

ExacTax

Online Services

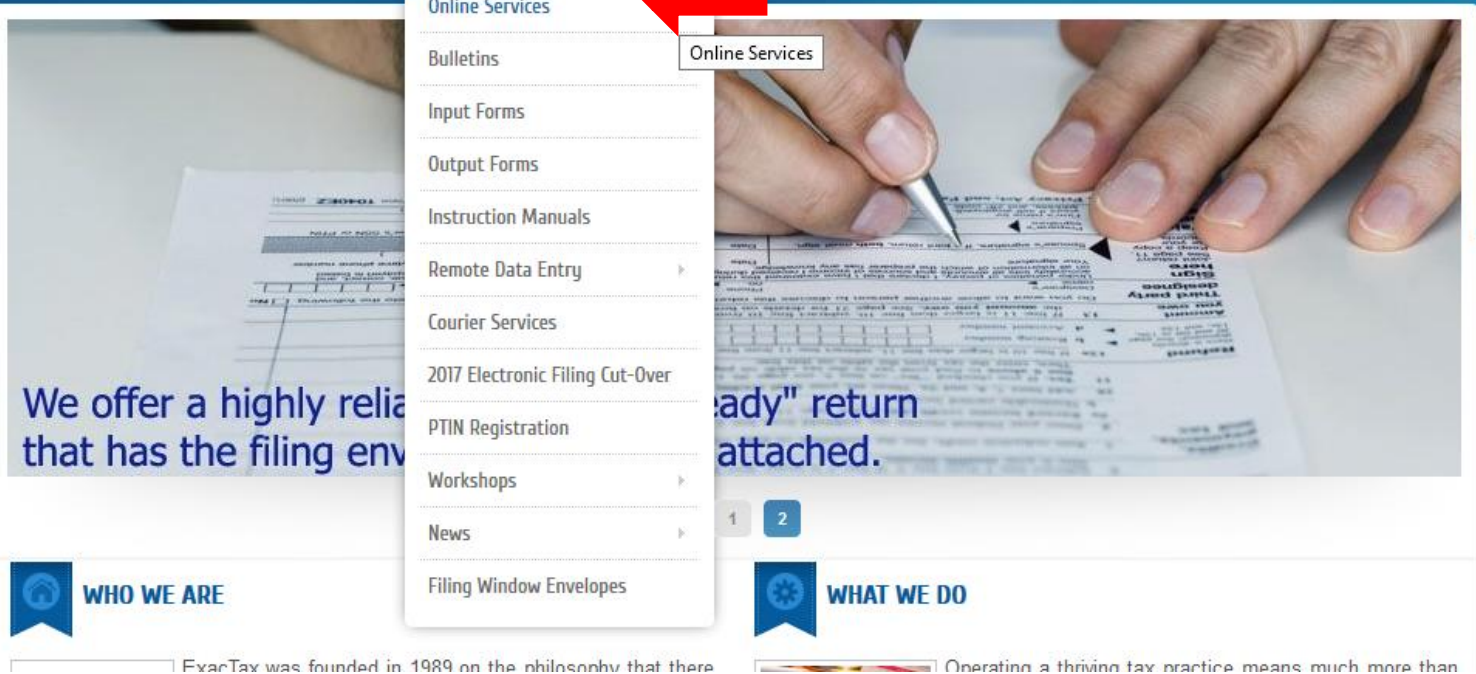
Upload Input Forms



Enter your keyword here...

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- SERVICES
- PRODUCTS
- SUPPORT
- MY ACCOUNT
- CONTACT US

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- Input Forms
- Output Forms
- Instruction Manuals
- Remote Data Entry
- Courier Services
- 2017 Electronic Filing Cut-Over
- PTIN Registration
- Workshops
- News
- Filing Window Envelopes



From the ExacTax website, at www.exactax.com
Click on “Support” then select “Online Services”.



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01/22
2018

ONLINE SERVICES

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EXACTAX ONLINE SERVICES

Tax Return Tracking

Electronic Filing Tracking

Upload Input Forms



Read 11 times

From this webpage, click the online service you want to use.

Tip: For quick access to online services, add a bookmark to your browser.



ExacTax Tracking Login Form



Username

012345



ExacTax Account Number

Password

.....



PTIN number with a Capital "P"

Login

You will be required to login to access the Tracking /Upload system.





Track Returns

Track ELF

Upload Input

Back To Home

Select Tax Year

From this page you can select Track Returns, Track ELF or Upload Input forms to ExacTax. The tracking system only shows returns processed during 2018.

