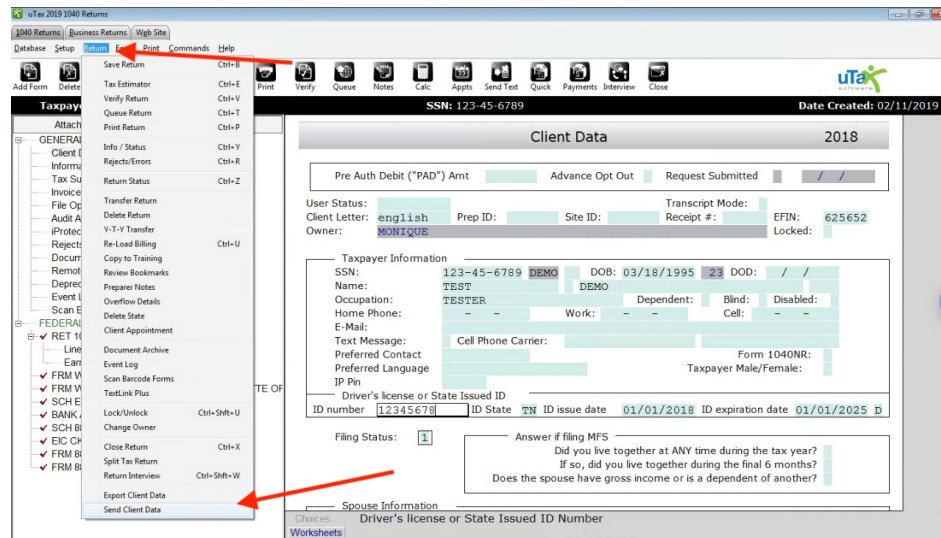


How to Import a Customer into TSS and Print their Check

1. 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”**



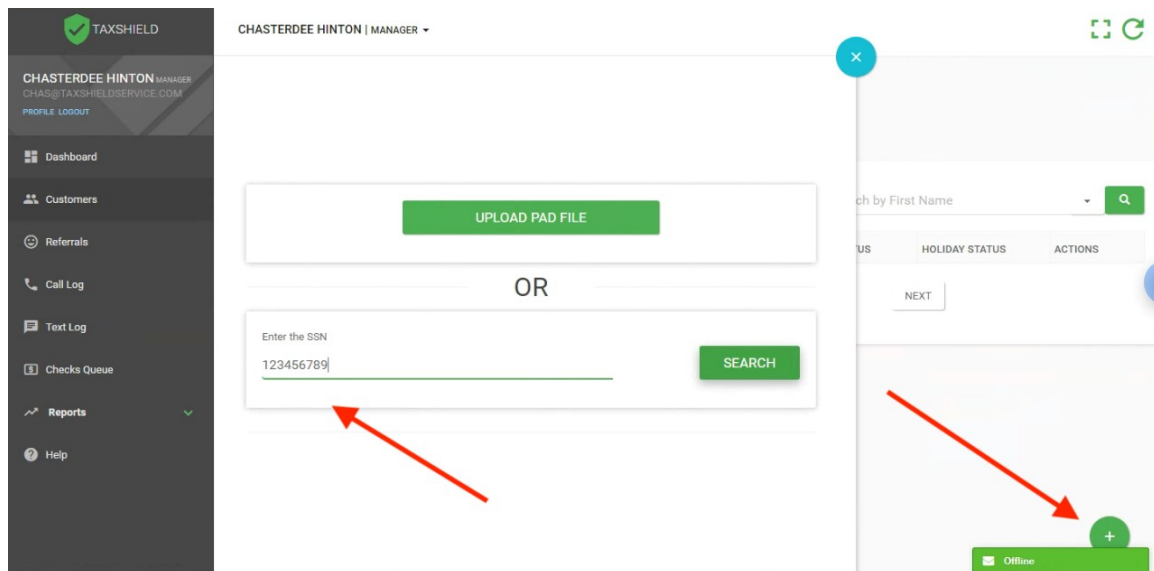
2. Once that has been selected, A confirmation pop-up will display that the data has been sent successfully; after which, we'll need to **open TSS (GetTaxShield.com)** and **login** to the application

