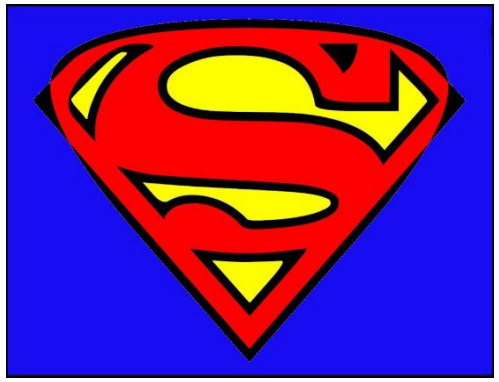
TAX TRANSFORMATION SUMMIT
NOVEMBER 3-5, 2019

# Top 10 Support Issues and How to Overcome Them

Doug Shawver – National Account Support Representative



Super Support

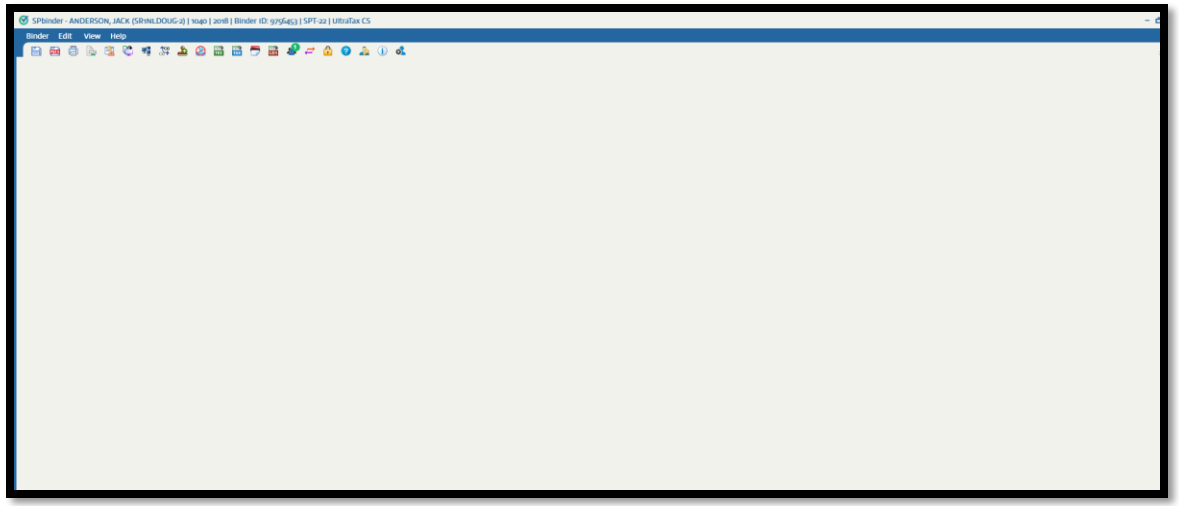
# Doug Shawver

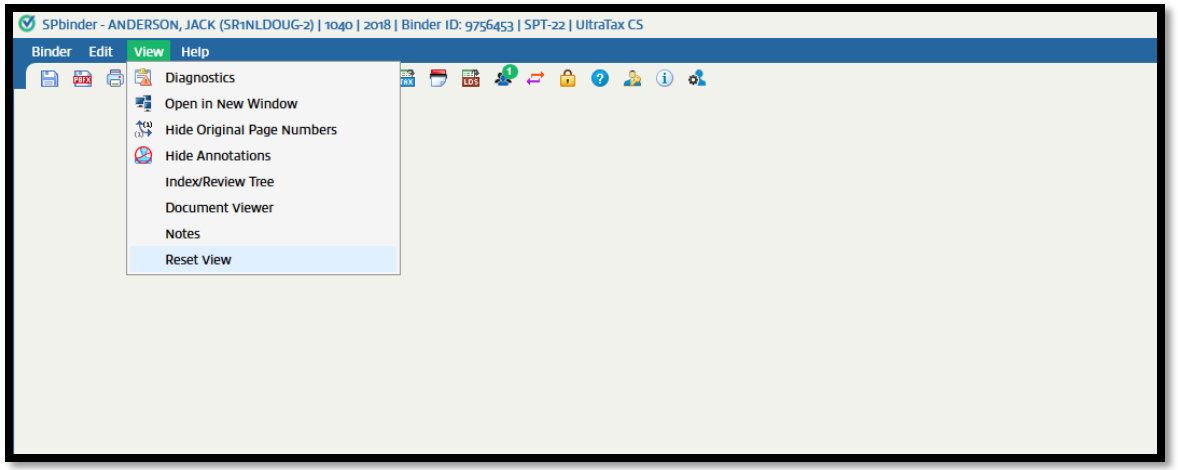
**Doug Shawver is a National Account Support Representative for SurePrep LLC, a leading provider of tax productivity solutions to U.S. public accounting firms. Doug excels in delivering top-notch assistance to premium clients and in delivering tier 2 support for all firms. Doug joined SurePrep as a member of the support team in 2016.**

**Doug joined SurePrep with 15 years of customer support experience, over 10 years serving the IT industries.**

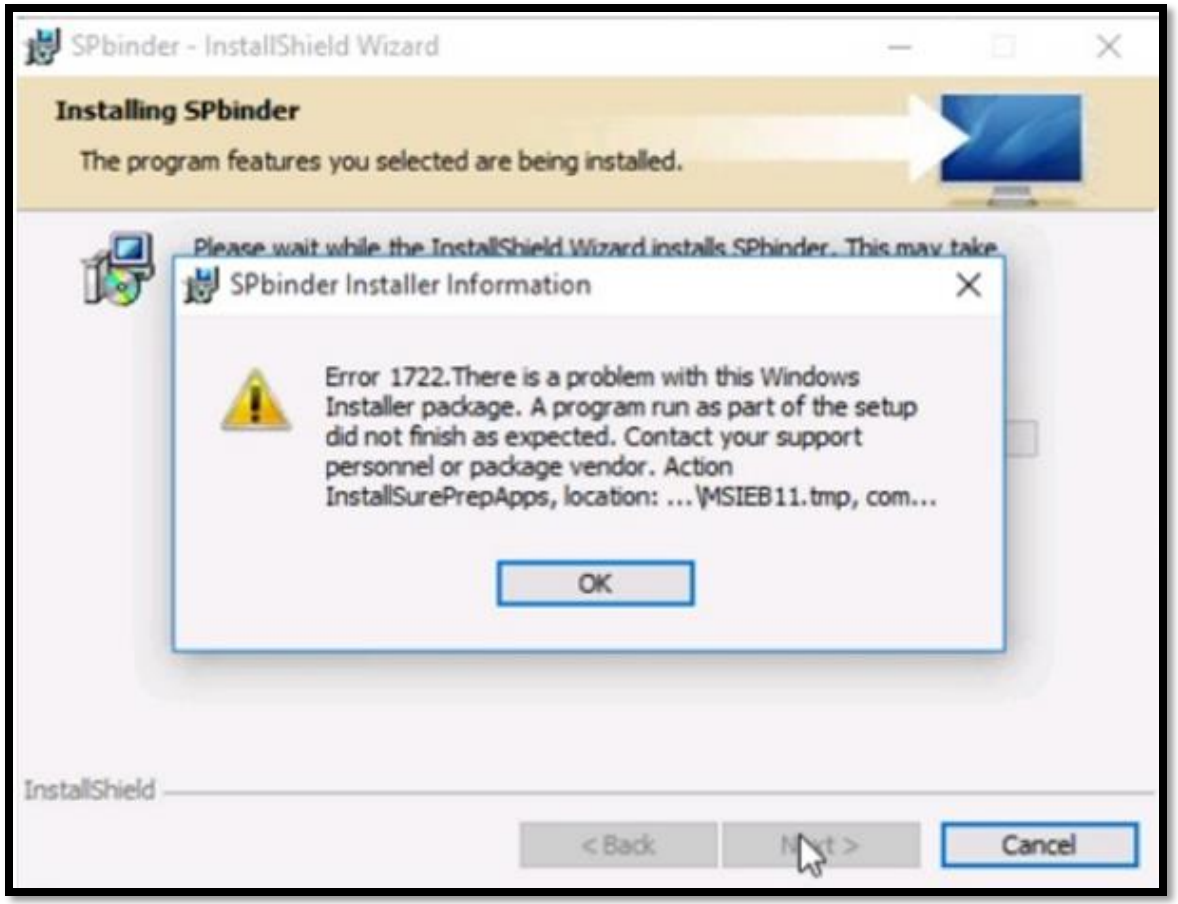
# My SPbinder Appears blank.

Click on View | Reset View





# I received Error 1722 while installing the SPBinder.exe



# Potential Solution

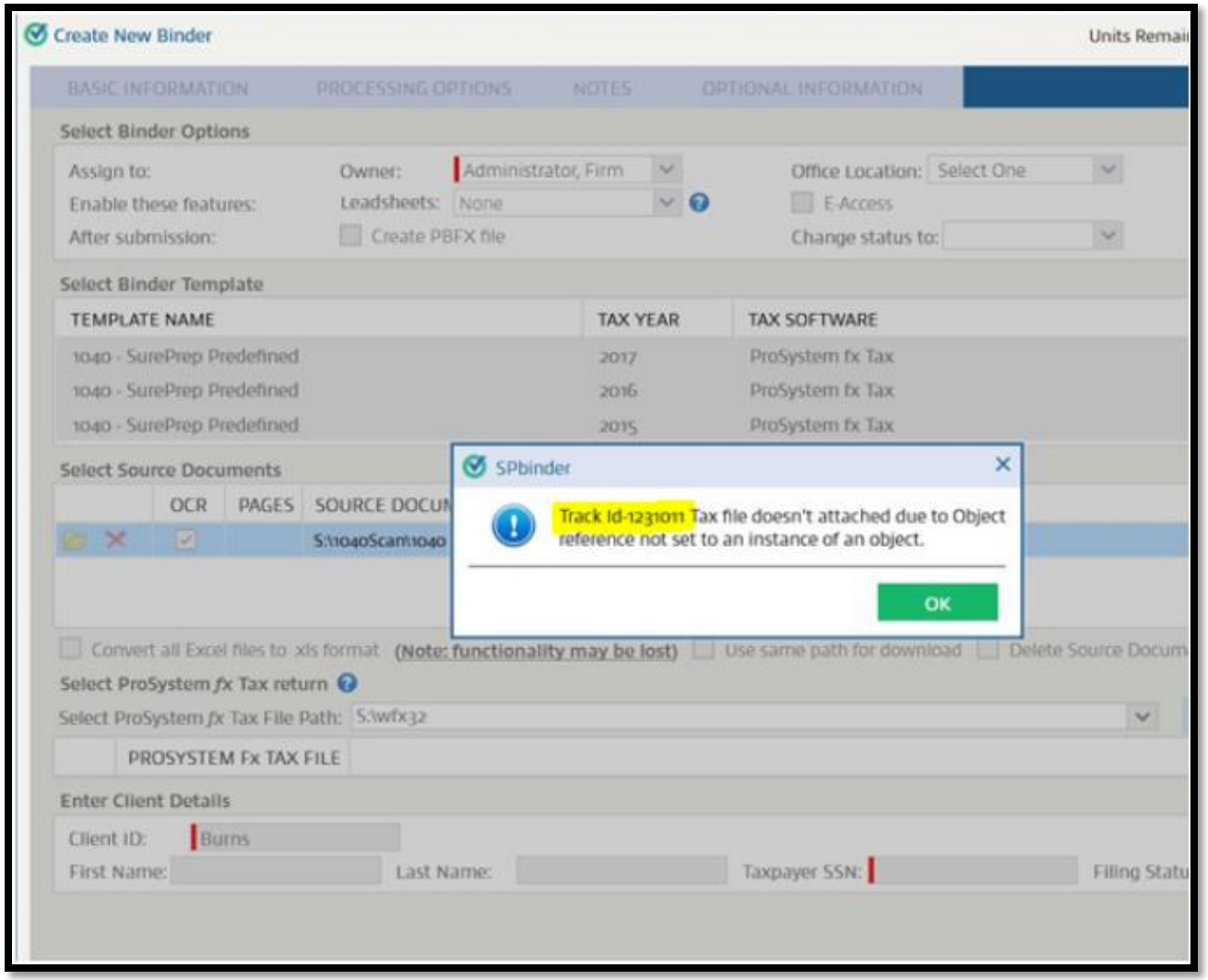
Click on the below link to Download the SPbinder installer link and download the installer file.

