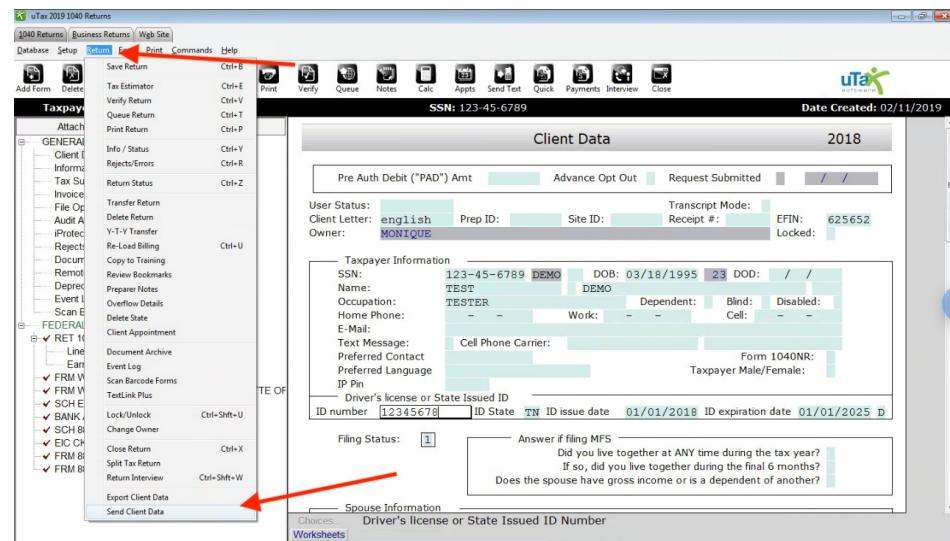
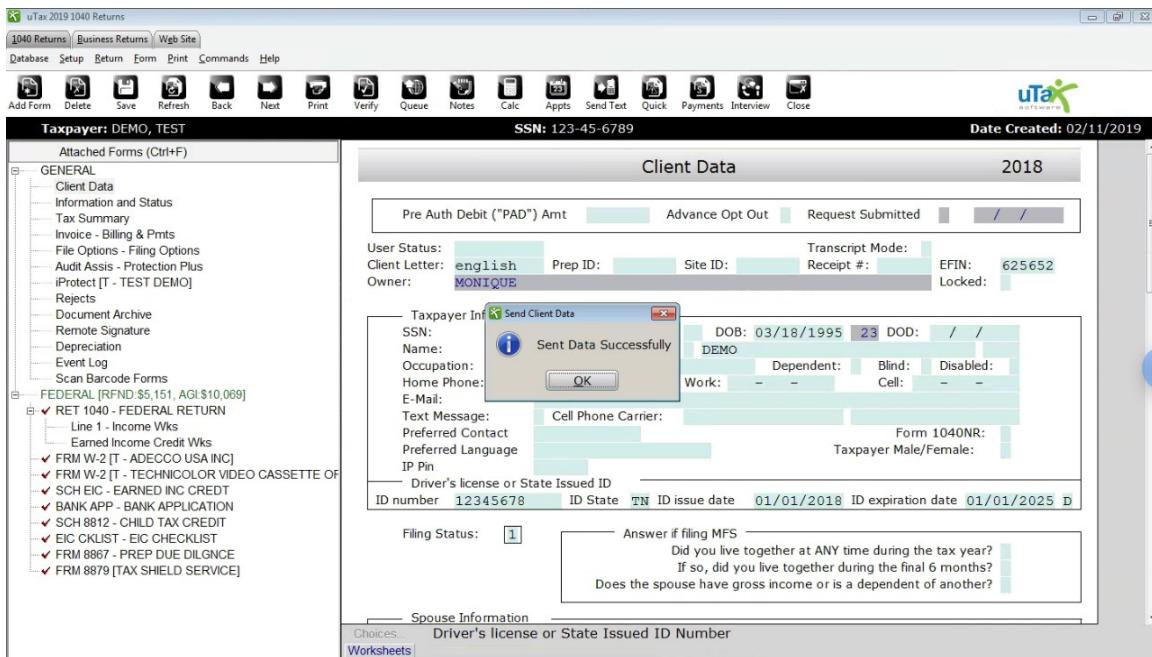