The screenshot shows the uTax 2019 1040 Returns software interface. The main window displays 'Client Data' for the year 2018. A 'Send Client Data' dialog box is open in the center, showing a message 'Sent Data Successfully' with an 'OK' button. The background form includes fields for Pre Auth Debit ('PAD') Amt, Advance Opt Out, Request Submitted, User Status, Client Letter, Prep ID, Site ID, Transcript Mode, Receipt #, EFIN, Owner, and a 'Locked' checkbox. Below these are fields for Taxpayer Info (SSN, Name, Occupation, Home Phone, E-Mail, Text Message, Preferred Contact, Preferred Language, IP Pin) and Driver's license or State Issued ID (ID number, ID State, ID issue date, ID expiration date). A 'Filing Status' dropdown is set to '1'. At the bottom, there is a 'Spouse Information' section with a 'Driver's license or State Issued ID Number' field. The left sidebar shows a tree view of forms, including 'FEDERAL (RFND \$5,151, AGI \$10,069)' and 'RET 1040 - FEDERAL RETURN'.

3. Select the Customers tab to open the Customers menu

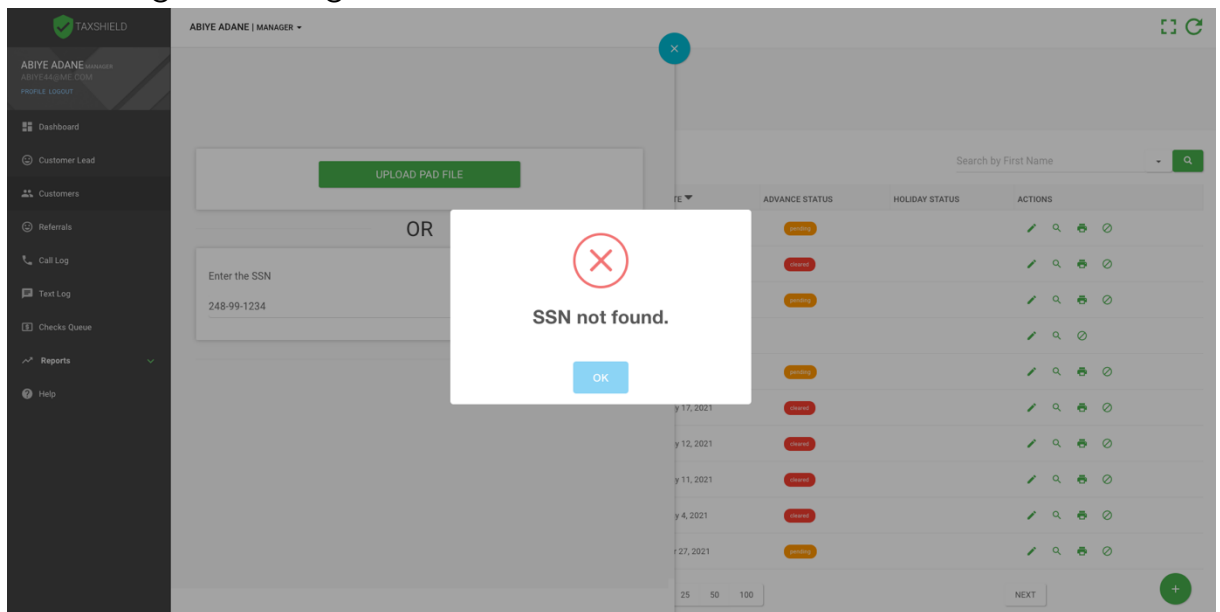
The screenshot shows the TAXSHIELD web application interface. The left sidebar contains a menu with options: Dashboard, Customers, Referrals, Call Log, Text Log, Checks Queue, Reports, and Help. A red arrow points to the 'Customers' tab. The main content area displays '0 Customers available' and a search bar labeled 'Search by First Name'. Below this is a table with columns: SSN, FIRST NAME, LAST NAME, ADVANCE AMOUNT, DATE, ADVANCE STATUS, HOLIDAY STATUS, and ACTIONS. The table is currently empty. At the bottom right, there is a green button with a '+' sign, which is used to add a new customer.