https://production.sureprep.com/pbfxinstaller/spbinder.exe

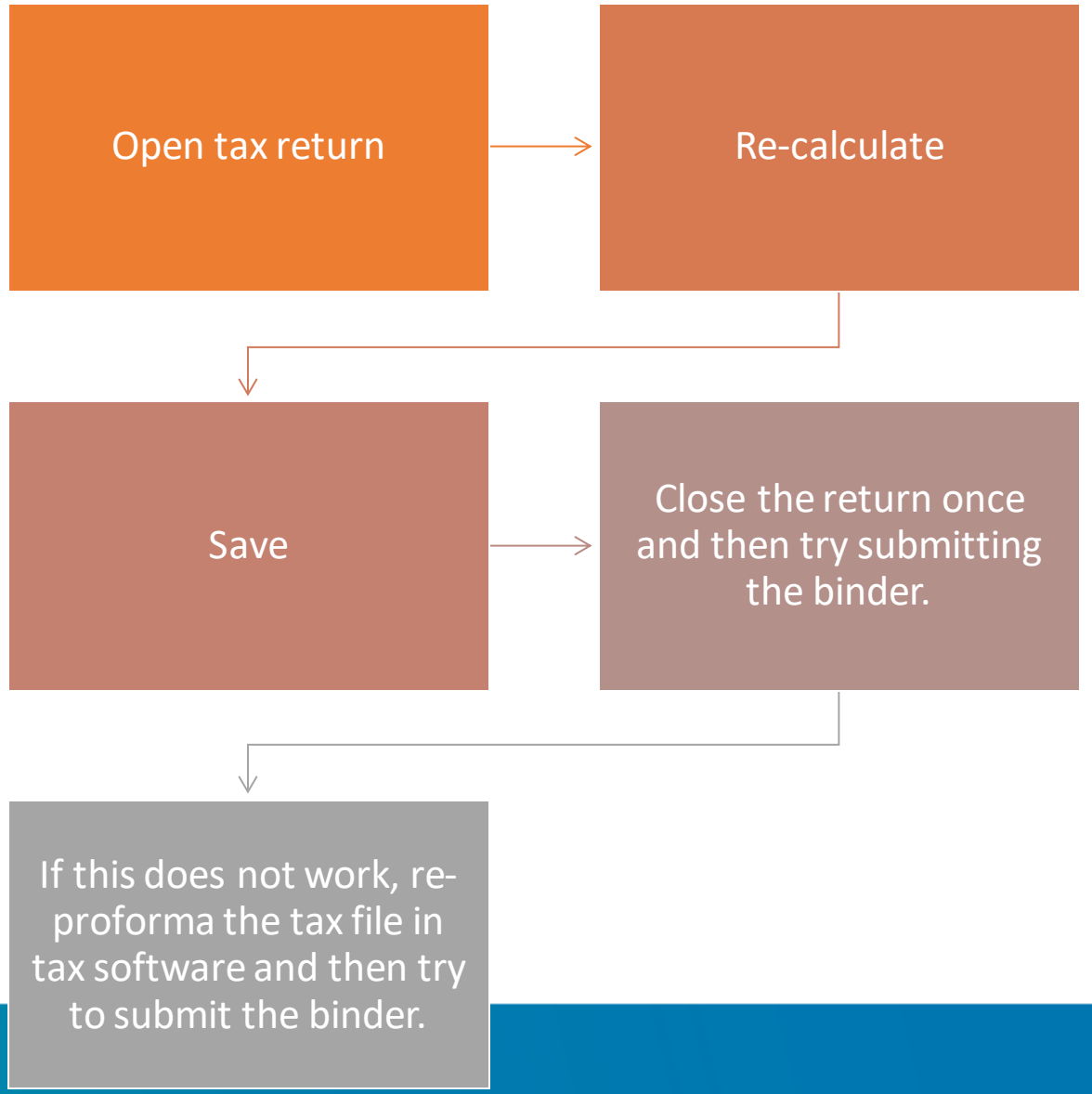
Go to Downloads folder, search for the installer file, right click on it and click on “Run as Administrator”. Follow the instruction to setup and install the software.

**Note:- If we still receive the same error “Error 1722” then we need to turn off the Antivirus and try it.**

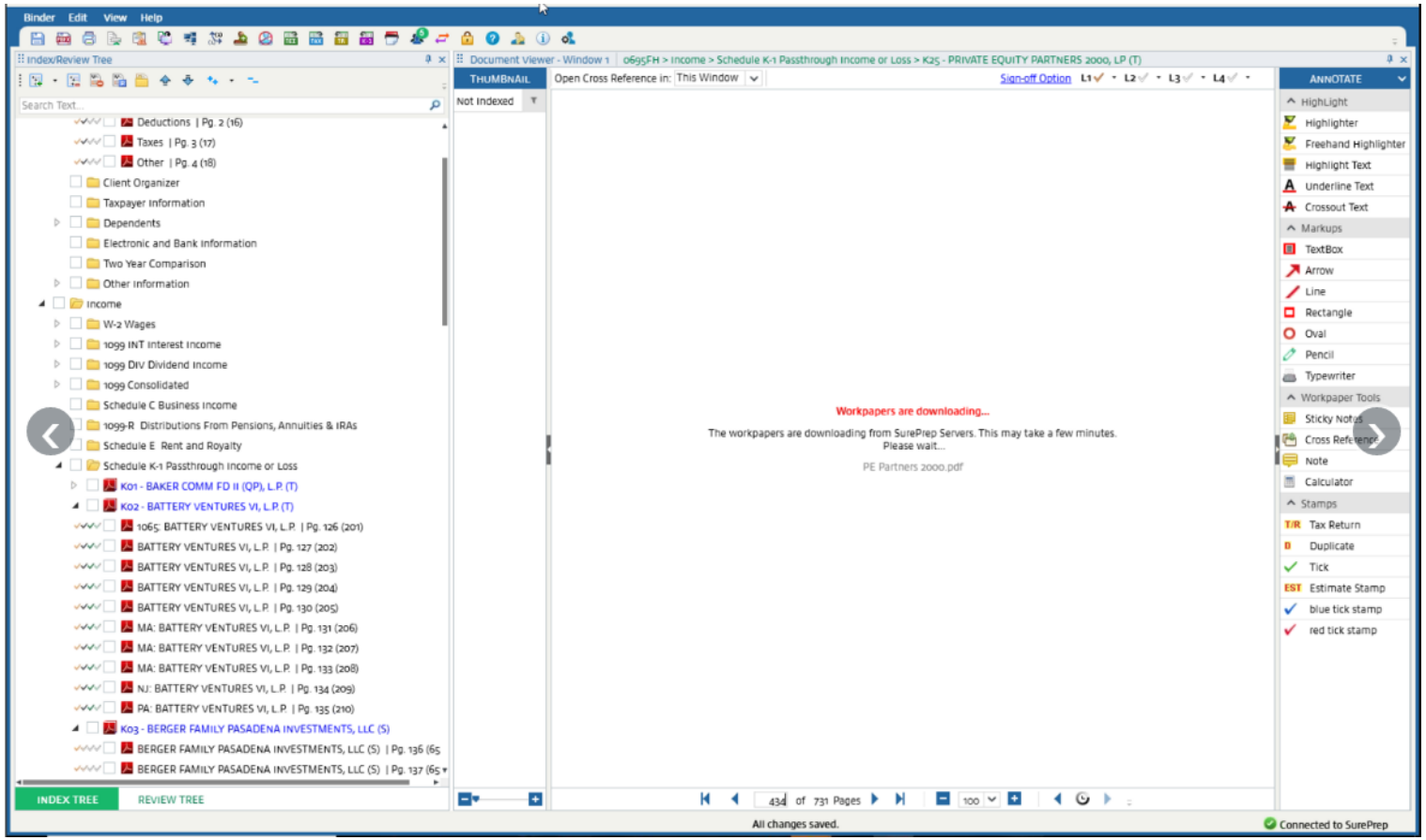
I am getting Track Id 123101 while submitting the binder.



# Potential Solution



My SPbinder has said ‘Workpapers are downloading for a long time now

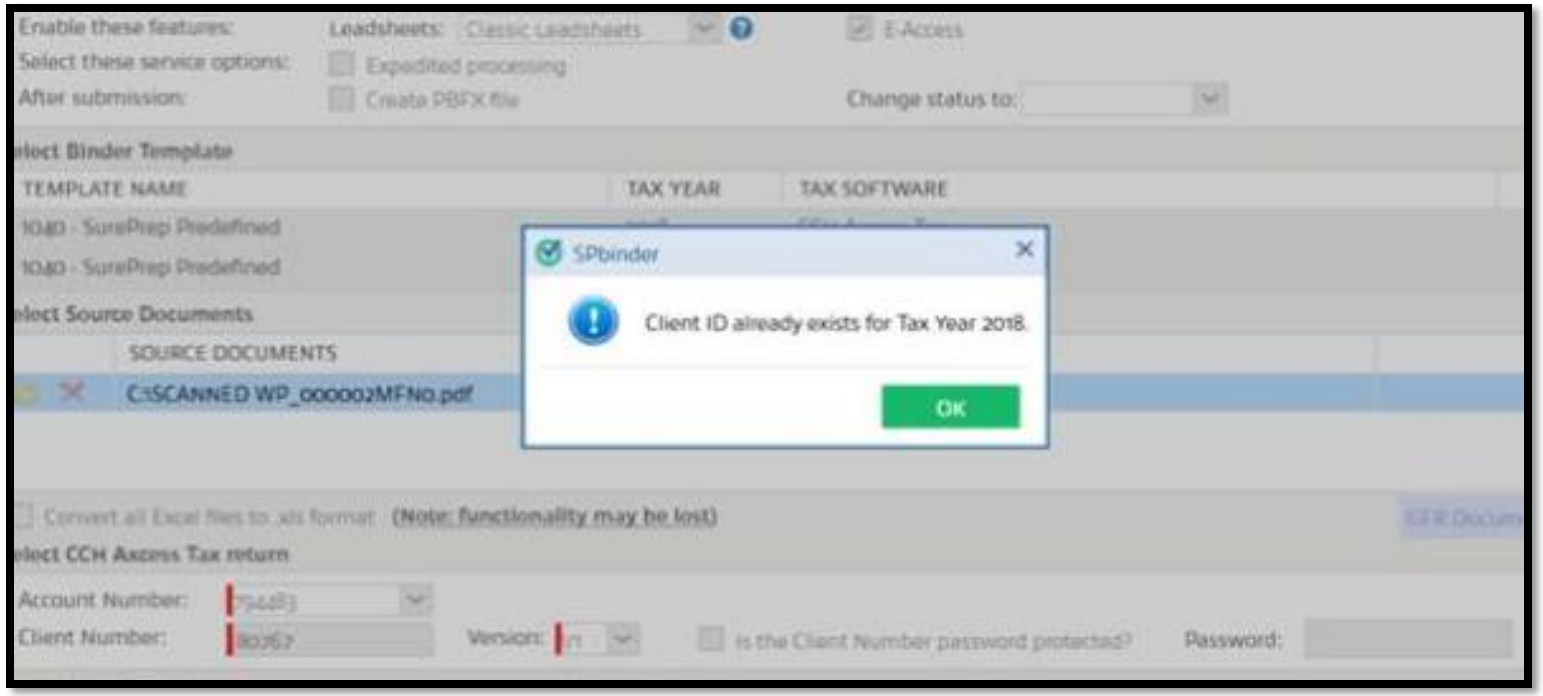


# What is the resolution?

- My SPbinder has said ‘Workpapers are downloading’ for a long time now

- Try to navigate to other pages.
- Close and reopen binder
- Contact support. Please have you Binder ID ready
- Support may ask for GoToMeeting
- Support will try to force an update.

