



# **Account Hub Basics for Service Bureaus**

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## Welcome to Account Hub

TaxSlayer works with Service Bureaus to customize our programs 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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Learn more about how TaxSlayer Pro can help your tax business go [remote](#)    [Contact us: 1-888-420-1040](#)

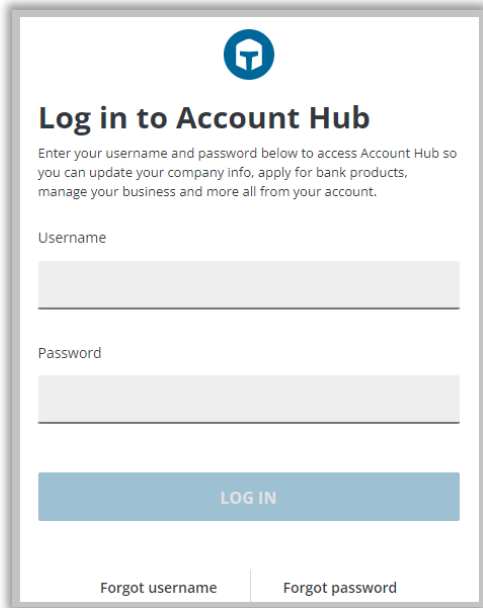
## Cloud-based professional tax prep software

With TaxSlayer ProWeb cloud-based software and our mobile app, TaxesToGo, you can prepare tax returns from anywhere. Go remote with our mobile tax office solutions.

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## Logging In

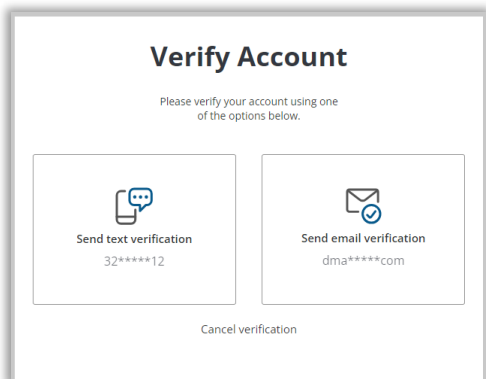
New clients will receive an email from Tax Status Now with their Activation Code. You will create a unique username and password to be used to log in to Account Hub.



The screenshot shows a login form with the following elements:

- Logo at the top center.
- Section title: **Log in to Account Hub**
- Instructional text: "Enter your username and password below to access Account Hub so you can update your company info, apply for bank products, manage your business and more all from your account."
- Input field for Username.
- Input field for Password.
- A blue button labeled "LOG IN".
- Links for "Forgot username" and "Forgot password" at the bottom.

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**.



The screenshot shows a verification form with the following elements:

- Section title: **Verify Account**
- Instructional text: "Please verify your account using one of the options below."
- Two selection options:
  - "Send text verification" with a phone icon and a code field containing "32\*\*\*\*\*12".
  - "Send email verification" with an envelope icon and a code field containing "dma\*\*\*\*\*com".
- A "Cancel verification" link at the bottom.

