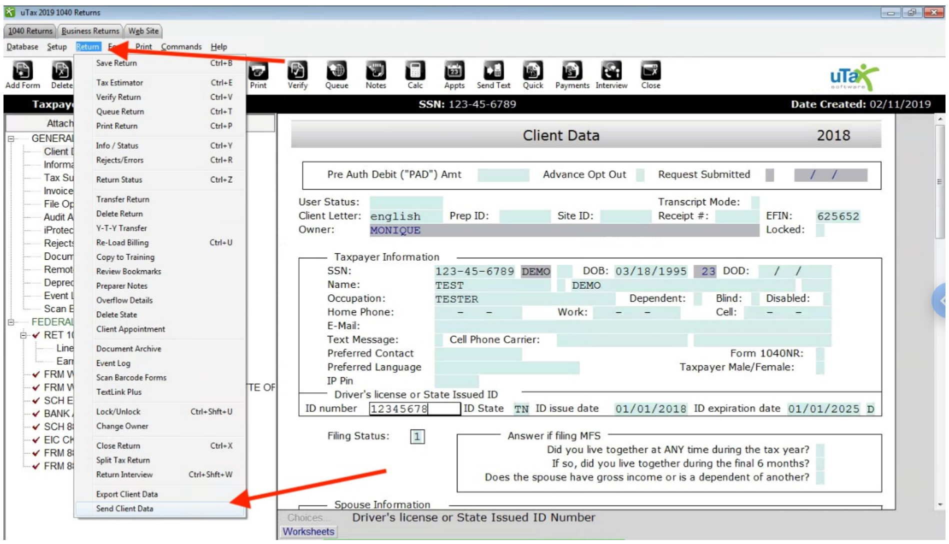
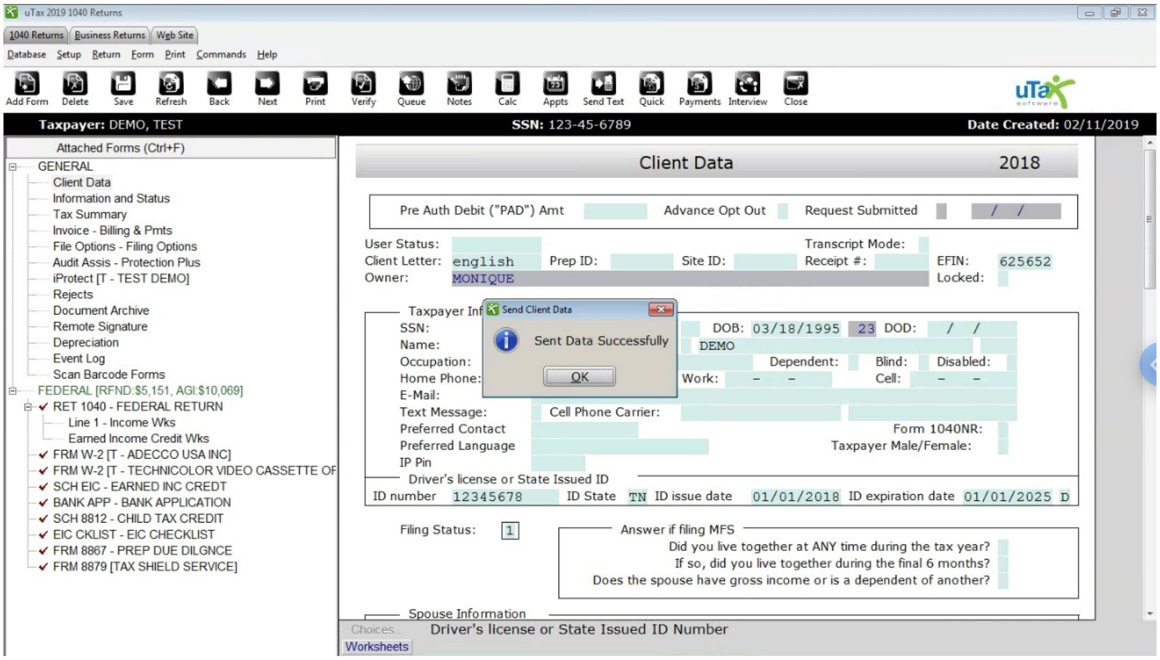
How to Import a Customer into TSS and Print their Check

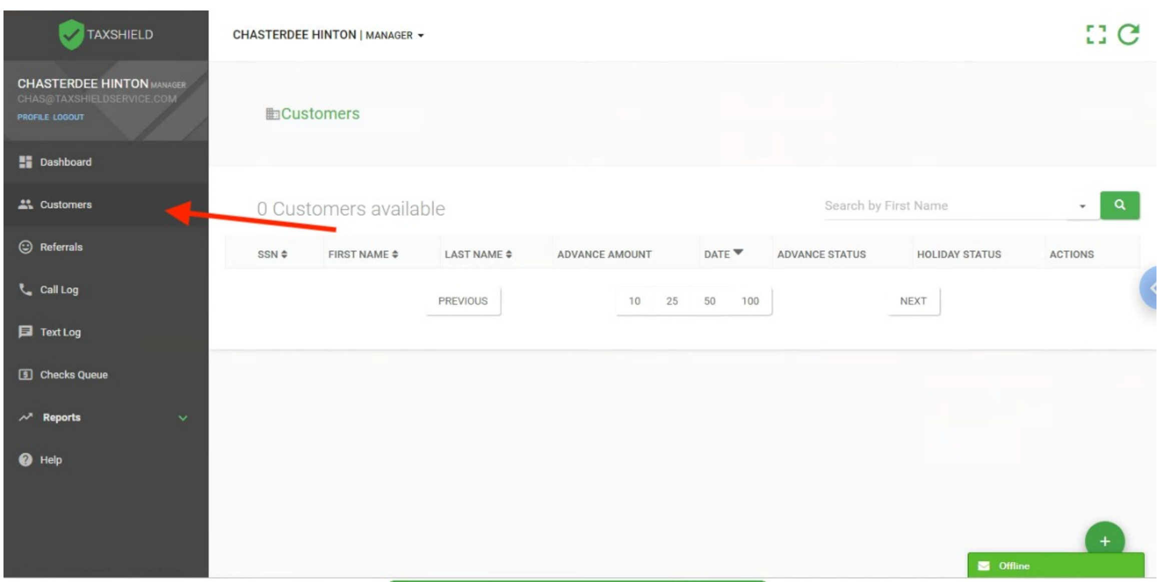
1. Once a return has been completed the tax software; all of the appropriate forms and signatures have been collected → Go to the menu