TSS Help Index [Admin]

Dashboard: 'Home Screen' if you will; this screen allows you to get a snapshot of the state of your applicable services. You can access several pertinent data points that let you know 'to the dollar' of the incoming/outgoing amounts. Also allows you to see the dollar amount per-store, of your franchises as well as the % of returns that have Educational Credit and/or Sch C included in your total returns (if applicable)

The Refresh Button: This button is what you'll press when you are attempting to view any updates/changes within the system. This will be a button you'll want your managers to become familiar with whenever you have to adjust any function within the system, The system will kick out any account under it in a event

Customers: A detailed list of the clients that you have serviced along with their relevant information. You can sort by: First Name, Last Name or SSN

Call Log: Your digital/virtual call center. Tracks every incoming call and provides an audio playback of the duration of the call for quality assurance purposes. Lists are ordered by Store; and can be sorted by: Caller Number or Caller Source while detailing the time duration of calls as well as the time-stamp of the incoming call.

Text Log: Hub for communication with your clients utilizing text capabilities. Once a text campaign has been selected [**Text Back**, **Mass Text Blast**, **Appointment Text**, **Referral Alert**] send and reply in real-time directly with your clients. The campaign number that the client is texting in reference to, will be displayed in the messenger interface.

Referrals: A detailed list of **referrers**, and the **referrals** that have been serviced; complete with information regarding the 'Paid Ratio' of the referrals that have been paid out to the referrers

Checks Queue: A real-time updated list of checks that have been either: **Printed**, **Pending**, **Re-Printed** or **Voided** by any store within your network. You can sort this by: Chk#, Last Name, SSN, Amount & Chk Type

Reports: Data hub for exporting analysis surrounding your marketing campaigns, check information, cashflow, and other crucial data points that allow you to maximize the efficiency of your operations

Marketing: Charted analytics detailing the cost per dollar of your campaigns as well as efficiencies around the phone numbers you've purchased

Phone Settings: Configure all phone-related services and features

-My Numbers: Purchase phone numbers and customize the phone number(s) by area code, Toll-Free#, or by keyword (866-TAX-1040). Once labeled, set the **routing** of the phone call as well as the greetings and/or prompts that your clients will hear upon calling

-Geo-Router: Label the Geo-Routing campaign and choose whether to route calls by: Zip Code, Area Code or directly to a specified number

Text (Campaign): The hub for communication in real-time with your clients via text. Start a new text campaign with a purchased phone number using one of the following methods:

-Text Back: If for whatever reason a client calls and the office is not able to answer that call, **Text Back** will send a customized text back to that particular client + other 3 features

-Mass Text Back: Import a .csv list of clients and instantly blast a customized text message along with an image if desired.

-Appointment Text: Import a .csv list of clients who are scheduled for appointments that day and send them a reminder text

-Referral Alert: When an return is acknowledged from a client that was referred, a customized text will alert the **referrer**'s phone number on file

Account Settings: Configuration of the settings for **Owner Accounts**, **Banking**, **Advance Criteria**, and **Billing**

-Owner Accounts: Invite owners and configure their profile & privileges

-Banking: If not using TaxShield Funding; then setup the bank information that will dictate which account, the funding for your business draws. This is also where you set up your check verification ph# that will be on the checks printed from your stores

-Advance Criteria: Configure the rules for each of the check types: **Referrals**, **Advances**, and **Holiday Advances**. Set min/max amounts, link checks so they release upon acknowledgements from the IRS. Set client retention variables so you can initialize a 'Loyalty Program' with your return clients as well as 'fix' amounts for Sch. C and clients with **Bad Debt**

-**Billing**: Maintenance of account balances, view payment history and the activation of services for your profile

-Invoice: Setup your payment method, set the preferences for your account balance and review your payment history

-**Services**: View/Activate service plans
-**Holiday/Advances:** Process advances for you clients based off of set criteria
-**Call Log:** Virtual call center with call tracking and audio playback features
-**Positive Pay:** Automated fraud detection tool that matches acct#, chk#, and $ amount with a list of authorized checks from issuer
-**Referral:** Enable your clients to receive a kick-back for referring clients to your business
-SMS (TEXT): Activate the power of text interaction with your clients along with mass text blast features and other text-based campaigns
-Referral Funding: Opt-in to funding to allow the printing of referral checks for your clients
-**Billing Method**: Add/Edit and Save credit card credentials

Archive: Archive inactive **Owner Accounts** without having to onboard them again