

A Hassle-Free Guide to Providing a Private-Label E-File Site for Your Tax-Filing Customers

The screenshot shows the 'efile for you' website. At the top left is the logo 'efile for you'. To its right, a red banner says '2018 Forms Now Available! File early to beat the rush.' In the top right corner, there are links for 'LOG IN' and 'SIGN UP'. Below the logo is a navigation menu with 'How It Works', 'Forms & Fees', and 'Help'. The main content area features a woman smiling at a laptop. Text next to her says 'Quick and Easy Online Filing of 1099, W-2 and ACA Forms Starts Here!' with a red button that says 'CREATE AN ACCOUNT FOR FREE >'. To the right is a 'RETURNING USERS' login form with fields for 'YOUR EMAIL *' and 'PASSWORD *', a 'Forgot Password' link, a 'LOG IN' button, and a 'Sign in with Intuit' option. Below the main content, it says 'Securely Complete 1099, W-2 and ACA Forms Online' and 'Welcome to a simple, safe and smart way to electronically file, print and mail your essential tax reporting forms.'

TABLE OF CONTENTS

Why a Private-Label E-file Site?	page 2	End User Experience	page 4
Set-Up	page 3	Billing	page 5
Next Steps for Reseller	page 3	FAQs	page 6

Why a Private-Label E-file Site?

Small businesses used to be limited to one option with mandatory 1099 and W-2 filing: paper forms. Not anymore! As our fast-paced world becomes increasingly electronic, tax filing is experiencing the same shift – and moving online.

Today, more and more businesses are ditching traditional paper forms and switching to cloud-based processing of 1099s, W-2s. **As a result, there's never been a greater time to offer a private-label e-file site from ComplyRight Tax Solutions.**

With minimal effort on your part (yes, really!), you can offset declining paper forms sales, retain more customers and, best of all, boost overall revenue. We provide the secure website engine and handle all the printing, mailing and e-filing for your customers. We even provide a transformation template to transform data from your software to a format the efile1 site can understand. We also extend the hands-on marketing, customer service and tech support you need to promote the e-file site and make it a resounding success.

Ready for what's next? This guide will get into the practical nuts and bolts of a private-label e-file site so you can go from "interested" to "invested." An exciting and lucrative selling opportunity awaits, so let's get started.

Why a private-label e-file site makes sense for your business

- More profitable than paper forms
- No hassles getting the right forms
- No last minute or small-quantity forms orders
- Full customer service and tech support
- Marketing assistance to help you sell more
- Increased customer retention
- Ability to recapture lost paper forms sales

Why e-filing makes sense for your tax-filing customers

- No software or paper forms needed
- Easy data import from QuickBooks, Excel and other popular programs
- Eliminates labor costs of printing, mailing and manually submitting forms to the IRS/SSA
- Data validation reduces filing errors
- Only pay for the number of forms filed
- Secure data encryption and processing from SOC-2 certified facilities

Target customer? E-filing is ideal for small business and accountants that file 100 or fewer 1099s or W-2s for independent contractors and employees each tax season. This includes churches, non-profits, construction firms, property management companies or businesses that use commissioned sales, like real estate and insurance agencies.

Set-Up

We make it easy to set up your own e-file site. Best of all, it's absolutely free.

Requesting an e-file website

- Our team will send you a set-up form within 24 hours to fill out.

e-file site

ComplyRight E-file Setup Form					Date:
Company Profile <i>(For internal use only)</i>					
Company Name:					
TFP Account # (if applicable)					
Address Line 1:					
Address Line 2:					
City, State, Zip:					
Main Contact:					
Email Address:					
Phone Number:					
Accounting Contact:					
Email Address:					
Phone Number:					
Subdomain Name*:				.efile1.com	
	<i>(No spaces)</i>				
What type of Reseller?	<input type="checkbox"/> Financial Software	<input type="checkbox"/> Large File	<input type="checkbox"/> Small Reseller	<input type="checkbox"/> Specialty	
Customer Profile (e.g. how many customers):					
Payment Plan					
What margin / percentage are we offering:					
Revenue agreement:	<input type="checkbox"/> Top Line Revenue	<input type="checkbox"/> Royalty Payment			
Please provide Merchant Provider information (<i>Paymentech, Paypal, Authorize.net</i>)					
Provider:					
Merchant ID:					
Merchant Password:					

Next Steps for Reseller

As you can see, we've carefully orchestrated the process for getting resellers set up with a private-label e-file site quickly and easily.