at the top of the application, **Select** "Return" and at the bottom of the menu, there will be an option to "Send Client Data"



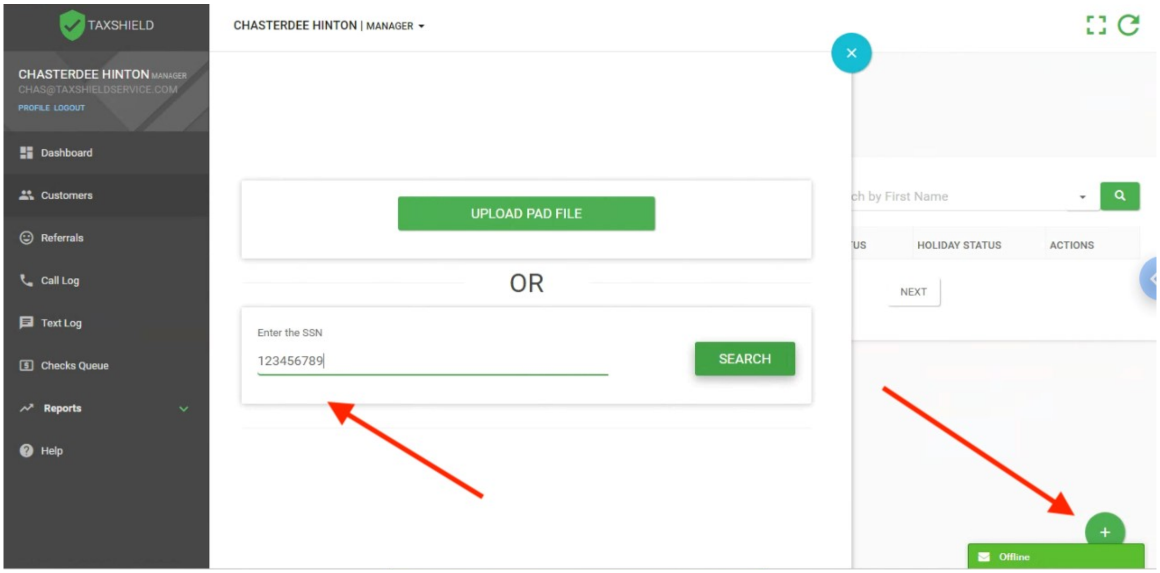
2. Once that has been selected, A confirmation pop-up will display that the data has been sent successfully; after which, we'll need to **open