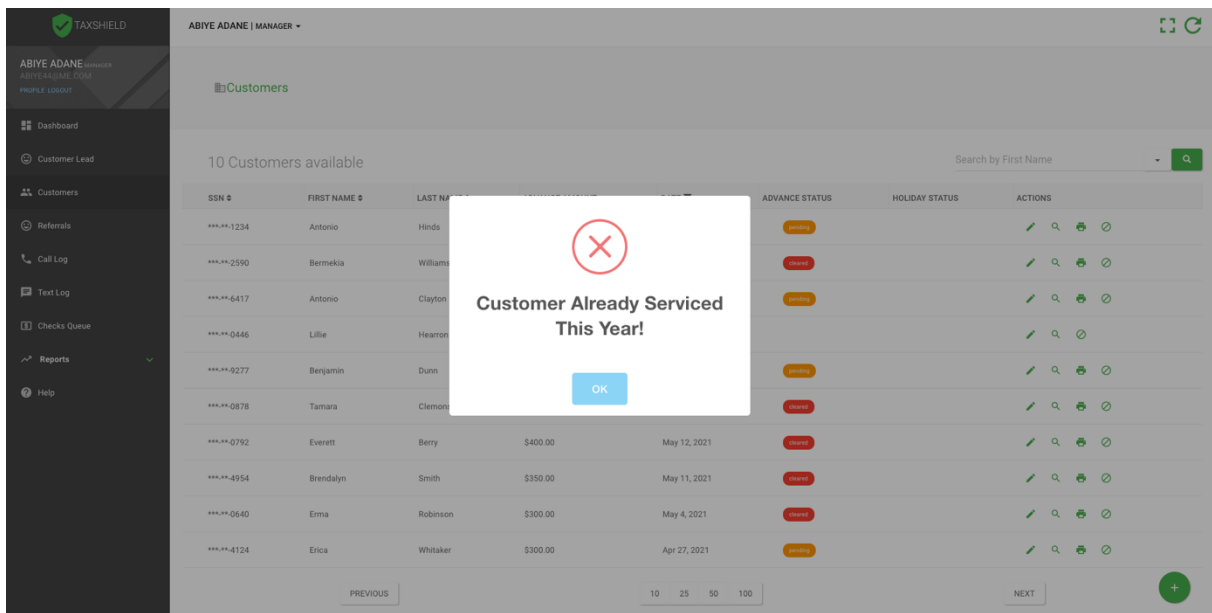
4. To add a customer, click the green "+" sign at the bottom-right of the page, which will open up a field that requires the **Client's SS#** of the return that was finished a few moments ago

