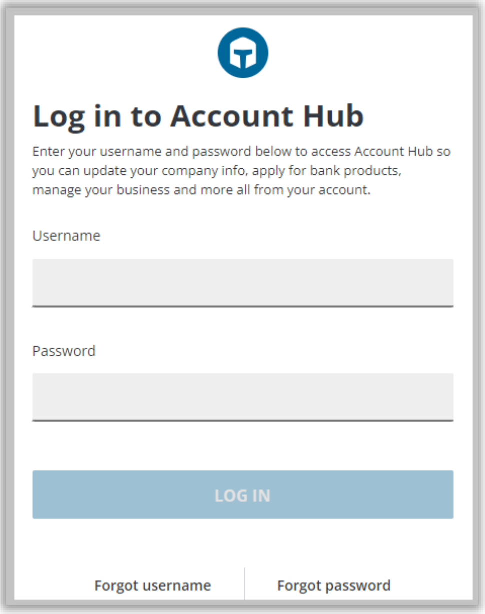
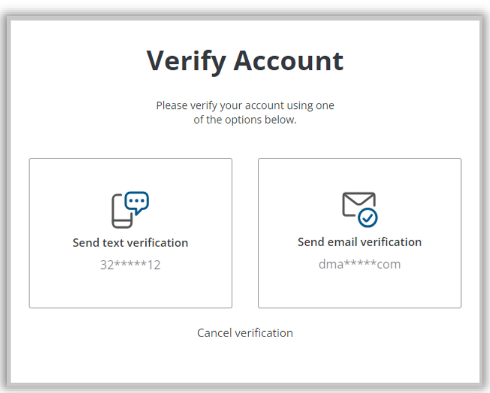
Logging In

New clients will receive an email from Tax Status Now with their Activation Code. You will create a unique username and password to be used to log in to Account Hub.



Multi-Factor Authentication is implemented as additional security. The first method is your username and password. The second method is a security code. Authentication can be done via text or email. Click on the method you prefer. Enter the code into the dedicated field and click **Verify.**



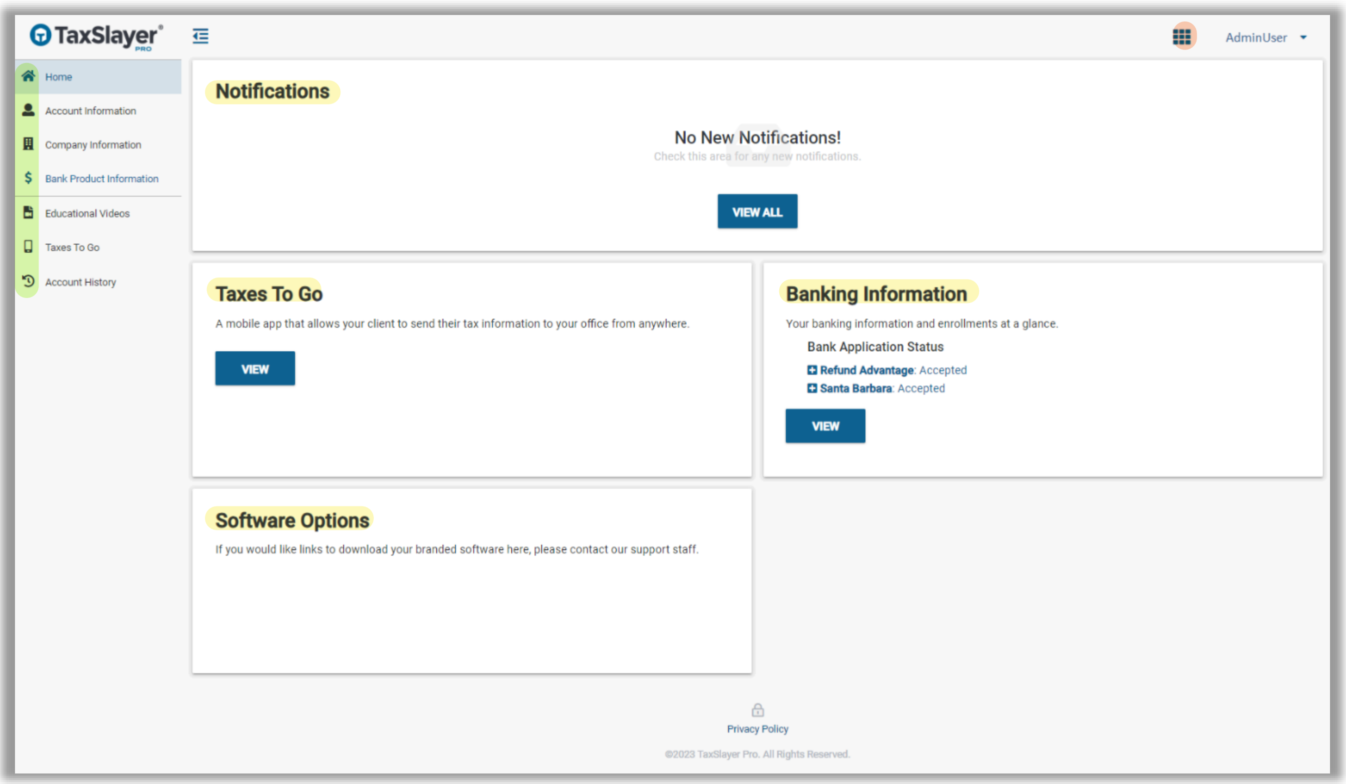
[Forgot Username or Password]

If you have forgotten your username or password, select the Forgot option. Usernames will be emailed, and passwords can be reset with verification. Detailed instructions can be found by clicking on the link above.

Home Page Overview

The cloud-based nature of Account Hub means you can work from anywhere with an internet connection. Whether working from home, in a co-working space, or on the go, you can securely access and manage offices, banking, access Web Reports and web-based Client Status without being tied to a physical office.

The Account Hub home page consists of four sections for easy navigation. The **Sidebar** with links to features and resources. The **App Switcher,** that provides access to Location Manager, Web Client Status, Web Reports, and the TaxSlayer ProWeb Website. **Support Tools** is accessed by a drop-down arrow for tools or signing out of Account Hub. And the **Hub Cards**, are quick link tiles that can be arranged to preference.



