



Account Hub Basics for Affiliates

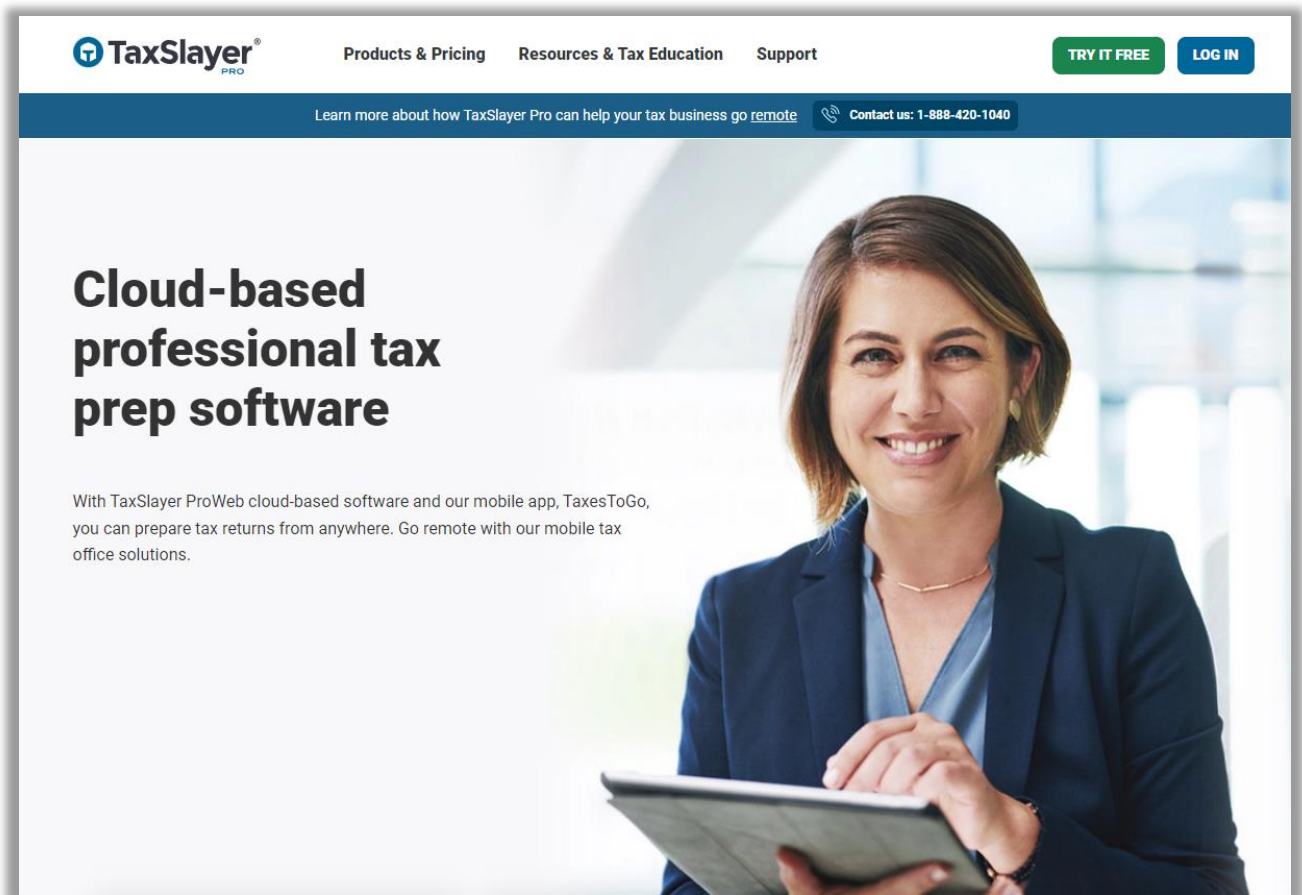
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Welcome to Account Hub

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.

