



Dashboard

14 Steps

Created by

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Creation Date

September 7, 2022

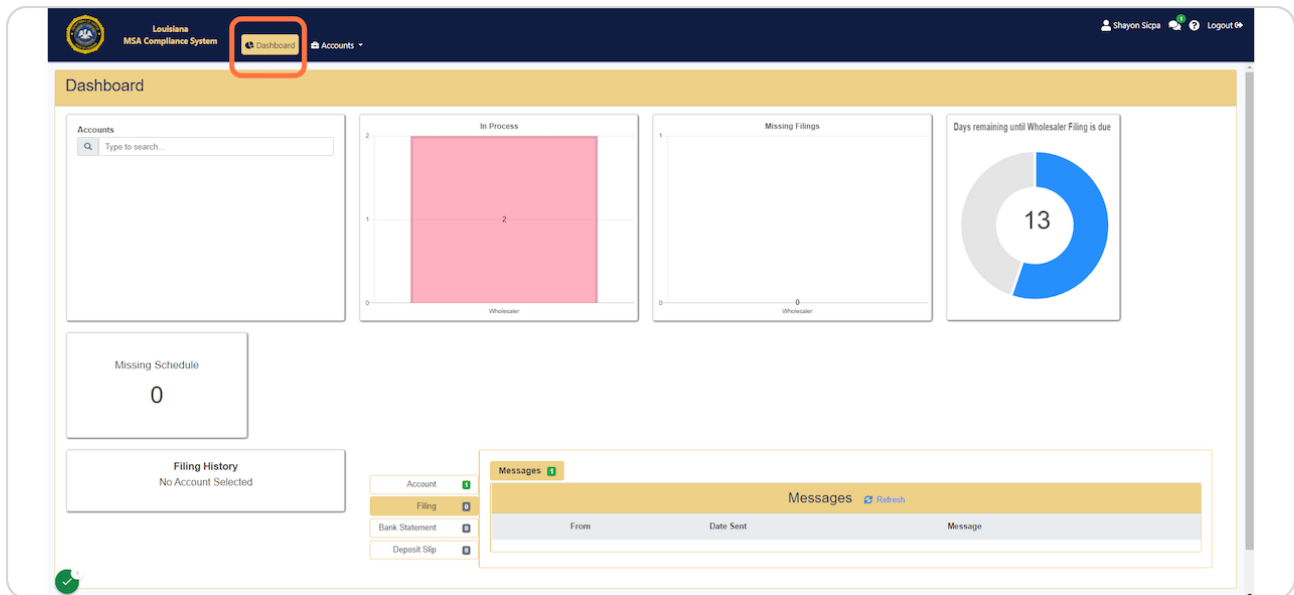
Last Updated

September 19, 2022

STEP 1

Dashboard Page

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



STEP 2

Accounts Panel

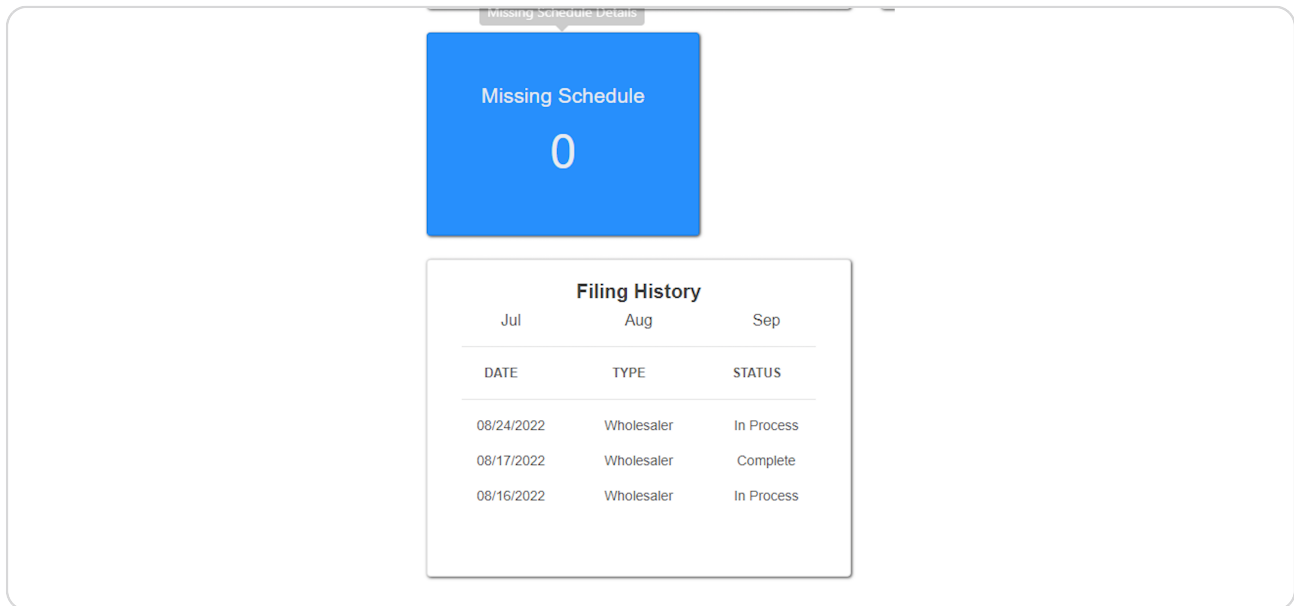
You will be able to search for wholesale accounts that are associated to your user profile. Click the search bar and type in the name of an account, if it is associated to you it will appear in that panel. You can then click on it see the filing history, which is towards the bottom of the dashboard.



STEP 3

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.



STEP 4

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.



STEP 5

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.

Dashboard / In Process Wholesaler

Filer Demo Company	Date Received	Last Modified	Status	Action
MAY 2021 - Original (1)	Not available	06/28/2022	In Process	
APR 2022 - Original (1)	Not available	06/27/2022	In Process	

