



# Optimizing Your **PTM** Solution

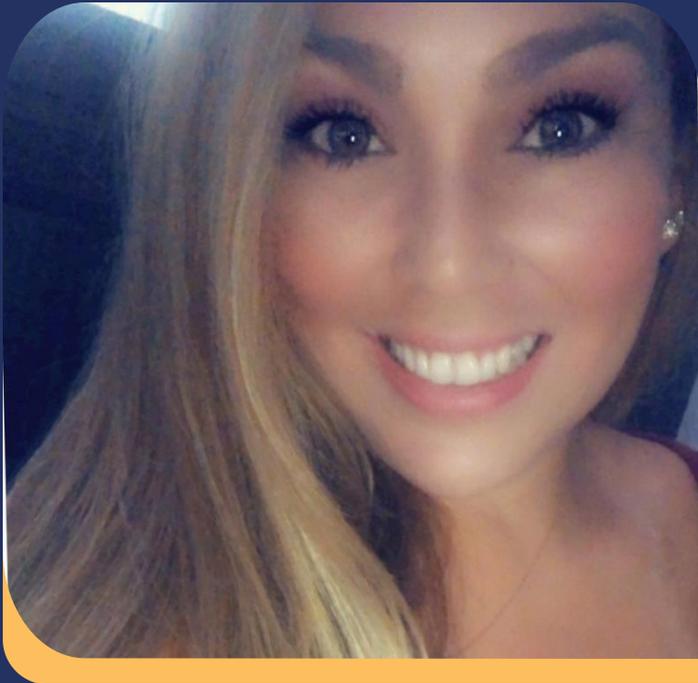
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2024 Asure Reseller Partner Conference

Presented by Janel Weinke



# Speaker Introduction



## Janel Weinke

Senior Director of Tax Operations

Over 20yrs of Payroll Tax experience beginning my career at leading tax compliance filing, tax agency notices and regional payroll location for small and national payroll clients. I have worked closely with clients to ensure from beginning to end the payroll tax setup is setup for success to ensure timely and accurately filing and payment remittance. I have worked with all size of companies with 1 to 1000+ employee(s) and multi-state.

Joined Asure in 2020 leading tax filing/payment submission through our direct business using Evolution. As we moved our direct business to One Asure, and processing the operations to one tax engine APTM, I am currently leading our reseller support team.

# Session Agenda

- 01** Introduction A2A Integration
- 02** IRS Standalone Process
- 03** Creation, Upload & Confirm
- 04** Web Portal
- 05** Q&A

# What is A2A Integration?

The ability to submit E-file quarterly returns to a tax agency within minutes and receive acceptance or rejections for the tax agency.



# IRS 941/940 Standalone Process



## Asure E-File Web Portal

How long does it take to process the creation, batching, submission and obtaining acceptance or rejections from the IRS?

Would you like if you can submit all 941s for all your clients within batch?

Imagine the extra time you will have...

**Yes, it's possible to process all 941s electronic filings to the IRS and receive response from the IRS all within ONE day!**

# Creation, Upload & Confirm

01

## Create the 941s electronic filings & Upload returns

- Create the 941 returns from EVO.
- Process up to 10k EINS within one batch.
- User will enter the quarter, year and the form that is being uploaded.
- The file can contain up to 10,000 returns.

02

## Message Received

- The file uploaded is parsed and uploaded to the S3 processing bucket.
- A message will be located at the lower bottom by the UPLOAD button indicating successfully processing file uploaded.

03

## Transmit View Batch Files

- The returns are parsed and new batches of 100 are being created.

# Creation, Upload & Confirm

04

## Transmit Files

- User can select one or more bathes and transmit to the IRS by selecting Transmit.
- Once files have been transmitted the files will be removed from transmit page and will be located on Transmission page.

05

## Transmission Page

- Select Confirm action to receive response from files transmitted.
- User can select one file or multiple returns for confirmations or rejections.

