TAX TRANSFORMATION SUMMIT
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Tips and Tricks to Effectively Manage Taxpayers in TaxCaddy

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Primary focus is product consultation and implementation and account retention for small to medium sized accounting firms

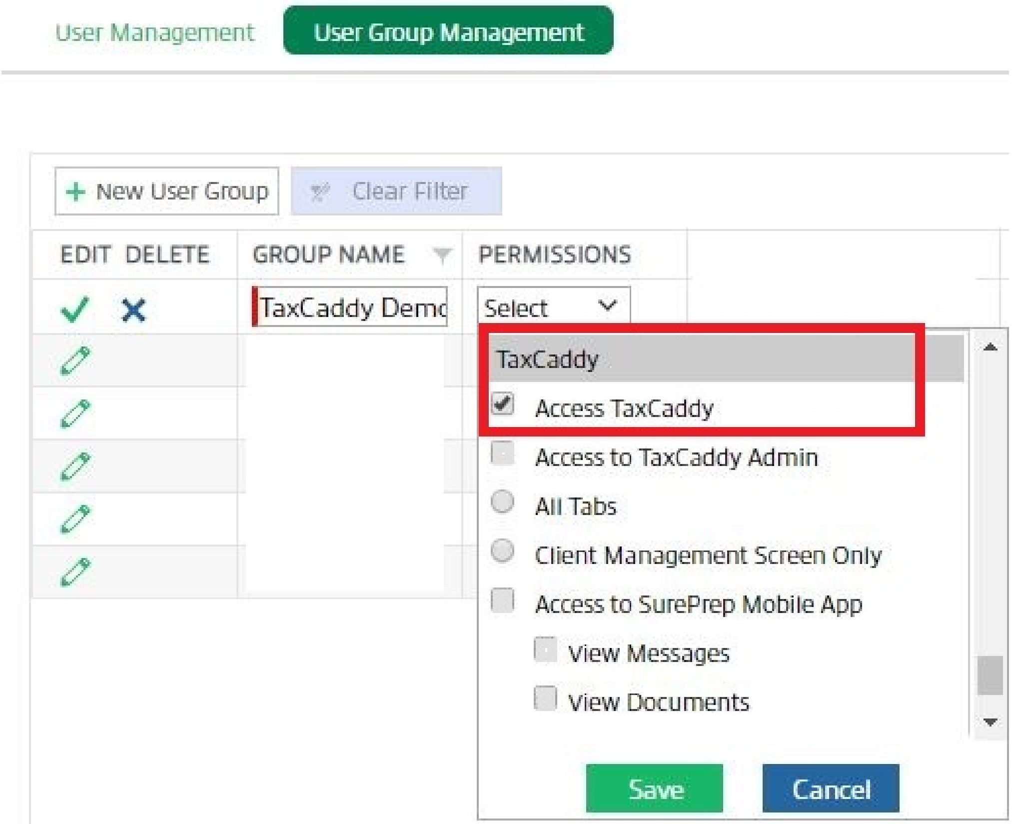
Prior experience as a Firm Administrator at a local accounting firm with responsibilities that included implementing TaxCaddy at the firm

Today's Topics

- User Permissions
- Email notifications
- Statuses in Client Management Tab
- Sort Categories and Filters on Overview Screen
- Support