TSS** (GetTaxShield.com) and **login** to the application



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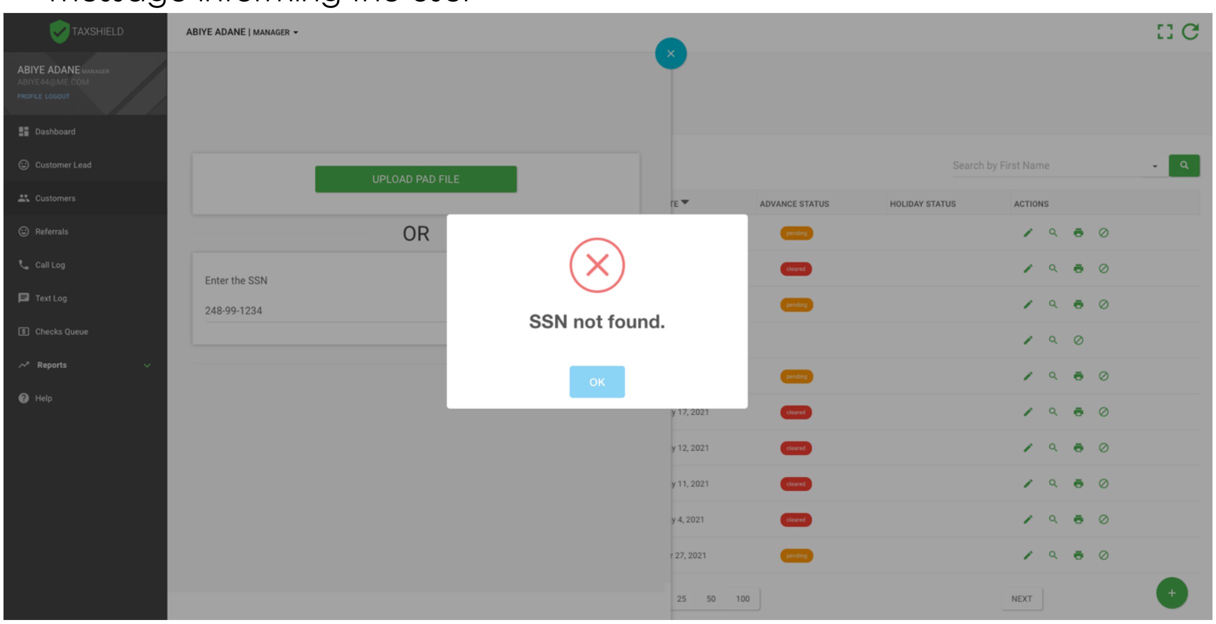
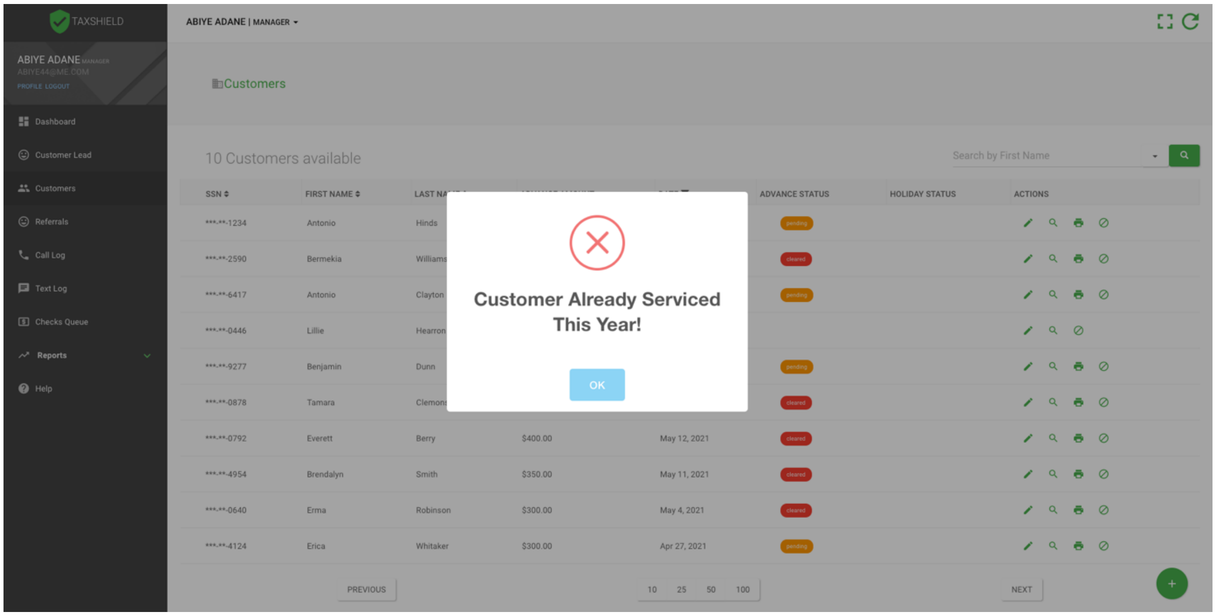
➢ Note: If the client's SS# has already been entered in to the system, owes debt, or the SS# entered is incorrect, the