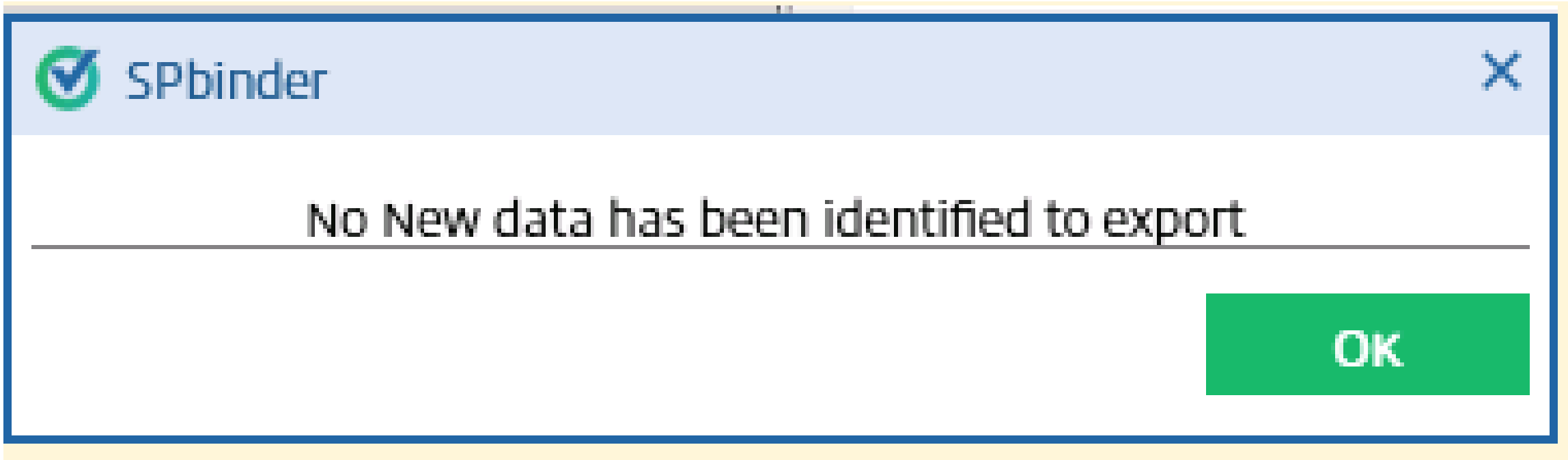
I am trying to create a binder and I get the following error message. What do I do?



# Action taken

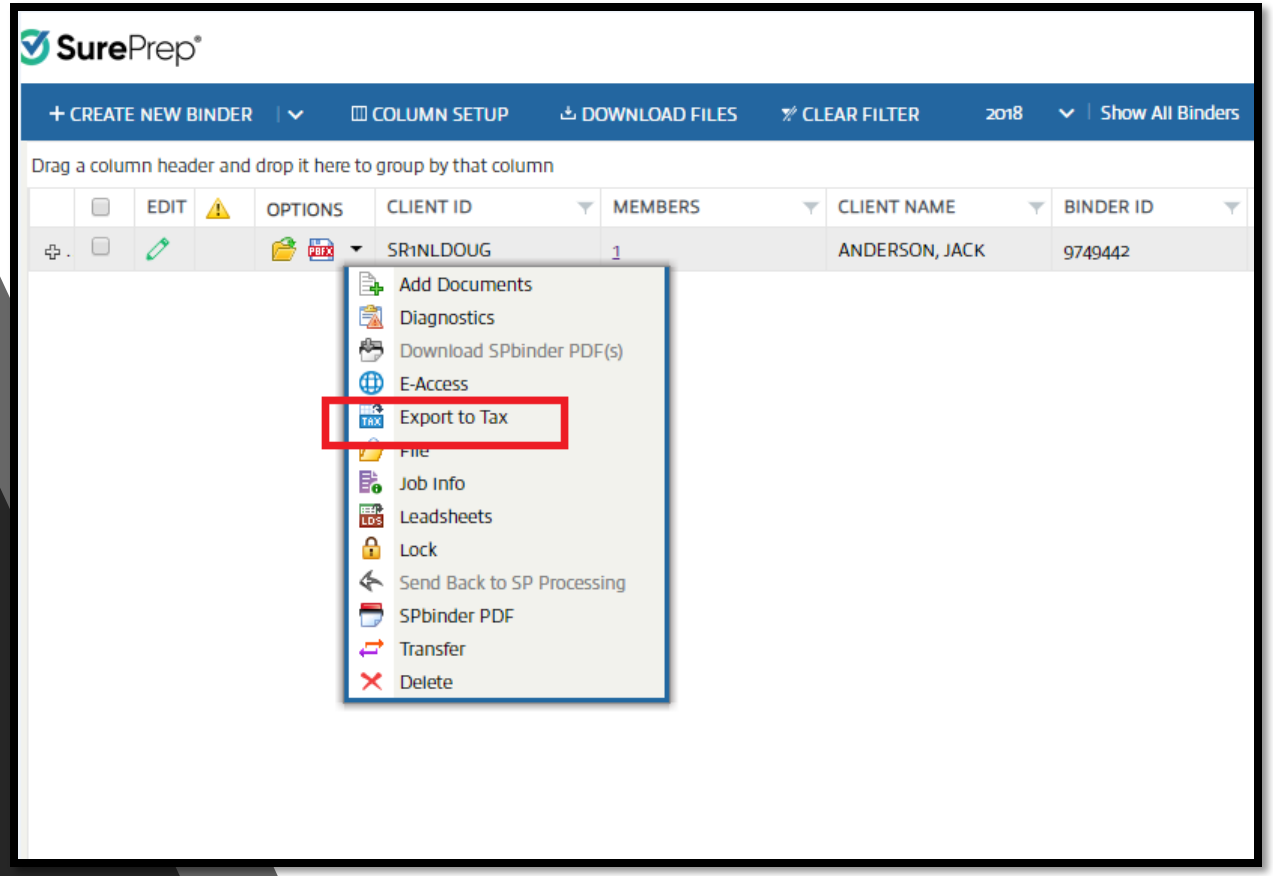
CONTACT SUPPORT. PLEASE HAVE YOUR CLIENT ID, FIRM ID, AND TAX YEAR.

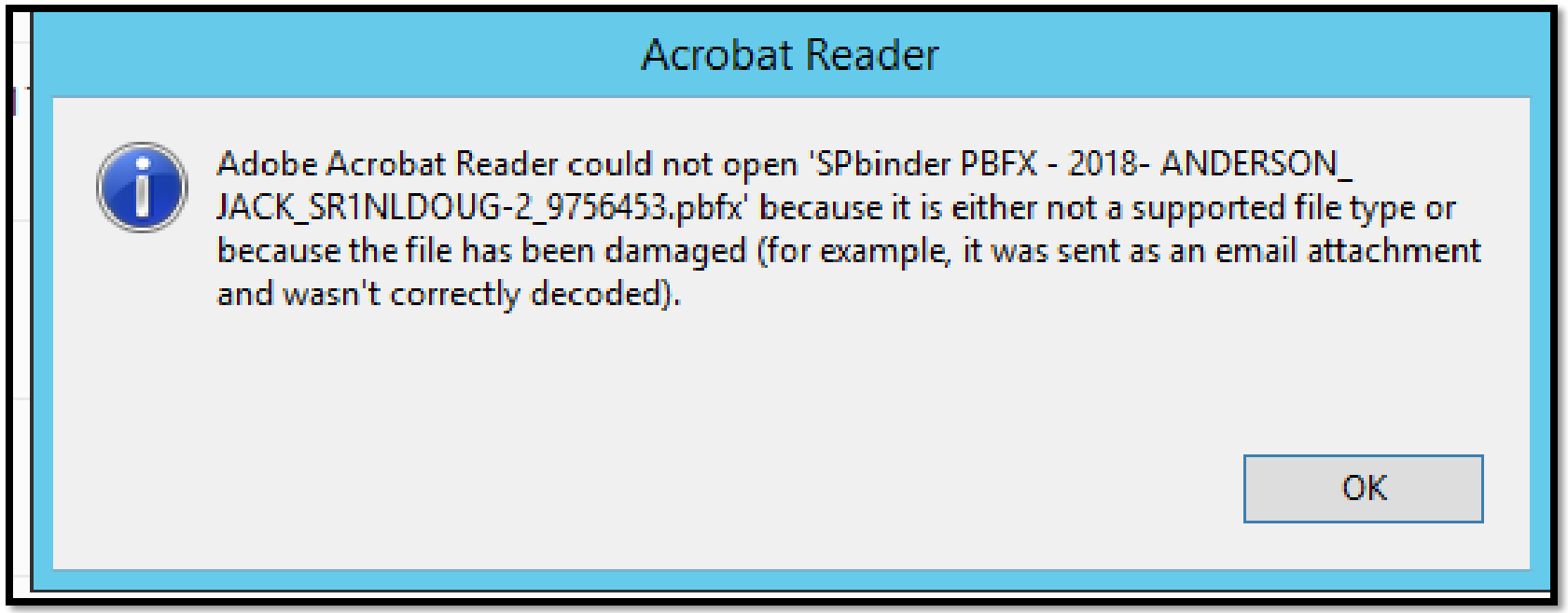
THE BINDER WAS UPLOADED IN ERROR, AND SUPPORT WILL NEED TO DELETE THE BINDER THAT WAS UPLOADED IN ERROR.




I tried to export to tax and the binder says there is no new data. Why? What if there is no new data in my tax return?