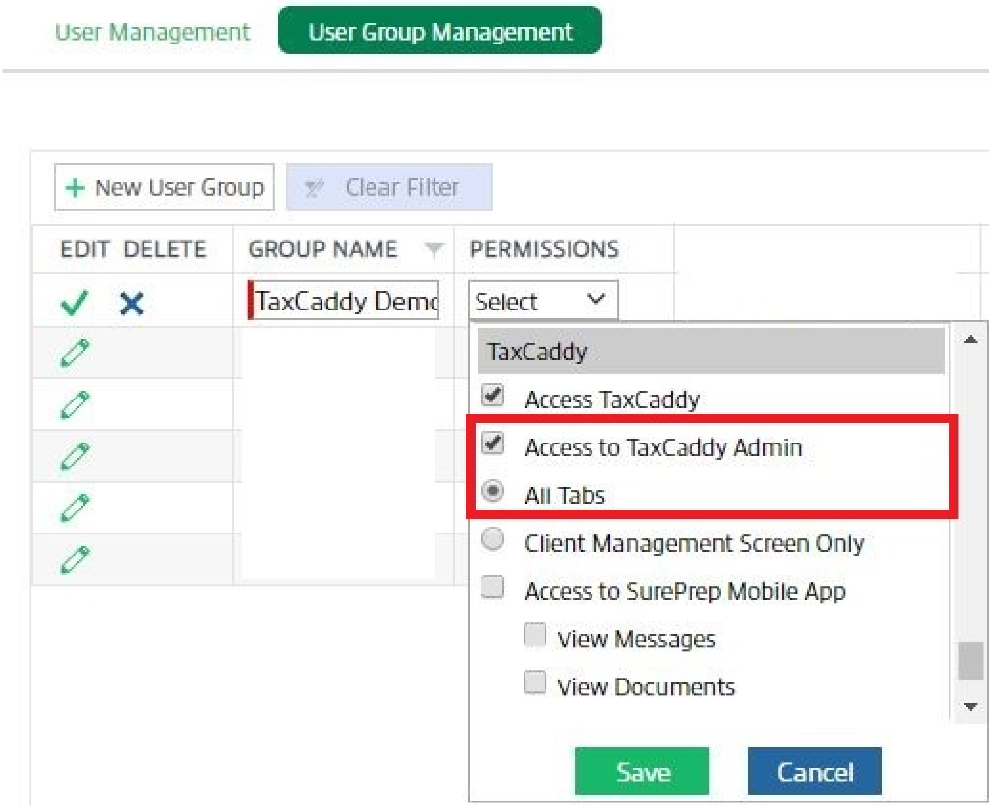
User Permissions

- “Access TaxCaddy” must be enabled for all users to access TaxCaddy
- Most commonly asked question regarding TaxCaddy firm users