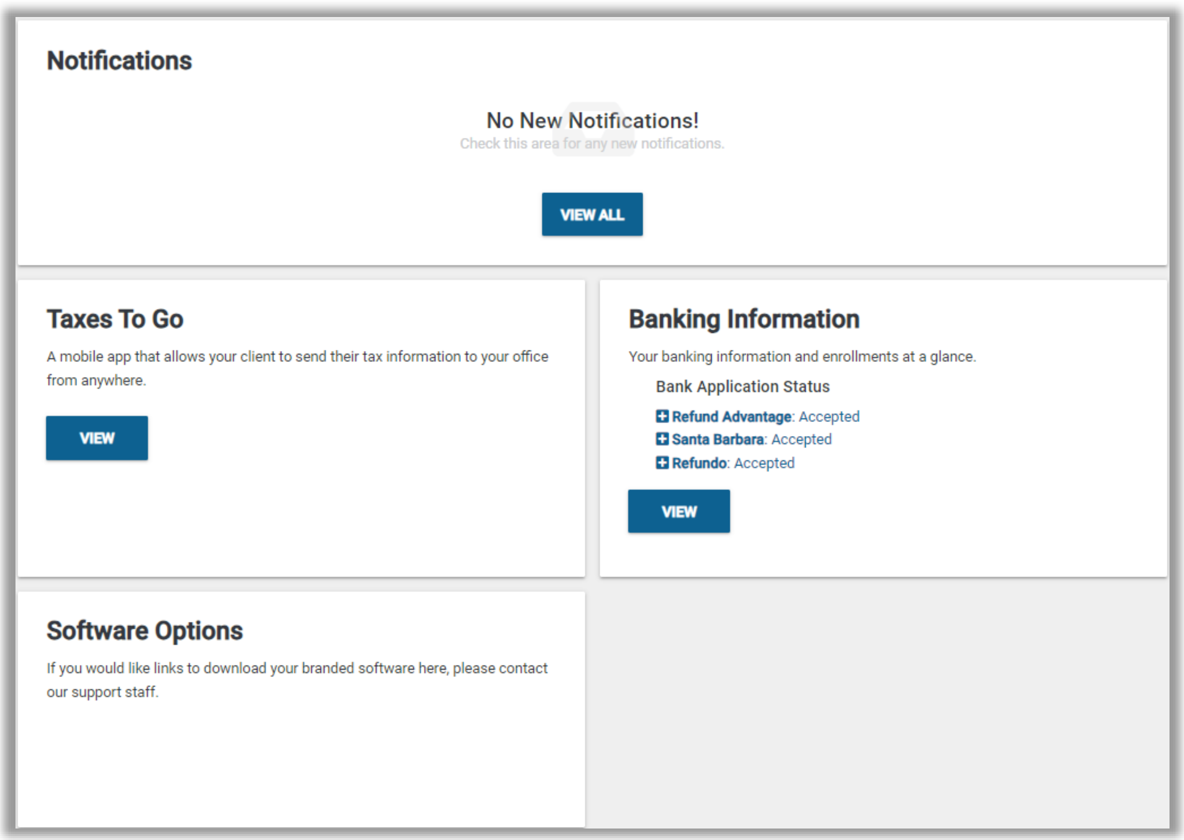
The Hub Cards

Hub Cards gives quick access to information pertaining to different aspects of your TaxSlayer Pro software.

Notifications: This card displays notifications pertaining to your Account Hub. These action items will display in red and indicate incomplete account information. You can select the View All button to view previously dismissed notifications.

Taxes To Go: This card links to configuration of the branded Taxes To Go app.

Banking Information: This card links to your bank applications. Here, you can configure or review the status of your applications.



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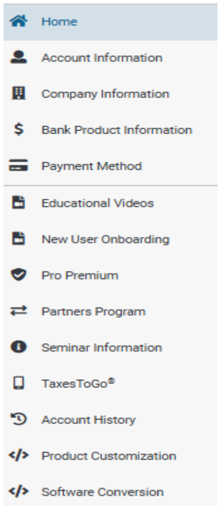
The Sidebar

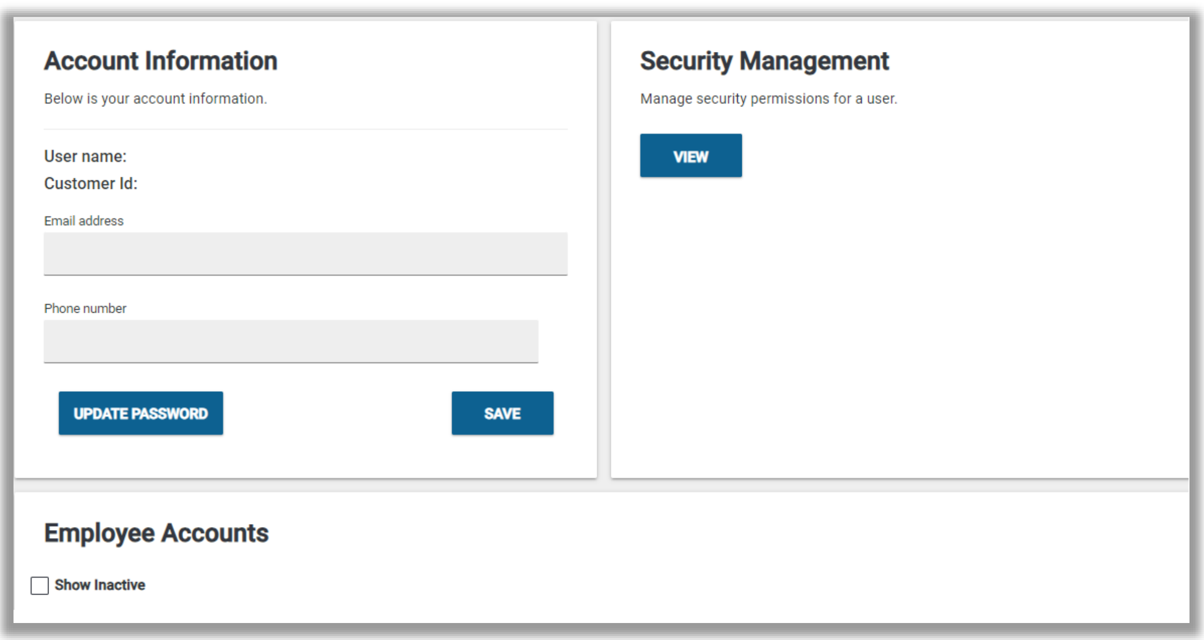


Located on the left side of the screen the Sidebar gives you quick access to configuration items and additional resources listed below.

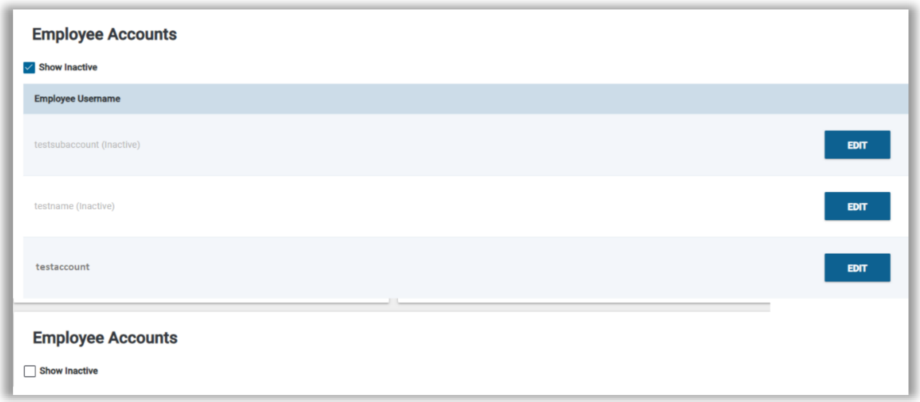
Account Information

Account Information Card: The username, email address and phone number listed here are for your Multi-factor Authentication. For information on how to update your MFA visit **this** knowledge base article.