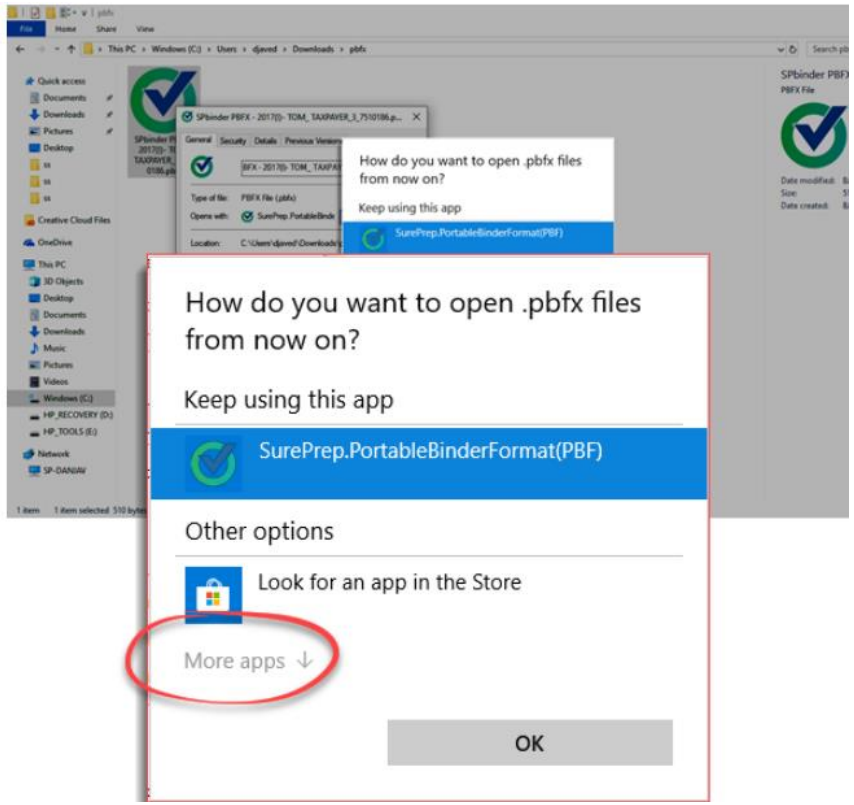
- The system believes SPbinder has already been exported.
- Contact support
- Provide Binder ID number
- Request to update export flag





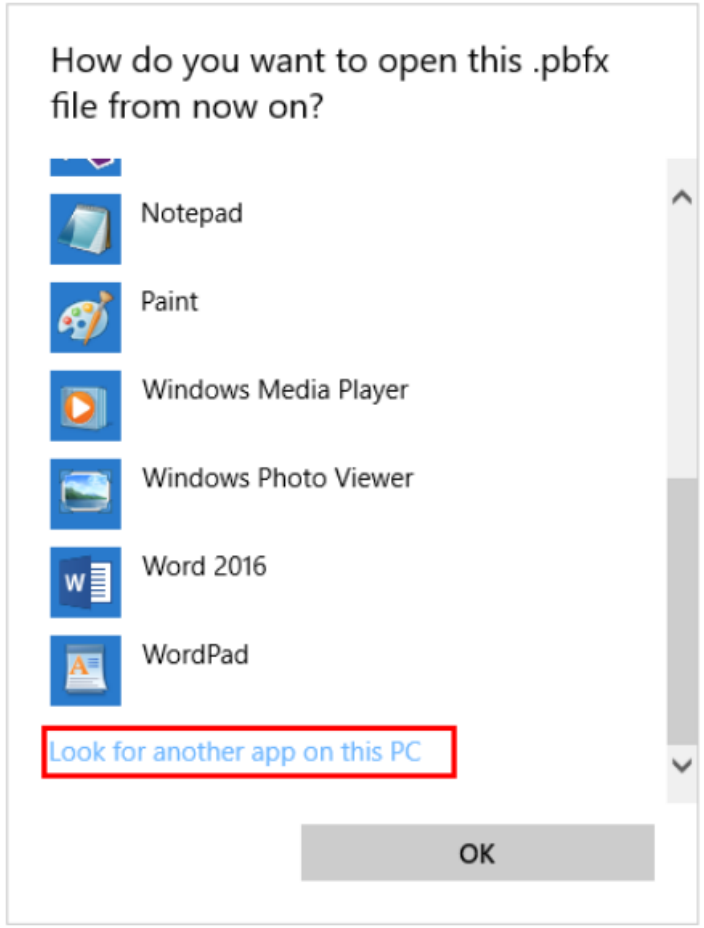

When I open my SPbinder it tries to open in Adobe Acrobat.

- What do I do?




# Set PBFX files to open in SPbinder by default

On the Software selection window, click More apps.

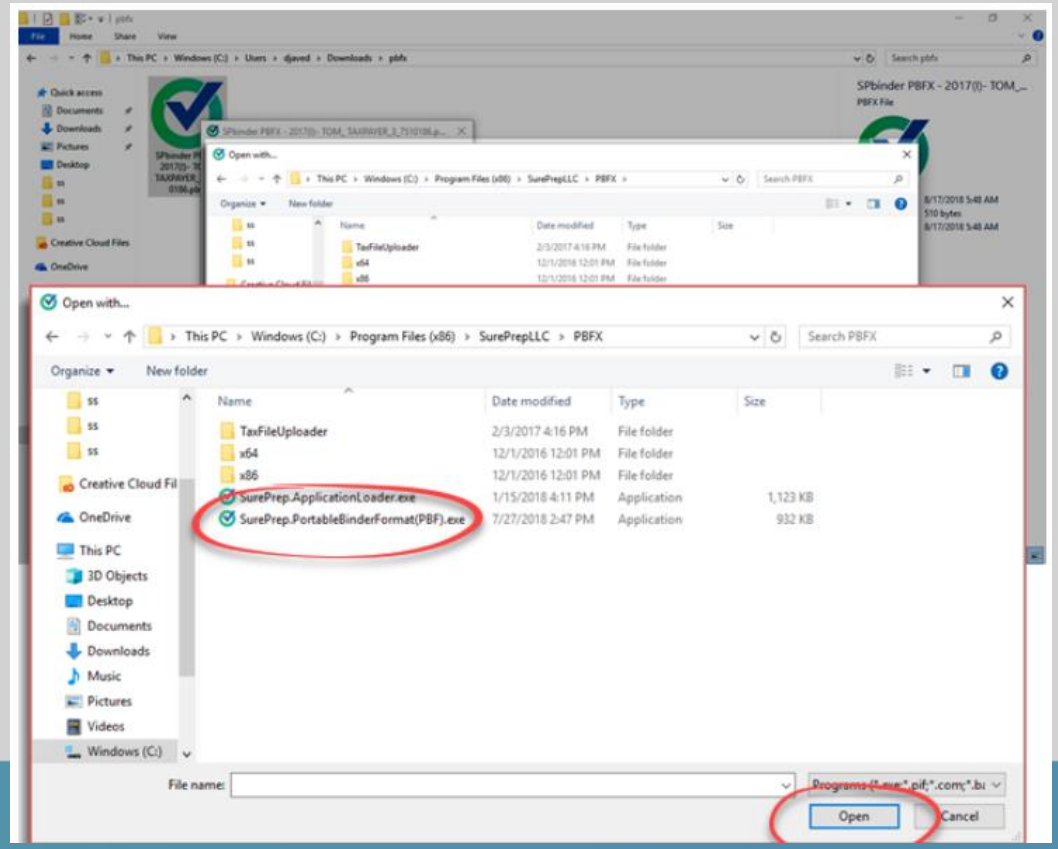


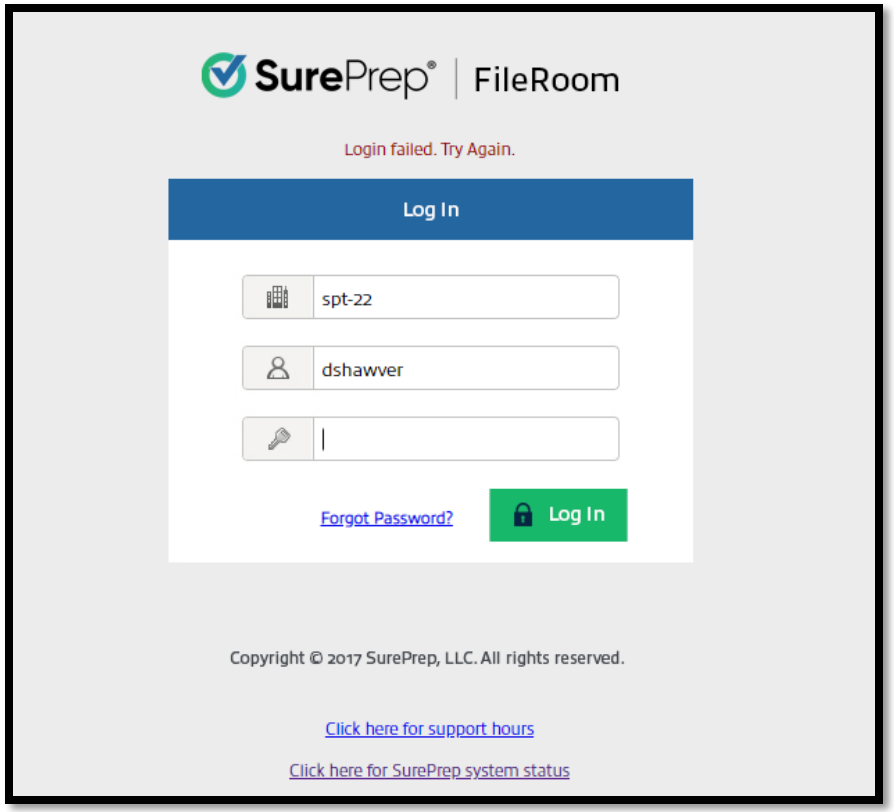

# Set PBFX files to open in SPbinder by default

To view additional options. Click Look for another app on this PC.

# Set PBFX files to open in SPbinder by default

- When the Open With window appears navigate to the Program Files(x86)|SurePrepLLC|Pbfx folder
- Click on the SurePrep.PortableBinderFormat(PBF) and click Open.
- https://helpcenter.sureprep.com/hc/en-us/articles/219903388-Set-PBFX-files-to-open-in-SPbinder-by-default
- Contact support