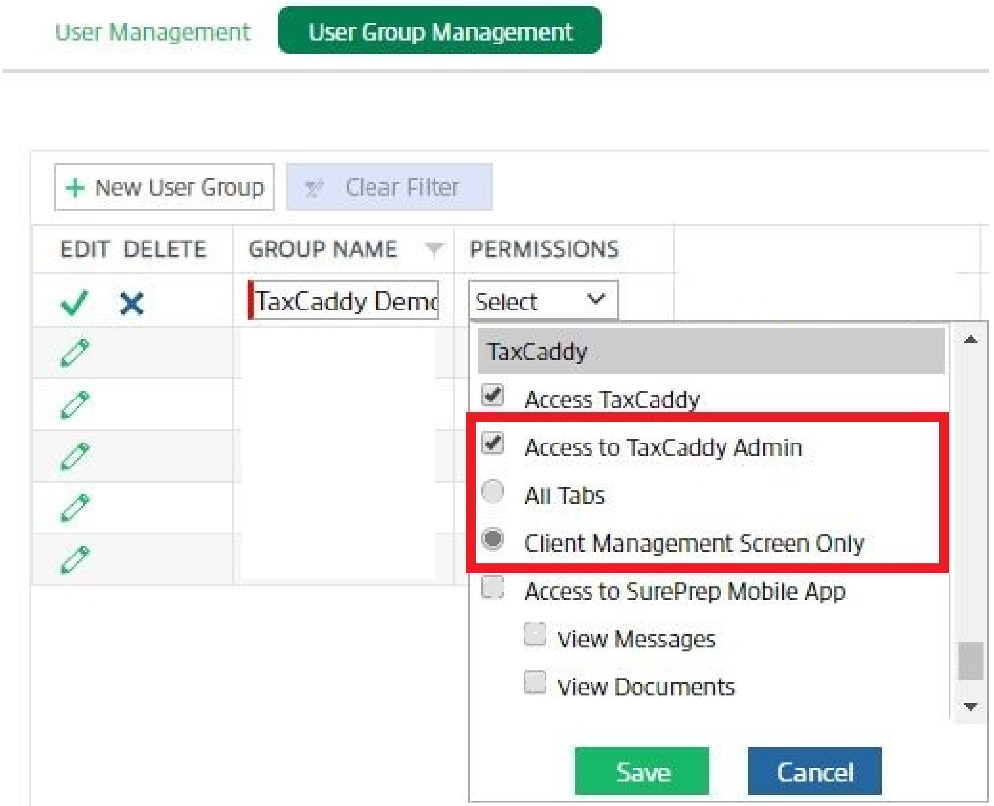
User Permissions

- Access to TaxCaddy Admin
- Who needs “All Tabs” access?



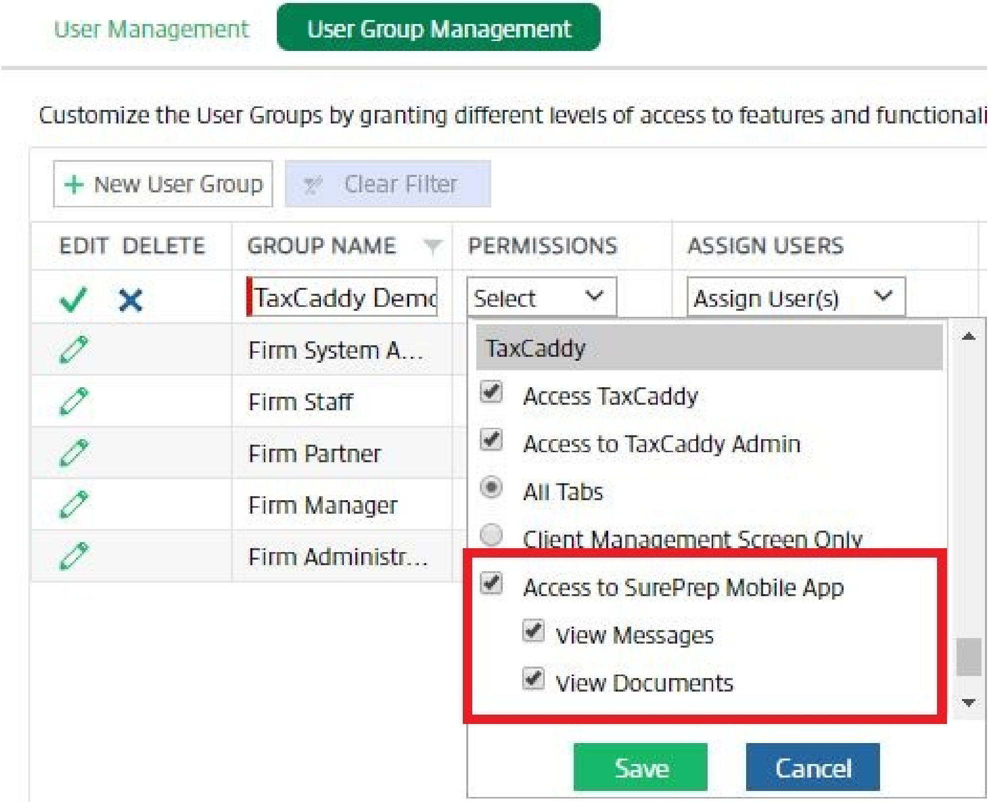
User Permissions

- Access to TaxCaddy Admin
- Recommended best practice for “Client Management Screen Only” option



User Permissions

- Recently added option- “Access to SurePrep Mobile App”
- Factors to consider when granting this permission



Email Notifications

- All notifications or specific notifications?
- Set up an email rule to help keep your inbox clean
- Notifications come for only clients you are following

Client Management Tab

- How is this tab used to help manage clients?