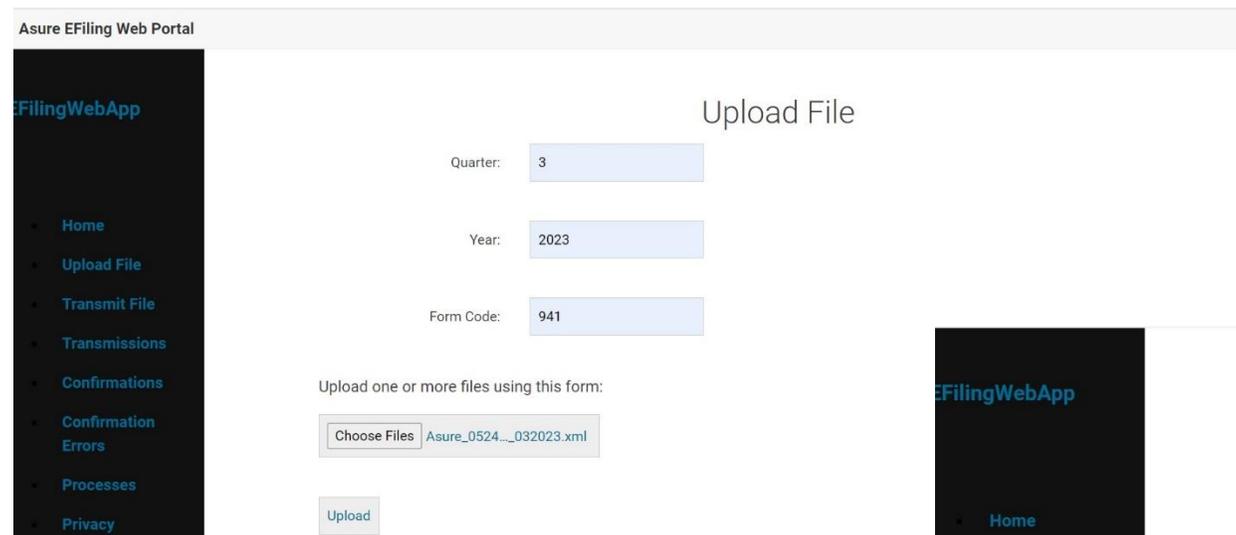
06

## Response from the IRS

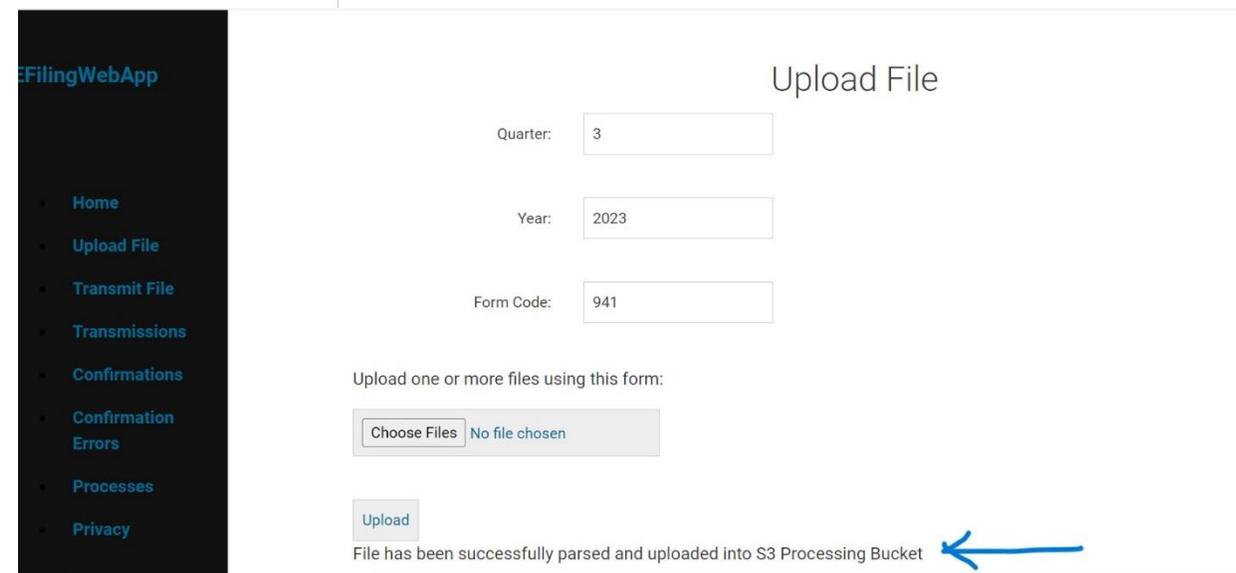
- Go to Confirmation screen and user will have the ability to download all confirmation files received from the IRS.
- Go to Confirmation Errors and user and can download the report of any errors received from the IRS.