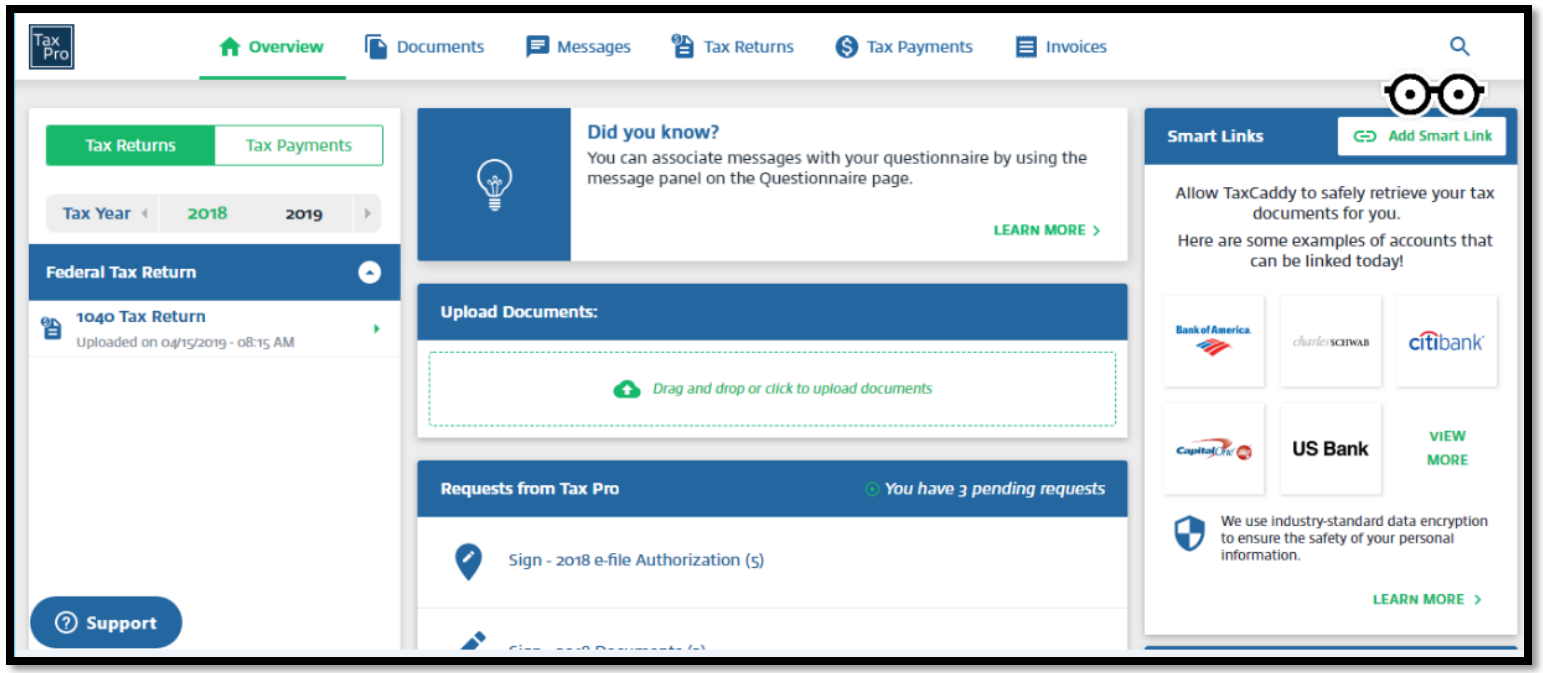



# I keep getting login failed. Try again. Why can I not login?

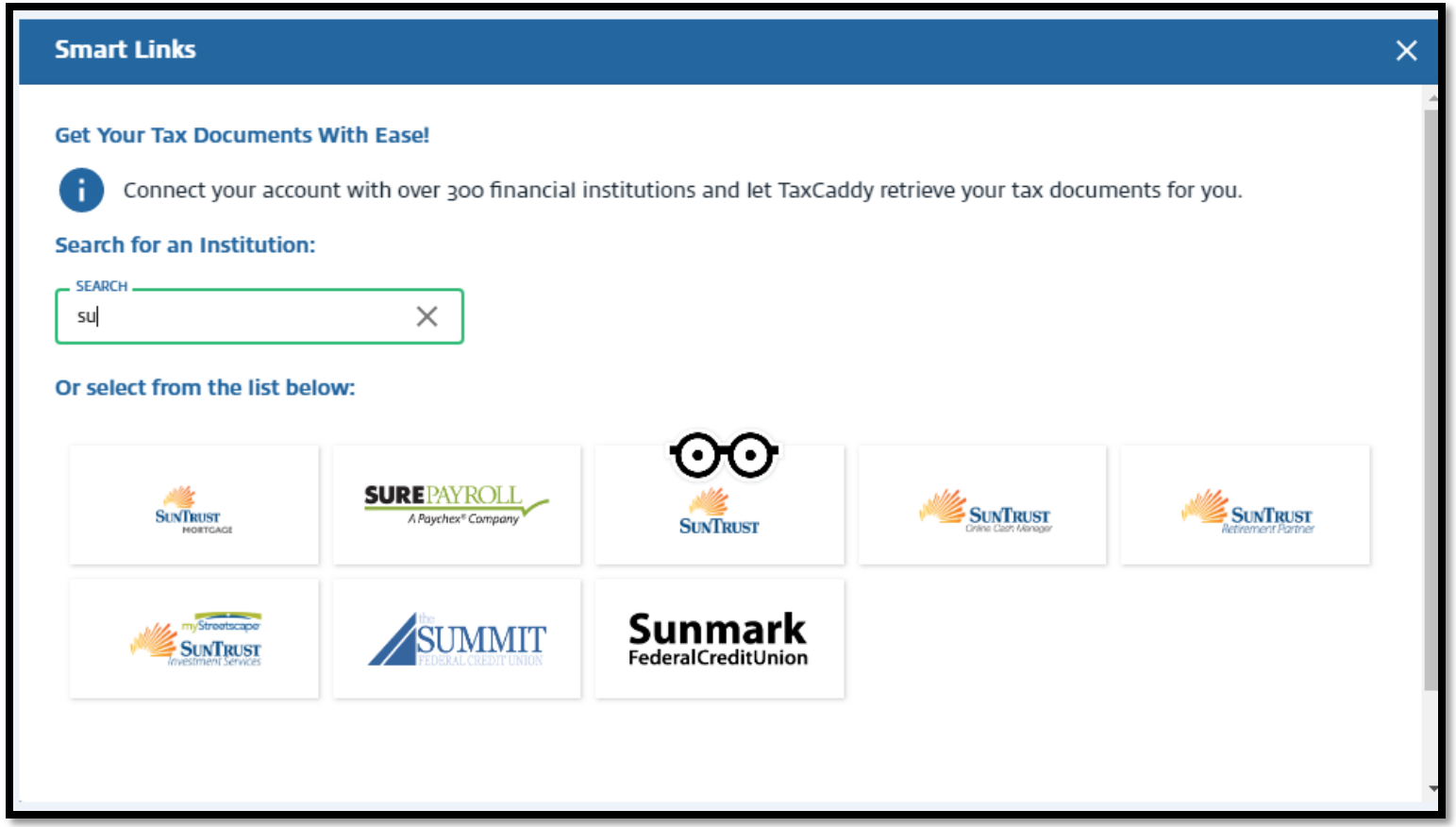
Please make sure the following are correct.

- First line- Firm ID
- Second line- Username
- Third line- Password

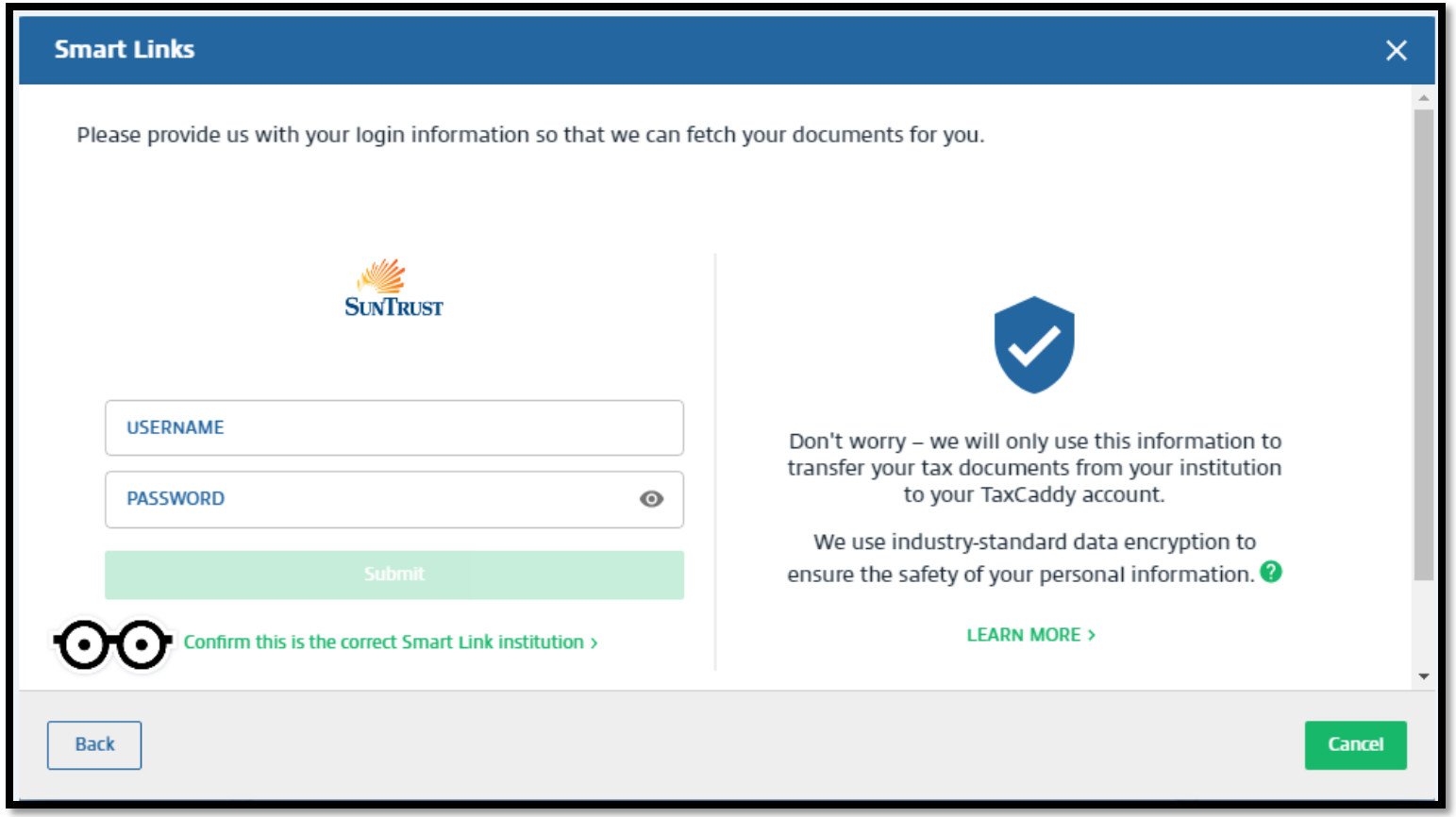
Smart links: *Ensuring the user connects to the correct Smart Link.*



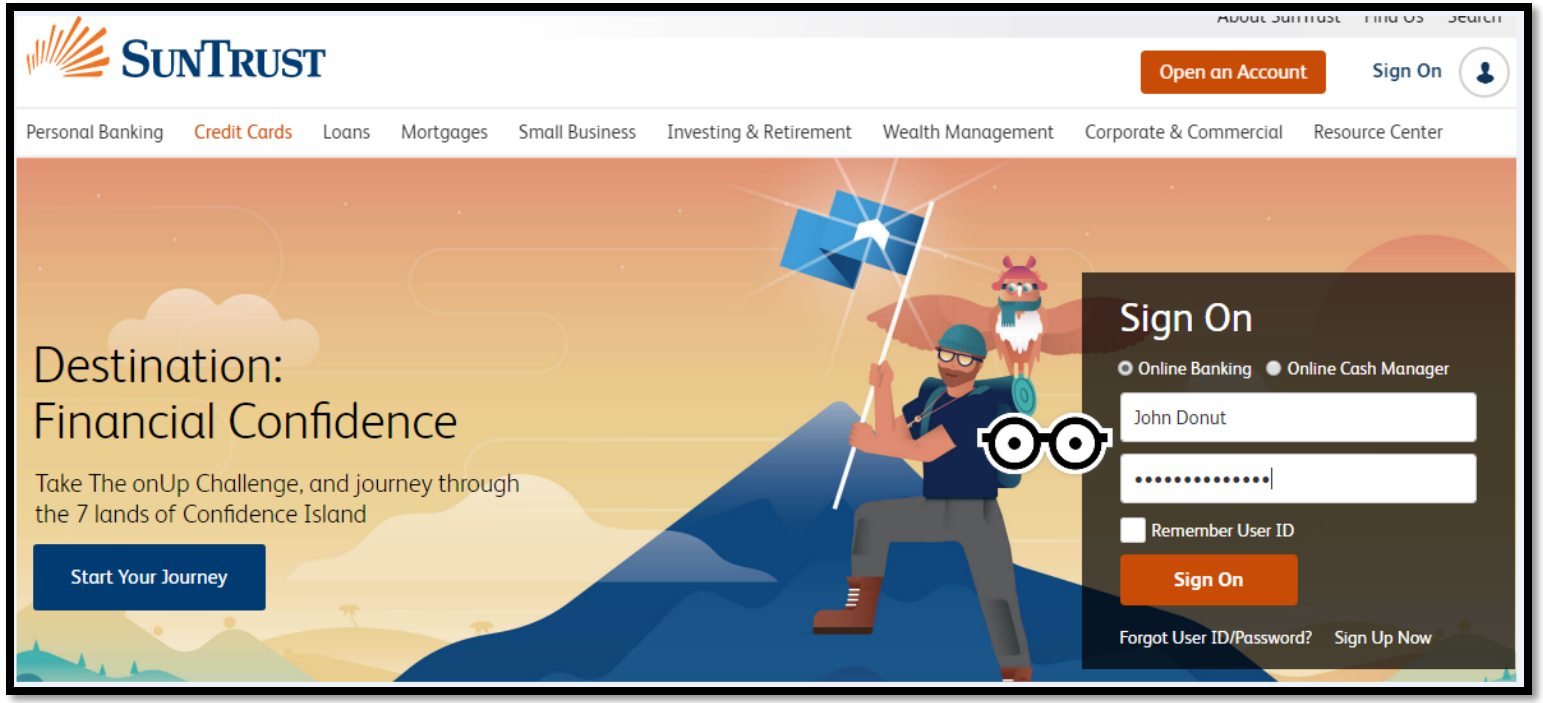
Smart links:
*Ensuring the user connects to the correct Smart Link.*