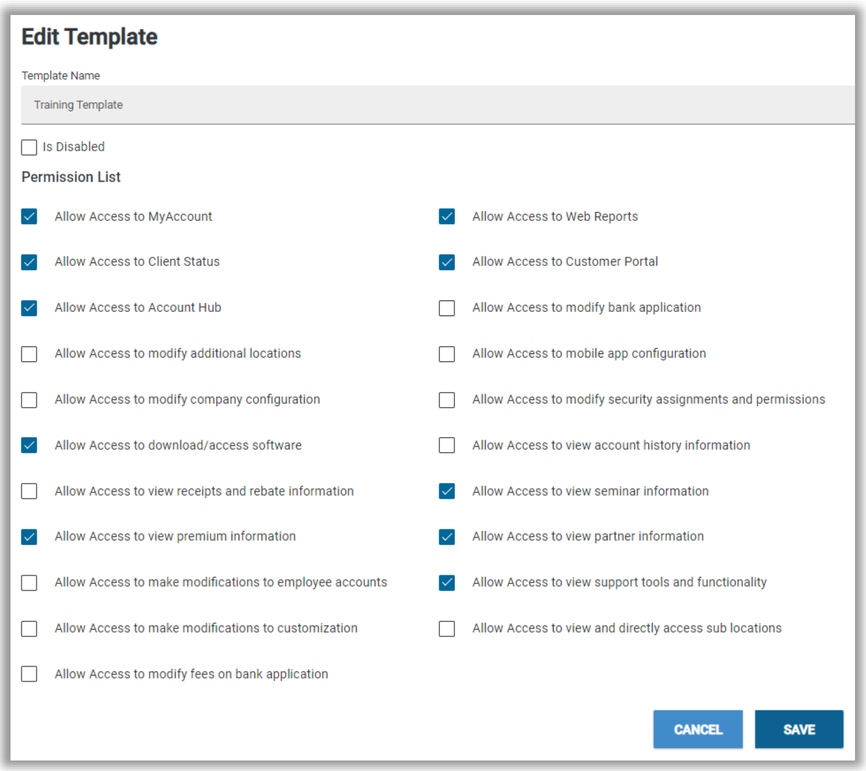
Each client receives a unique customer ID that can be found on the account information card. This unique ID is assigned by TaxSlayer and is required when setting up your ERO in ProWeb. Additional locations will have their own unique customer ID that can be found in their Account Hub and/or Web Reports. If the location does not have access, the Master Location will need to provide this information or assist with ProWeb ERO setup.



Employee Accounts setup: Creating an employee account gives your employees access to the different sections and features within **Account Hub and/or Web Reports**. This will create a separate log in from the Administrator. You can create as many employee accounts as needed, each with different security settings.



Security Management Card: Control what **employee accounts** have access to by creating security templates. These templates are for **Account Hub only**. Separate Security templates are available in the ProWeb program to set access for tax preparers.



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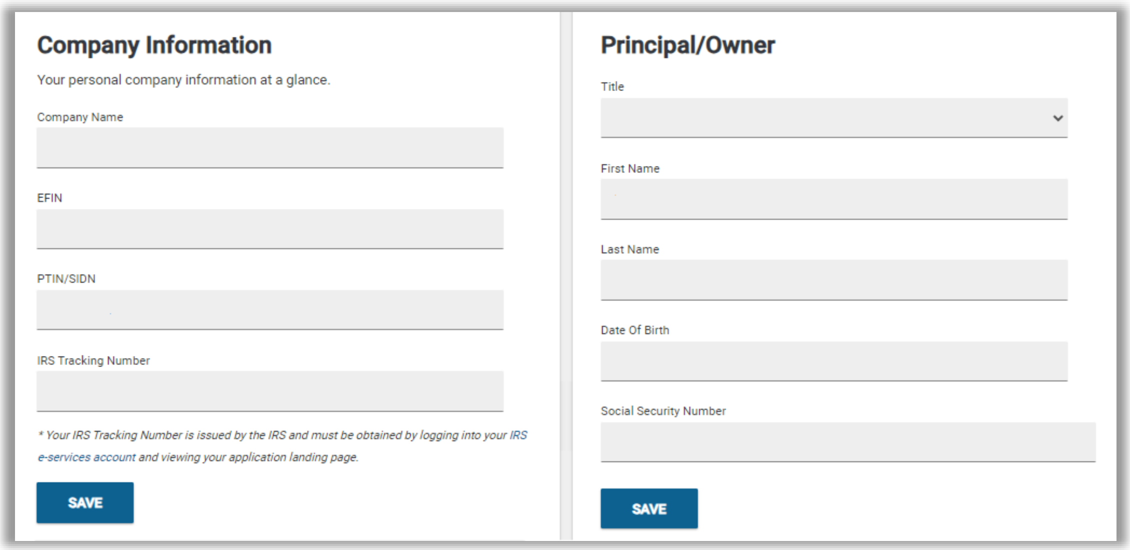
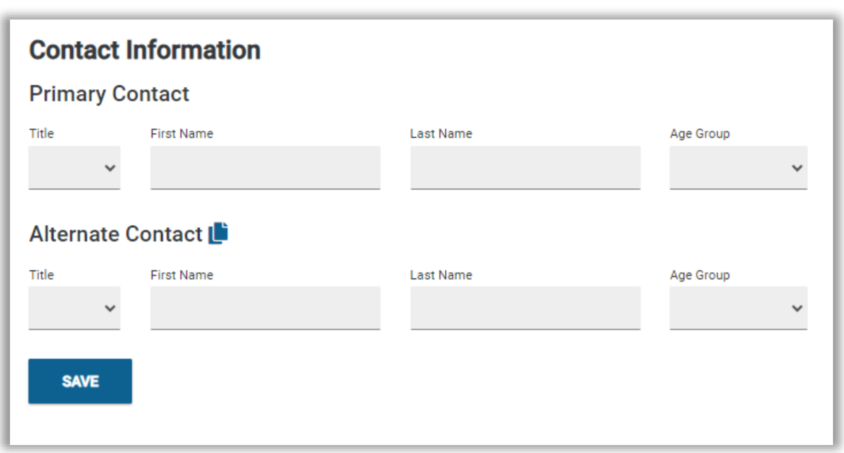
Company Information

The Company Information card displays your company name, EFIN, PTIN and IRS tracking number. To complete your TaxSlayer Pro Account Hub and to electronically file tax returns with TaxSlayer, you must have a valid EFIN and an IRS Tracking Number. Your EFIN and Tracking Number can be obtained by logging into your IRS e-Services Account. Company information for additional locations must be accessed through that locations Account Hub, or by using Location Manager. All information can be edited except the EFIN. Contact your sales manager if the EFIN needs to be updated or changed.



An alternative contact can be listed here, allowing TaxSlayer Pro support agents to assist alternative contacts when the primary contact is unavailable.