# How to Import a Customer into TSS and Print their Check

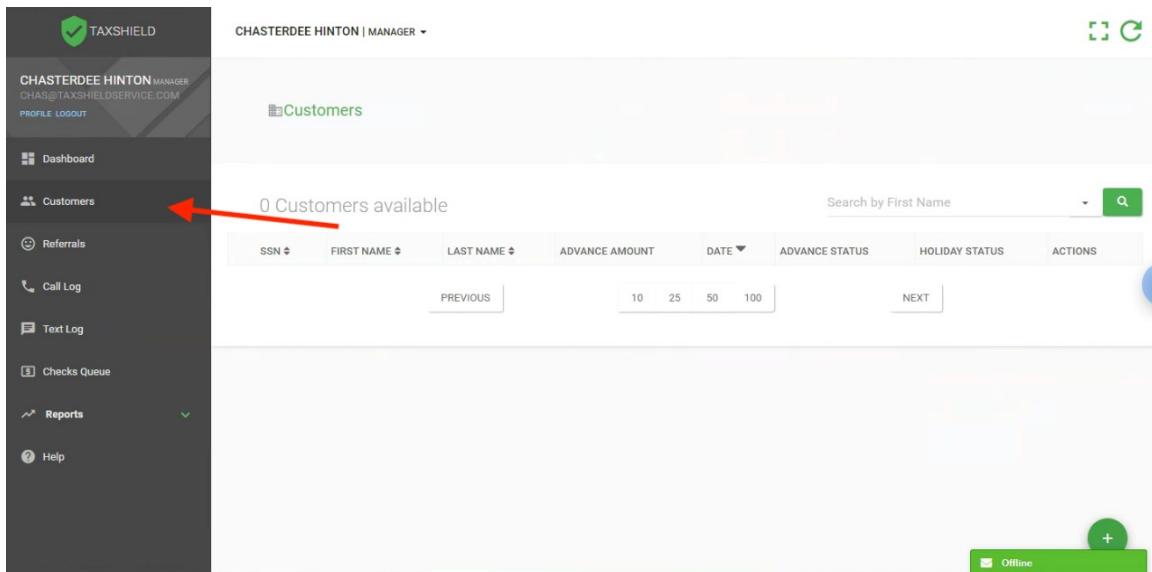
- Once a return has been completed the tax software; all of the appropriate forms and signatures have been collected → Go to the menu at the top of the application, **Select “Return”** and at the bottom of the menu, there will be an option to “**Send Client Data**”



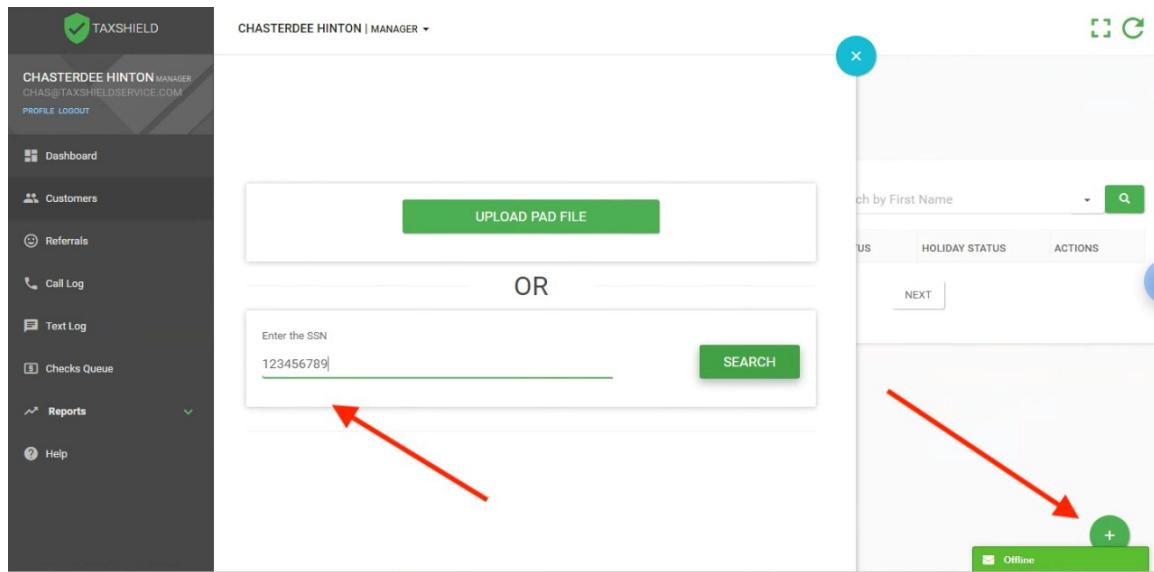
- Once that has been selected, A confirmation pop-up will display that the data has been sent successfully; after which, we'll need to **open TSS (GetTaxShield.com)** and **login** to the application