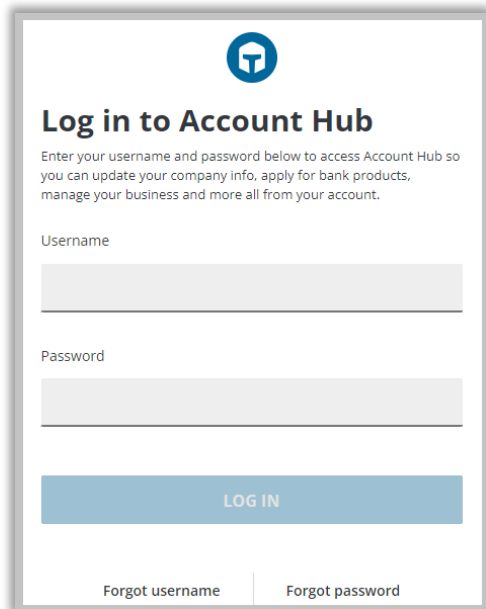
Your location's individual access to Account Hub can be tailored to your business model. Employees can be granted anything from total access to none at all.



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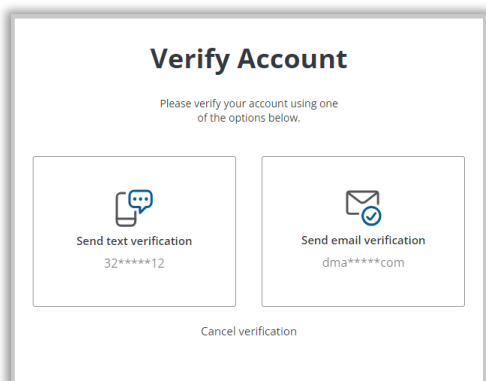
Logging In

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.



The screenshot shows a login form titled "Log in to Account Hub" with a blue circular logo at the top. Below the title, a paragraph explains that users can update company info, apply for bank products, and manage their business. The form includes two input fields: "Username" and "Password". Below these fields is a blue "LOG IN" button. At the bottom, there are two links: "Forgot username" and "Forgot password".

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 titled "Verify Account". It instructs users to verify their account using one of the options below. There are two options: "Send text verification" with a phone icon and a security code field containing "32*****12", and "Send email verification" with an envelope icon and a security code field containing "dma*****com". At the bottom, there is a "Cancel verification" link.

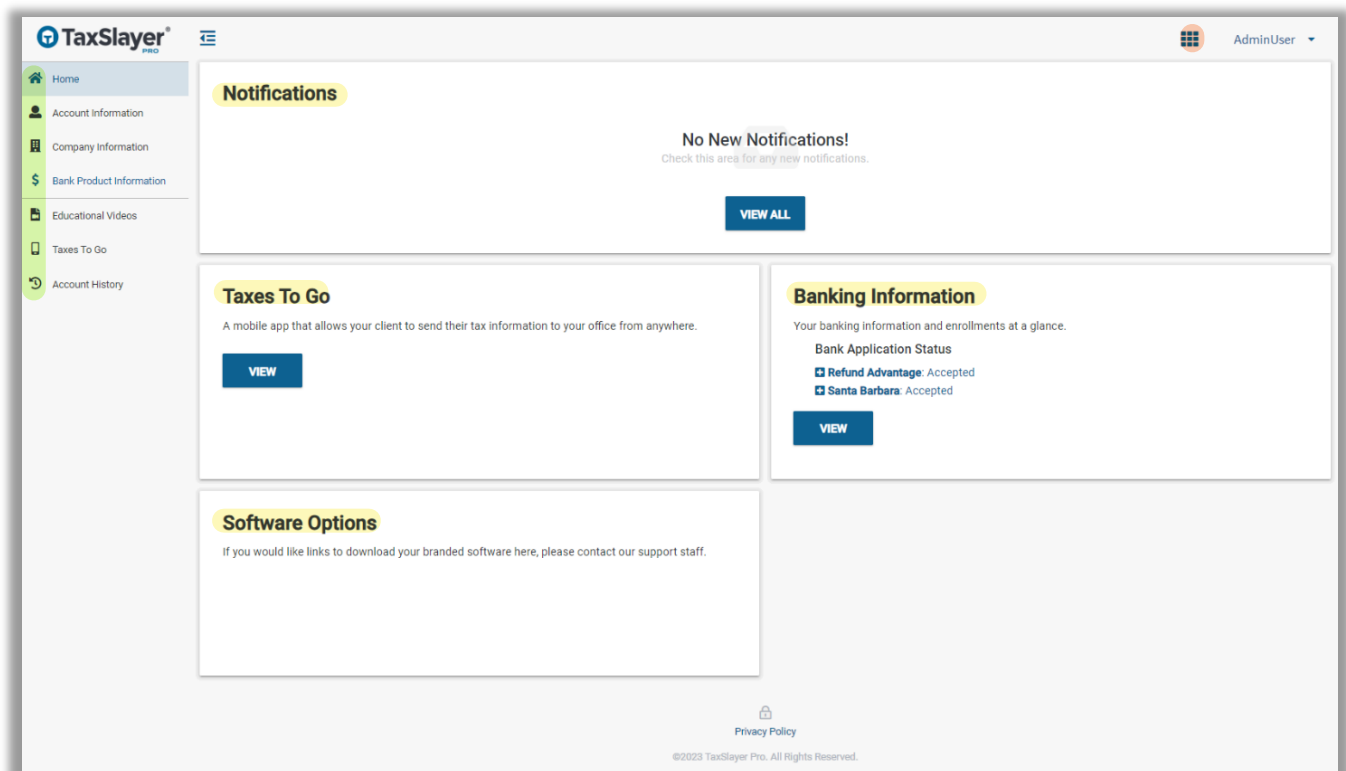
[Forgot Username or Password](#)