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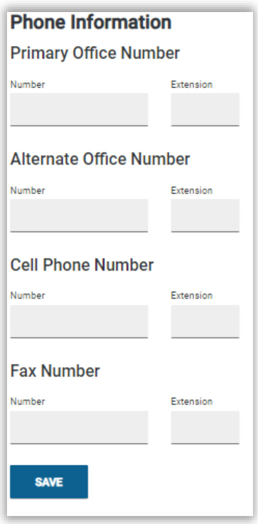
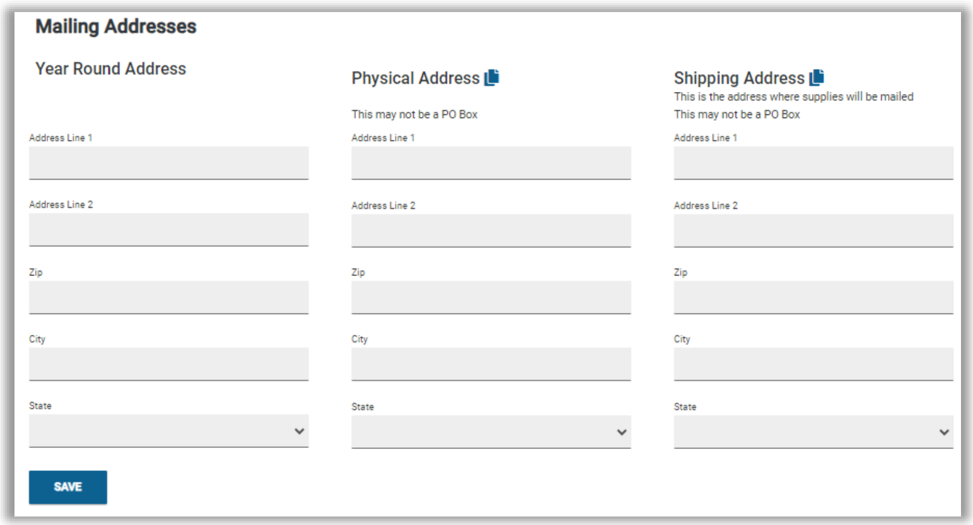
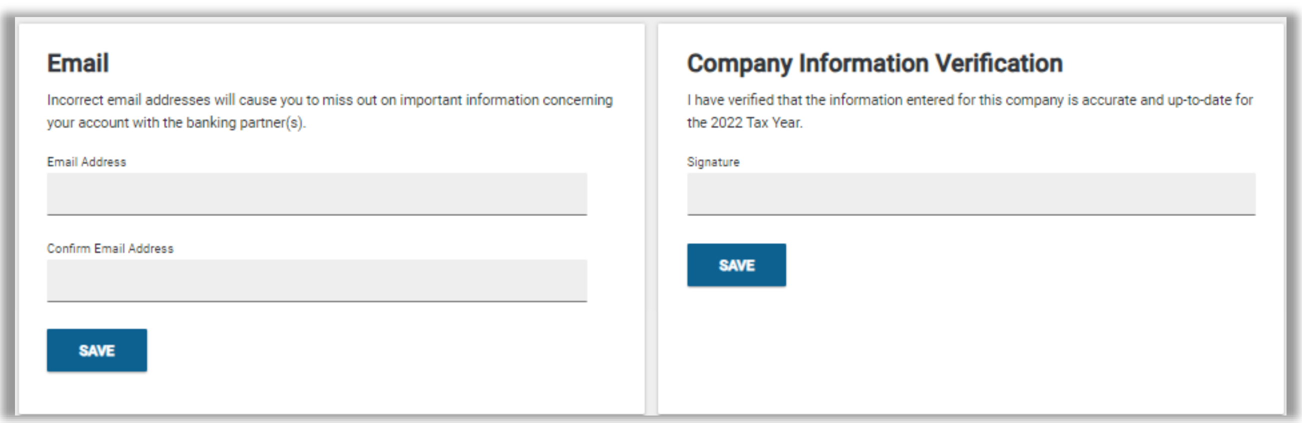
Company Information cont.

Provide up to three contact phone numbers as well as your primary address and shipping address. The shipping address may not be a P.O. Box.





To complete this page, provide and confirm your email address. When updating or changing information, or renewing, the Company Information Verification must also be completed.



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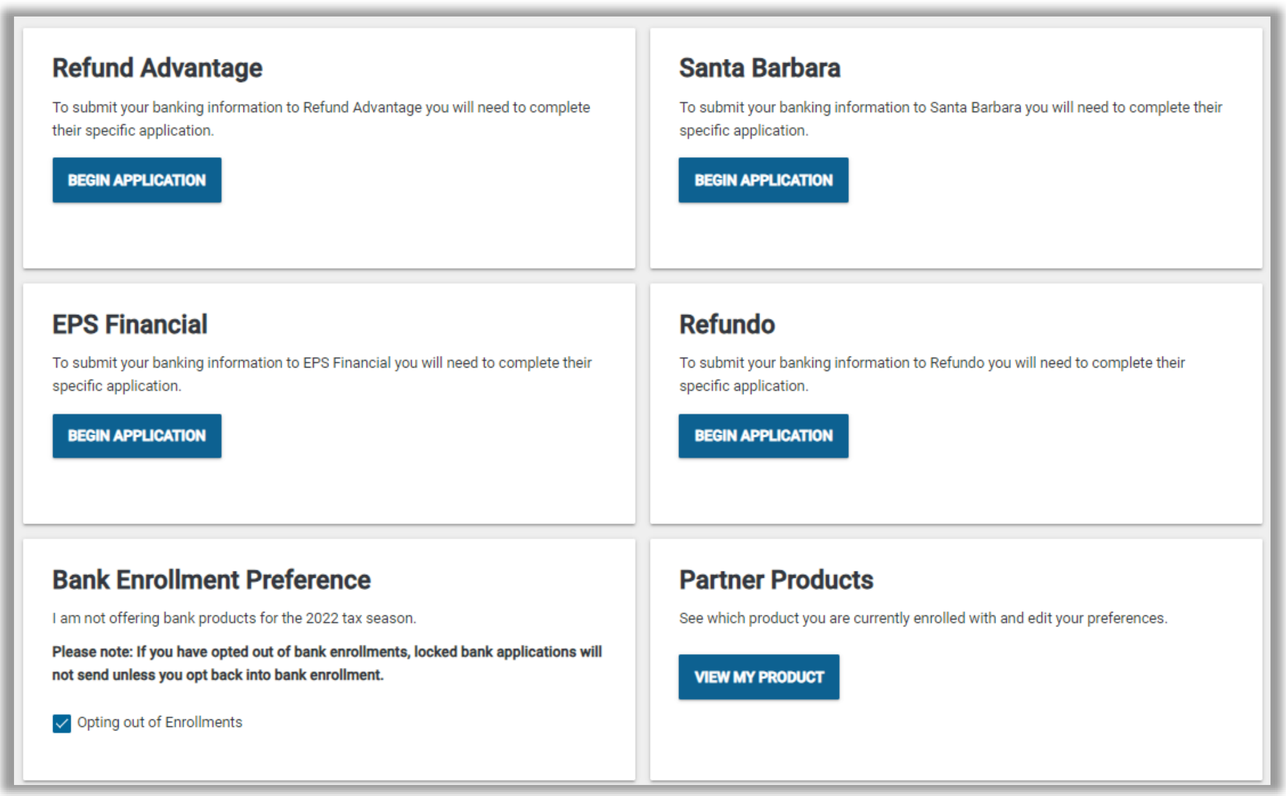
Bank Product Information

Tax-related bank products can be offered to your clients to assist in paying their tax preparation fees and ensure timely refunds. Your preparation fees will automatically be deducted from the taxpayer's income tax refund and deposited into your bank account. We strongly encourage getting your office set up to offer tax-related bank products as early as possible before the tax season to help avoid unnecessary delays at the beginning of the season.