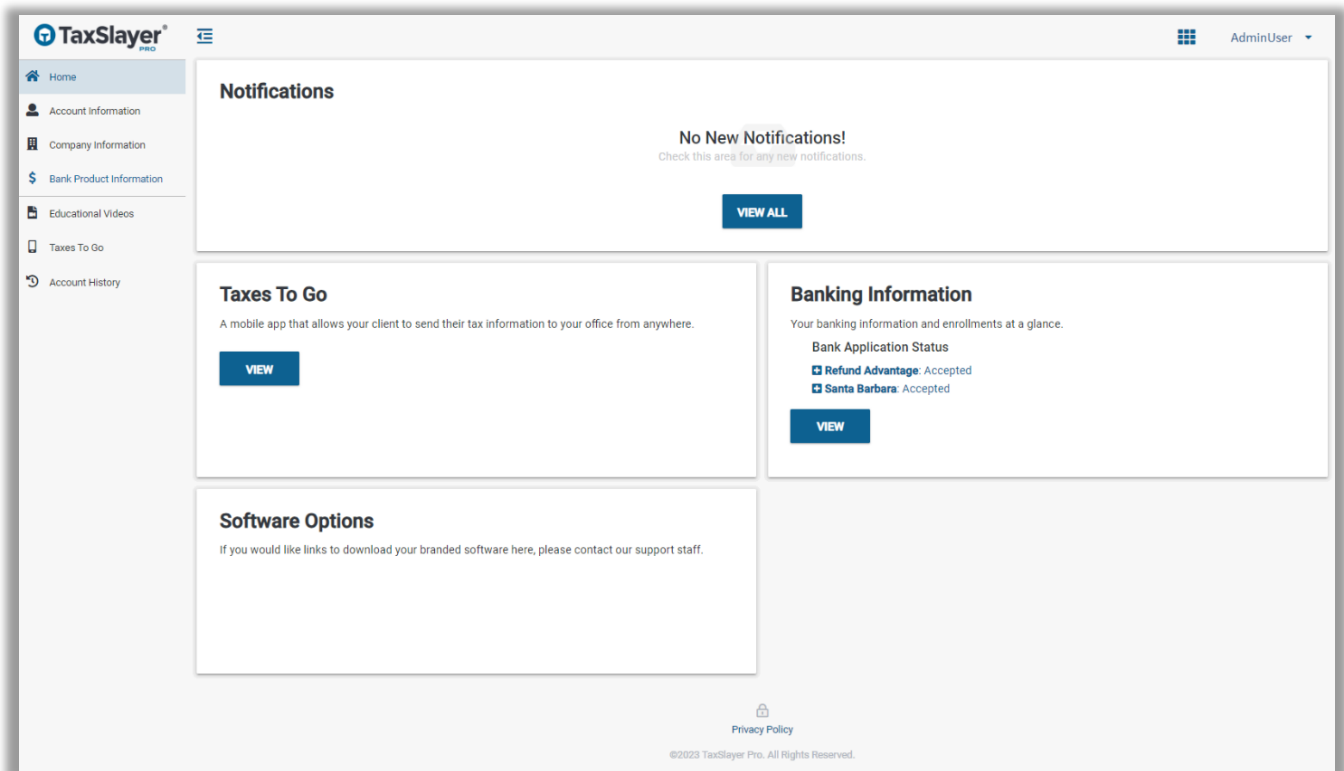
## [Forgot Username or Password](#)

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.

The screenshot displays the Account Hub interface with three main cards:

- Notifications:** Features the heading "No New Notifications!" and a subtext "Check this area for any new notifications." Below this is a blue "VIEW ALL" button.
- Taxes To Go:** Includes the heading "Taxes To Go" and a description: "A mobile app that allows your client to send their tax information to your office from anywhere." A blue "VIEW" button is positioned below the text.
- Banking Information:** Features the heading "Banking Information" and a subtext: "Your banking information and enrollments at a glance." Underneath, it lists "Bank Application Status" with three items: "Refund Advantage: Accepted", "Santa Barbara: Accepted", and "Refundo: Accepted". A blue "VIEW" button is located at the bottom of this card.

The bottom right section of the interface is a greyed-out area with the heading "Software Options" and a description: "If you would like links to download your branded software here, please contact our support staff."