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.



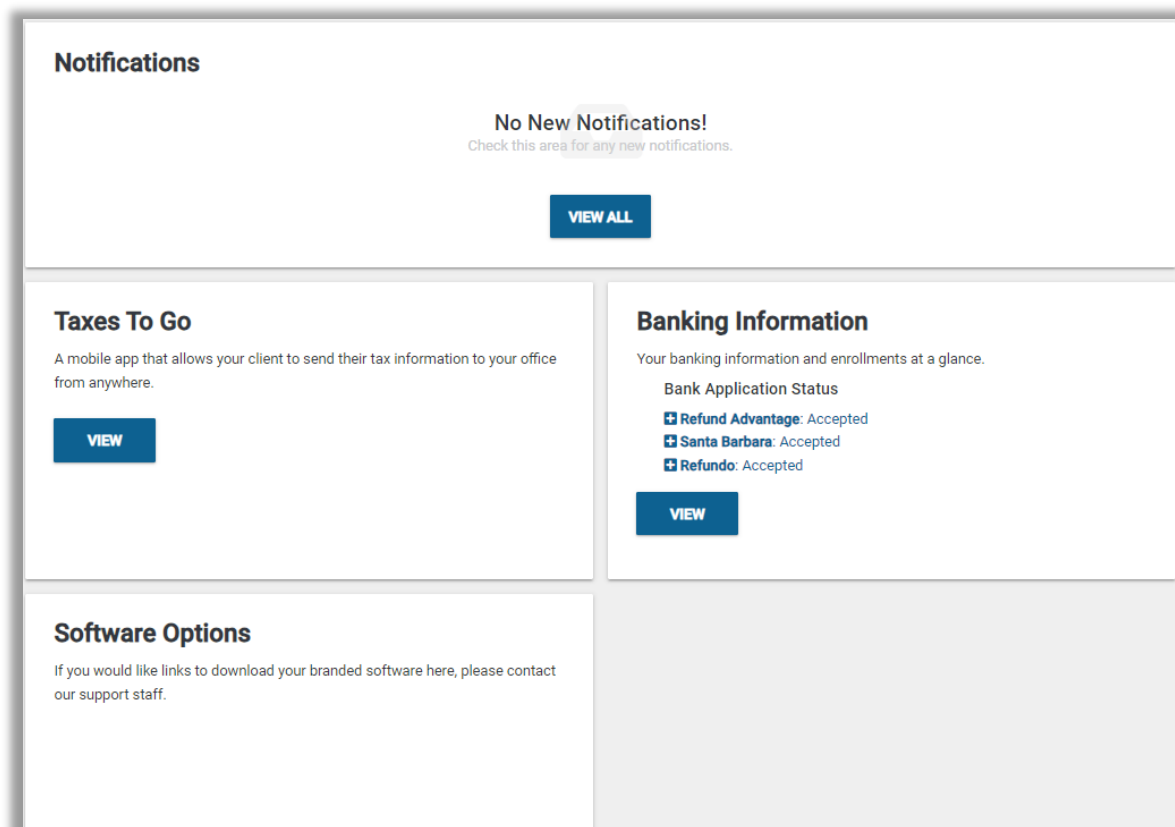
The Hub Cards

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.