TaxSlayer partners with four different banks. You can apply with any of the banks throughout much of the year. Bank Products cannot be applied when preparing prior year returns.

Each location will need to complete a separate application through their company Account Hub once the Master EFIN's application is approved. If Account Hub access has not been granted to a location, the Service Bureau can complete the application.



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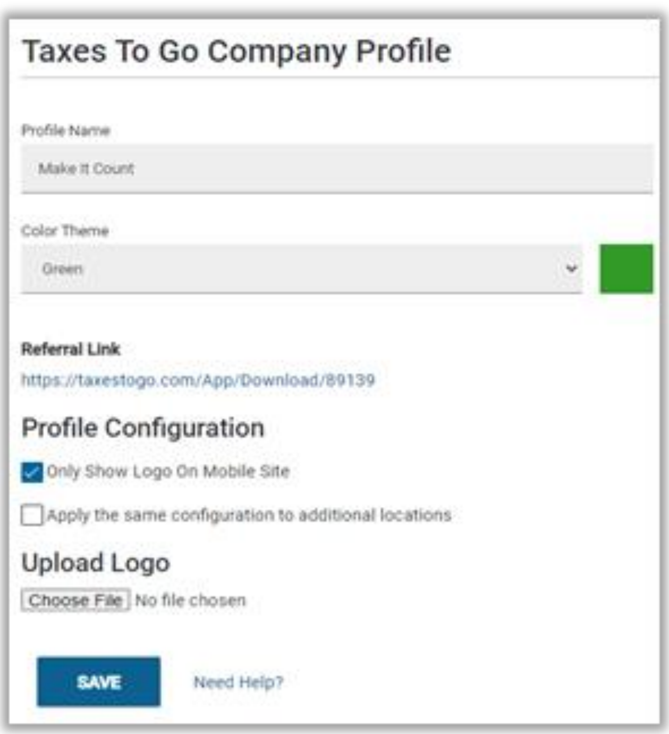
Taxes To Go

The Taxes to Go Mobile App allows taxpayers to snap pictures and submit their tax documents to you, complete their tax return and even get a bank product from anywhere, without ever stepping foot in your office. The app includes a chat feature that is fully integrated to your Tax Program so you can always stay in contact with your customers.

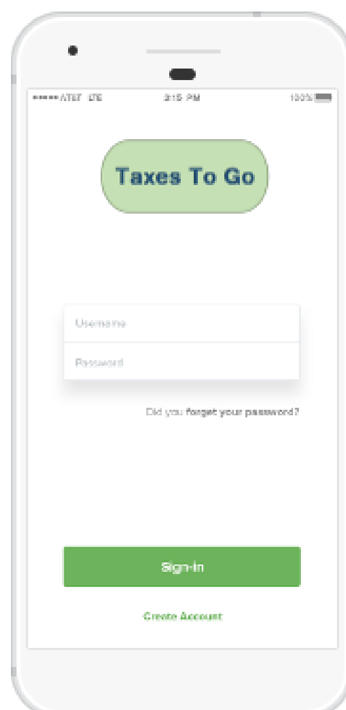
Taxes to Go is a generic mobile app available for Android and iOS devices, however you have the option to brand the app to your tax office. The branded Taxes to Go mobile app allows you to customize the color and logo shown within the app.

For taxpayers to have access to the Branded Application they must download from the referral link. This can be emailed, sent via text, or posted on your company webpage. Using the Branded Taxes To Go App imports the returns directly to your Desktop or ProWeb Queue.

It's important to note that Taxes To Go needs to be set up for each individual location.



Branded App setup in Account Hub



As seen by taxpayer on mobile device after download.

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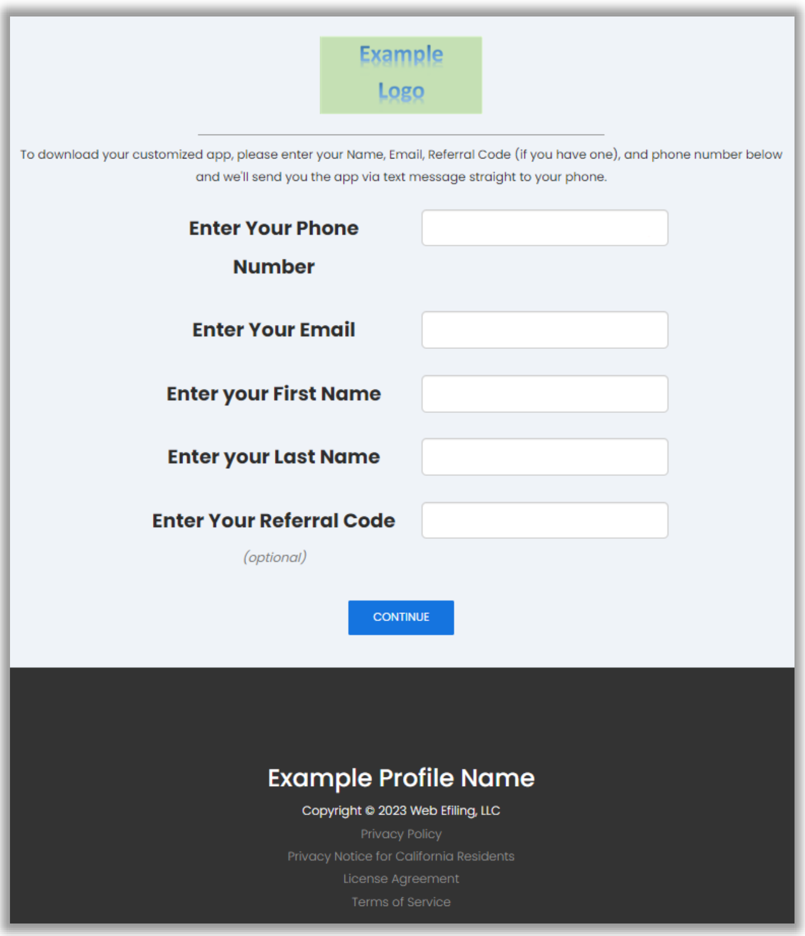
Taxes To Go cont.