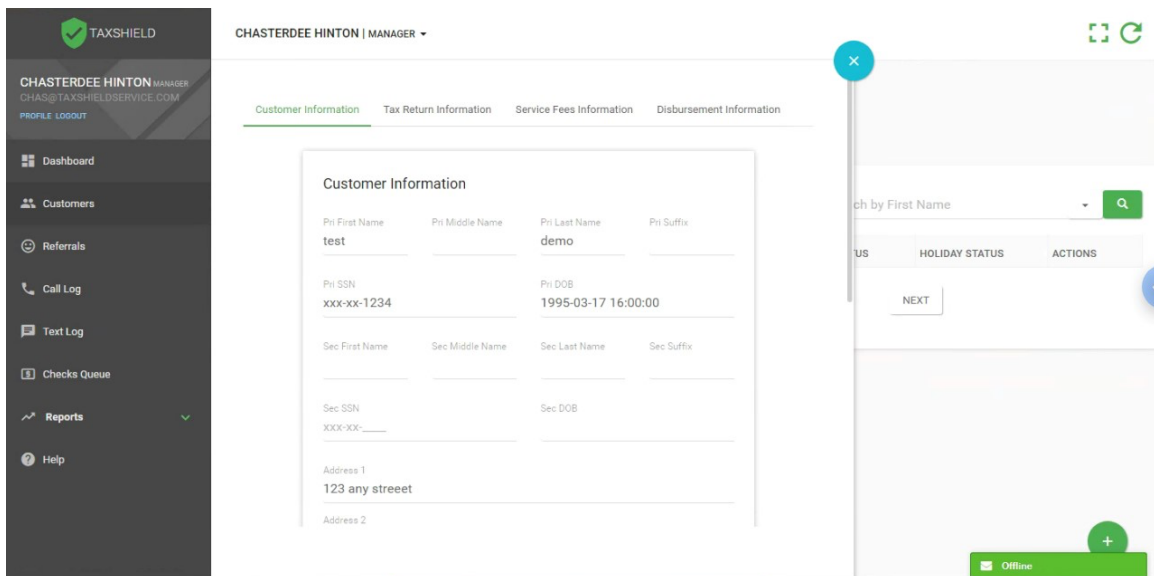


5. Enter the Client's SS# and TSS will verify this information on the backend and then **display the Customer Profile** of the client

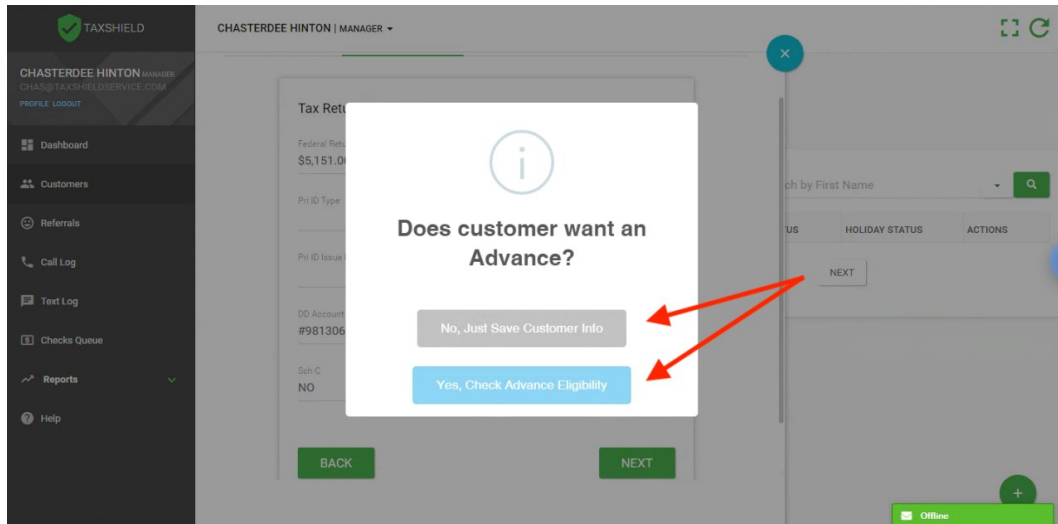
- Note: If the client's SS# has already been entered in to the system, owes debt, or the SS# entered is incorrect, the system will display a message informing the user