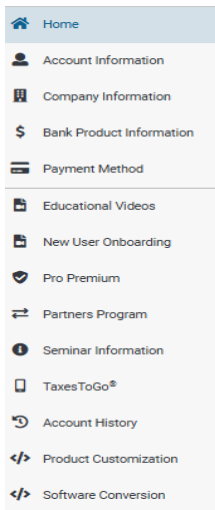
Taxes To Go: This card links to configuration of the branded Taxes To Go app.

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.

A screenshot of a web application interface. The top section is divided into two columns. The left column is titled 'Account Information' and contains the text 'Below is your account information.' followed by labels for 'User name:', 'Customer Id:', 'Email address', and 'Phone number'. Each label is followed by a text input field. At the bottom of this column are two buttons: 'UPDATE PASSWORD' and 'SAVE'. The right column is titled 'Security Management' and contains the text 'Manage security permissions for a user.' followed by a 'VIEW' button. Below these two columns is a section titled 'Employee Accounts' which contains a checkbox labeled 'Show Inactive'.

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.

Employee Accounts

☒ Show Inactive

Employee Username

testsubaccount (inactive)

EDIT

testname (inactive)

EDIT

testaccount

EDIT

Employee Accounts

☐ Show Inactive

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.

Edit Template

Template Name

Training Template

☐ Is Disabled

Permission List

☒ Allow Access to MyAccount

☒ Allow Access to Web Reports

☒ Allow Access to Client Status

☒ Allow Access to Customer Portal

☒ Allow Access to Account Hub

☐ Allow Access to modify bank application

☐ Allow Access to modify additional locations

☐ Allow Access to mobile app configuration

☐ Allow Access to modify company configuration

☐ Allow Access to modify security assignments and permissions

☒ Allow Access to download/access software

☐ Allow Access to view account history information

☐ Allow Access to view receipts and rebate information

☒ Allow Access to view seminar information

☒ Allow Access to view premium information

☒ Allow Access to view partner information

☐ Allow Access to make modifications to employee accounts

☒ Allow Access to view support tools and functionality

☐ Allow Access to make modifications to customization

☐ Allow Access to view and directly access sub locations

☐ Allow Access to modify fees on bank application

CANCEL

SAVE

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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</p> <input type="text"/>	<p>Title</p> <input type="text"/>
<p>EFIN</p> <input type="text"/>	<p>First Name</p> <input type="text"/>
<p>PTIN/SIDN</p> <input type="text"/>	<p>Last Name</p> <input type="text"/>
<p>IRS Tracking Number</p> <input type="text"/>	<p>Date Of Birth</p> <input type="text"/>
<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>Social Security Number</p> <input type="text"/>
<p>SAVE</p>	<p>SAVE</p>

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

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

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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.

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

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.

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

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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.

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

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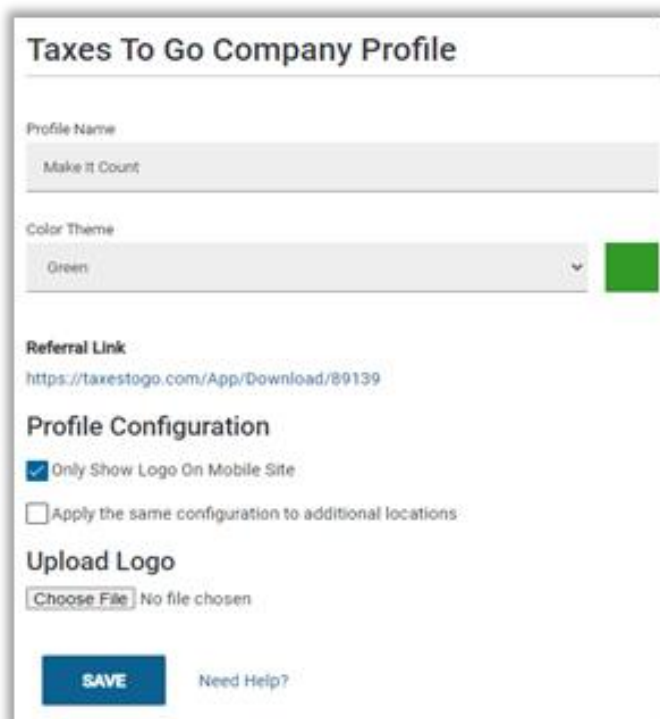
Taxes To Go

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.