3. Select the Customers tab to open the Customers menu



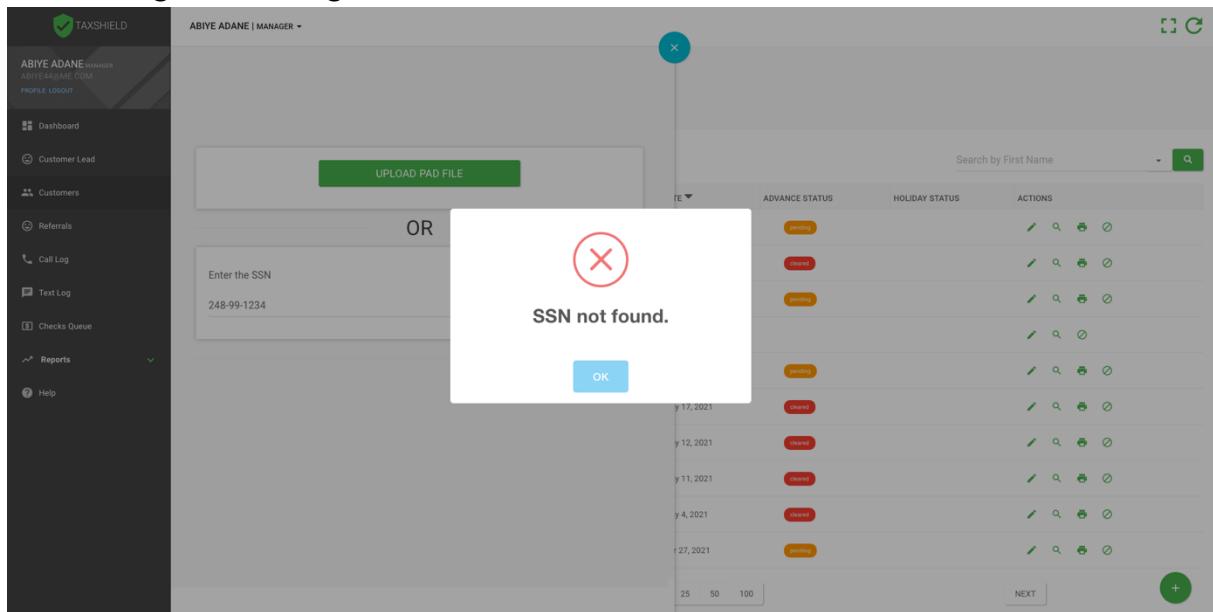
4. To add a customer, click the green "+" sign at the bottom-right of the page, which will open up a field that requires the **Client's SS#** of the return that was finished a few moments ago



5. Enter the Client's SS# and TSS will verify this information on the backend and then **display the Customer Profile** of the client

\*\*\*\*\*

- Note: If the client's SS# has already been entered in to the system, owes debt, or the SS# entered is incorrect, the system will display a message informing the user



ABIYE ADANE | MANAGER

ABIYE44@ME.COM

PROFILE LOGOUT

Dashboard

Customer Lead

Customers

Referrals

Call Log

Text Log

Checks Queue

Reports

Help

10 Customers available

SSN # FIRST NAME LAST NAME ADVANCE STATUS HOLIDAY STATUS ACTIONS

***-**-1234	Antonio	Hinds	pending	✓	🔍	✖		
***-**-2590	Bernelia	Williams	closed	✓	🔍	✖		
***-**-6417	Antonio	Clayton	pending	✓	🔍	✖		
***-**-0446	Lillie	Heaton	pending	✓	🔍	✖		
***-**-9277	Benjamin	Dunn	pending	✓	🔍	✖		
***-**-0878	Tamara	Clemens	closed	✓	🔍	✖		
***-**-0792	Everett	Berry	\$400.00	May 12, 2021	closed	✓	🔍	✖
***-**-4954	Brendalyn	Smith	\$350.00	May 11, 2021	closed	✓	🔍	✖
***-**-0640	Erma	Robinson	\$300.00	May 4, 2021	closed	✓	🔍	✖
***-**-4124	Erica	Whitaker	\$300.00	Apr 27, 2021	pending	✓	🔍	✖