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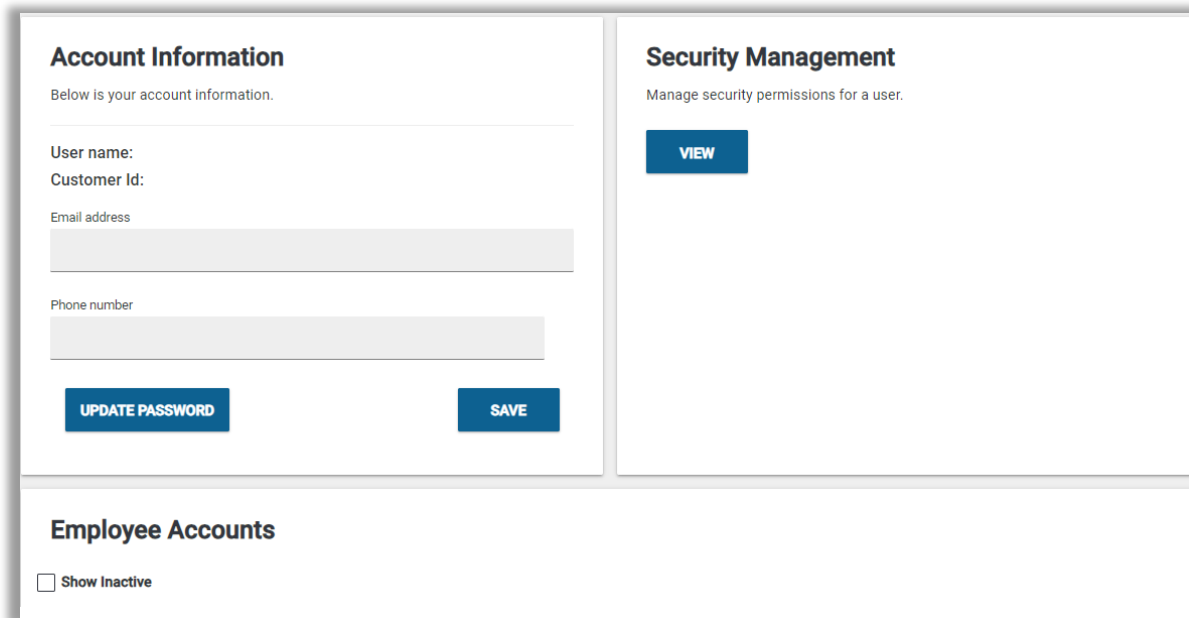
## The Sidebar

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.

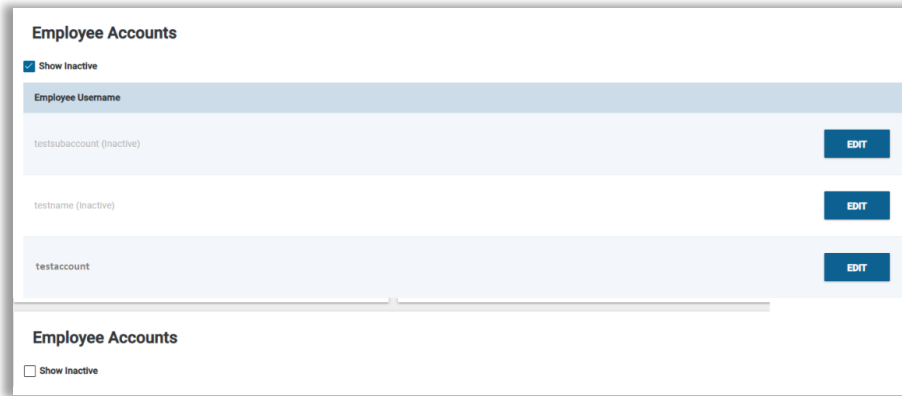
Each client receives a unique customer ID that can be found on the account information card. This unique ID is assigned by TaxSlayer and is required when setting up your ERO in ProWeb. Additional locations will have their own unique customer ID that can be found in their Account Hub and/or Web Reports.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