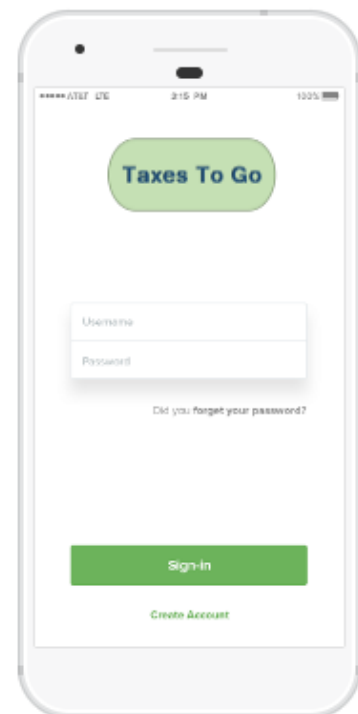
For taxpayers to have access to the Branded Application they must download from the referral link. This can be emailed, sent via text, or posted on your company webpage. Using the Branded Taxes To Go App imports the returns directly to your Desktop or ProWeb Queue.

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



The screenshot shows the 'Taxes To Go Company Profile' setup 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' is displayed as <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 shows 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
Copyright © 2023 Web Efilling, LLC
[Privacy Policy](#)
[Privacy Notice for California Residents](#)
[License Agreement](#)
[Terms of Service](#)

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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.

Product Customization

Customize your ProWeb / Account Hub through the options below

Color Themes

Default

Dark

Light

Blue

Brown

Green

Purple

Logo

How would you like to display your company name?

Upload Logo
Upload logo file from computer

Display as Text
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

ProWeb Setup Information

**All fields below are required*

Subdomain/Prefix

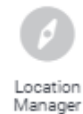
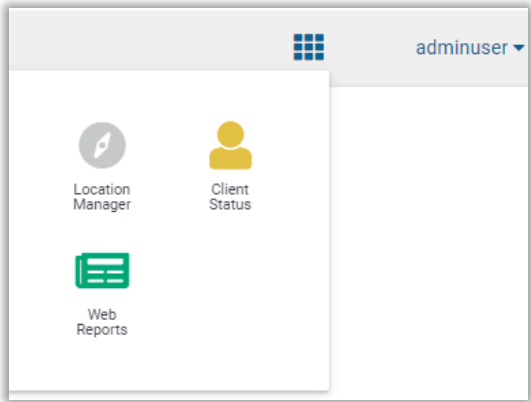
Support Phone

Support Email

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

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.

Manage Locations

EFIN

Location Name

Primary Contact

SEARCH

CLEAR FILTER

ADD LOCATION

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

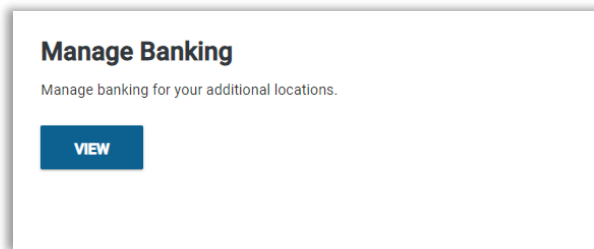


Delete Location



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	Location Name	Group Name	Tax Year	
<input type="text"/>	<input type="text"/>	Please Select ▼	2022 ▼	
<div>SEARCH</div> <div>CLEAR FILTER</div>				
EFIN	Company	Address	Contact Name	Banks

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.

2024 Santa Barbara Application

You've completed 3 of 9 steps.

Tax Year 2024

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

[GO BACK](#)

Santa Barbara Bank Info

Bank Setup Information

Account Name	Account Type	Routing Number	Confirm Routing Number
<input type="text"/>	Please Select	<input type="text"/>	<input type="text"/>
Account Number	Confirm Account Number		
<input type="text"/>	<input type="text"/>		
Bank Name			
<input type="text"/>			
Program Type			
Traditional - ERO Incentives			

Enrollment Setup

Hold Shipment Until

MM/DD/YYYY

[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: 2024 ▼

EFIN:

4 SSN:

Last Name:

Primary SSN:

Submission ID:

Return ID:

✓ Search

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

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Additional Resources

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- [Creating a ProWeb Account](#)
- [Downloading and Installing TaxSlayer Pro for Desktop](#)
- [Tax-Related Bank Products Overview](#)
- [Partner Programs](#)
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