Client Management Tab

Statuses you may see…

Eligible to send an invite	Not Invited
Invite has been sent but taxpayer has not created account yet	Not Enrolled
Account created but connection request has not been accepted yet	Enrolled

Client Management Tab

(Continued)

Connection request accepted and account eligible to be managed

Connected

Email address is associated to an account connected to a different tax professional

Not Connected

Client Management Tab

(Continued)

Account was created as offline

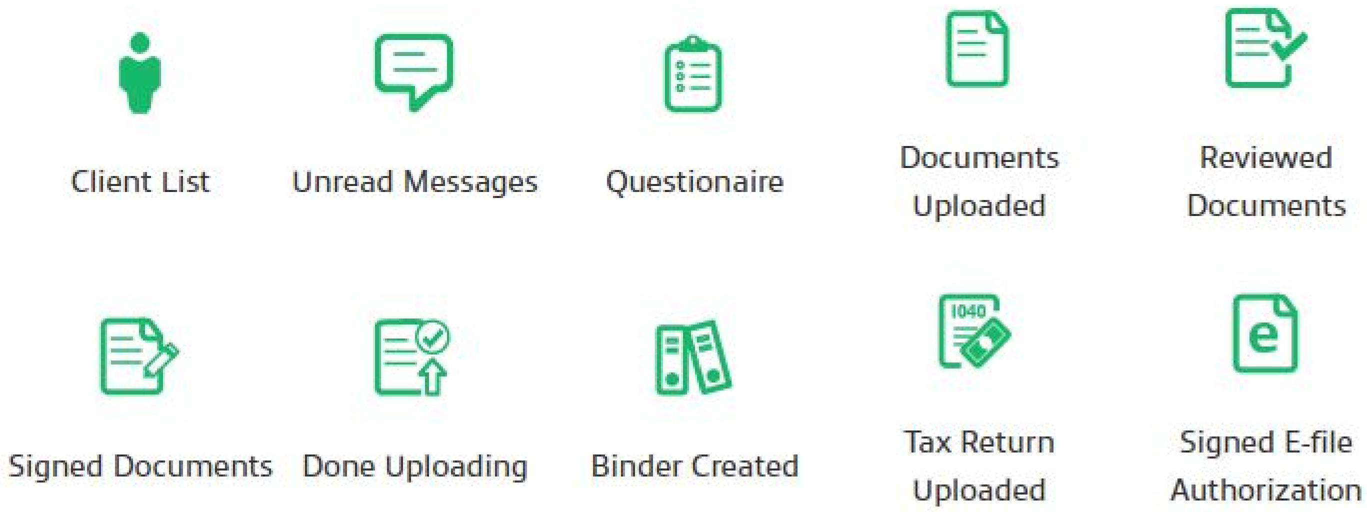
Offline

Account is created without a connection request from tax professional

Connected Elsewhere

Overview Screen

- Sort views and Filters

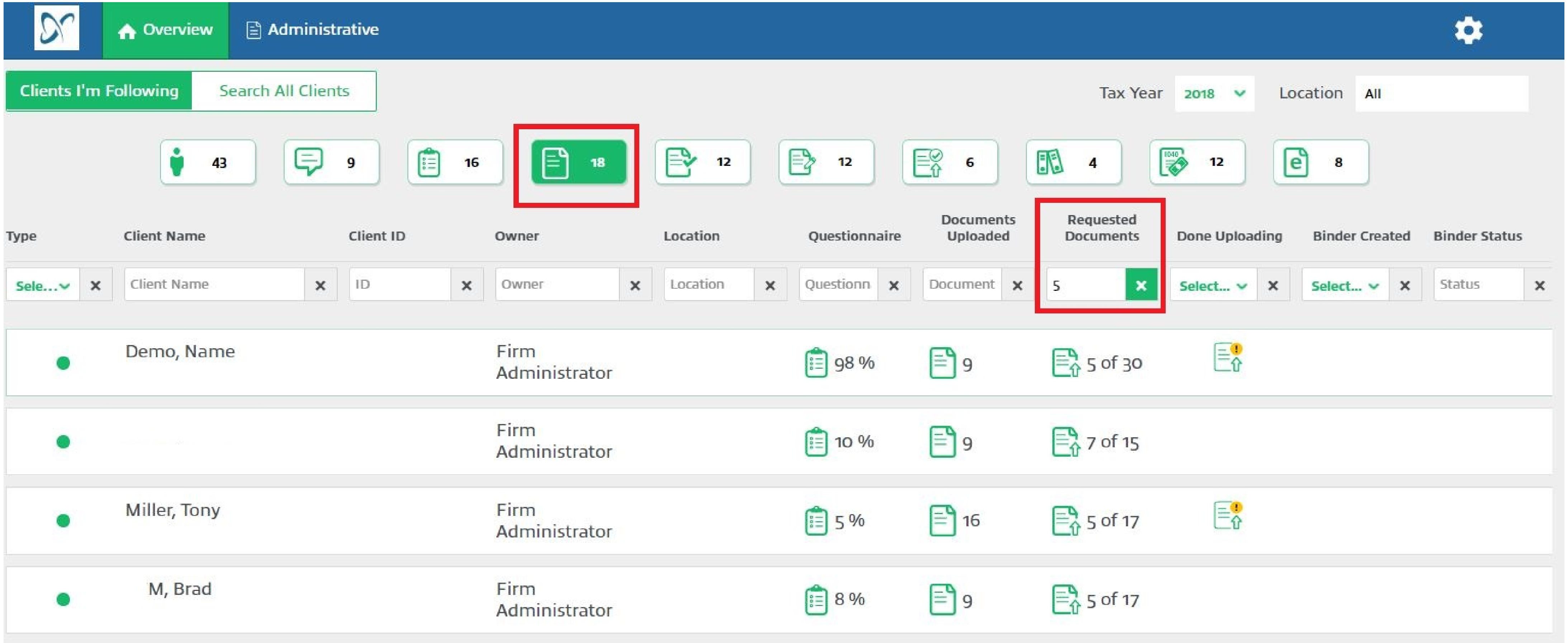


Type	Client Name	Client ID	Owner	Location	Done Uploading	Binder Created	Binder Status	Tax Return Uploaded	E-File Auth.	Last Activity