system will display a message informing the user





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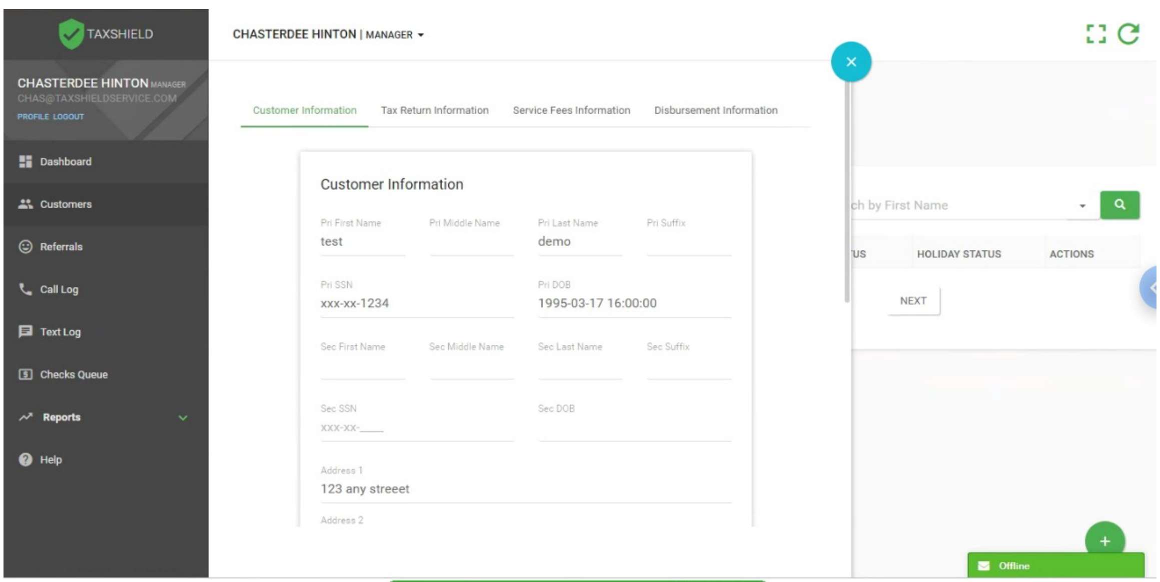
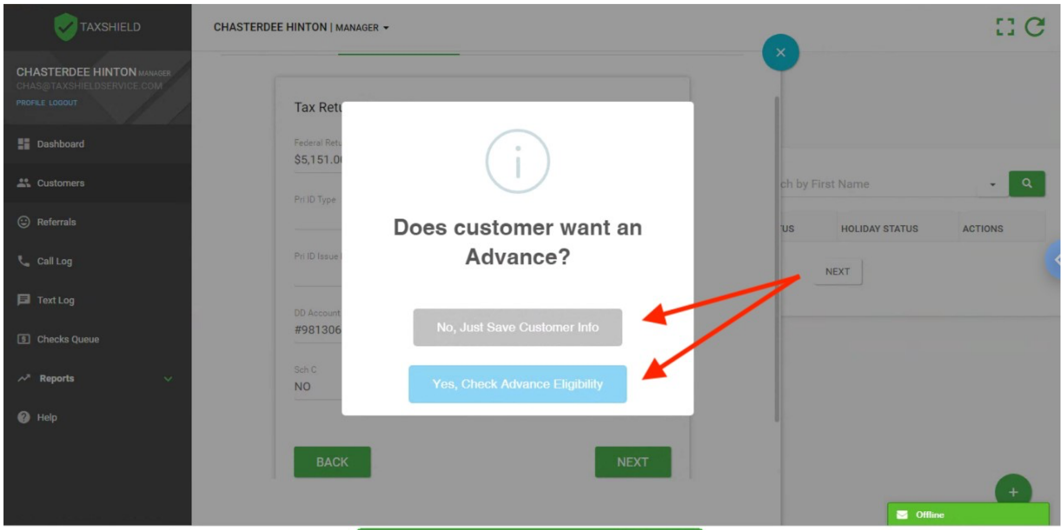
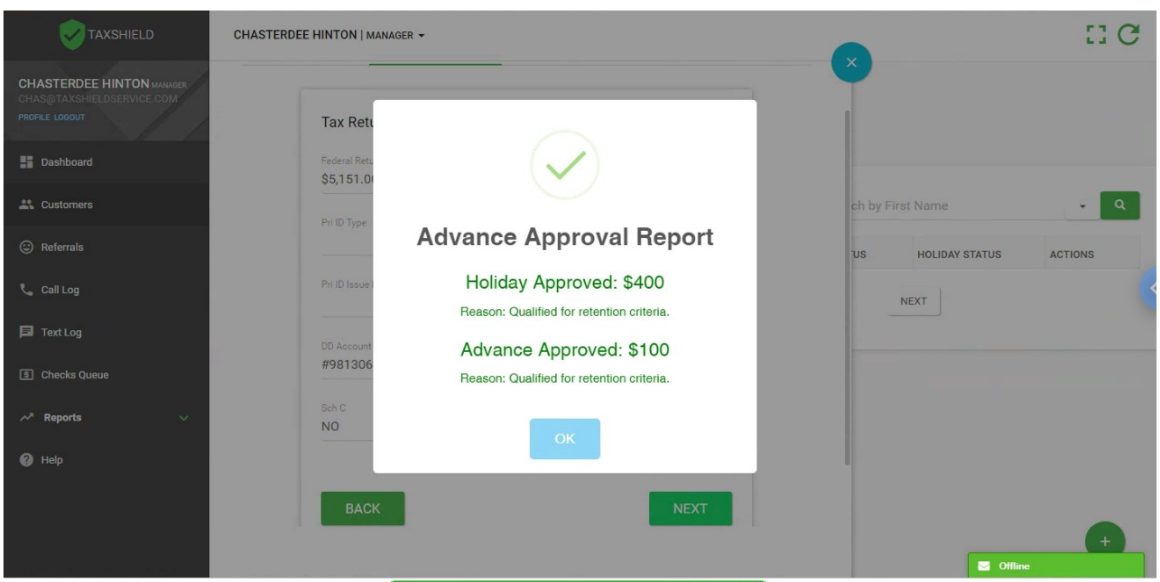


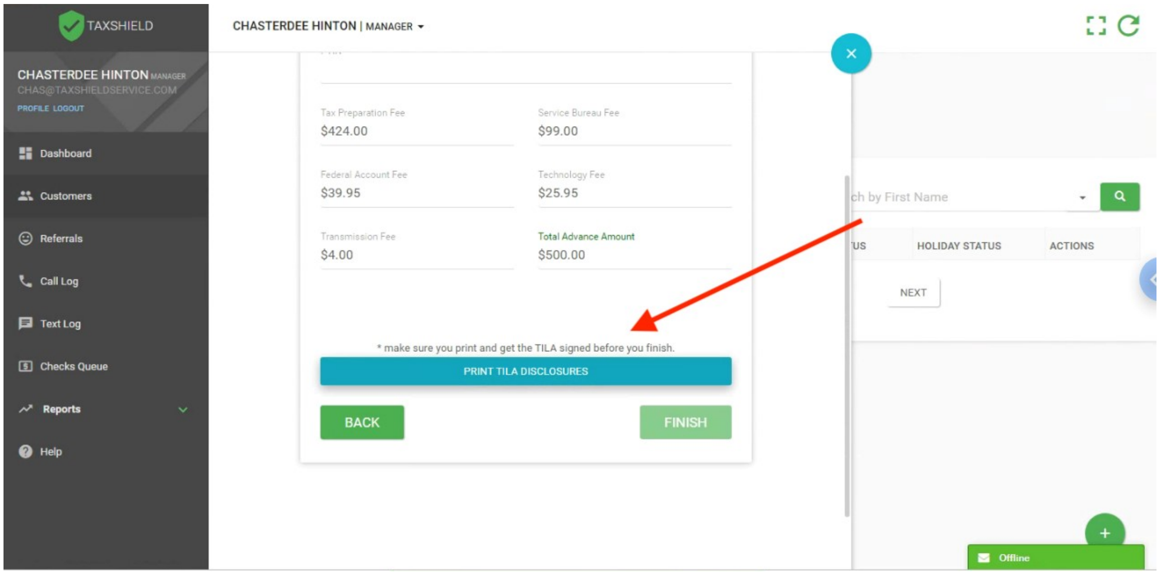
6. Once the correct client has been confirmed, **scroll to the bottom of the page** and click '<u>Next</u>' which will display the return information, click '<u>Next</u>' to continue, which the application will ask you if you would like to **<u>Check Advance Eligibility</u>** or **<u>Just Save Customer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