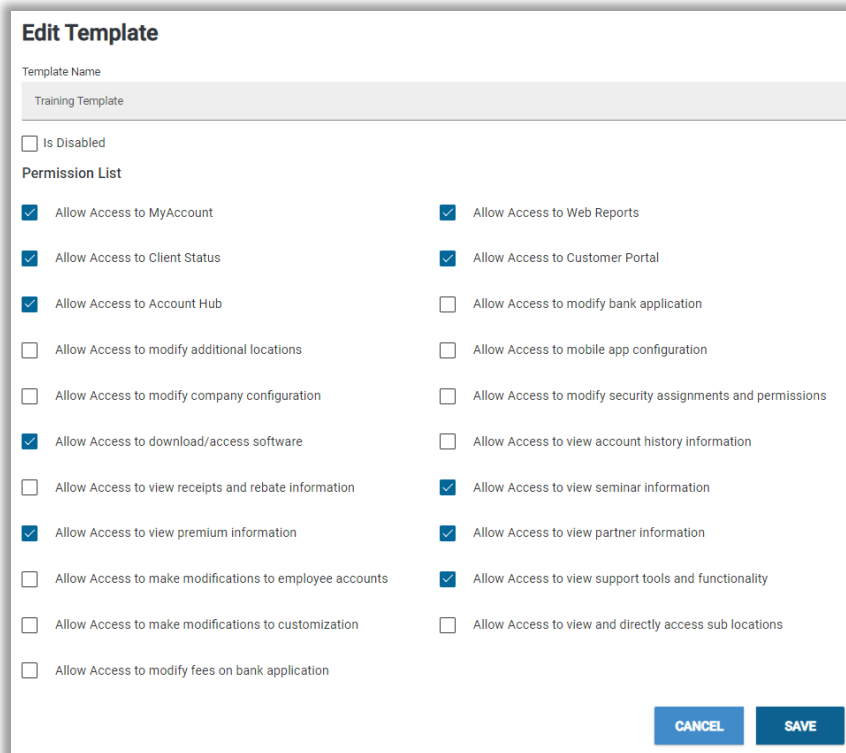
The screenshot shows two side-by-side panels. The left panel is titled "Account Information" and contains a sub-header "Below is your account information." followed by input fields for "User name:", "Customer Id:", "Email address", and "Phone number". At the bottom of this panel are two buttons: "UPDATE PASSWORD" and "SAVE". The right panel is titled "Security Management" and contains the sub-header "Manage security permissions for a user." with a single "VIEW" button below it. Below these two panels is a third section titled "Employee Accounts" with a checkbox labeled "Show Inactive".

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**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 Admin. 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 each 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.

Company Information	Principal/Owner
<p>Your personal company information at a glance.</p> <p>Company Name <input type="text"/></p> <p>EFIN <input type="text"/></p> <p>PTIN/SIDN <input type="text"/></p> <p>IRS Tracking Number <input type="text"/></p> <p><small>* Your IRS Tracking Number is issued by the IRS and must be obtained by logging into your IRS e-services account and viewing your application landing page.</small></p> <p><b>SAVE</b></p>	<p>Title <input type="text"/></p> <p>First Name <input type="text"/></p> <p>Last Name <input type="text"/></p> <p>Date Of Birth <input type="text"/></p> <p>Social Security Number <input type="text"/></p> <p><b>SAVE</b></p>

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

Contact Information			
<b>Primary Contact</b>			
Title <input type="text"/>	First Name <input type="text"/>	Last Name <input type="text"/>	Age Group <input type="text"/>
<b>Alternate Contact</b> 			
Title <input type="text"/>	First Name <input type="text"/>	Last Name <input type="text"/>	Age Group <input type="text"/>
<b>SAVE</b>			

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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.

