How to File as a Bulk Filer (Tax Preparer)

Avenu Insights and Analytics offers two methods to file online as a bulk filer for many jurisdictions. The primary method to file is to register as a tax preparer and then have any business that you wish to file on their behalf create an account. This method does create a parent-child relationship and allows the client's account to retain all the filing history associated with that account.

The second method is to create a taxpayer account and upload a CSV file with the data required to file for your clients. This method will benefit a business who owns multiple businesses on which it needs to report but does not want to force clients/each entity to create and manage their own account.

What is a Preparer Account?

A Preparer Account allows a tax preparer to link to and manage individual Client Accounts. Preparer Accounts on SalesTaxOnline.com have a parent-child relationship with Client Accounts. Each preparer has a unique username and password to manage his Preparer Account. Within the Preparer Account, he can manage his Clients' Accounts. Each Client Account will also have a unique username and password, but the link between the Client Account and the Preparer Account prevents the preparer from having to log in with the username and password of each client. At any time, the preparer can add a new Client Account to manage or discontinue management of a current Client Account.

Who Should NOT Sign Up for a Preparer Account?

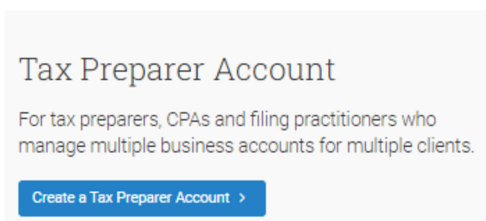
You should not sign up for a Preparer Account on SalesTaxOnline.com if you are filing returns for a company with multiple locations. If you are unsure about whether a Preparer Account would be right for you, please contact Technical Support.

Who Should Sign Up for a Preparer Account?

You should sign up for a Preparer Account on SalesTaxOnline.com if you are responsible for preparing returns on behalf of multiple clients and wish to keep each client's account separate. The benefit of keeping separate client accounts linked to a Preparer Account is that you can allow your client to log into her own account without exposing another client's information.