The Taxes to Go Mobile App is for your taxpayers. As a Tax Preparer, you will not download the app. Everything you receive from the app or send to the app will be done within your Tax Software.

When your client clicks on the referral link, they will be taken to the Taxes To Go Registration page.

If you have already started your client's tax return in your program, the taxpayer can still use the Taxes To Go to send you their information and to sign documents. The information entered on the registration page must match what's been entered in the tax return.

For more information, troubleshooting, FAQ's and access to the Preparer's and Taxpayer's customized Taxes to Go Manuals click HERE.



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Account History

Account History is where you will find your payment history. This shows you your purchase orders and receipts, EFIN validation code for desktop installations and your rebate history. If you have multiple offices, the EFIN Validation Codes for all locations are listed in the Service Bureau's Account History.
Select **View** under **Payment History**.

Payment History

View your account purchase history and retrieve your EFIN validation code to enter into your software.

VIEW

Payment History

Date	Description	Amount
9/21/2022 12:56:04 PM	Store Purchase - Order #326308 | Receipt	$0.00
3/1/2022 7:07:07 AM	Store Purchase - Order #297397 | Receipt EFIN validation code 7Q02973973B5. You will need to enter this into your 2022 Software.	$0.00

Scroll down the page and you will find the **Additional Locations**. These will be listed in alphabetical order. Each office's purchase order and validation code will be displayed.

Additional Locations
TaxSlayer Pro Seasonal Support

Date	Description	Amount
11/9/2020 10:29:35 AM	Store Purchase - Order #230973 | Receipt EFIN validation code 7Q02309735FA. You will need to enter this into your 2019 Software.	$0.00

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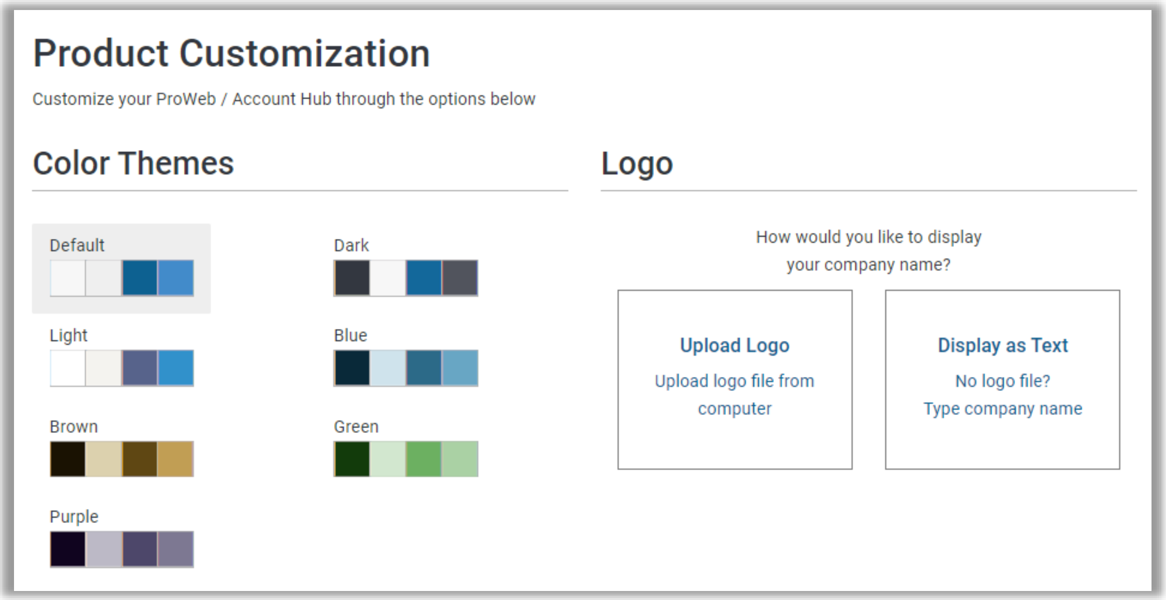
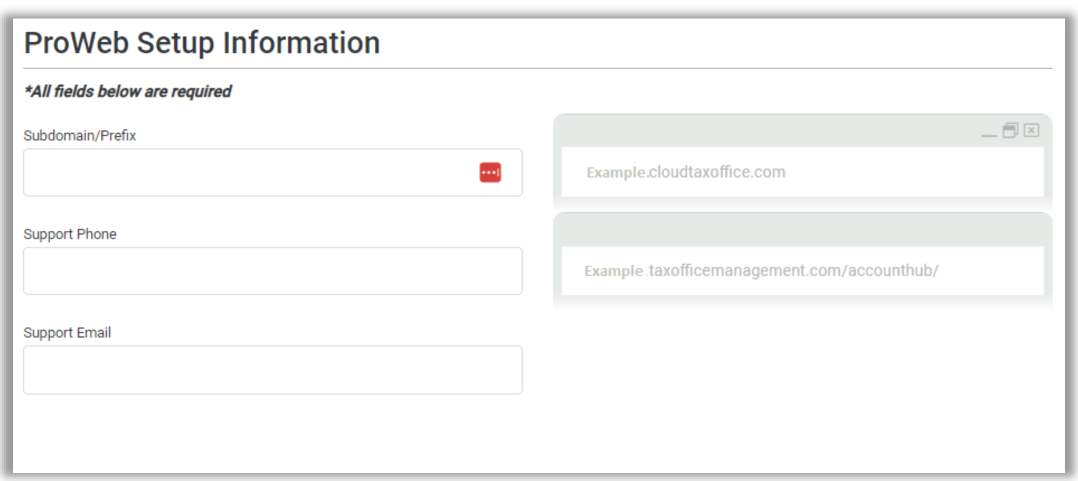
Product Customization

Each of our Service Bureau and Multi-Office users who have purchased ProWeb will receive their own a unique URL. For clients that have chosen to include product customization, this option will be available on the left navigation pane.



These branded sites are set up by the Service Bureau support team. Once the site has been created, the Service Bureau will be able to maintain their branded site via their Account Hub. Inside the My Account section of Account Hub, if included in your contract, you will see the option for Product Customization on the left-hand side. This menu will allow you to update your logo, support



The Support Phone and Support Email entered here will be how your customers contact you for assistance.