2 Records Found

STEP 6

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.

Dashboard

Accounts

Type to search...

In Process

2

Wholesaler

Missing Filings

0

Wholesaler

Days remaining until Wholesaler Filing is due

13









Missing Schedule

0

STEP 7

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.

Dashboard			
Dashboard / Non Filer Wholesaler			
SICPA - Wholesaler Acct	Wholesaler	APR 2022	
SICPA - Wholesaler Acct	Wholesaler	JUN 2022	
SICPA - Wholesaler Acct	Wholesaler	NOV 2021	
SICPA - Wholesaler Acct	Wholesaler	JAN 2022	
SICPA - Wholesaler Acct	Wholesaler	MAR 2022	
SICPA - Wholesaler Acct	Wholesaler	JUL 2022	
SICPA - Wholesaler Acct	Wholesaler	DEC 2021	
SICPA - Wholesaler Acct	Wholesaler	FEB 2022	
8 Records Found			

STEP 8

Days Remaining Panel

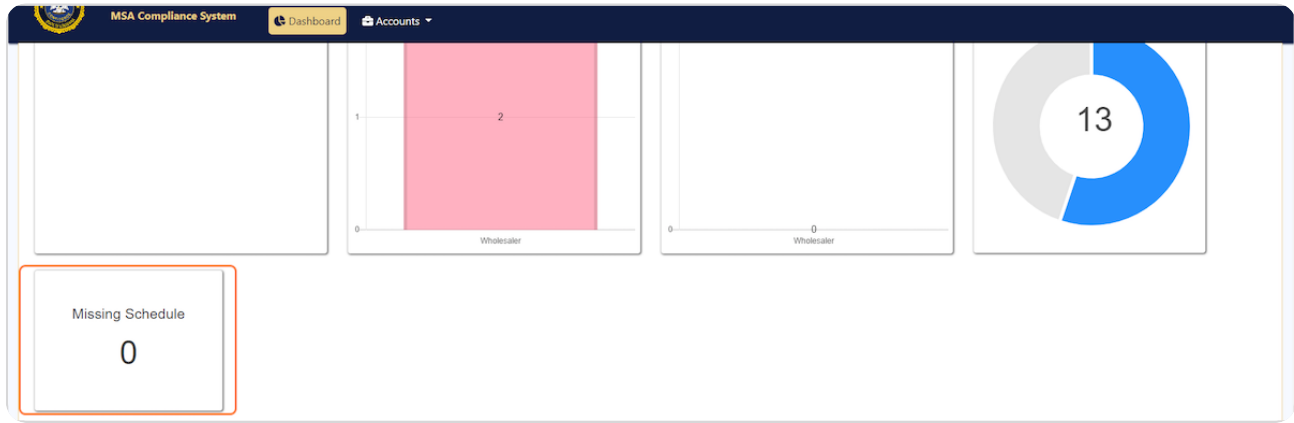
This panel shows how many days are left until the current period filing is due. You can hover your mouse over the grey part to see how many days remaining and the blue part to see how many days have passed.