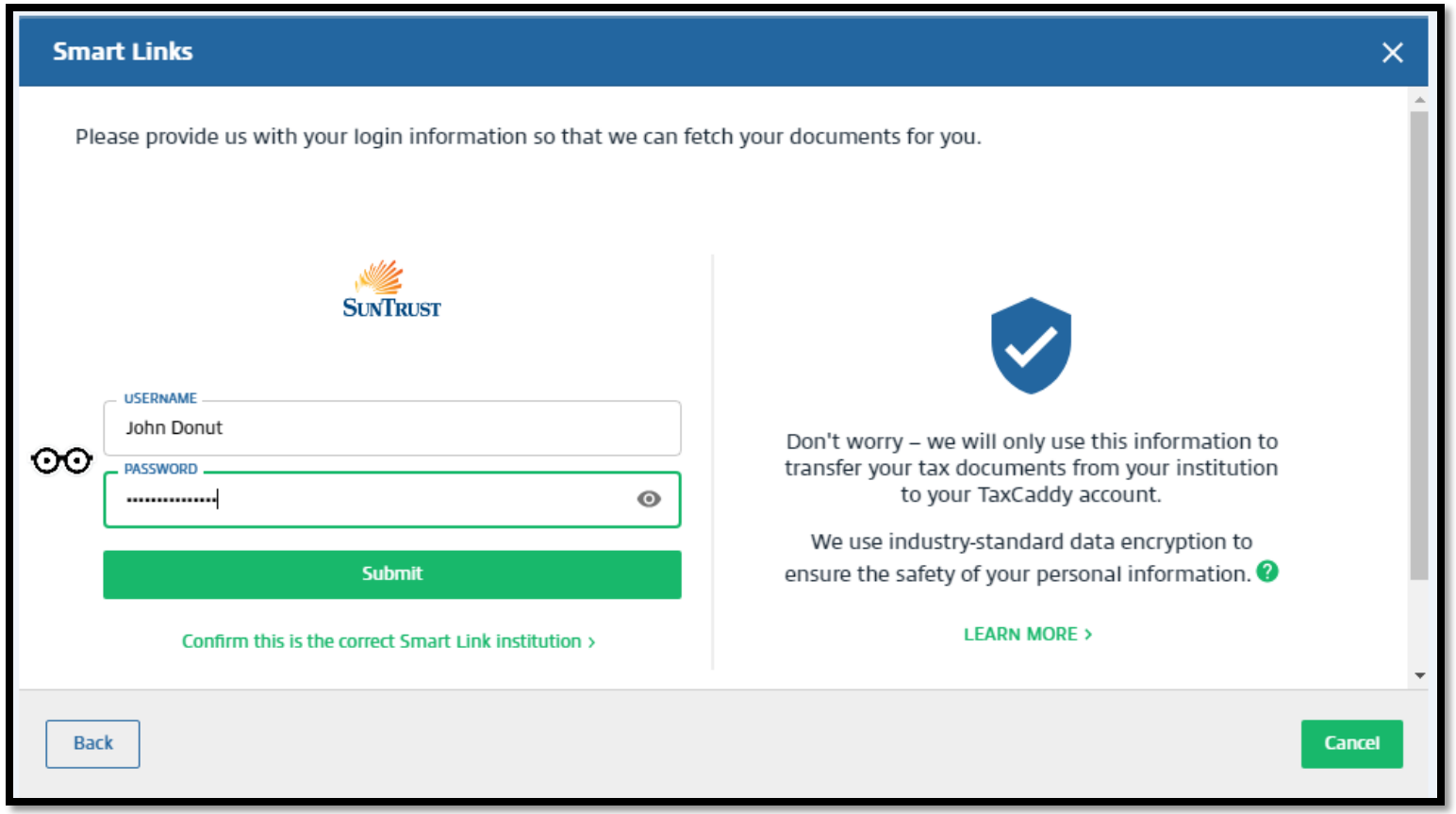
Smart links: *Ensuring the user connects to the correct Smart Link.*



Smart links: *Ensuring the user connects to the correct Smart Link.*



Smart links: *Ensuring the user connects to the correct Smart Link.*



# Onboarding: *First Steps*

TaxCaddy accounts can be created outside of the invitation email. Often times the taxpayer will create a TaxCaddy account using a different email address than the one which was used for the invitation.

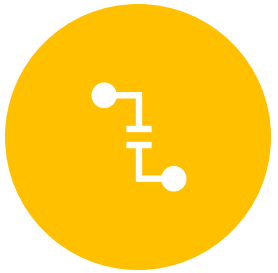
When this happens, the taxpayer will not have a connection request from their tax firm. The taxpayer may be expecting the request but cannot locate it, because the account they created was registered using a different email address.

This scenario can be reduced by setting clear instructions with your clients to create their TaxCaddy account directly through the invitation sent to their email.

# Onboarding: *Invitation Example*

YOU SEND THE CLIENT AN INVITATION TO: PAT@TAXPAYER.COM

PAT DOESN'T KNOW ABOUT THE EMAIL AND CREATES A TAXCADDY ACCOUNT USING THEIR OTHER EMAIL WHICH IS PAT1@TAXPAYER.COM



IN THIS SCENARIO YOUR CLIENT CANNOT LOCATE THEIR CONNECTION REQUEST.

# Questionnaire: *Pre & Post Completion*

## *Common inquiries regarding the Questionnaire*

1. Is my Questionnaire complete?
2. Can I download my Questionnaire?

## *Process*

Taxpayer's may not understand that their Questionnaire is complete because it will remain under the **Tax Pro Requests** section, even though they have answered all the questions. The Questionnaire remains active and can be edited while it is still within the **Tax Pro Requests** section of TaxCaddy.

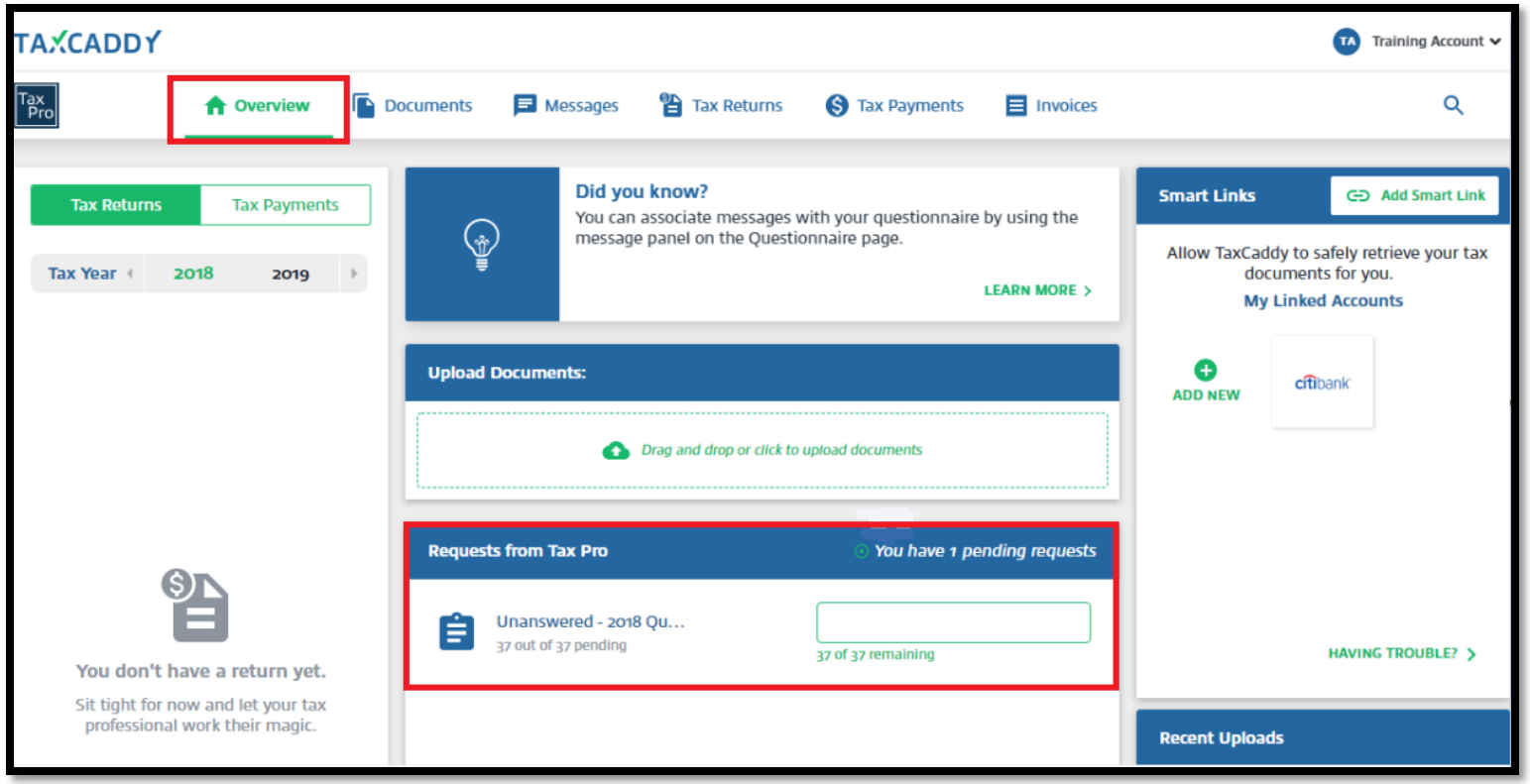
Taxpayer's may want to download and print their Questionnaire but cannot do so until their tax professional reviews the Questionnaire and selects **File to Tax Documents**, thus making the Questionnaire a static document.

When a tax professional selects **File to Tax Documents**, the Questionnaire will automatically move from the taxpayer's **Requests from Tax Pro** section in TaxCaddy, to their **Uploaded Documents** section, where they can download their Questionnaire and then print from their local machine.