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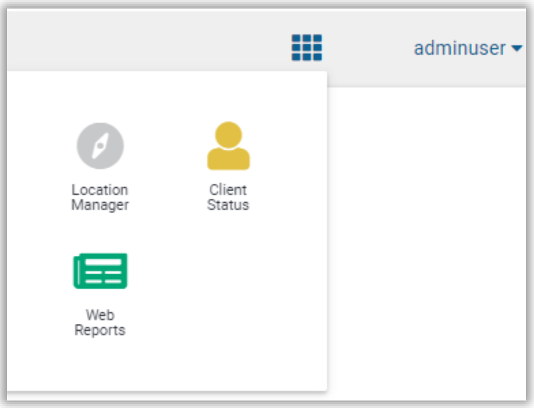
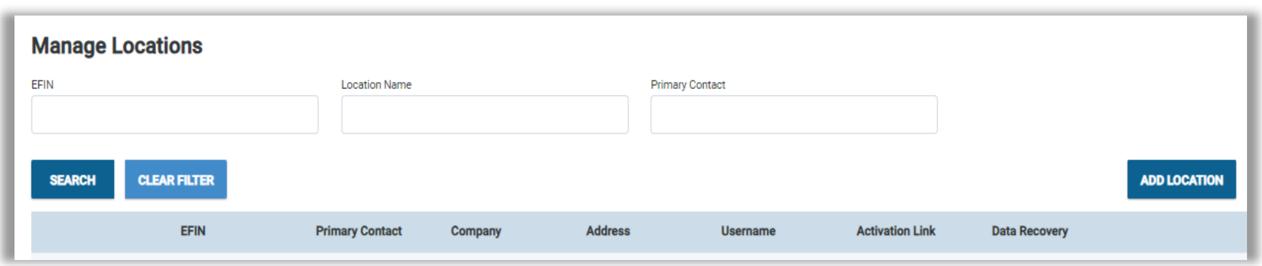
The App Switcher

The App Switcher is a cluster of 9 blocks at the top-right of Account Hub providing direct passthrough into featured content.



Location Manager

Selecting Location Manager from the App switcher will take you to a new page with options for banking and configuration of new and existing locations. Once the location is added, depending on the business model, you can choose to allow your additional locations to manage their own Account Hub accounts. To do this, you will select **Get Activation** Link next to that office, this sends a link to the customer in charge of that office and walks them through creating their own Account Hub. The **Data Recovery** is used with TaxSlayer Pro Desktop and allows you to recover returns that have been electronically filed.



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Additional Locations

You will find quick link icons located next to each location and sub location:

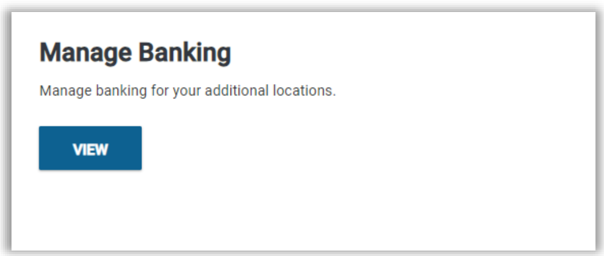
Manage Taxes to Go – Configure and manage the branded Taxes to Go for that location.

Edit Location Information

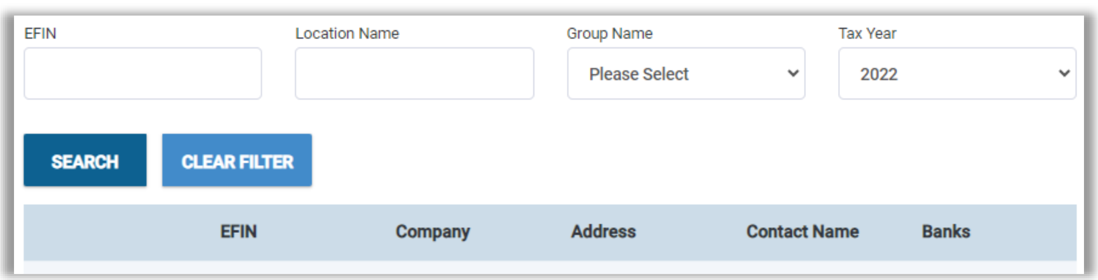
Delete Location

Access Location – this takes you to that locations Account Hub

Within the Location Manager you will find your banking information for the Service Bureau as well as any additional locations. These can be configured and edited by selecting **View** under **Manage Banking**.

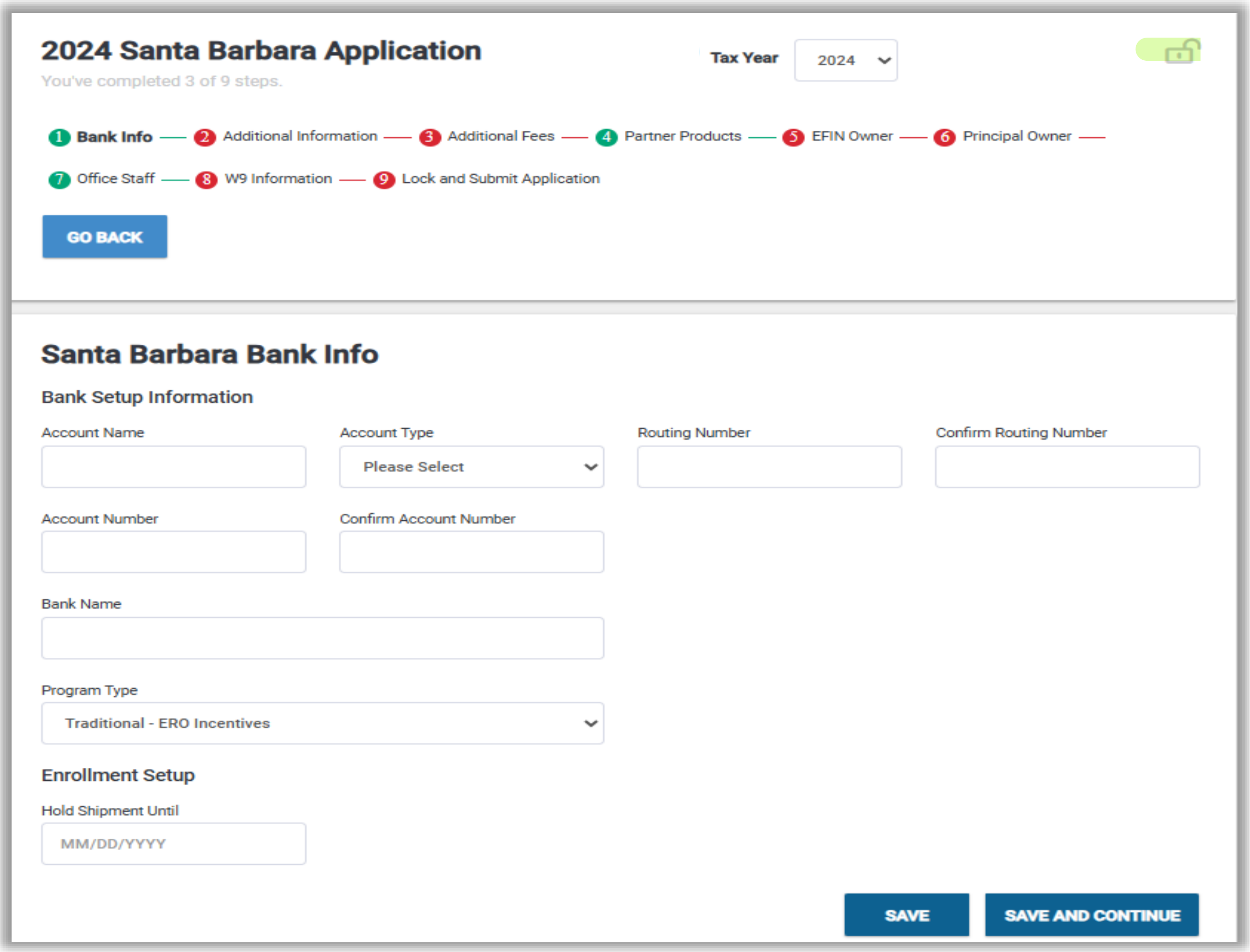


Each EFIN will be listed with the company name and contact. In the Banks column you will see the banks associated with that specific EFIN.



