Dashboard

14 Steps

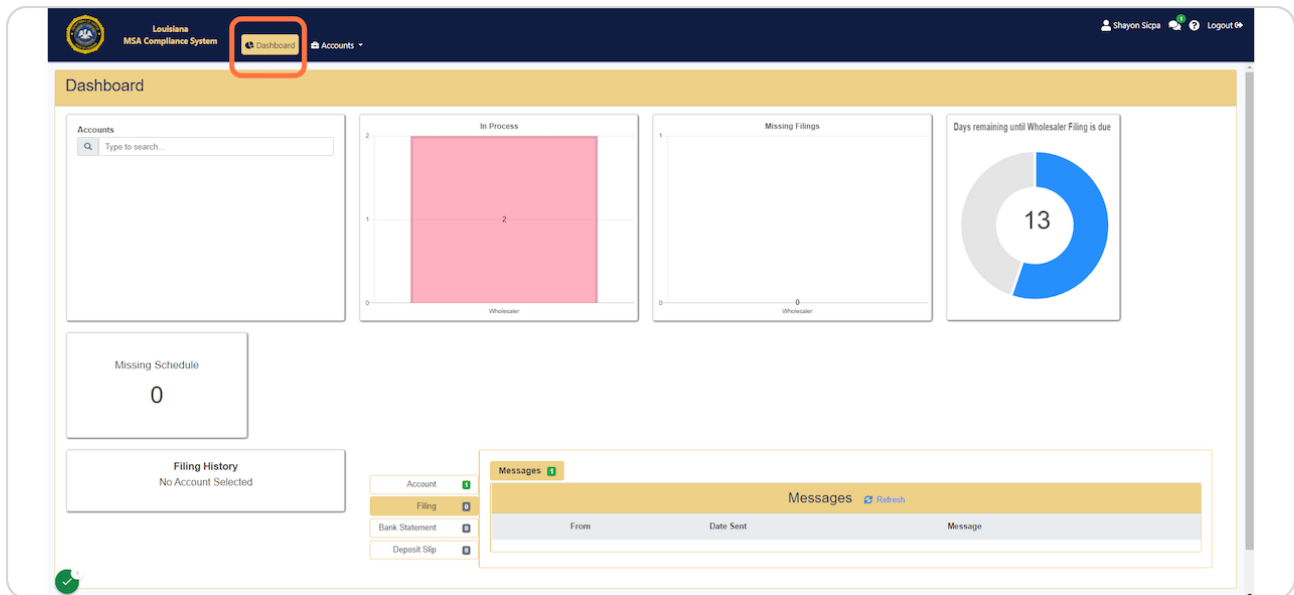| Created by	Creation Date	Last Updated
Shayon Zadeh	September 7, 2022	September 19, 2022

Dashboard Page

You can click on dashboard at the top left of the screen to navigate to the dashboard page.

Accounts Panel

You will be able to search for wholesale accounts that are associated to your user profile. Click the search bar and type in the name of an account, if it is associated to you it will appear in that panel. You can then click on it see the filing history, which is towards the bottom of the dashboard.

Filing History Panel

Once an account has been selected from the accounts panel you will see past filings for the account listed in the filing history panel. You will see the date the filing was created, the organization type, and the status of the filing.
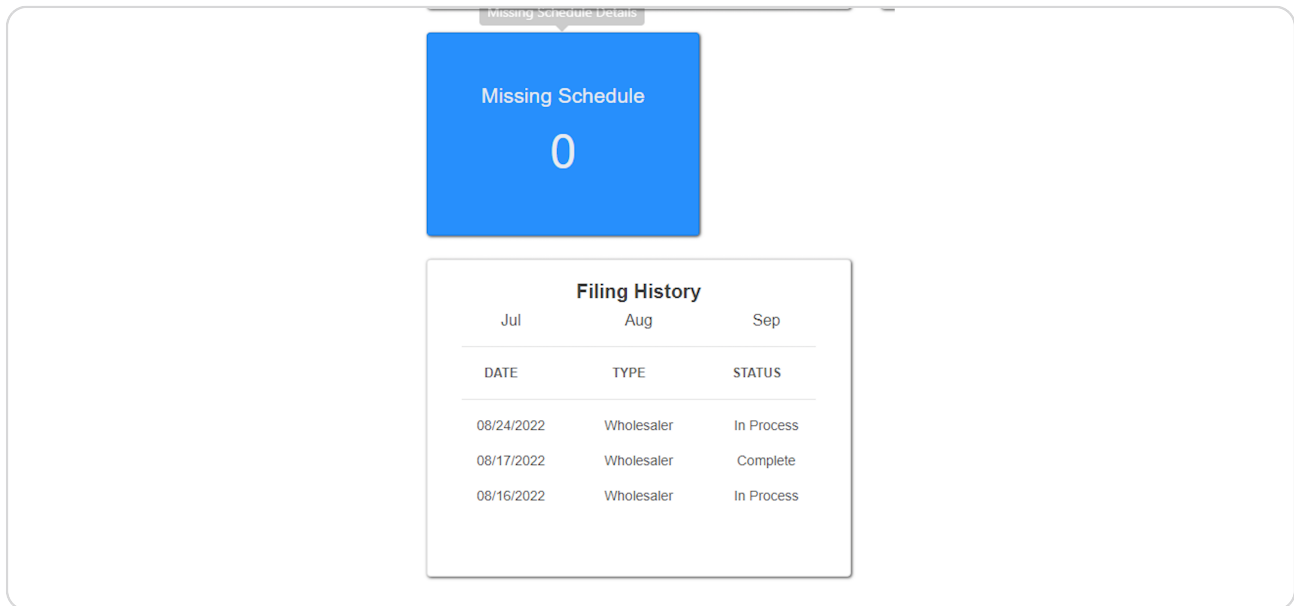
In Process Panel