# Asure E-File Web Portal

1. Select Quarter, Year, Form Code and locate file and then Upload

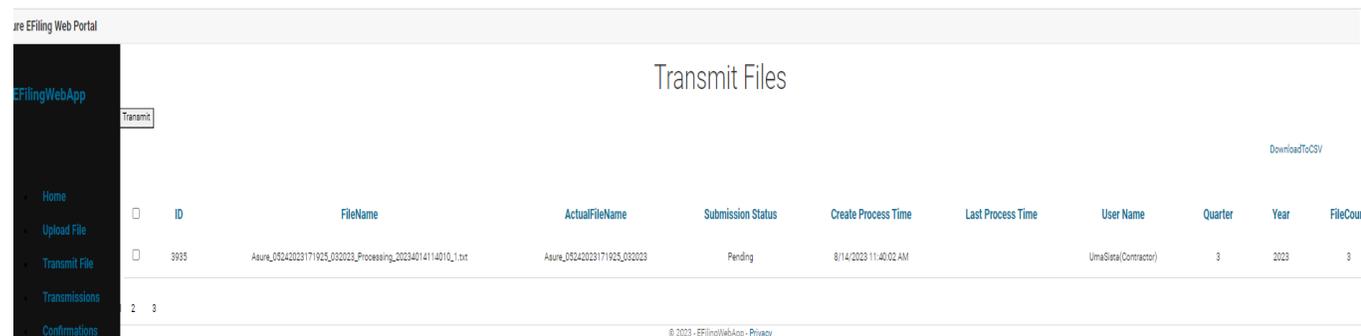


2. File Uploaded user will receive a successful message.



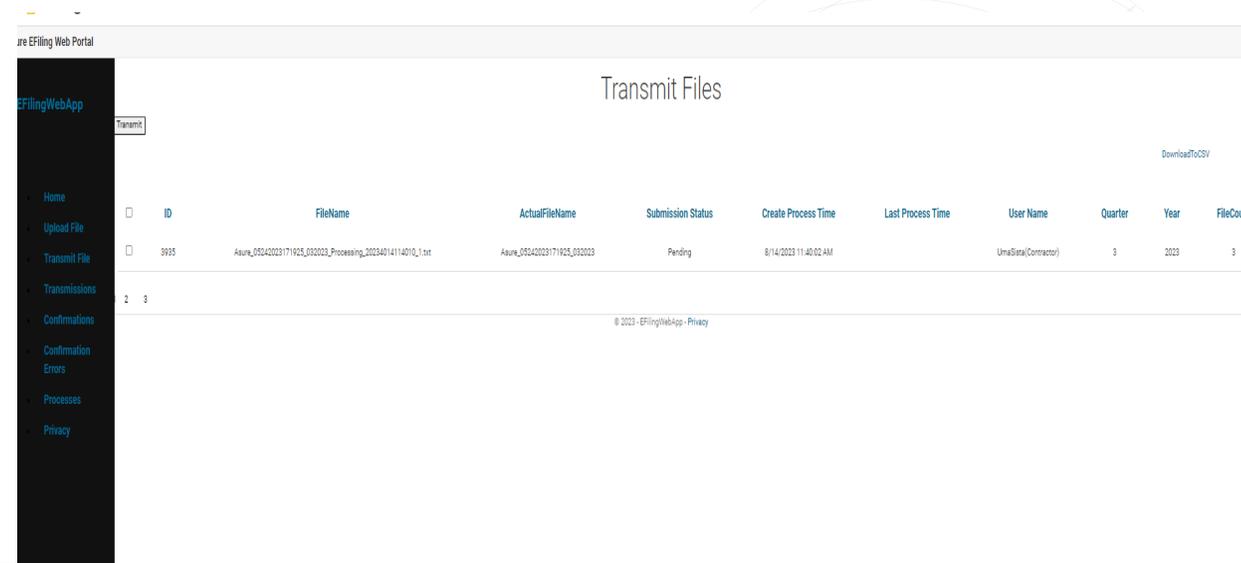
# Asure E-File Web Portal

3. Go to the Transmit File Page for status of the batch files created status.



ID	FileName	ActualFileName	Submission Status	Create Process Time	Last Process Time	User Name	Quarter	Year	FileCount
9995	Asure_05242023171925_032023_Processing_20234014114010_1.txt	Asure_05242023171925_032023	Pending	8/14/2023 11:40:02 AM		UmaSera(Contractor)	3	2023	3