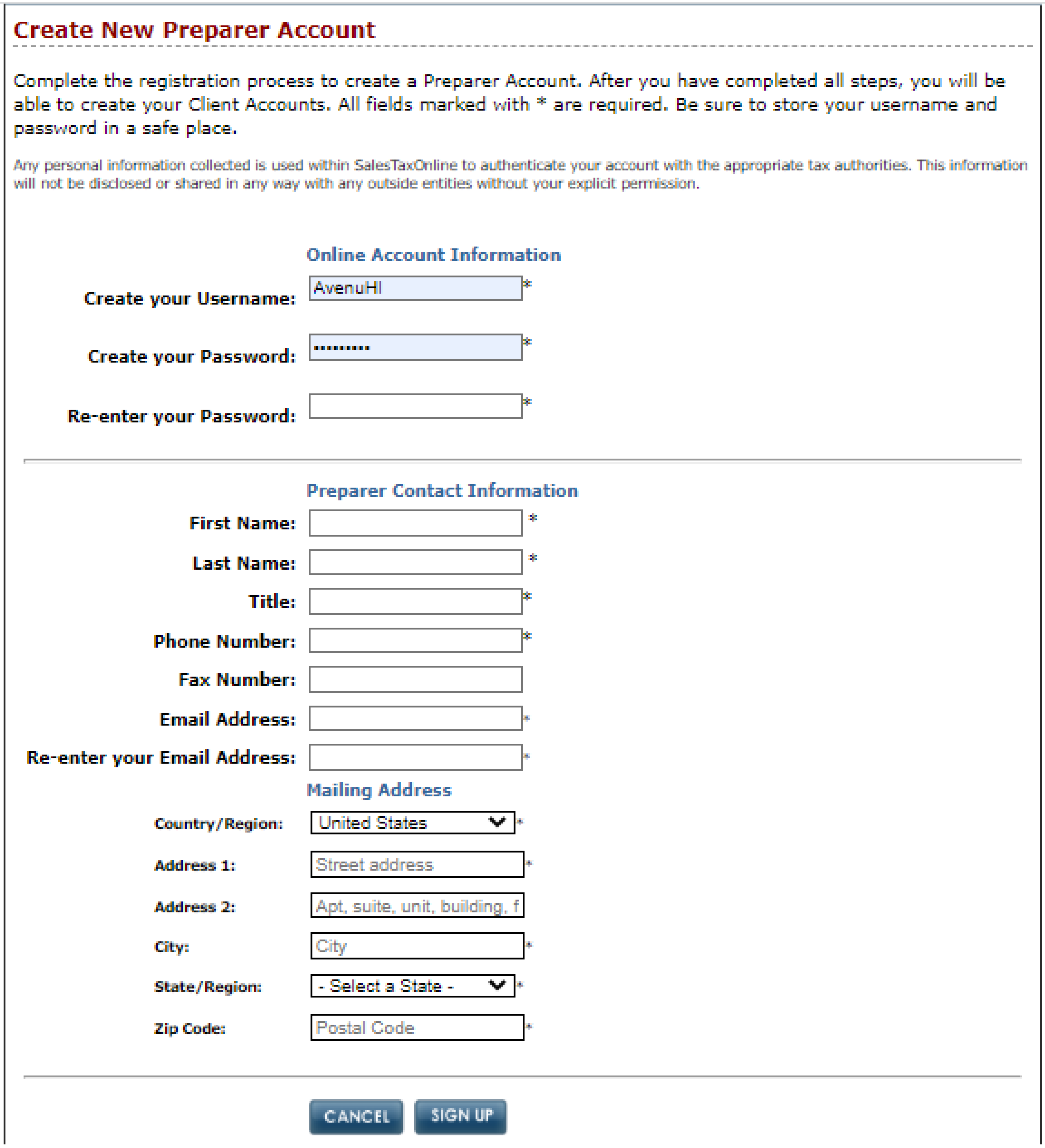
To create a Tax Preparer Account

1. Click on



2. Read the description and then click on CONTINUE to proceed.

3. Complete the required information. All asterisk (*) information is required.



Create New Preparer Account

Complete the registration process to create a Preparer Account. After you have completed all steps, you will be able to create your Client Accounts. All fields marked with * are required. Be sure to store your username and password in a safe place.

Any personal information collected is used within SalesTaxOnline to authenticate your account with the appropriate tax authorities. This information will not be disclosed or shared in any way with any outside entities without your explicit permission.

Online Account Information

Create your Username: AvenuHI *

Create your Password: ••••••••• *

Re-enter your Password: *

Preparer Contact Information

First Name: *

Last Name: *

Title: *

Phone Number: *

Fax Number:

Email Address: *

Re-enter your Email Address: *

Mailing Address

Country/Region: United States *

Address 1: Street address *

Address 2: Apt, suite, unit, building, f

City: City *

State/Region: - Select a State - *

Zip Code: Postal Code *

CANCEL SIGN UP

4. Create your security question. Either select a suggested question or enter your own along with your response. Be sure to store this information along with your username and password in a secure location. The security question will allow you to reset your password if ever necessary.

Set Your Security Question and Answer

If you forget your password or must reset an expired password, you will be asked the question below and must provide the answer. The answer should be something that you will always know. Here are a few suggestions for the question:

- What is the first and last name of your first boyfriend or girlfriend? Use this question?
- Which phone number do you remember most from your childhood? Use this question?
- What was your favorite place to visit as a child? Use this question?
- Who is your favorite actor, musician, or artist? Use this question?
- What is your favorite hobby? Use this question?

Security Question: What was your favorite place to visit as a child?

Answer:

BACK SAVE

5. You can now begin to associate your practitioner account with your clients' accounts.

Practitioner Account

Click the Add New Account button if you need to prepare returns for a client who does not already have a username and password on this website.

Click the Add Existing User button if your client already has a username and password on this website and you want to link that client's account with your Practitioner account.

Click Select in the row of a client to view the client account and prepare returns for the client.

ADD NEW ACCOUNT ADD EXISTING ACCOUNT

Setting up a New Account

Click on Add New Account if the business does not have a username and password. You will then be able to register the business on their behalf and provide them with the username, password, security question and answer that they will need to manage their account.

Tax ONLINE

Home | Practitioner Account | Import Returns | Account Center | Lookup | Support | FAQ

Adding a New Client Account

A Preparer Account allows a tax preparer to link to and manage individual Client Accounts.

Each Client Account will also have a unique username and password, but the link between the Client Account and the Preparer Account prevents the preparer from having to log in with the username and password of each client.

Optionally, you can provide the client username and client password to the client, to allow him to view the information that pertains to the business.

Click the Continue button to create a new client account for a business that does not already have a username and password on this website. You will be taken through the steps to enter the client's business information. The client's account will be automatically linked to your Preparer Account.

CANCEL CONTINUE

Manage an existing account

To manage an existing account, search for the account using the business's email address.

Manage Existing User Accounts

To find a client that already has a username and password on this website, please enter the email address associated with the client's account.

Search by **Email address:**

CANCEL SEARCH

Select each client that you wish to manage and click the Request to Manage button. The client will receive an email with a confirmation code and must log into his own account to grant permission. The client will appear in your client list as "Pending" until permission has been granted to manage the account.

The business then must log in and provide the confirmation code that was emailed to them:

Account Management Confirmation

has requested to manage your SalesTaxOnline User Account.

An online Confirmation Code has been sent to your Email Address. Your Confirmation Code must be entered below to complete and activate the management of your User Account, which is now in a Pending Status with the requesting manager.

If you have not received an email with your Confirmation Code, please check your spam folder.