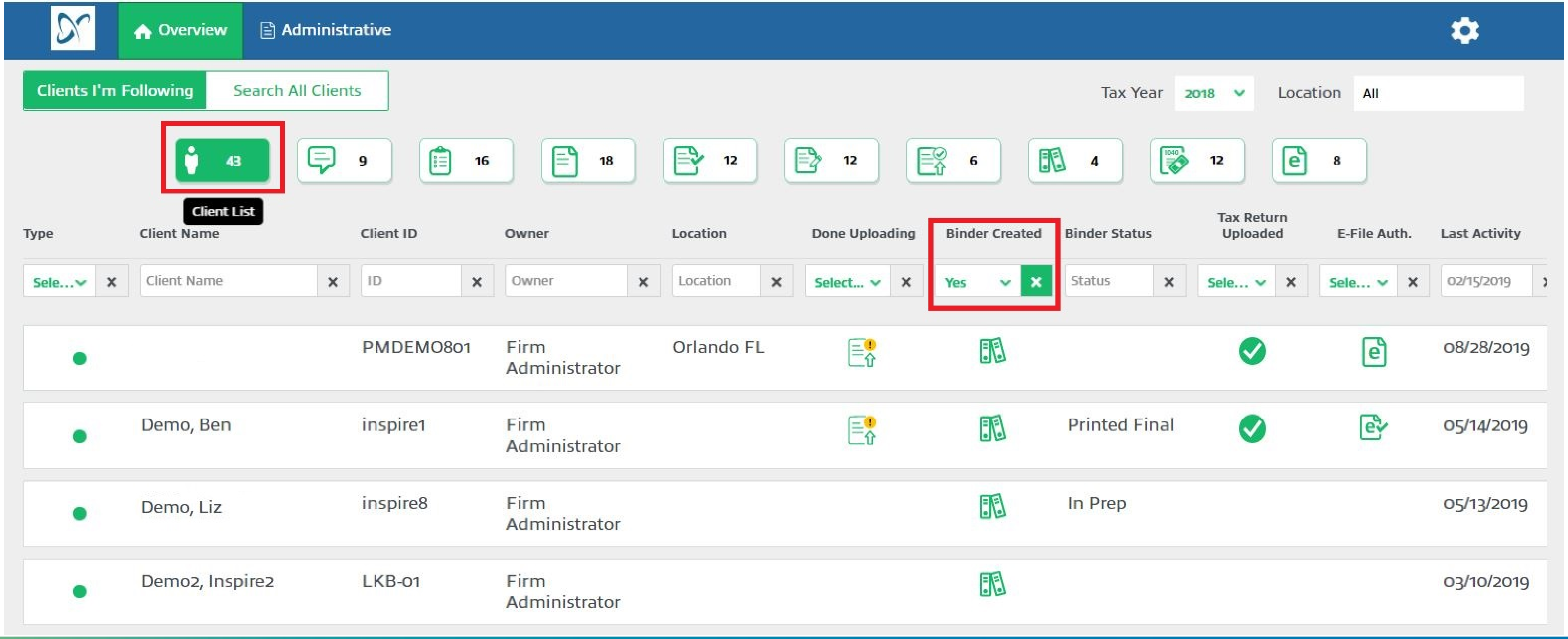
Overview Screen

- Use sort views and filters together to narrow results to display specific subset of information

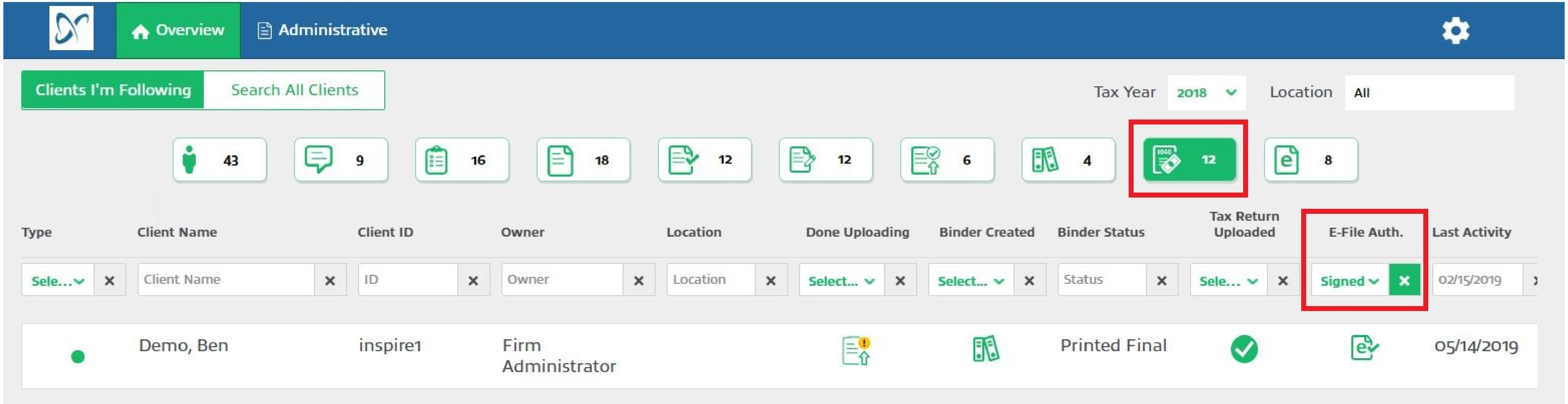
Overview Screen (Filter Examples)



Overview Screen (Filter Examples)



Overview Screen (Filter Examples)



Available Resources

- Help Center
- Enhancement Requests
- Subscribe to SurePrep Status Page
    - status.sureprep.com
    - One page for all product and service levels

Recap

- Objective: Explore the resources available within TaxCaddy to optimize taxpayer account management
- User Permissions and Email Notifications
- Client Management Tab and Statuses
- How to Use Sort Views and Filters
- Additional Resources Available

Q & A

Contact Info

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