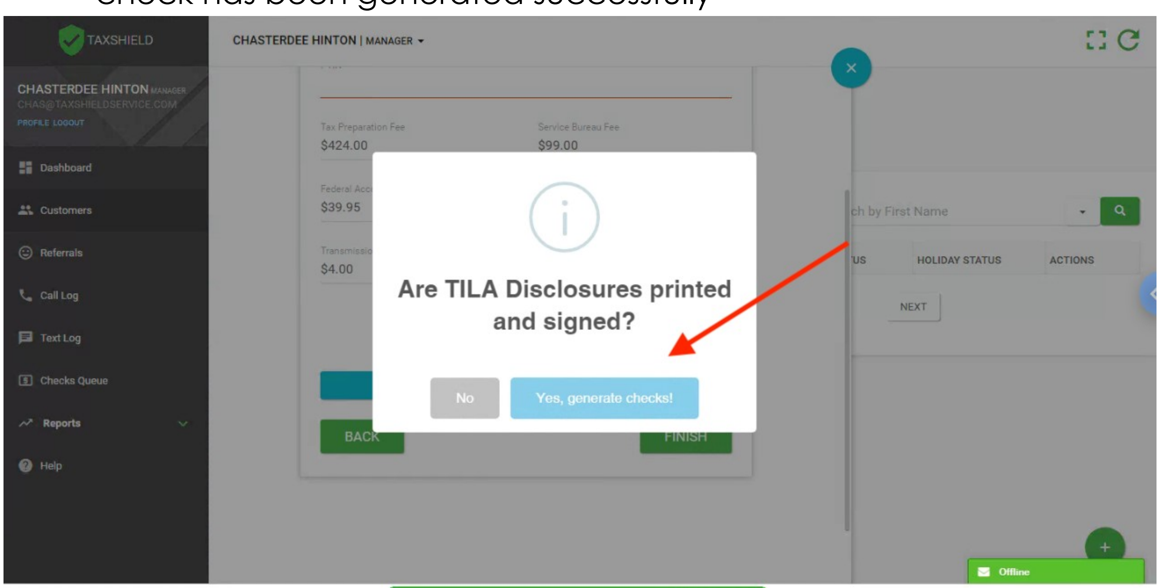
7. Click **Check Advance Eligibility** and if approved, the Advance Amount will be displayed!



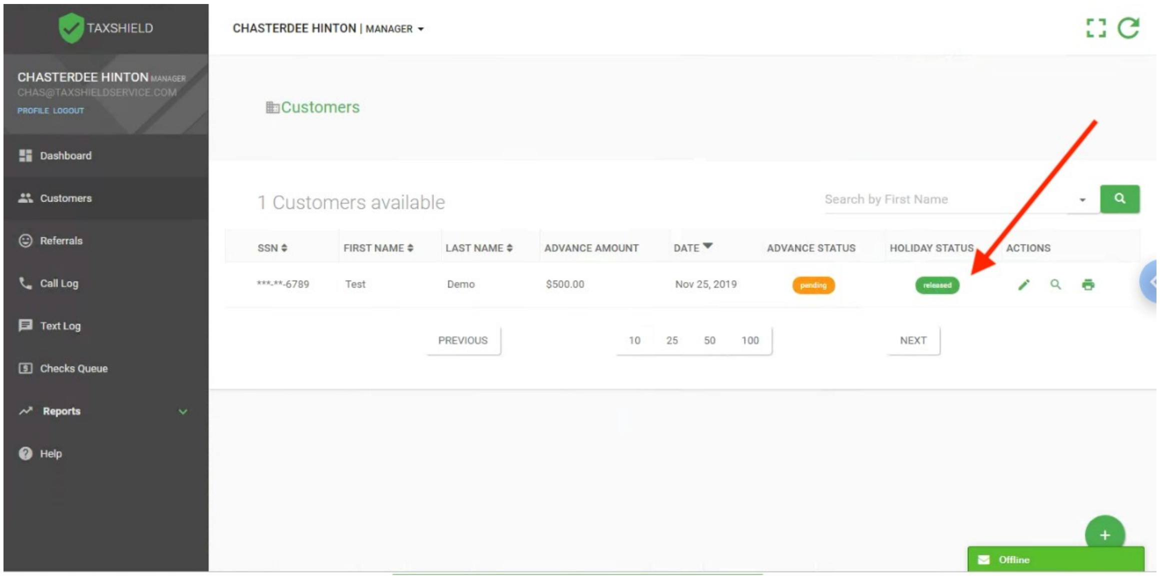
8. Select **OK** then click 'Next' to print the **TILA Disclosures** (Legal Customer disclosure document) for the client.
   - Note: The finish button will **NOT** populate until the TILA has been printed