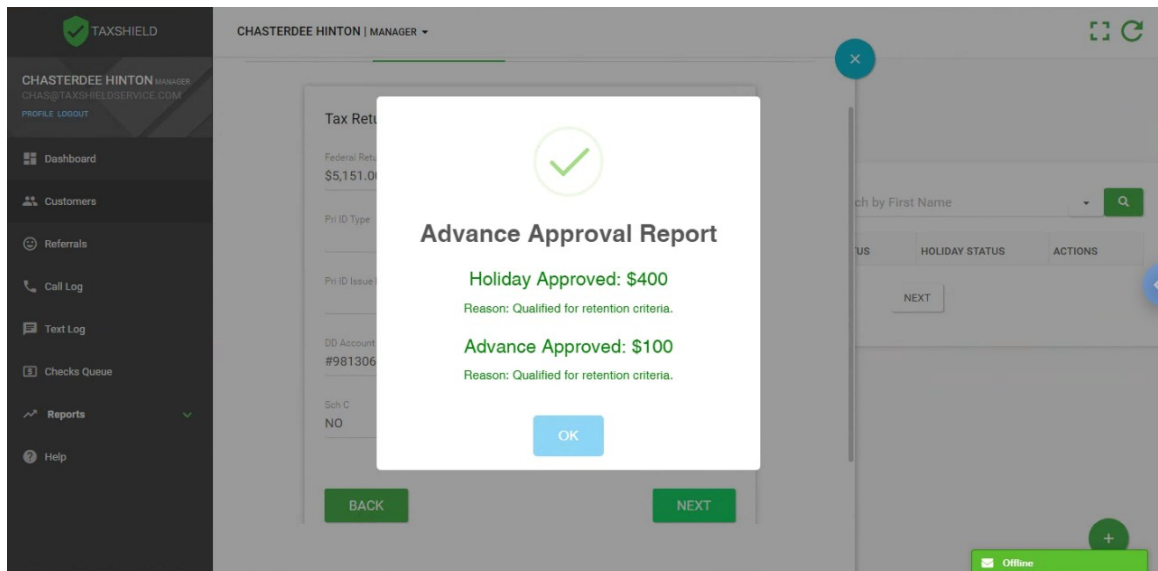




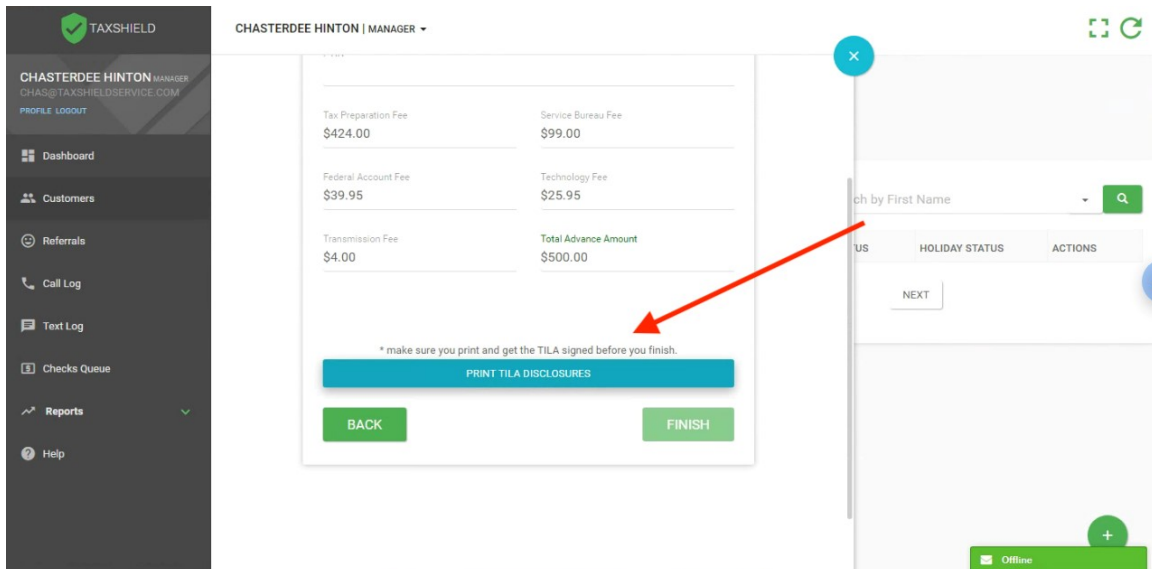
6. Once the correct client has been confirmed, **scroll to the bottom of the page** and click '**Next**' which will display the return information, click '**Next**' to continue, which the application will ask you if you would like to **Check Advance Eligibility** or **Just Save Customer Info** to the application without processing a check
If...
 - a. **Check Advance Eligibility** – Go forward to Step 7
 - b. **Just Save Customer Info** – Save customer info to process them as a referred person.