<h3>Phone Information</h3> <p><b>Primary Office Number</b></p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p><b>Alternate Office Number</b></p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p><b>Cell Phone Number</b></p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p><b>Fax Number</b></p> <p>Number <input type="text"/> Extension <input type="text"/></p> <p><b>SAVE</b></p>	<h3>Mailing Addresses</h3> <table border="1"><tr><td><p><b>Year Round Address</b></p><p>Address Line 1 <input type="text"/></p><p>Address Line 2 <input type="text"/></p><p>Zip <input type="text"/></p><p>City <input type="text"/></p><p>State <input type="text"/></p><p><b>SAVE</b></p></td><td><p><b>Physical Address</b> </p><p>This may not be a PO Box</p><p>Address Line 1 <input type="text"/></p><p>Address Line 2 <input type="text"/></p><p>Zip <input type="text"/></p><p>City <input type="text"/></p><p>State <input type="text"/></p></td><td><p><b>Shipping Address</b> </p><p>This is the address where supplies will be mailed This may not be a PO Box</p><p>Address Line 1 <input type="text"/></p><p>Address Line 2 <input type="text"/></p><p>Zip <input type="text"/></p><p>City <input type="text"/></p><p>State <input type="text"/></p></td></tr></table>	<p><b>Year Round Address</b></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p><b>SAVE</b></p>	<p><b>Physical Address</b> </p> <p>This may not be a PO Box</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>	<p><b>Shipping Address</b> </p> <p>This is the address where supplies will be mailed This may not be a PO Box</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>
<p><b>Year Round Address</b></p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p> <p><b>SAVE</b></p>	<p><b>Physical Address</b> </p> <p>This may not be a PO Box</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>	<p><b>Shipping Address</b> </p> <p>This is the address where supplies will be mailed This may not be a PO Box</p> <p>Address Line 1 <input type="text"/></p> <p>Address Line 2 <input type="text"/></p> <p>Zip <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/></p>		

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

<h3>Email</h3> <p>Incorrect email addresses will cause you to miss out on important information concerning your account with the banking partner(s).</p> <p>Email Address <input type="text"/></p> <p>Confirm Email Address <input type="text"/></p> <p><b>SAVE</b></p>	<h3>Company Information Verification</h3> <p>I have verified that the information entered for this company is accurate and up-to-date for the 2022 Tax Year.</p> <p>Signature <input type="text"/></p> <p><b>SAVE</b></p>
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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.

<h3>Refund Advantage</h3> <p>To submit your banking information to Refund Advantage you will need to complete their specific application.</p> <p><a href="#">BEGIN APPLICATION</a></p>	<h3>Santa Barbara</h3> <p>To submit your banking information to Santa Barbara you will need to complete their specific application.</p> <p><a href="#">BEGIN APPLICATION</a></p>
<h3>EPS Financial</h3> <p>To submit your banking information to EPS Financial you will need to complete their specific application.</p> <p><a href="#">BEGIN APPLICATION</a></p>	<h3>Refundo</h3> <p>To submit your banking information to Refundo you will need to complete their specific application.</p> <p><a href="#">BEGIN APPLICATION</a></p>
<h3>Bank Enrollment Preference</h3> <p>I am not offering bank products for the 2022 tax season.</p> <p><b>Please note: If you have opted out of bank enrollments, locked bank applications will not send unless you opt back into bank enrollment.</b></p> <p><input checked="" type="checkbox"/> Opting out of Enrollments</p>	<h3>Partner Products</h3> <p>See which product you are currently enrolled with and edit your preferences.</p> <p><a href="#">VIEW MY PRODUCT</a></p>

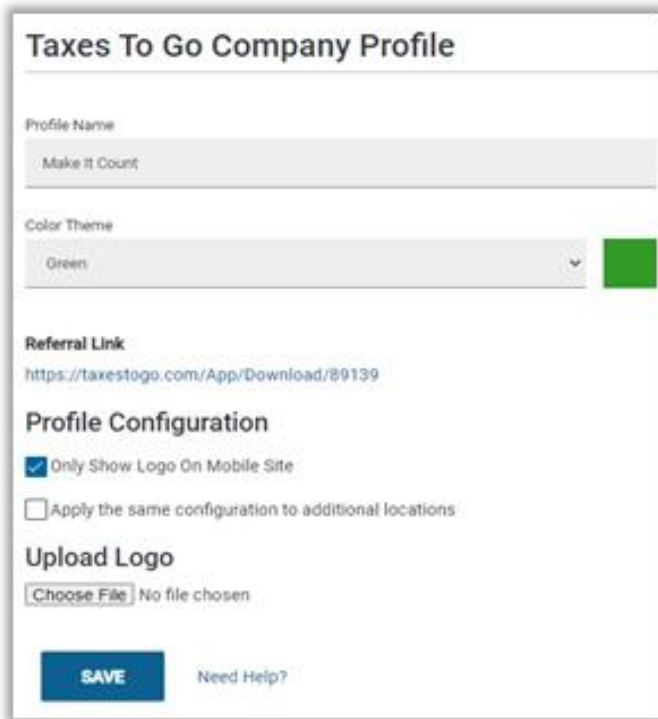
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## Taxes To Go

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.