This panel shows how many in process filings you currently have. Click on the graph to see a list of the filings that are still in process.

In Process Panel – Details

This is the list view of the in process returns. Click the page icon, which is circled, to navigate to that filing's page.

Missing Filings Panel

This panel shows if you are missing any filings. For example if it is July 12 2022 and you have not created a filing for May or June you will see a bar graph with the number 2. Click on the graph to see which periods you are missing.

Missing Filing Panel – Details

This is the list view of any filing that you have missed. It shows which account and period you are missing. Click the page icon that is circled to navigate to that account's page where you can create, complete and then submit the missing filing.

Days Remaining Panel

This panel shows how many days are left until the current period filing is due. You can hover your mouse over the grey part to see how many days remaining and the blue part to see how many days have passed.

Missing Schedule Panel

Each filing has a total of 7 schedules, if you have filings that are missing schedules the panel will display the number of filings with schedules that are marked as missing. Click the panel to see which schedule are missing.
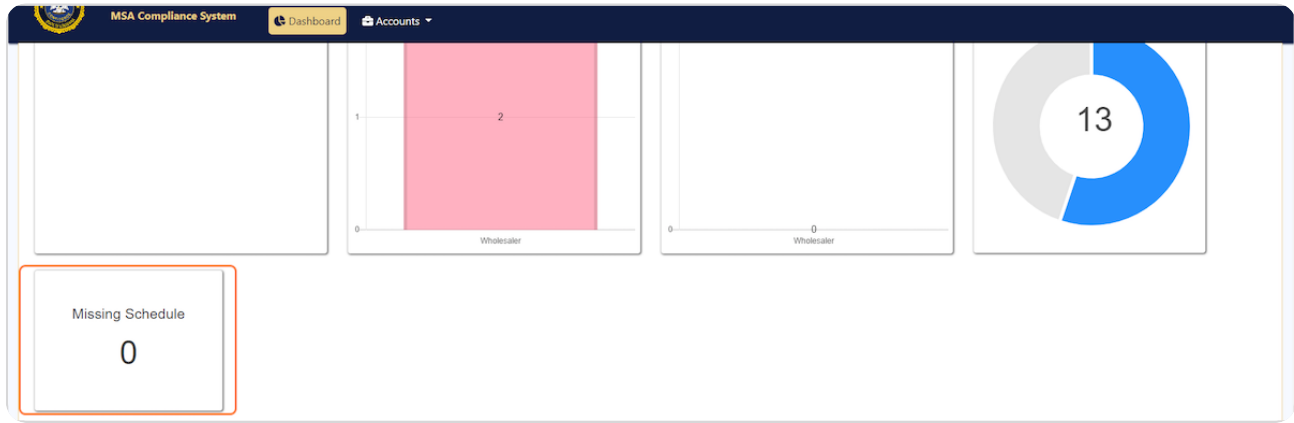
Missing Schedule Panel – Details

This is the list view of a filing you have that has been marked as missing schedules. It shows the account name, period and status. Click on the page icon, which is circled, to go to that filing's page.
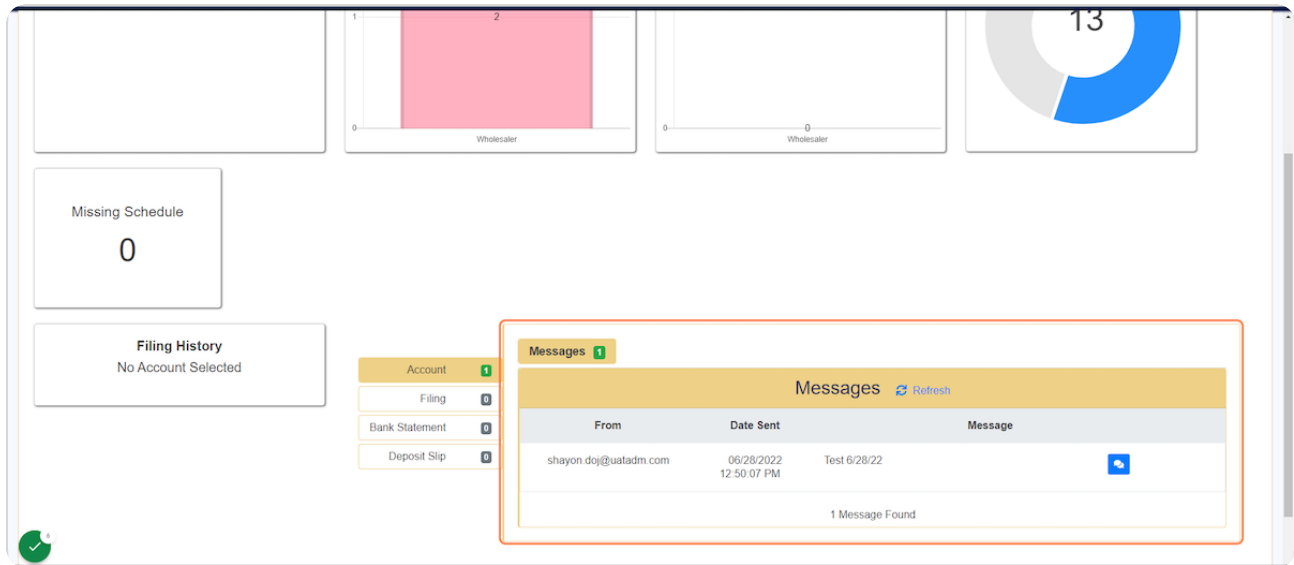
Messages Panel