You will be issued a URL with "efile1.com" in the name. You can either use this URL or buy another domain name and link it to the "efile1.com" URL. Most resellers establish a link right from their home page to the e-file site.

If you want mapping done from your software to efile1 template, simply provide the logo for the software along with the sample output files and we'll do the rest.

Next comes marketing to build awareness and, ultimately, secure more customers. We've got you covered here, too. We offer robust resources to help you successfully promote your e-file site to customers. Any of the following items can be tailored to your unique customer base:

- Seasonal email series
- Video clips
- Calling script to convert forms users
- And more
- Mailing campaign to forms buyers

End User Experience

Particularly in the past five years, the demand for paper forms has declined, while electronic filing continues to grow. It's an appealing alternative for small businesses because it's:

- **Convenient** – Instead of navigating software or handling mountains of paperwork, online filers follow a few easy prompts from their desktops. No more trips to the office supply store and post office – or struggling with paper jams and misaligned forms in printers. E-filing is more environmentally friendly, too, thanks to less paper and toner cartridge use.
- **Affordable** – The online filer pays only for the number of forms filed, even if it's only one. In most cases, online tax reporting is much more affordable than purchasing software and bundles of forms.
- **Accurate** – In addition to the numerous prompts that ensure compliance with the latest tax rules, e-file sites do the complicated calculations. Data entry errors are caught, and mistakes are prevented. In fact, the IRS considers e-file returns to be virtually error-proof.
- **Helpful** – Online filers appreciate the regular communication during the e-file process, including email notifications when the IRS and/or SSA receives filings. Plus, the business can check the status of a specific filing any time, from any computer, laptop or tablet.

Here's how it works for the end user:

- **Sign up for free** – Your customer creates an account to access the web-based dashboard. Sign-up is free and secure. They don't pay anything until they're ready to file their first form.
- **Enter or upload data** – The customer enters payer, recipient and form information, or uploads existing data from QuickBooks, Excel and other programs.
- **Submit data and check out** – The customer adds the completed forms to the cart and checks out. At this point, they can choose their options.

That's it! We handle the rest.

We electronically process and file the forms with the IRS, notify the customer, send copies to recipients and keep everything on file for next year.

At-a-Glance Benefits of Electronic Filing


- Eliminates labor costs of printing, mailing and manually submitting forms to the IRS/SSA
- Only pay for the number of forms filed
- Data validation reduces filing errors
- Payer and recipient data can be reused each year
- Easy post-submission corrections

Billing

Once you're fully operational and securing online tax-filing customers, you can expect to earn profits as follows:

- **Our merchant ID** – The customer checks out and uses our merchant ID. We then pay you a commission at the end of the tax season. This is the easiest method.
- **Your merchant ID** – The customer checks out and uses your merchant ID. We then bill you for our percentage of the revenue.

Regarding commissions, you earn **40% on all sales** from the site. We issue regular, detailed sales reports outlining your earnings.