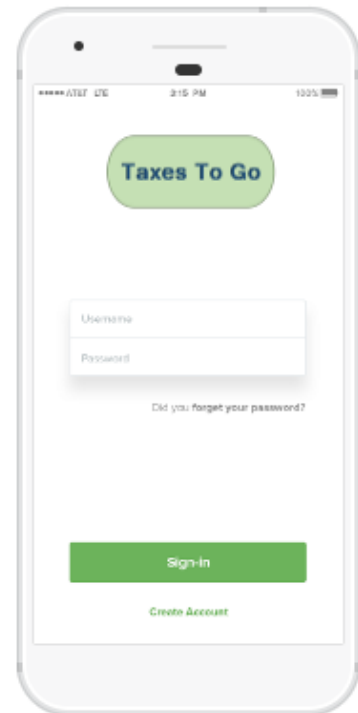
Taxes to Go is a generic mobile app available for Android and iOS devices, however you have the option to brand the app to your tax office. The branded Taxes to Go mobile app allows you to customize the color and logo shown within the app.

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.



The screenshot shows the 'Taxes To Go Company Profile' configuration page. It includes a 'Profile Name' field with the text 'Make it Count'. Below that is a 'Color Theme' dropdown menu set to 'Green' with a green color swatch. A 'Referral Link' section displays the URL 'https://taxestogo.com/App/Download/89139'. The 'Profile Configuration' section has a checked checkbox for 'Only Show Logo On Mobile Site' and an unchecked checkbox for 'Apply the same configuration to additional locations'. The 'Upload Logo' section has a 'Choose File' button and the text 'No file chosen'. At the bottom, there is a blue 'SAVE' button and a 'Need Help?' link.

Branded App setup in Account Hub



As seen by taxpayer on mobile device after download.

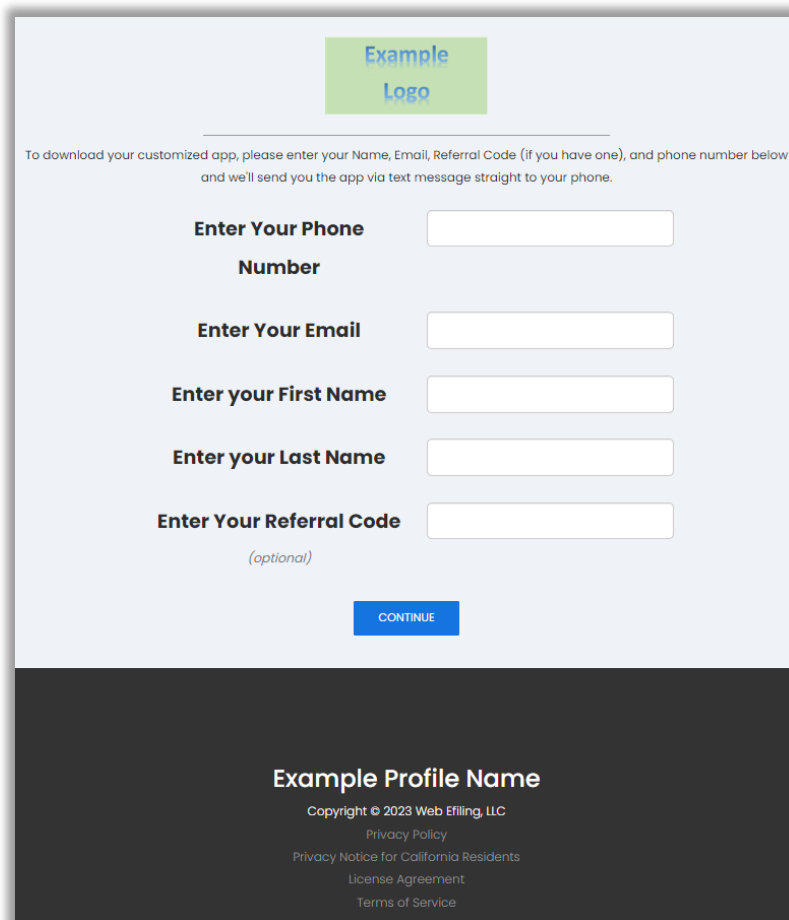
## Taxes To Go cont.

