

Optimizing Your PTM Solution

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







Creation, Upload & Confirm

Web Portal





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.



- 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

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

Creation, Upload & Confirm



Transmit Files

04

- 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.

Transmission Page

05

Select Confirm action to receive response from files transmitted.

 User can select one file or multiple returns for confirmations or rejections.

Response from the IRS

06

- 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

Asure EFiling Web Portal								
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Privacy	Upload			Home Upload File	Year:	2023		
				Transmit File Transmissions	Form Code:	941		
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				Confirmation Errors	Choose Files No file chosen			
				Processes Privacy	Upload File has been successfully p	arsed and uploaded ir	nto S3 Processing Bucket	



Asure E-File Web Portal

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

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Asure E-File Web Portal

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

Asure EFiling Web Portal

Confirm

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

Transmitted Files											ĺ	EFilingWebApp							Confirma	ations			DownloadToCSV		
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Technology will never replace great teachers, but technology in the hands of great teachers is transformational.

George Couras





Thank You!



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