STEP 9

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.



STEP 10

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.

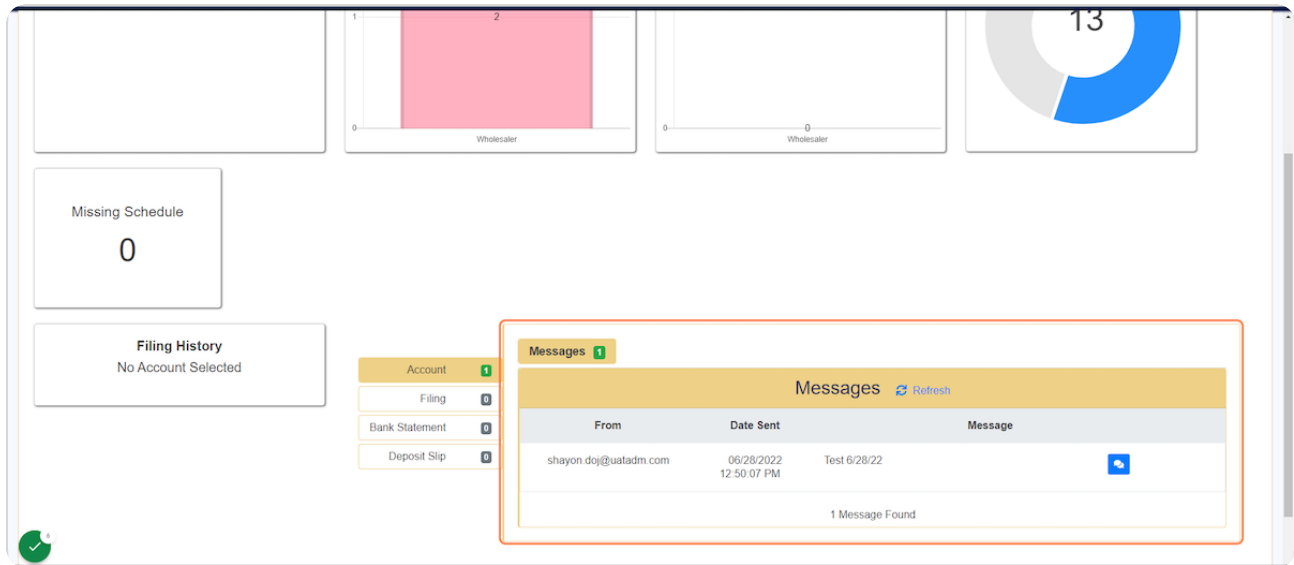
The screenshot shows the "Dashboard / Missing Schedule" details view. It features a table with two rows of filing information. The first row is for "SICPA Cigars JAN 2022 - Correction (2)" and the second row is for "SICPA Cigars MAR 2022 - Amendment (2)". Both rows show "Date Received: Not available" and "Last Modified: 05/05/2022". The status for both is "In Process". On the right side of each row, there is a page icon (a small square with a circle inside) which is circled in orange. A "Expand All" link is visible in the top right corner.