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](#).



**Example Logo**

To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

**Enter Your Phone Number**

**Enter Your Email**

**Enter your First Name**

**Enter your Last Name**

**Enter Your Referral Code**   
*(optional)*

**CONTINUE**

**Example Profile Name**  
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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](#)

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.

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.

The screenshot displays the 'Product Customization' interface. At the top, it says 'Product Customization' and 'Customize your ProWeb / Account Hub through the options below'. The interface is split into two main sections: 'Color Themes' and 'Logo'. Under 'Color Themes', there are seven options: Default (white, light gray, dark blue, blue), Light (white, light gray, dark blue, blue), Brown (dark brown, light brown, dark brown, light brown), Purple (dark purple, light purple, dark purple, light purple), Dark (dark gray, light gray, dark blue, dark gray), Blue (dark blue, light blue, dark blue, light blue), and Green (dark green, light green, dark green, light green). Under 'Logo', there is a question: 'How would you like to display your company name?'. There are two buttons: 'Upload Logo' with the subtext 'Upload logo file from computer', and 'Display as Text' with the subtext 'No logo file? Type company name'.

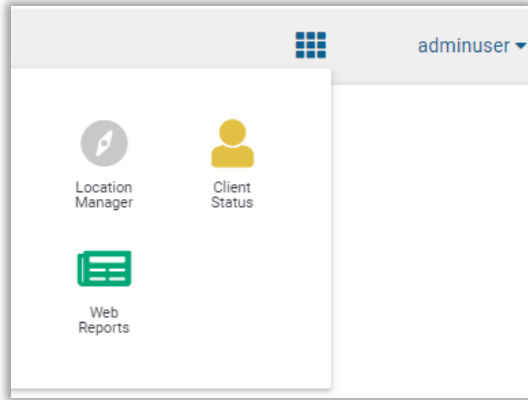
These branded sites are set up by the Service Bureau support team. Once the site has been created, the Service Bureau will be able to maintain their branded site via their Account Hub. Inside the My Account section of Account Hub, if included in your contract, you will see the option for Product Customization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

The screenshot shows the 'ProWeb Setup Information' form. It has a title 'ProWeb Setup Information' and a note: '\*All fields below are required'. There are three input fields on the left: 'Subdomain/Prefix', 'Support Phone', and 'Support Email'. On the right, there are two text boxes showing examples: 'Example.cloudtaxoffice.com' and 'Example.taxofficemanagement.com/accounthub/'.

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

## 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

### 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.


EFIN	Primary Contact	Company	Address	Username	Activation Link	Data Recovery
------	-----------------	---------	---------	----------	-----------------	---------------


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## Additional Locations

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

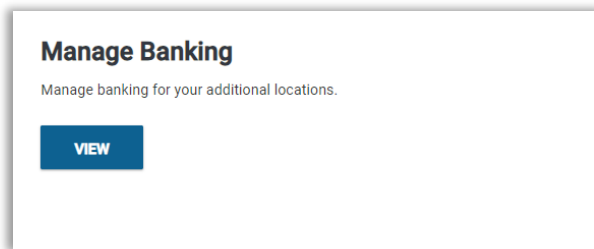
 Manage Taxes to Go – Configure and manage the branded Taxes to Go for that location.

 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.