Search by First Name

OK

PREVIOUS 10 25 50 100 NEXT

CHASTERDEE HINTON | MANAGER

CHAS@TAXSHIELDSERVICE.COM

PROFILE LOGOUT

Dashboard

Customers

Referrals

Call Log

Text Log

Checks Queue

Reports

Help

Customer Information Tax Return Information Service Fees Information Disbursement Information

Customer Information

Pri First Name test	Pri Middle Name	Pri Last Name demo	Pri Suffix
Pri SSN xxx-xx-1234	Pri DOB 1995-03-17 16:00:00		
Sec First Name	Sec Middle Name	Sec Last Name	Sec Suffix
Sec SSN XXX-XX-_____		Sec DOB	
Address 1 123 any street			
Address 2			

Search by First Name

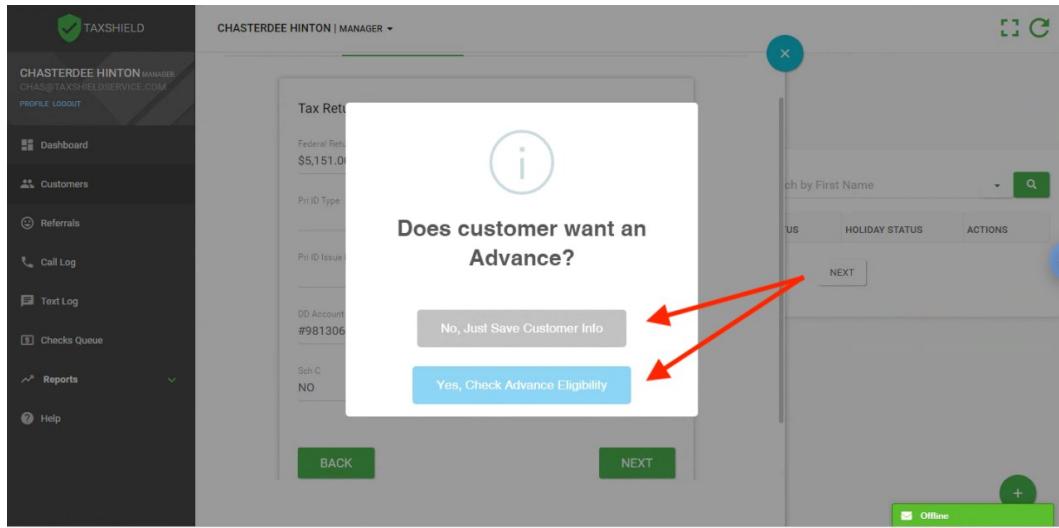
US HOLIDAY STATUS ACTIONS

NEXT

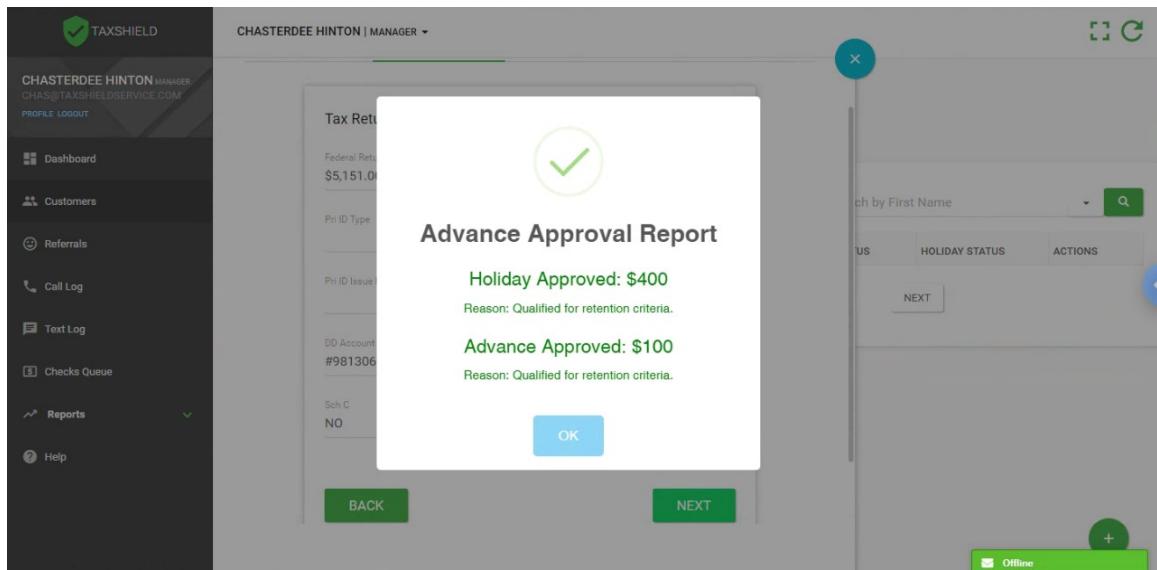
Offline

6. Once the correct client has been confirmed, **scroll to the bottom of the page** and click 'Next' which will display the return information, click 'Next' to continue, which the application will ask you if you would like to Check Advance Eligibility or Just Save Customer Info to the application without processing a check If...

- Check Advance Eligibility** – Go forward to Step 7
- Just Save Customer Info** – Save customer info to process them as a referred person.