 3451 Jupiter Ct OXNARD, CA 93030				Invoice No ; Inv. Date ; Due Date ; Terms ;	
Reseller 1122 Main Street BLD 1 STE 100 Oxnard CA, 93030			ABC Company 1234 Main Street Suite 2 Oxnard CA, 93030		
Cust No	Order No	Order Date	Carrier	Purchase Order	
T12345	6000001	2/28/2017	US Mail 1st Class	01/01-01/31	
Order Quantity	Item Number	DESCRIPTION		List	
1	ERESELLERSITE	PRINT/MAIL/EFILE Total Filings = 94 Total Sales = \$338.00		165.39	L
10	DOMESTIC	SB DOMESTIC POSTATE ***** 40% RESELLER = \$135.48 60% CDS = \$203.22		0.44	E

Email	Company Name	Phone	Contact	Order Date	Form Id	Invoice Id	Form Type	Filing Option	Operation	Quantity
office123@yahoo.com	The Store Company	800-123-4567	John Doe	10/12/17	25974558	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974559	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974560	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974561	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974562	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974564	587944	1099-INT	EFileDelivery	New	1
	The Store Company	800-123-4567	John Doe	10/12/17	25974565	587944	W-2C	EFileDelivery	Correction	1
									Customer Total	7
									Total New Form	
									Total Edit Form	
									Total Correction	7
									Distributor Total	7
									Total New Form	
									Total Edit Form	
									Total Correction	7

FAQs

Q: Can an interested business try it at no charge?

A: Yes! They can create a log-in and complete forms. There is no charge until they check out.

Q: What does the service include?

A: E-File and Delivery: Printing and mailing to the recipient via 1st-class mail or e-delivery to the employee, e-filing with the IRS and SSA

E-File Only: Only E-files with the IRS and SSA

Confirmation messages at each step of the process and printable PDF copies for state/local filings for the customer's records.

In addition, the payer and recipient data is saved to make future filings even easier.

Q: When can customers start filing forms?

A: They can start filing as soon as the current year's forms are released, typically in late November or early December.

Q: Is there an online demo or tutorial available?

A: Yes, there are two online tutorials -- one for general usage of the site and another on importing data from QuickBooks. You can find them at the links below. These make excellent sales tools, as well.

How to use the e-file site

<https://www.youtube.com/watch?v=ih1TYk4XZrM>

How to upload data using QuickBooks Online

<https://www.youtube.com/watch?v=67ctC5eAcNo>

Q: Can the site be used for small orders?

A: Customers can file one form or 100 or more. They only pay for the forms they file. This can be a good way for you to handle the requests for small quantities of forms; just send them to the e-file site.

Q: Can you do payroll processing for W-2s?

A: We can quote this for you, but most payroll forms deal directly with low-cost providers or have their own service bureau. There are many details associated with this service and it's often difficult for a reseller to compete on these terms.

FAQs (continued)

Q: Does the site file forms with the state and city?

A: We automatically file form types 1099-DIV, 1099-INT, 1099-MISC, 1099-B and 1099-R in the Combined Federal/State Filing Program, which makes form data available in the 31 states that participate in the program. These states are: AL, AZ, AR, CA, CO, CT, DE, GA, HI, ID, IN, KS, LA, ME, MD, MI, MN, MS, MO, MT, NE, NJ, NM, NC, ND, OH, OK, SC, UT, VT, and WI. Not all states participate in this program, including tax-free states such as Nevada, Florida, Washington, Texas and Wyoming. If a customer has questions regarding state filings, we suggest they talk with an accountant or attorney for clarification.

We do not directly e-file or mail city or local copies. To comply in non-participating states, or with city and local requirements, a customer must print copies of the forms and mail them to the appropriate agencies. Even so, it's less work to print and mail copies from the e-file site than handle everything manually with preprinted paper forms.

Q: Is there online customer service and support?

A: Yes! The site has Live Chat support during tax season, as well an email option to assist users. We even extend service hours during tax season to help users and make sure they meet the deadlines.

Q: How safe is the data entered on the e-file site?

A: Unlike with many unregulated "mom and pop" service providers, our security is best in class. As an authorized IRS e-filer, we encrypt data under the strictest IRS guidelines and print from our high-security, SOC-certified and HIPAA-compliant print and mail facility. Sensitive data is guarded against tampering and identity theft through the latest, most stringent business practices.

Set up your own site today!

Email us at **info@complyright.com**, or call **800.482.9367**