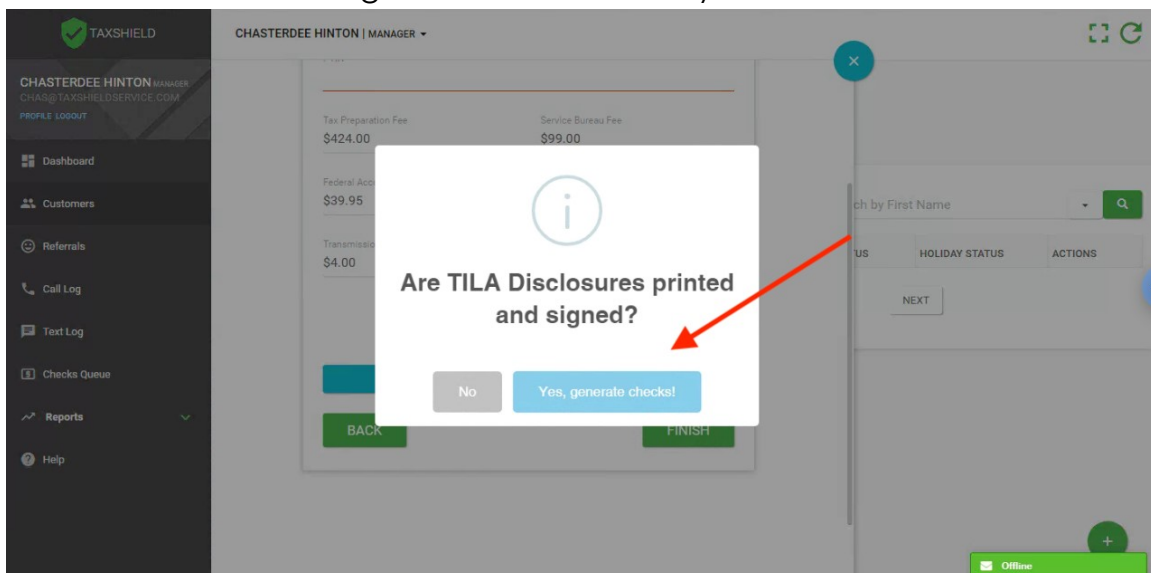
7. Click **Check Advance Eligibility** and if approved, the **Advance Amount** will be displayed!



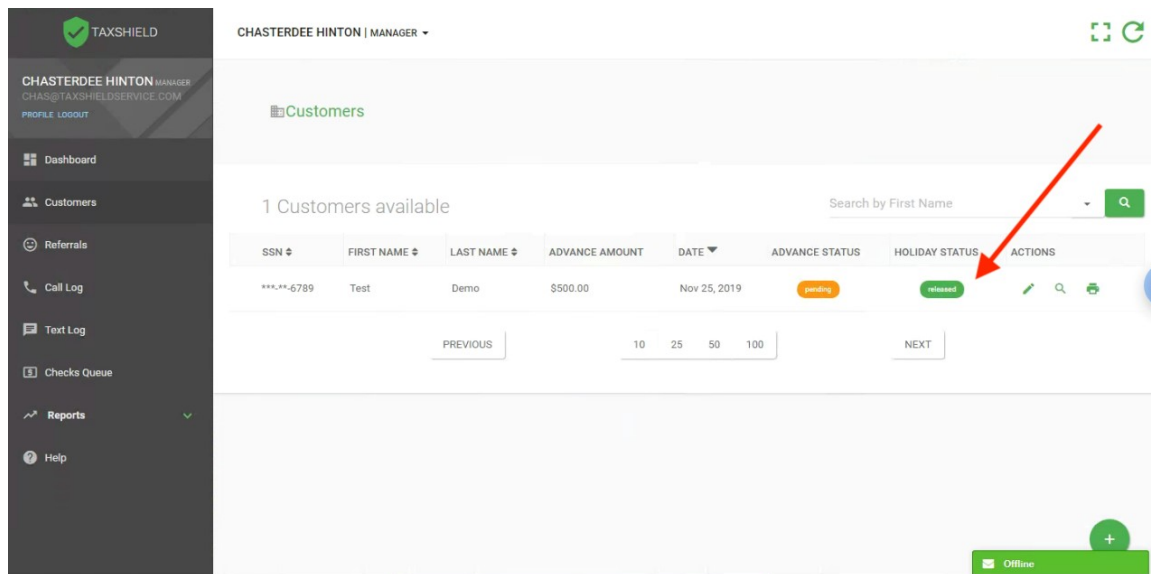
8. Select **OK** then click 'Next' to print the **TILA Disclosures** (Legal Customer disclosure document) for the client.
- Note: The finish button will **NOT** populate **until the TILA has been printed**