4. Transmit the files to the IRS.



# Asure E-File Web Portal

5. To confirm transmitted files, select one or more returns for confirmations.

6. Two screens within Dashboard to review acceptance or rejection and reason from the IRS.

Asure E-File Web Portal

EFileWebApp

Transmitted Files

Confirm

DownloadFileCSV

ID	Company Name	FEIN	FormCode	SubmissionID	Quarter	Year	Submission Status	Uploaded File Name
324291	PIED P. SOCIAL LLC	83449830	941	709785020202060002814	2	2023	Transmitted	Azure_07282023022215_022023_Processing_20234425114408_1.txt
324282	RAMWIDE SERVICES LLC	844649332	941	709785020202060002815	2	2023	Transmitted	Azure_07282023022215_022023_Processing_20234425114508_2.txt
324283	KTEE KTY ELECTRIC LLC	820194988	941	709785020202060002816	2	2023	Transmitted	Azure_07282023022215_022023_Processing_20234425114508_3.txt

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EFileWebApp

Confirmations

ID	Company Name	FEIN	FormCode	SubmissionID	Quarter	Year	SubmissionStatus	ConfirmationStatus	UploadedFileName	DownloadFileCSV	DownloadFile
323449	RED-ADMAN MFG INC	770141110	941	709785020202060000002	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_2023024030303_1.txt	Download File	
323470	PUSHMAN LLC	47948105	941	709785020202060000003	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323471	KONING & ASSOCIATES INC	71069616	941	709785020202060000004	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323472	KERI SYSTEMS INC	943117805	941	709785020202060000005	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323473	SANDHAR CORPORATION	92076655	941	709785020202060000006	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323474	BRINDING YOU HOME REALTY	471951280	941	709785020202060000007	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323475	CLAAR CORPORATION	941367979	941	709785020202060000008	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323476	ARRISA AND ASSOCIATES INC	920593028	941	709785020202060000009	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323477	ARCIOUS CORPORATION	280435217	941	709785020202060000010	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323478	RICHARD DELOY SMITH	770027891	941	709785020202060000011	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323479	USSEST MANAGEMENT INC	870738387	941	709785020202060000012	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	
323480	98W8 INC	770464801	941	709785020202060000013	2	2023	Transmitted	Confirmed	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File	

EFileWebApp

Confirmation Errors

Reject

DownloadFileCSV

DownloadFile

ID	Company Name	FEIN	FormCode	SubmissionID	Quarter	Year	SubmissionStatus	ConfirmationStatus	Errors	UploadedFileName	SubmissionFile
323507	DOB3 DO3 INC	770454738	941	70978502020206000000040	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114448_1.txt	Download File
323583	WAMP HAALPO	383065768	941	709785020202060000114	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114448_2.txt	Download File
323659	ONR O HEBL SECURITY GROUP COOP	833427090	941	709785020202060000172	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114448_2.txt	Download File
323771	MIVDY MAN DYER INC	835060346	941	709785020202060000304	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_4.txt	Download File
324194	AVENTURA AT PROSPECT LLC	831690503	941	709785020202060000727	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_8.txt	Download File
324282	ISLAND LAKE CENTER LLC	431988458	941	709785020202060000754	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_8.txt	Download File
324283	RIVERWOOD CENTER LLC	431988461	941	709785020202060000756	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_8.txt	Download File
324396	ARAB WEST VILLAGE NURSING AND REHAB OP CO LLC	882453478	941	709785020202060000901	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_10.txt	Download File
324499	ARAB VILLAGES ASSISTED LIVING PROPCO LLC	882453682	941	709785020202060000902	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_10.txt	Download File
324414	PRIN PRINACLE GROUP OF HUDSON VALLEY VE	010402202	941	709785020202060000947	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_10.txt	Download File
324417	DAIC OAK CREST HEALTH & REHAB...	880667162	941	709785020202060000950	2	2023	Transmitted	Confirmation Error	...	Azure_07282023022215_022023_Processing_20234425114453_10.txt	Download File



Technology will never replace great teachers, but technology in the hands of great teachers is transformational.

George Couras



# Q & A



# Thank You!

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