Account Name	Period	Date Received	Last Modified	Status	Page Icon
SICPA Cigars	JAN 2022 - Correction (2)	Not available	05/05/2022	In Process	📄
SICPA Cigars	MAR 2022 - Amendment (2)	Not available	05/05/2022	In Process	📄

STEP 11

Messages Panel

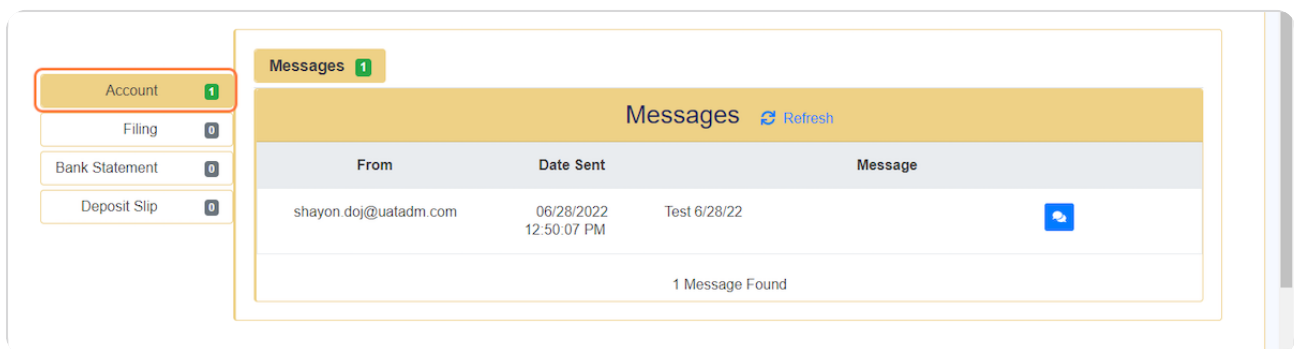
You can view the messages that have been sent to the account that you are associated to. You will have a green number showing how many unread message you have or a grey zero showing there are no unread messages. Clicking on the blue chat bubble will redirect you to the location of the message where you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



STEP 12

Messages - Account Tab

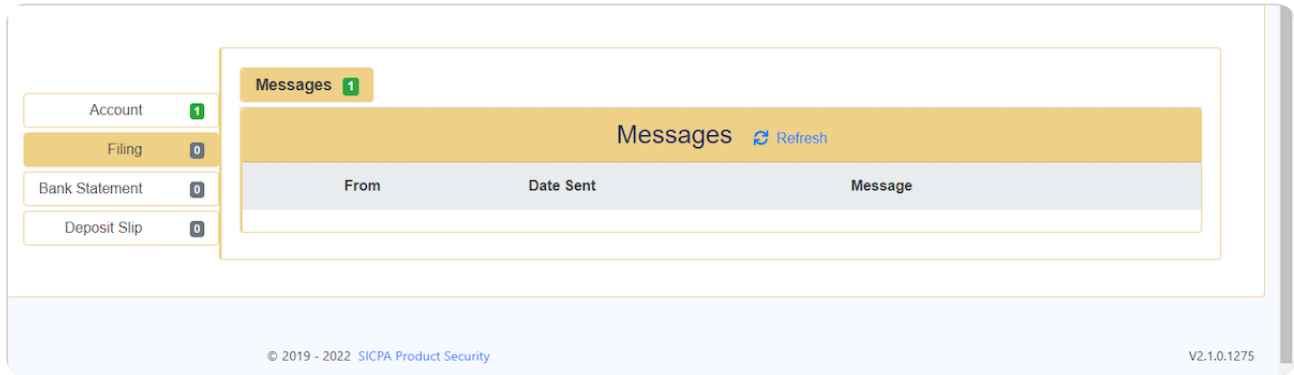
Messages that have been made on the account level, meaning someone at LA AG has written a message regarding the account, can be viewed by clicking on account on the left hand side.



STEP 13

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.



STEP 14

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.