EFIN	Company	Address	Contact Name	Banks
------	---------	---------	--------------	-------

EFIN:

Location Name:

Group Name:

Tax Year:

## 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.

### Enrollment Information

## 2021 Santa Barbara Application (EFIN: 000000) 2021

You've completed 0 of 9 steps.

1 **Bank Info** — 2 Additional Information — 3 Additional Fees — 4 Partner Products — 5 EFIN Owner — 6 Principal Owner —  
7 Office Staff — 8 W9 Information — 9 Lock and Submit Application

### Santa Barbara Bank Info

#### Bank Setup Information

Account Name	Account Type	Routing Number	Confirm Routing Number
<input type="text"/>	Please Select <span>▼</span>	<input type="text"/>	<input type="text"/>
Account Number	Confirm Account Number		
<input type="text"/>	<input type="text"/>		
Bank Name	<input type="text"/>		

#### Enrollment Setup

Hold Shipment Until

SAVE SAVE AND CONTINUE

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Client  
Status

## 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.

**Home - Client Status**

Tax Return Lookup

Lookup Tax Returns »

Lookup any return (Individual or Business) using EFIN, SSN, EIN, Last4, Submission ID, or Return ID

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.

**Customer Lookup**

Return Type: **Individual**

Tax Year: 2022

EFIN:

4 SSN:

Last Name:

Primary SSN:

Submission ID:

Return ID:

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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.

Available Reporting Tools		
<b>Summary Reports</b>		
<b>Federal Return Summary</b> View Federal Return Information and Statistics	<b>State Return Summary</b> View State Return Information and Statistics	<b>State Detail Summary Report</b> View Production State Detail Summary for your EFINs
<b>Summary Report</b> View an Overall Summary of Return Statistics for your Groups and EFINs	<b>Summary Report By Date</b> View an Overall Summary of Return Statistics for your Groups and EFINs By Date	<b>Bank Product Funding</b> View Bank Product Funding Information
<b>Electronic Filing Summary</b> View a list of Electronically Transmitted Returns	<b>Proweb Demo Prospect Report</b> View Proweb Demo Prospect Information	
<b>Pro Web Reports</b>		
<b>Pro Web Returns - Return Report</b> View Your Returns created in ProWeb	<b>Pro Web Returns - Detailed Return Report</b> View Refund and State Refund Information for your EFINs	<b>Pro Web Returns - Audit Report</b> View Production Audit Information for your site and EFINs
<b>Production Detail Reports</b>		
<b>Office Production Detail Report - Electronic</b> View Electronic Production Detail information for your office and EFINs	<b>Office Production Detail Report - Paper</b> View Paper Production Detail information for your office and EFINs	
<b>Return Reports</b>		
<b>Submitted Returns</b> View Submitted and Bank Return Statistics	<b>Returns Awaiting Acknowledgement</b> View Your Returns Awaiting Acknowledgement	<b>Extension Report</b> View Your Return Extension Report
<b>Business Returns</b> View transmitted Federal Business Return Information for your EFINs		
<b>Customer Reports</b>		
<b>Bank Approvals</b> View Bank Application Statuses by EFIN	<b>Customer Contact Report</b> View Your Customer Contacts (additional locations)	<b>Customer Order Code Report</b> View Your Customer EFIN Validation Code Report
<b>Miscellaneous Reports</b>		
<b>Customer Portal Report</b> View Users and Information regarding Customer Portal Imports	<b>Customer Portal Report By Date</b> View Users and Information regarding Customer Portal Imports By Date	<b>Taxes To Go Report</b> View Users and Information regarding Taxes To Go Imports
<b>Taxes To Go Report By Date</b> View Users and Information regarding Taxes To Go Imports By Date	<b>Bank Invoice Report</b> View special Invoicing data for partner products	<b>User Access Report</b> View Proweb Preparer Login History for your EFINs
<b>Saved Reports</b>		
<b>View Saved Reports</b> View and Run Custom Formatted Reports		

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- [TaxSlayer Premium Overview](#)

### [Seminars](#)

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