NEXT CANCEL

Lost your Confirmation Code? Click here to have a new Confirmation Code emailed to you.

The user should expect an email that looks like the following. Each email will have its own unique code to link the accounts.

Request to Manage Account – Action Required

ST Sales TaxOnline.com <support@salestax

To

Reply Reply All Forward

Sun 6/4/2023 3:38 PM

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello

The Practitioner has requested to manage the account on SalesTaxOnline.com with Username: marinabhamastest.

To allow the Practitioner to manage the account:

1. Login to the account on SalesTaxOnline.com with Username: marinabhamastest and your current password. You will be presented with a confirmation page.

2. Enter the following confirmation code below to allow the practitioner to manage your account:

CONFIRMATION CODE: OHDW1DH

If at any time you need assistance, please call our Technical Support Line at 1.800.227.7059 or email us at support@salestaxonline.com. Our Technical Support Service Center is open from 8:00 am to 6:00 pm CST, Monday through Friday.

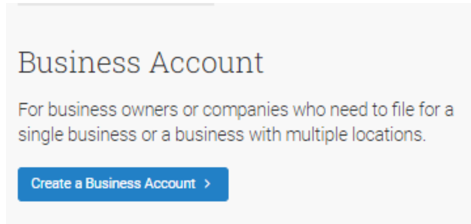
ABOUT THIS MESSAGE
This service message was delivered to you to provide you with account updates and information about your online filing account. SalesTaxOnline.com values your privacy and your preferences. If you want to contact SalesTaxOnline.com, please do not reply to this message, but instead call our Technical Support Line at 1.800.227.7059 or email us at support@salestaxonline.com. Our Technical Support Service Center is open from 8:00 am to 6:00 pm CST, Monday through Friday. Replies to this message will not be read or responded to.

Once the accounts are linked, you will be able to pay on behalf of the business.

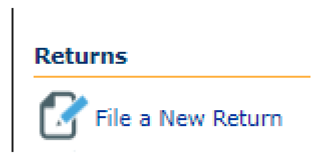
Option 2: Bulk Filer Import

For some municipalities, bulk filing import is available.

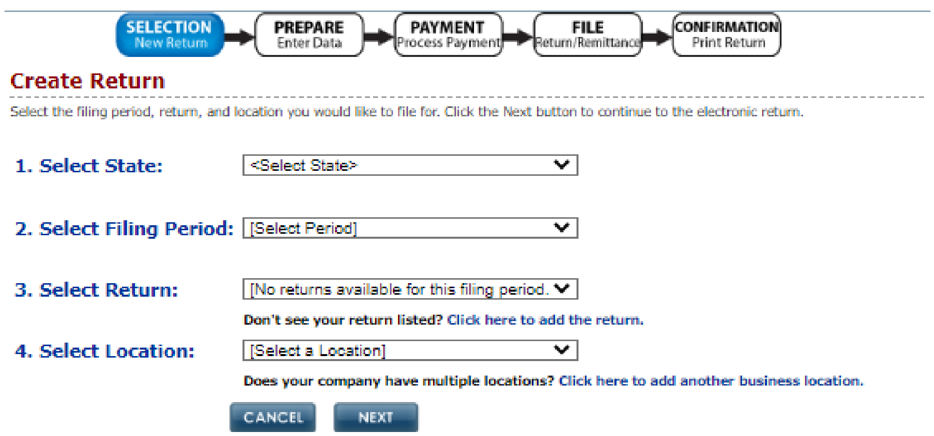
1. To file create a Business Account.



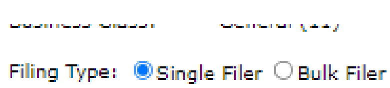
The information associated with this account is your information as the tax preparing agency. Each business will need to have registered with Avenu Insights and Analytics and have an Avenu account number. Each business will receive information detailing their account number and business name. They should provide this information to you so you can build the appropriate import to file on behalf of your clients/businesses.



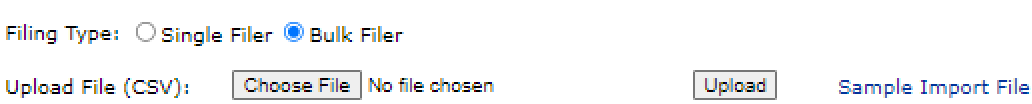
2. Once you have completed your signup, you can click on file a new return.
3. Select your state, filing period, return and location. Then click next.



Jurisdictions with the option to import a file will see a radio button indicating bulk filing is an option.



4. Click on Bulk Filer and you will see the option to import the CSV file as well as a sample import file that you should reference to build your import. Each municipality's sample import may require different fields depending on the municipality's requirements. Please be sure to review the sample import to ensure you are successfully able to file.



5. Once you have uploaded your file, you should see all the taxpayers listed along with the respective calculations based on the information provided. You can then click next to file and pay.