



TAX TRANSFORMATION
S U M M I T
NOVEMBER 3-5, 2019

Tips and Tricks to Effectively Manage Taxpayers in TaxCaddy

- Jerica Hernandez
Client Success Associate



Jerica Hernandez

Client Success Associate

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



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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

The screenshot displays the 'User Group Management' interface. At the top, there are two tabs: 'User Management' and 'User Group Management', with the latter being active. Below the tabs, there are buttons for '+ New User Group' and 'Clear Filter'. The main area contains a table with columns for 'EDIT', 'DELETE', 'GROUP NAME', and 'PERMISSIONS'. The first row shows a green checkmark and a blue 'X' in the 'EDIT' and 'DELETE' columns, respectively. The 'GROUP NAME' column contains 'TaxCaddy Demc'. The 'PERMISSIONS' column has a dropdown menu open, showing a list of permissions. The 'Access TaxCaddy' option is selected and highlighted with a red box. Other permissions listed include 'Access to TaxCaddy Admin', 'All Tabs', 'Client Management Screen Only', 'Access to SurePrep Mobile App', 'View Messages', and 'View Documents'. At the bottom of the dropdown menu, there are 'Save' and 'Cancel' buttons.

EDIT	DELETE	GROUP NAME	PERMISSIONS
✓	✗	TaxCaddy Demc	Select
			<input checked="" type="checkbox"/> Access TaxCaddy
			<input type="checkbox"/> Access to TaxCaddy Admin
			<input type="radio"/> All Tabs
			<input type="radio"/> Client Management Screen Only
			<input type="checkbox"/> Access to SurePrep Mobile App
			<input type="checkbox"/> View Messages
			<input type="checkbox"/> View Documents



User Permissions

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

User Management **User Group Management**

+ New User Group Clear Filter

EDIT	DELETE	GROUP NAME	PERMISSIONS
<input checked="" type="checkbox"/>	<input type="checkbox"/>	TaxCaddy Demo	Select

TaxCaddy

- Access TaxCaddy
- Access to TaxCaddy Admin
- All Tabs
- Client Management Screen Only
- Access to SurePrep Mobile App
 - View Messages
 - View Documents

Save Cancel



User Permissions

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

User Management **User Group Management**

+ New User Group Clear Filter

EDIT	DELETE	GROUP NAME	PERMISSIONS
<input checked="" type="checkbox"/>	<input type="checkbox"/>	TaxCaddy Demo	Select

TaxCaddy

- Access TaxCaddy
- Access to TaxCaddy Admin
- All Tabs
- Client Management Screen Only
- Access to SurePrep Mobile App
- View Messages
- View Documents

Save Cancel



User Permissions

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

User Management **User Group Management**

Customize the User Groups by granting different levels of access to features and functionality

+ New User Group Clear Filter

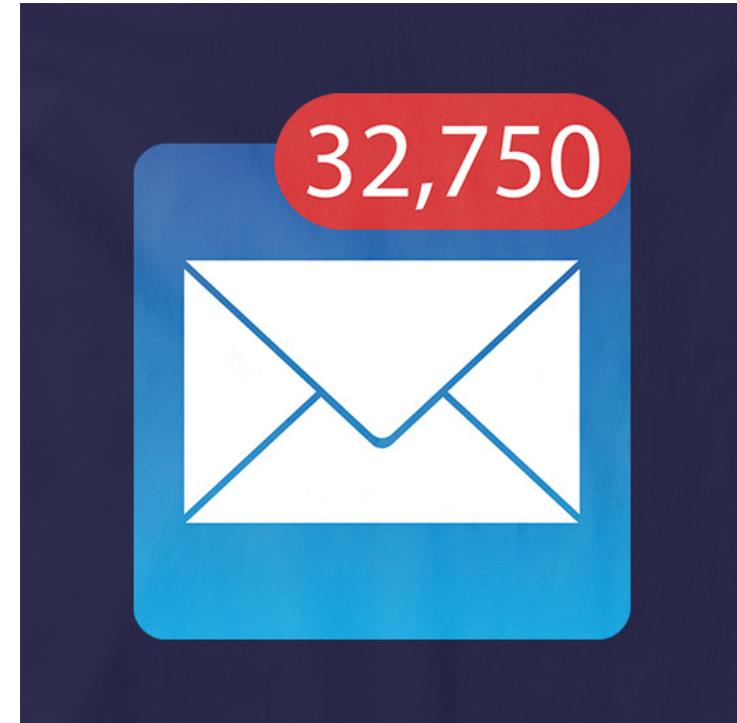
EDIT	DELETE	GROUP NAME	PERMISSIONS	ASSIGN USERS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TaxCaddy Demo	Select	Assign User(s)
<input type="checkbox"/>	<input type="checkbox"/>	Firm System A...	TaxCaddy	
<input type="checkbox"/>	<input type="checkbox"/>	Firm Staff	<input checked="" type="checkbox"/> Access TaxCaddy	
<input type="checkbox"/>	<input type="checkbox"/>	Firm Partner	<input checked="" type="checkbox"/> Access to TaxCaddy Admin	
<input type="checkbox"/>	<input type="checkbox"/>	Firm Manager	<input type="radio"/> All Tabs	
<input type="checkbox"/>	<input type="checkbox"/>	Firm Administr...	<input type="radio"/> Client Management Screen Only	

Access to SurePrep Mobile App
 View Messages
 View Documents

Save Cancel

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





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Client Management Tab

- How is this tab used to help manage clients?