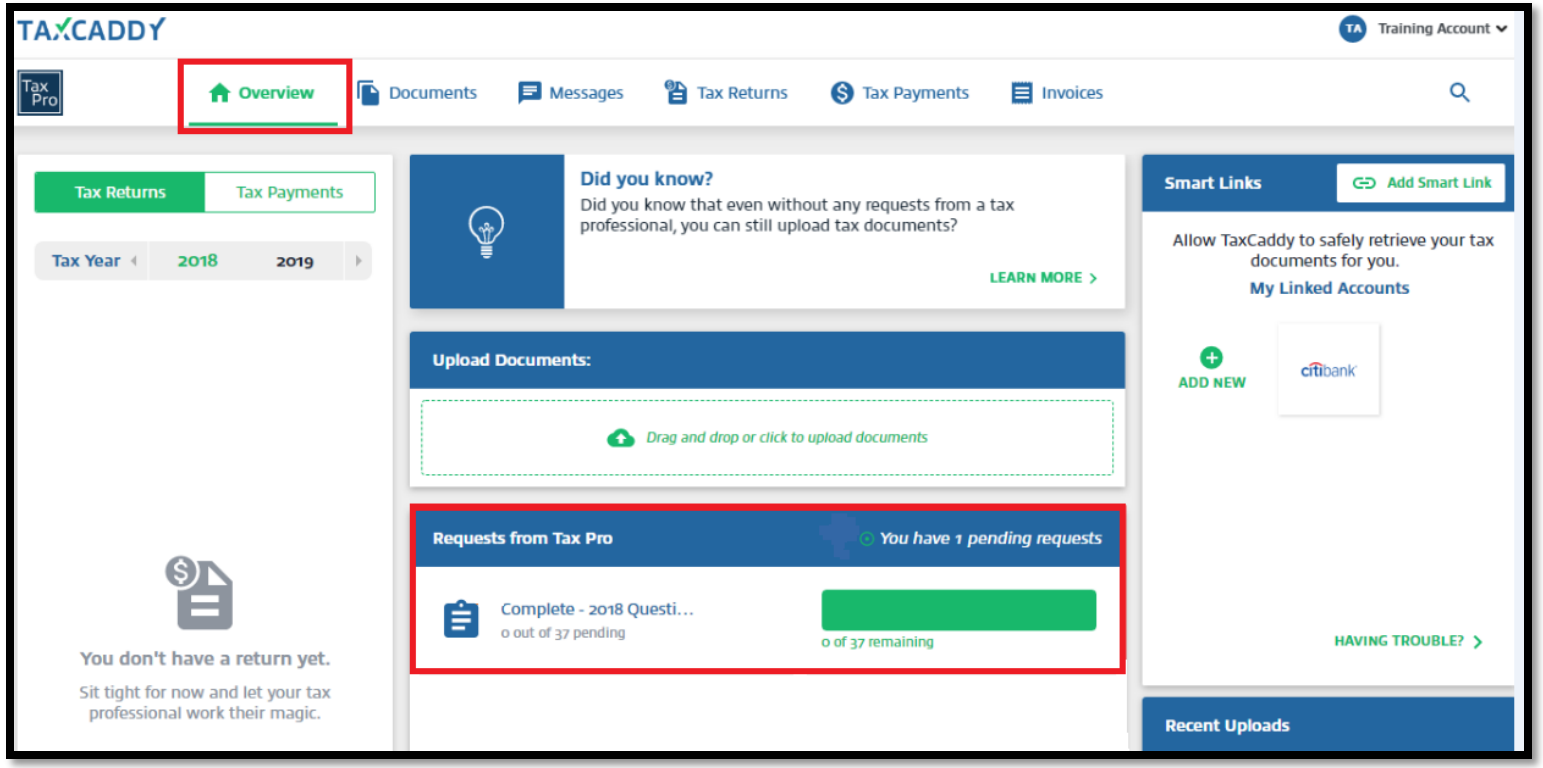
## *Resolution*

Best Practice: Promptly reviewing completed Questionnaires and selecting to **File to Tax Documents**, typically resolves both inquires.