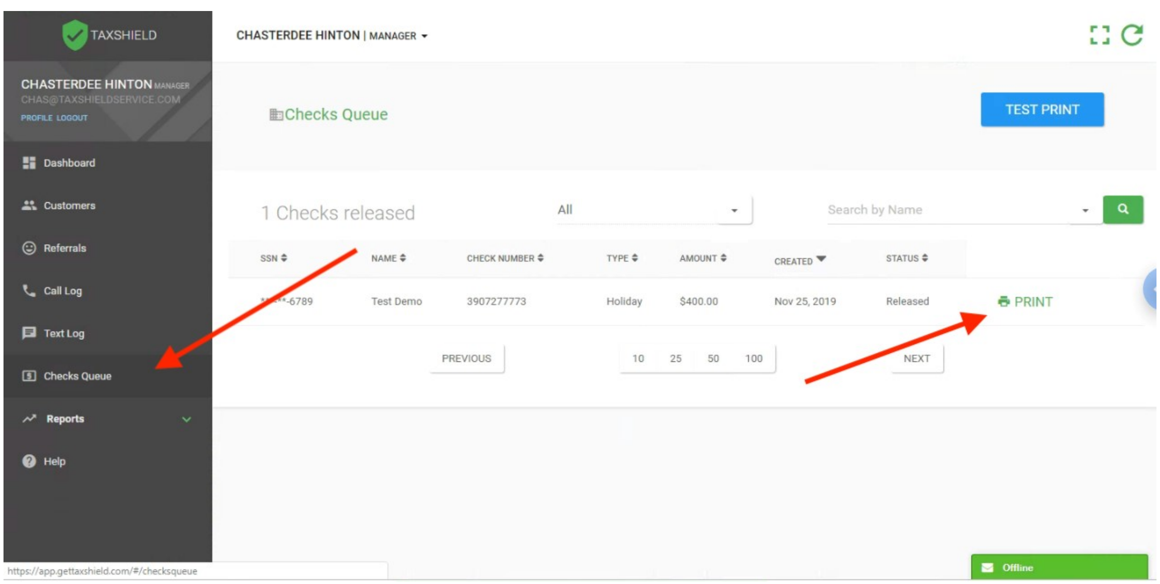
9. TSS will ask if the TILA has been signed for this client. **If you click yes, the process to generate a check is complete**. You'll see a green notification on the top right hand side of the page stating the check has been generated successfully



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!