You can view the messages that have been sent to the account that you are associated to. You will have a green number showing how many unread message you have or a grey zero showing there are no unread messages. Clicking on the blue chat bubble will redirect you to the location of the message where you can read and reply to the message.
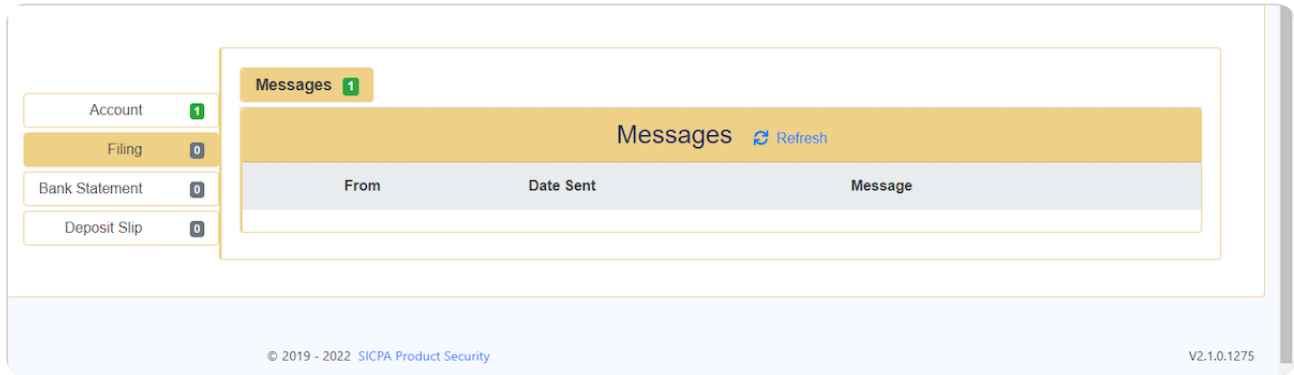
Messages – Account Tab

Messages that have been made on the account level, meaning someone at LA AG has written a message regarding the account, can be viewed by clicking on account on the left hand side.
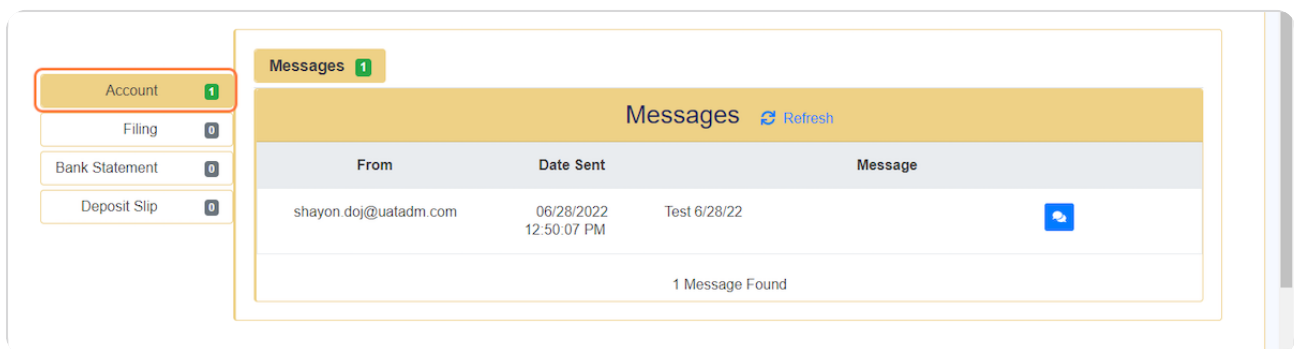
Messages – Filing Tab

Messages that have been made on the filing level, meaning someone has written a message regarding a specific wholesaler packet. These can be viewed by clicking on filing on the left hand side.

Messages – Bank Statement/Deposit Slip

As a wholesaler you will only receive messages on the account and filing level. The bank statement and deposit slip tabs will not have any messages.

SICPA