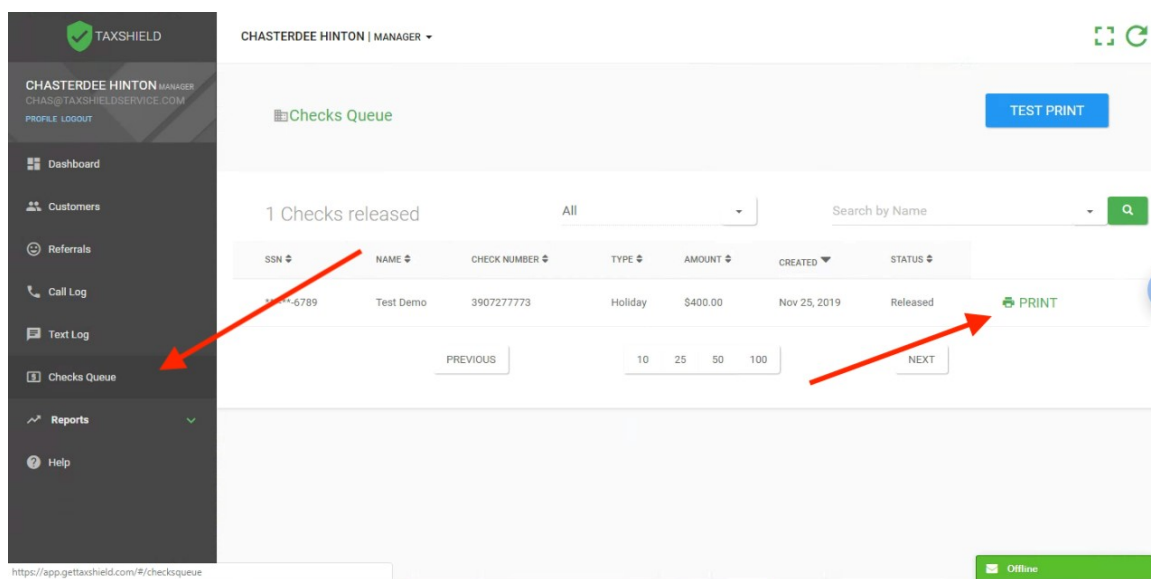
9. TSS will ask if the **TILA has been signed** for this client. **If you click yes, the process to generate a check is complete.** You'll see a green notification on the top right hand side of the page stating the check has been generated successfully



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



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



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!

The image displays two screenshots of the TAXSHIELD Manager interface, illustrating the status update of a check.

Top Screenshot: Checks Queue

The interface shows the user is logged in as CHASTERDEE HINTON | MANAGER. The left sidebar contains navigation options: Dashboard, Customers, Referrals, Call Log, Text Log, Checks Queue (selected), Reports, and Help. The main content area displays "1 Checks released" with a filter set to "All". A table lists the check details:

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

A red arrow points to the "Printed" status in the table. A "TEST PRINT" button is visible in the top right corner.

Bottom Screenshot: Customers

The interface shows the same user logged in. The left sidebar has "Customers" selected. The main content area displays "1 Customers available" with a filter set to "All". A table lists the customer details:

SSN	FIRST NAME	LAST NAME	ADVANCE AMOUNT	DATE	ADVANCE STATUS	HOLIDAY STATUS	ACTIONS
***-**-6789	Test	Demo	\$500.00	Nov 25, 2019	pending		printed

A red arrow points to the "printed" button in the "ACTIONS" column. Another red arrow points to the "Customers" option in the left sidebar. A green "+" button is visible in the bottom right corner.