Bank Application

Clicking on the bank name will take you to that bank's application. If the lock in the upper right is open, then the application can be edited. If the lock is closed, this indicates the application has been submitted to the bank and any changes must wait for bank approval or denial.



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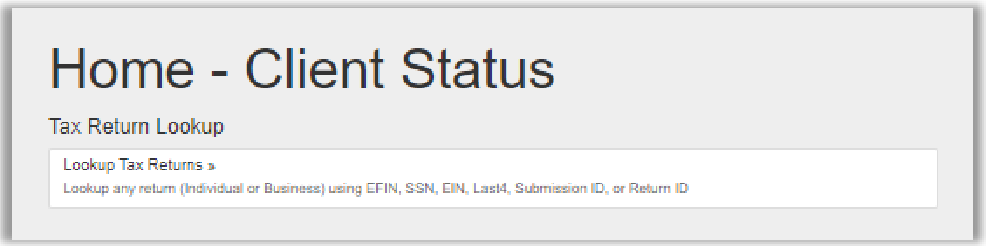
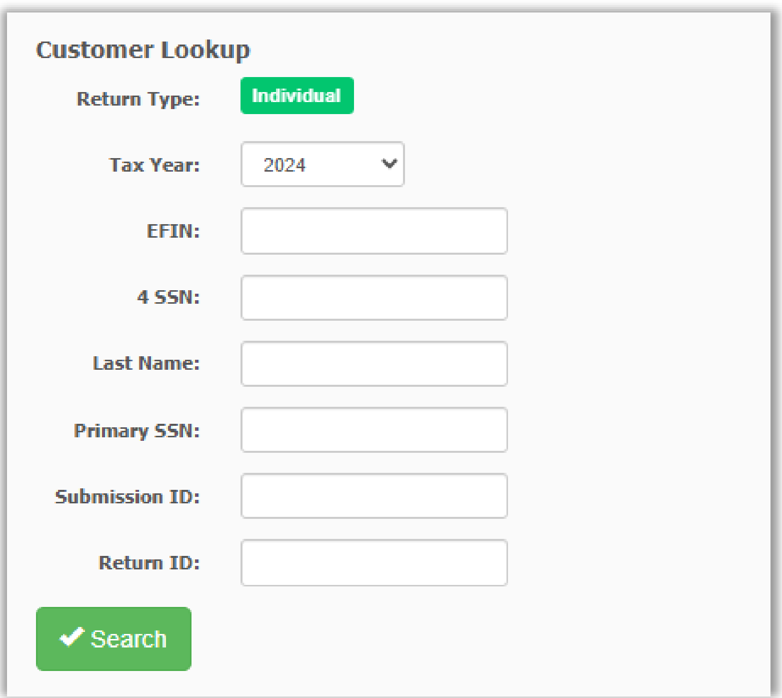
Client Status

https://www.taxstatusnow.com/clientstatus

Client Status in TaxSlayer ProWeb gives you important information about a tax return. This site can be accessed from any device with an internet connection. Client status can be manually logged into with your Account Hub Credentials or your Employee Accounts Credentials without installing the program or accessing ProWeb.



Look up any return, Individual or Business using Last Name, EFIN, SSN, EIN, Submission ID, or Return ID. You can also look up prior year returns by changing the Tax Year.



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Web Reports

Web Reports

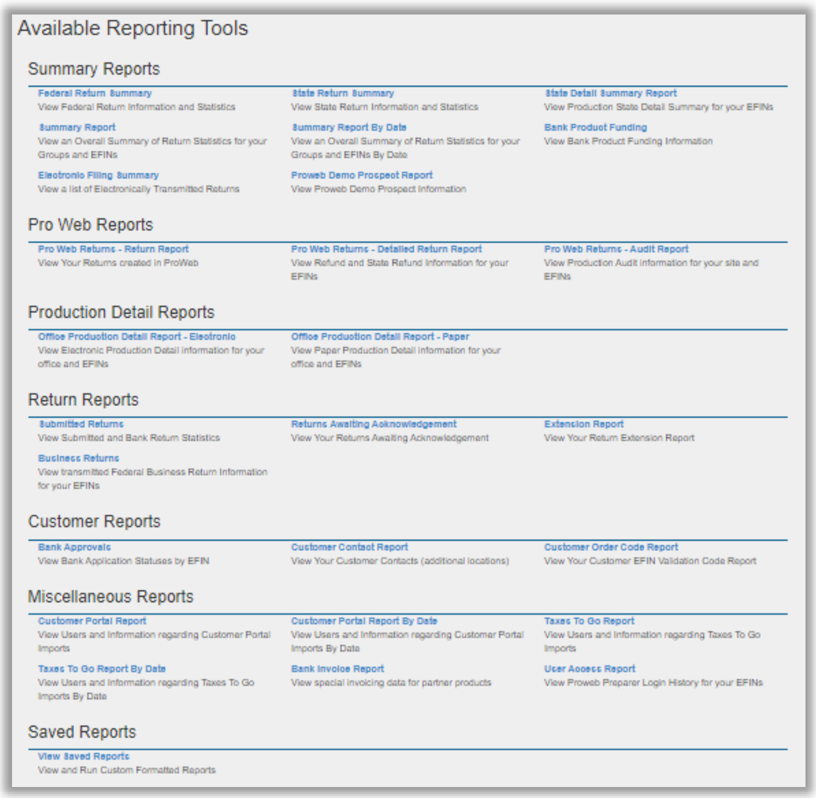
https://www.taxstatusnow.com/reports/web/

Web Reports are financial and biographical reports for your entire company in one location, providing you data useful for marketing and financial purposes.

Report data can be filtered by tax year, group, EFIN, and preparer. Reports can be exported to a CSV file suitable for importing into your spreadsheet software. Reports can also be saved, including the filters and column selections you have chosen, making them easy to run on a regular basis.

Just like Client Status, you do not need the program installed to use this website. You can manually log in with your Account Hub Credentials or your Employee Accounts Credentials if given permission, from any device.

Click here to read our KB (Knowledgebase) article on Web Reports for more details on report types.



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Additional Resources

Product Support Center

- Creating a ProWeb Account
- Downloading and Installing TaxSlayer Pro for Desktop
- Tax-Related Bank Products Overview
- Partner Programs
- TaxSlayer Premium Overview

Seminars

- New User Online Webinar

TaxSlayer Blog

- Tax Tips
- Grow Your Business

Practice Tax Returns

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