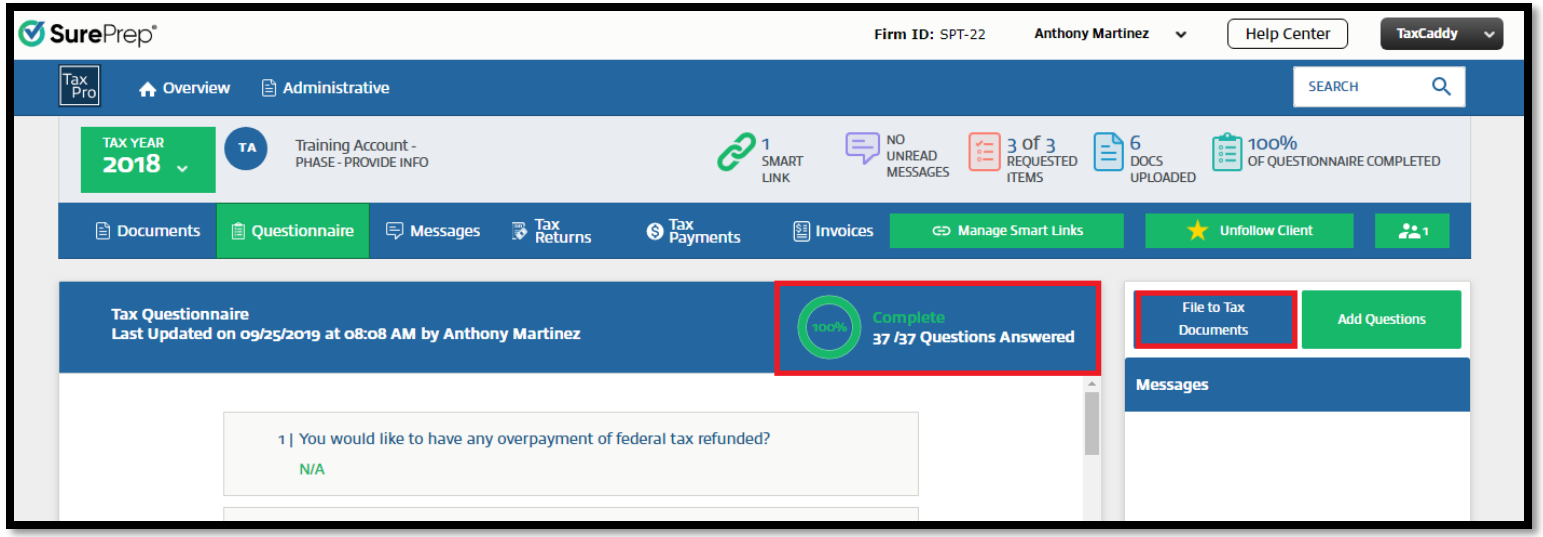
# Questionnaire



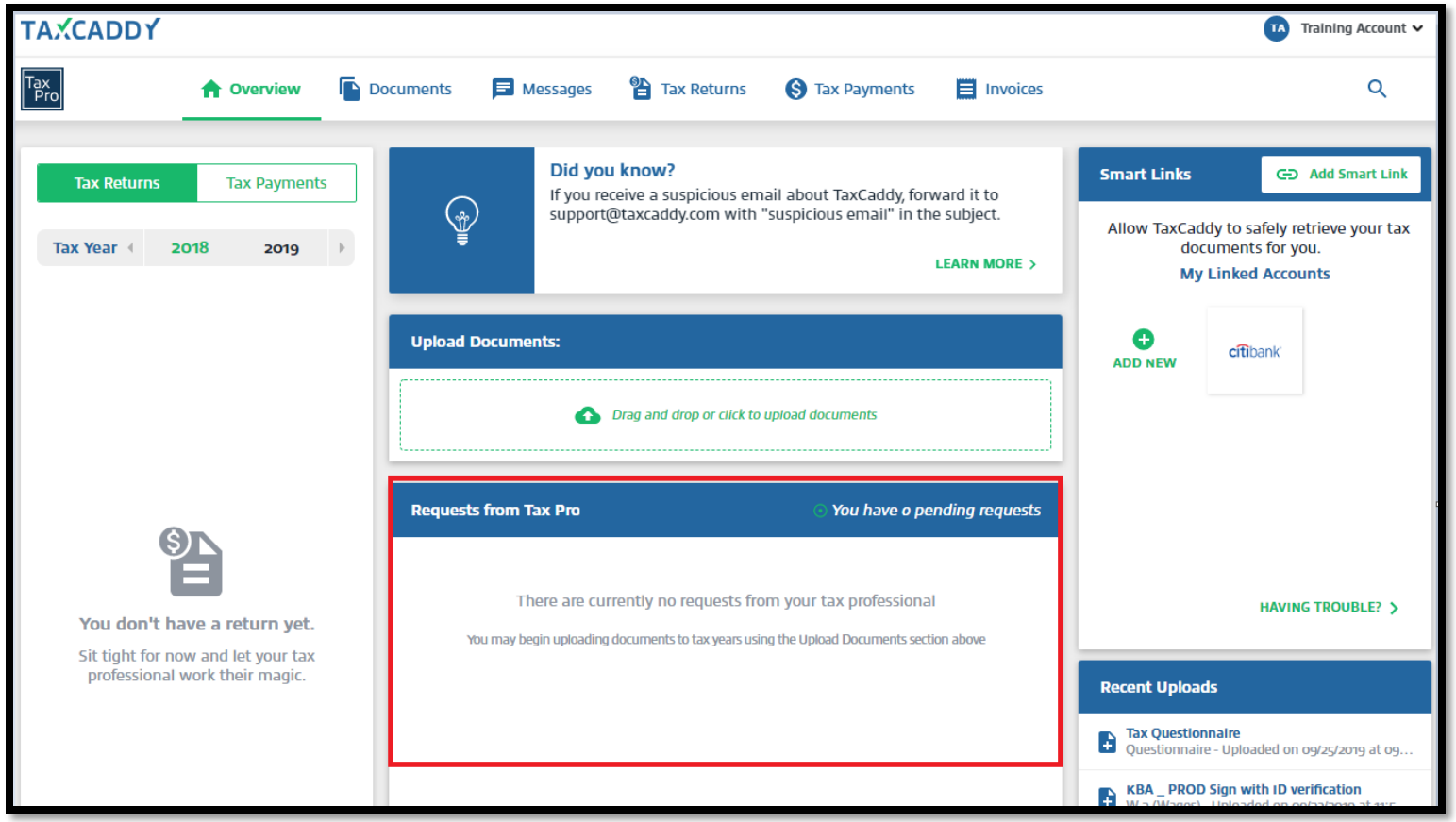
# Questionnaire



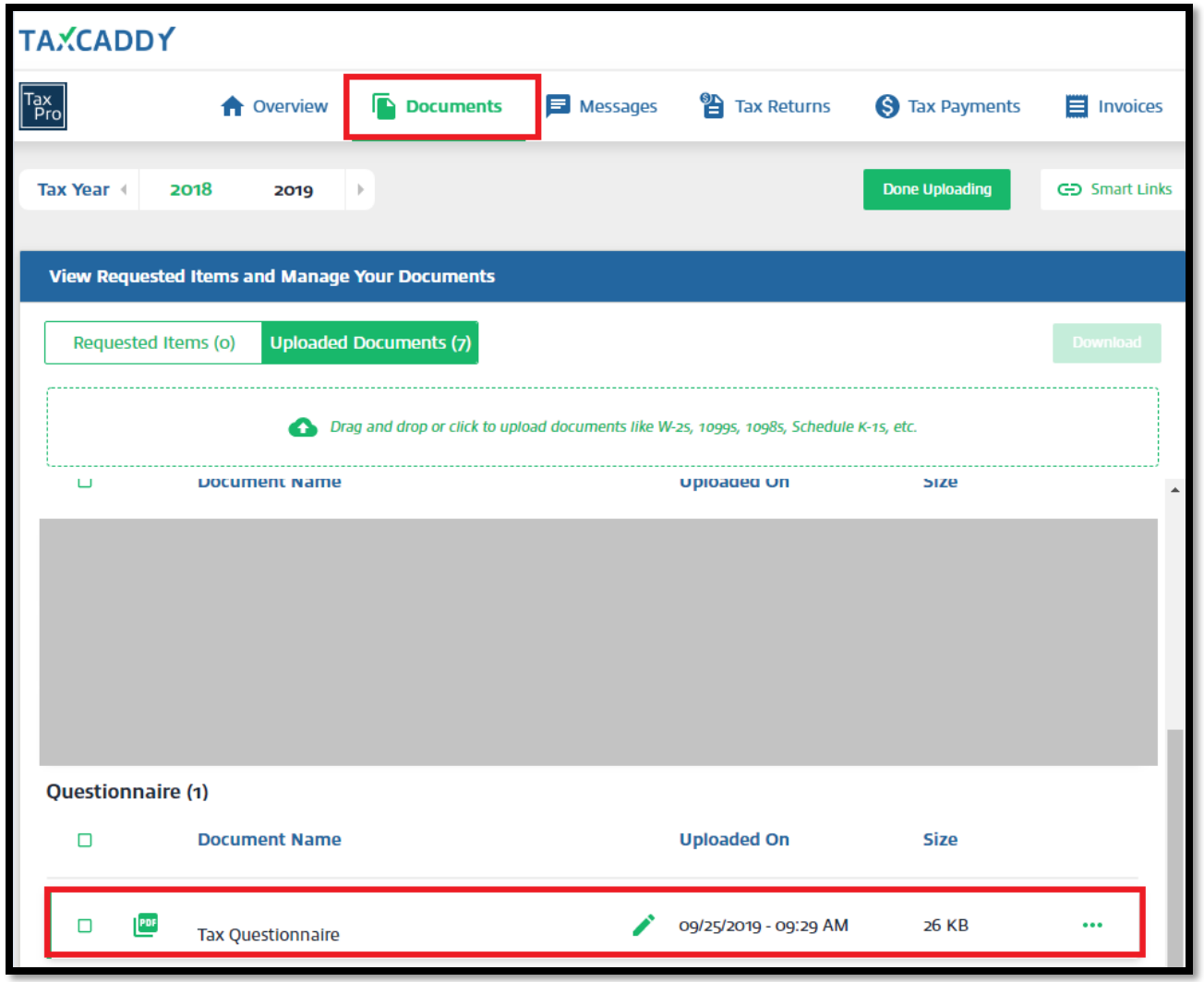
# Questionnaire



# Questionnaire

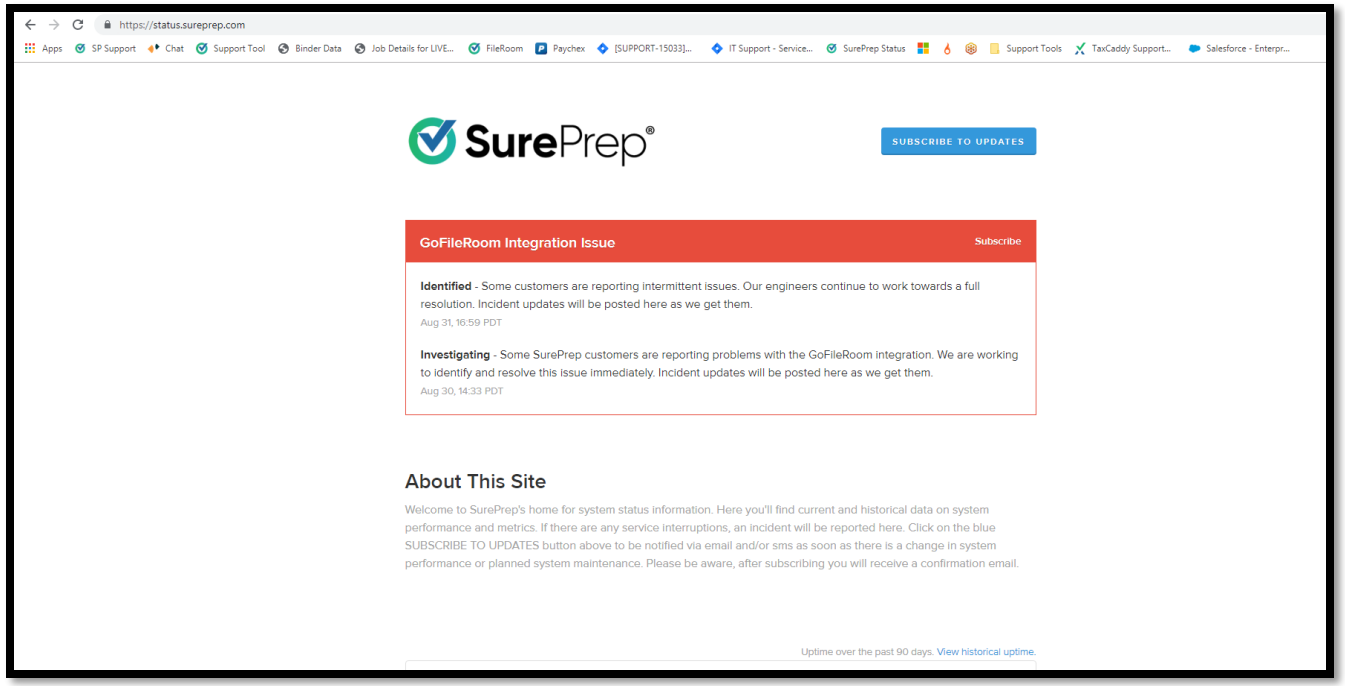


# Questionnaire



# How do I know if SurePrep is having any issues?

- https://status.sureprep.com/

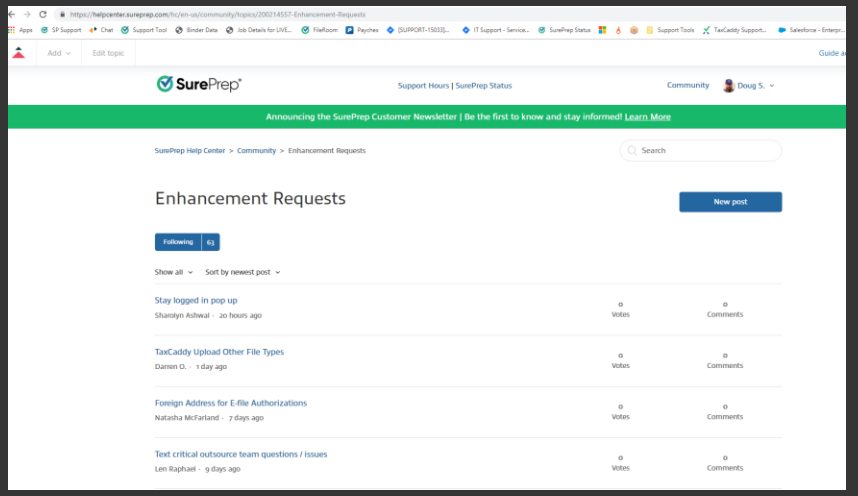


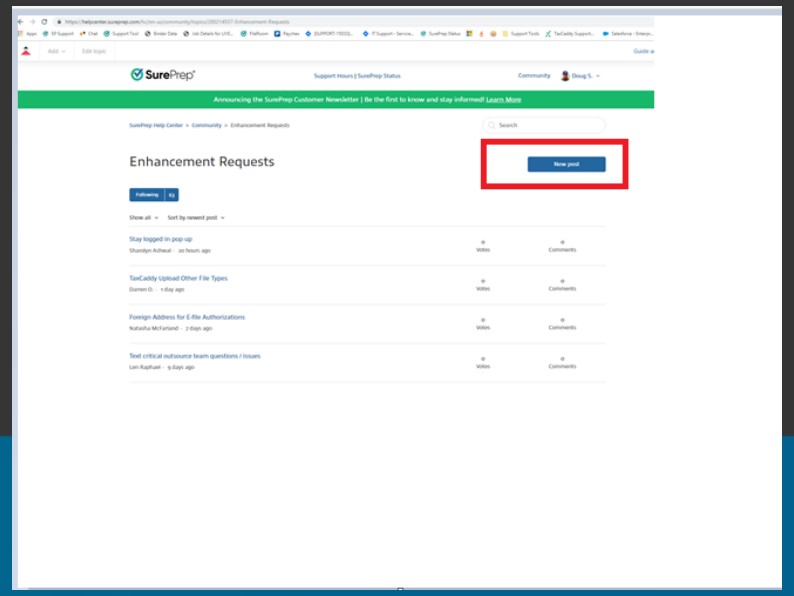
# Incidents

- Here you'll find current and historical data on system performance and metrics. If there are any service interruptions, an incident will be reported here.

# Enhancement request

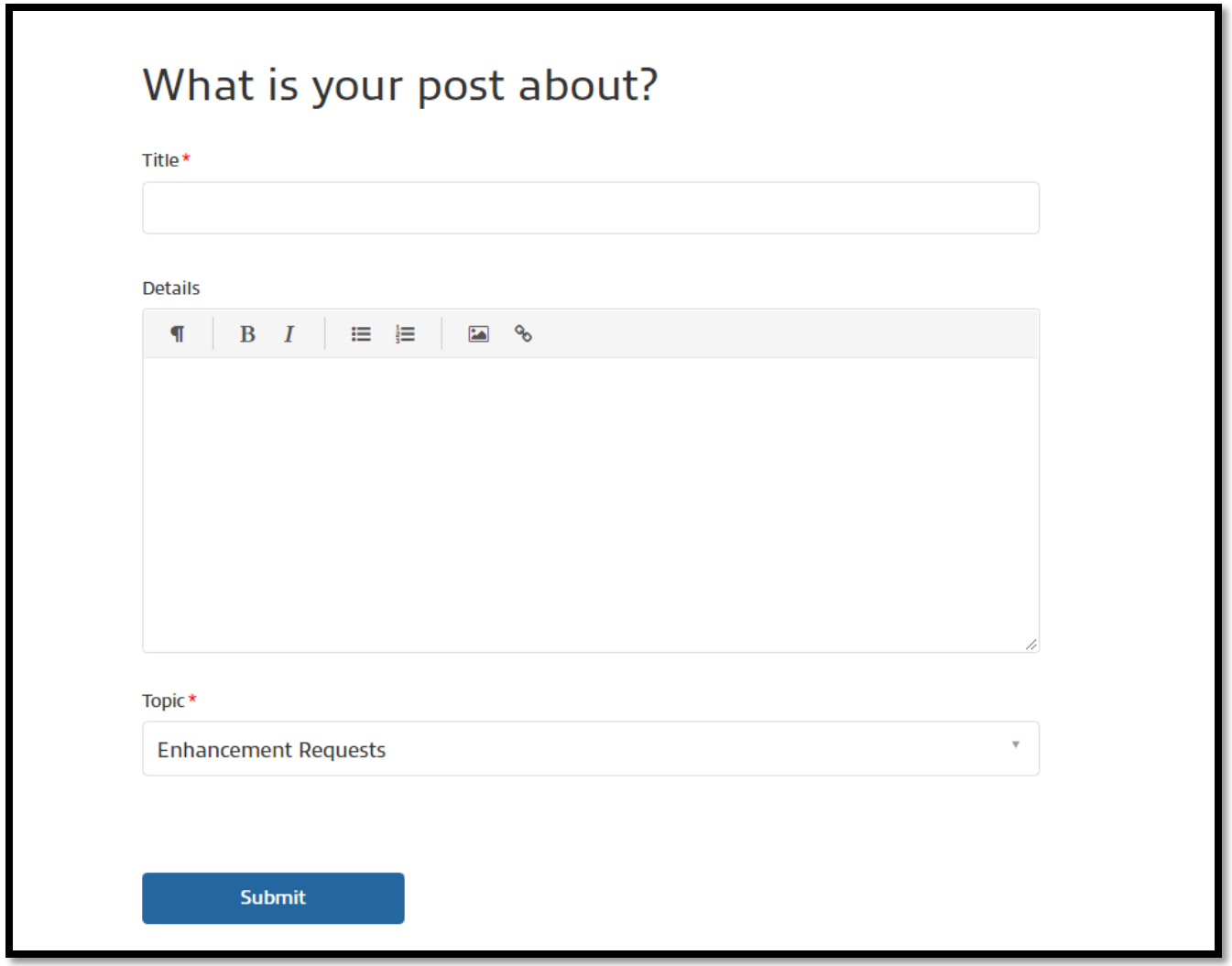
- https://helpcenter.sureprep.com/hc/en-us/community/topics/200214557-Enhancement-Requests



# Enhancement request

- What improvements do you think would benefit your firm or all firms ?



# Best Practices

When contacting support please provide your Binder ID, and a description of the issue you are facing.

Provide a screenshot of the reported issue.

E-access

Support access

# Q & A

## Contact Info


**Name: Doug Shawver**

**Email: douglas.shawver@sureprep.com**

**Website: https://corp.sureprep.com/**

**Phone: 800-805-8582 Ext 1**