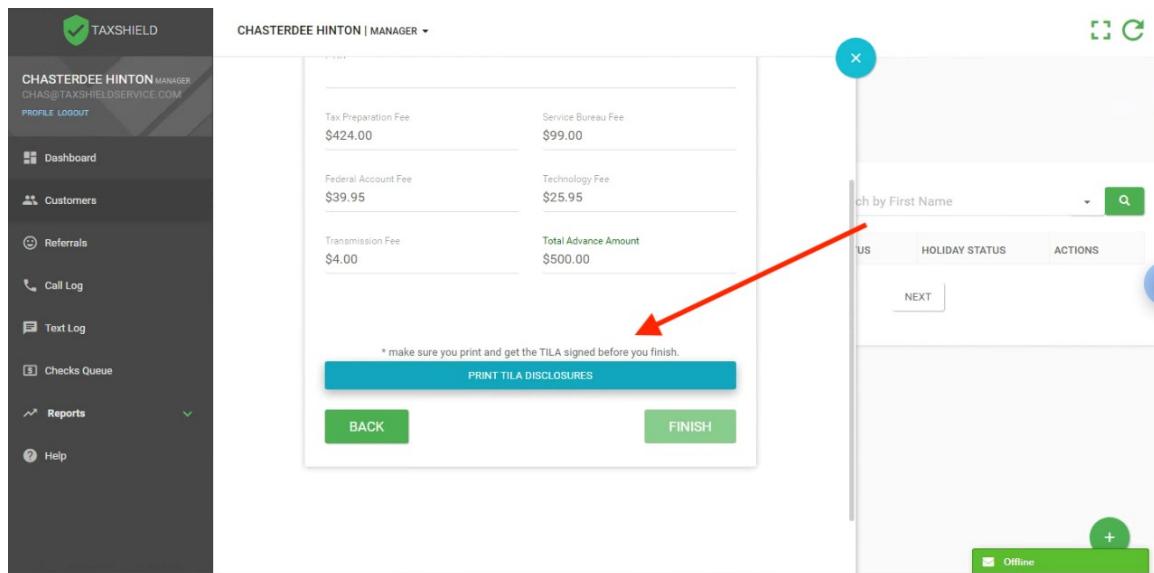


7. Click **Check Advance Eligibility** and if approved, the Advance Amount will be displayed!

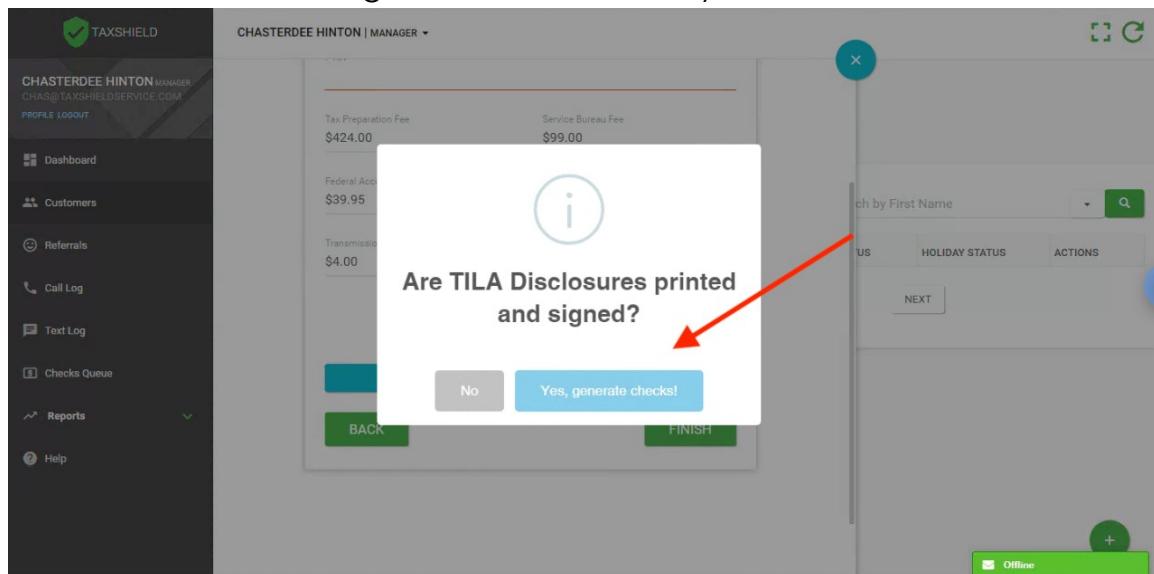


8. Select **OK** then click 'Next' to print the **TILA Disclosures** (Legal Customer disclosure document) for the client.

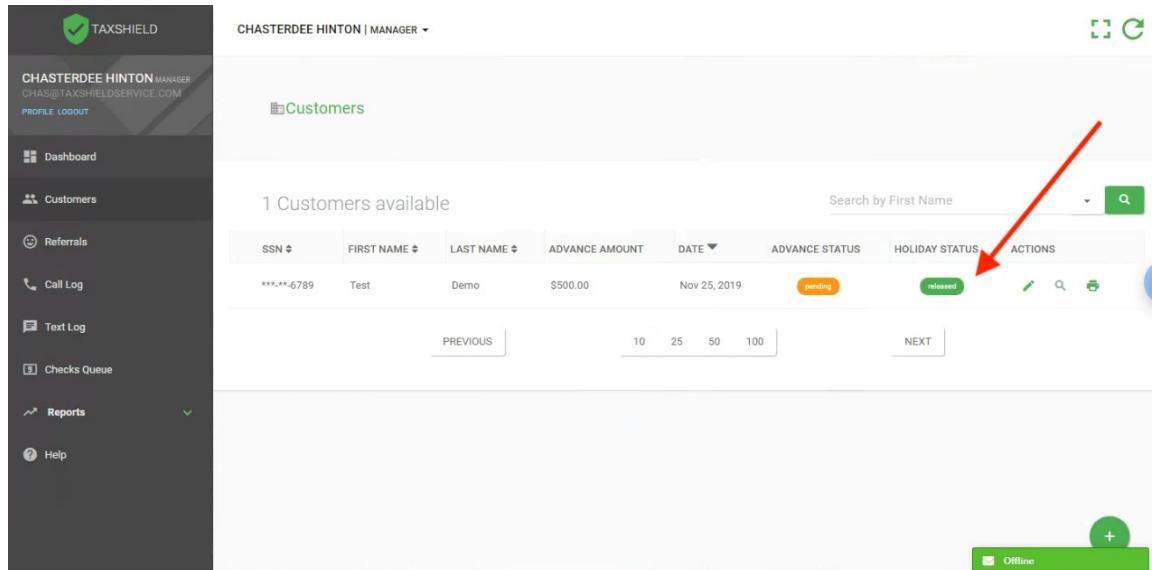
➤ Note: The finish button will **NOT** populate until the TILA has been printed



9. TSS will ask if the TILA has been signed for this client. **If you click yes, the process to generate a check is complete.** You'll see a green notification on the top right hand side of the page stating the check has been generated successfully