Client Management Tab

Statuses you may see...

Eligible to send an invite

Invite has been sent but taxpayer has not created account yet

Account created but connection request has not been accepted yet

Not Invited

Not Enrolled

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

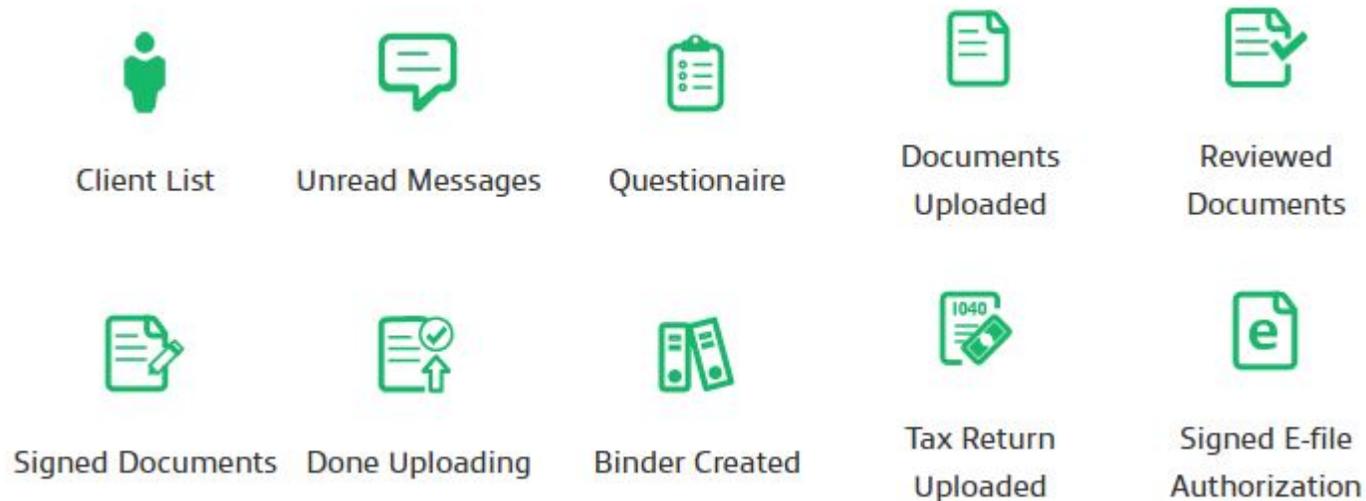
Account is created without a connection request from tax professional

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 Administrative

Clients I'm Following Search All Clients

Tax Year 2018 Location All

43 9 16 18 12 12 6 4 12 8

Type	Client Name	Client ID	Owner	Location	Questionnaire	Documents Uploaded	Requested Documents	Done Uploading	Binder Created	Binder Status
Sele... v	Client Name x	ID x	Owner x	Location x	Questionn x	Document x	5 x	Select... v	Select... v	Status x
●	Demo, Name		Firm Administrator		98 %	9	5 of 30			
●			Firm Administrator		10 %	9	7 of 15			
●	Miller, Tony		Firm Administrator		5 %	16	5 of 17			
●	M, Brad		Firm Administrator		8 %	9	5 of 17			



Overview Screen (Filter Examples)

The screenshot shows the Overview Screen with the following elements:

- Navigation: Overview (active), Administrative, Settings.
- Filters: Clients I'm Following, Search All Clients, Tax Year (2018), Location (All).
- Summary Cards: 43 Clients (highlighted), 9 Messages, 16 Documents, 18 Reports, 12 Tasks, 12 Alerts, 6 Reviews, 4 Forms, 12 Returns, 8 E-files.
- Table Headers: Type, Client Name, Client ID, Owner, Location, Done Uploading, Binder Created (highlighted), Binder Status, Tax Return Uploaded, E-File Auth., Last Activity.
- Table Data:

Type	Client Name	Client ID	Owner	Location	Done Uploading	Binder Created	Binder Status	Tax Return Uploaded	E-File Auth.	Last Activity
		PMDEMO801	Firm Administrator	Orlando FL						08/28/2019
	Demo, Ben	inspire1	Firm Administrator				Printed Final			05/14/2019
	Demo, Liz	inspire8	Firm Administrator				In Prep			05/13/2019
	Demo2, Inspire2	LKB-01	Firm Administrator							03/10/2019



Overview Screen (Filter Examples)

Clients I'm Following Search All Clients

Tax Year 2018 Location All

43 9 16 18 12 12 6 4 12 8

Type	Client Name	Client ID	Owner	Location	Done Uploading	Binder Created	Binder Status	Tax Return Uploaded	E-File Auth.	Last Activity
Select... x	Client Name x	ID x	Owner x	Location x	Select... x	Select... x	Status x	Select... x	Signed x	02/15/2019
	Demo, Ben	inspire1	Firm Administrator				Printed Final			05/14/2019



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

Jerica Hernandez

Jerica.Hernandez@SurePrep.com

www.SurePrep.com

1-800-805-8582



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