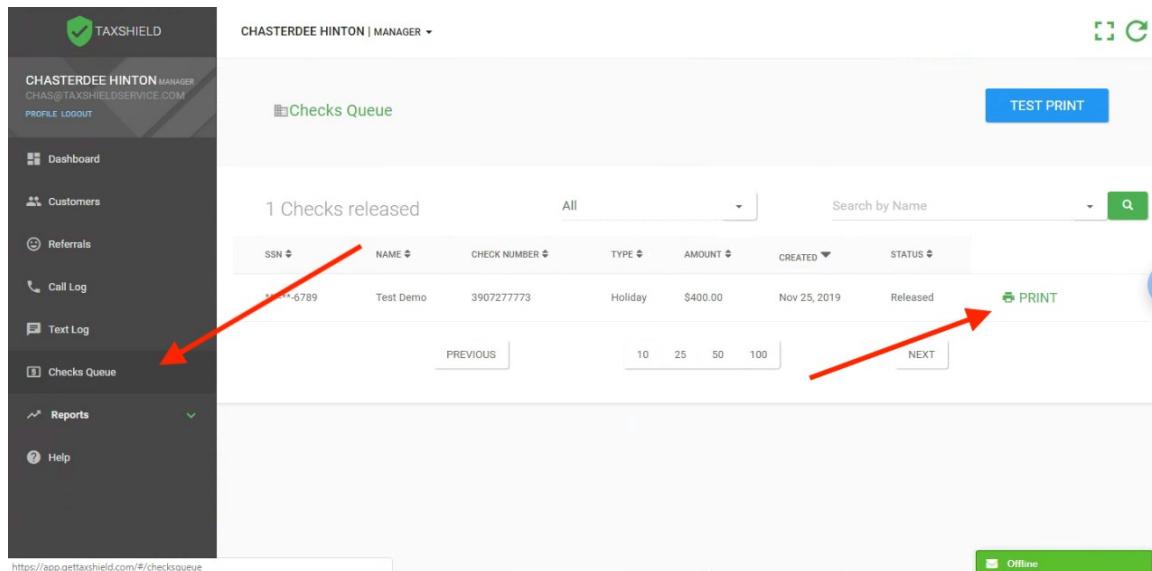


10. If the check has been **Released**, then we can PRINT from the **Checks Queue**



The screenshot shows the TAXSHIELD software interface. The left sidebar includes 'Dashboard', 'Customers' (selected), 'Referrals', 'Call Log', 'Text Log', 'Checks Queue' (selected), 'Reports', and 'Help'. The top bar shows 'CHASTERDEE HINTON | MANAGER' and an email address. The main area is titled 'Customers' with a sub-section '1 Customers available'. A table lists a single customer: SSN: \*\*\*-\*\*-6789, First Name: Test, Last Name: Demo, Advance Amount: \$500.00, Date: Nov 25, 2019, Advance Status: pending, Holiday Status: released. A red arrow points to the 'released' status in the Holiday Status column. The bottom right corner shows an 'Offline' status.

11. Next, we'll go to the Checks Queue menu, which will display the checks that are currently available to be printed. Locate the check that is to be printed, and click PRINT once, to the right of the check



The screenshot shows the TAXSHIELD software interface. The left sidebar includes 'Dashboard', 'Customers', 'Referrals', 'Call Log', 'Text Log', 'Checks Queue' (selected), 'Reports', and 'Help'. The top bar shows 'CHASTERDEE HINTON | MANAGER' and an email address. The main area is titled 'Checks Queue' with a sub-section '1 Checks released'. A table lists a single check: SSN: \*\*\*-\*\*-6789, Name: Test Demo, Check Number: 3907277773, Type: Holiday, Amount: \$400.00, Created: Nov 25, 2019, Status: Released. A red arrow points to the 'Checks Queue' menu item in the sidebar. Another red arrow points to the 'PRINT' button in the table row. The bottom right corner shows an 'Offline' status.

12. Once the check has been printed, the status of the check will be updated to **PRINTED** in both the **Checks Queue** and the **Customer Profile** and VOILA! Another satisfied customer!

**Checks Queue**

SSN	NAME	CHECK NUMBER	TYPE	AMOUNT	CREATED	STATUS
***-**-6789	Test Demo	3907277773	Holiday	\$400.00	Nov 25, 2019	Printed

**Customers**

SSN	FIRST NAME	LAST NAME	ADVANCE AMOUNT	DATE	ADVANCE STATUS	HOLIDAY STATUS	ACTIONS
***-**-6789	Test	Demo	\$500.00	Nov 25, 2019	Pending	Printed	<a href="#">Edit</a> <a href="#">Search</a> <a href="#">Print</a>