Search by Name

of the name

| YEAR | | | | READY | SHIPPED |
|------|--|----------------|---|----------------|----------------|
| 2016 | 45310 ROSENTHAL, CHRISIE, | 10/16/17 13:40 | PrintDate 10/16/17 14:10 | 10/16/17 14:20 | 10/17/17 15:43 |
| 2016 | 45308 Rerun:8 SCHARLIN, MELANIE, | 10/13/17 12:14 | PrintDate 10/13/17 12:46 | 10/13/17 13:24 | 10/17/17 15:43 |
| 2016 | 45309 MCGRAW, OSCAR W & LAURA H | 10/11/17 16:01 | PrintDate 10/11/17 16:13 | 10/11/17 16:53 | |
| 2016 | 45308 SCHARLIN, MELANIE, | 10/11/17 11:51 | PrintDate 10/11/17 12:33 | 10/11/17 13:29 | 10/11/17 13:34 |
| 2016 | 45303 Rerun:8 BERG, JOHN L & CHRISTINE | 10/11/17 11:51 | PrintDate 10/11/17 12:32 | 10/11/17 13:29 | 10/11/17 13:34 |
| 2016 | 15004 Rerun:8 GLEASON FAM TR, | 10/11/17 11:51 | PrintDate 10/11/17 12:32 | | 10/11/17 13:34 |
| 2016 | 45307 DELGADO, DAVID, | 10/11/17 09:12 | PrintDate 10/11/17 10:19 | 10/11/17 11:34 | |
| 2016 | 45306 MARSHALL, JOHN A, | 10/10/17 13:24 | PrintDate 10/10/17 14:00 | 10/10/17 14:24 | 10/11/17 11:15 |
| | 45305 | | PrintDate | | |





Track Returns

Track ELF

Upload Input

Back To Home

File Name *

Browse...

Upload

First part of file name must follow yy-012345-98765
where yy=year, 012345=Account# and 98765=Log #

File Name

If you have a scanner, you can submit your input via PDF 24 hours a day, 7 days a week. You will need to name the PDF files according to one of the following formats:

YY-XXXXXX-#####.pdf or YY-XXXXXX-##### Taxpayer Name .pdf

(YY = Year, XXXXXX = ExactTax Account Number, ##### = Log# *Taxpayer Name (optional)*)

Example: If you were sending 2016 input for the John Sample return, the filename would be:

16-099999-40577.pdf or 16-099999-40577 John Sample.pdf





Track Returns

Track ELF

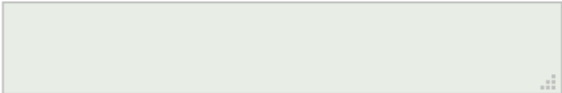
Upload Input

Back To Home

File Name *

Browse...

Upload



First part of file name must follow yy-012345-98765 where yy=year, 012345=Account# and 98765=Log #



Click on the browse button and select the client.

File Upload

This PC > OS (C:) > EXACTAX

Search EXACTAX

| Name | Date modified | Type | Size |
|--|----------------------|--------------------|--------|
| MICROSOFT | 12/30/2017 12:16 ... | File folder | |
| 16-099999-40077 SAMPLE, FRANK & SUS... | 12/20/2017 12:22 ... | Adobe Acrobat D... | 385 KB |
| 16-099999-40111 DOE, JOH P.pdf | 12/20/2017 12:22 ... | Adobe Acrobat D... | 385 KB |
| 16-099999-40222 JOHNSON, JOHN .pdf | 12/20/2017 12:22 ... | Adobe Acrobat D... | 385 KB |
| 16-099999-40577 SAMPLE, JOH P & MAR... | 12/20/2017 12:22 ... | Adobe Acrobat D... | 385 KB |

We recommend creating an "ExactTax" folder to store your scanned input files.





Track Returns

Track ELF

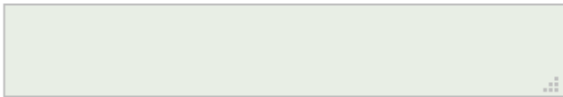
Upload Input

Back To Home

16-099999-40077 SAMPLE, FRANK & SUSAI

Browse...

Upload



First part of file name must follow yy-012345-98765
where yy=year, 012345=Account# and 98765=Log #



After selecting the client, click on the Upload button to send the file to ExacTax.

Upload list

| YEAR | ACCNT | LOG # | FILE NAME | UPLOAD DATE | PULL DATE | COMMENTS |
|------|--------|-------|---|-------------------|-------------------|----------|
| 2016 | 099999 | 99999 | 16-099999-999999 AUDIT.pdf | 11/16/17 10:43 | 11/16/17 13:12 | |
| 2016 | 099999 | 48097 | 16-099999-48097 testing length of file name RFP - Copy - Copy.PDF | 11/15/17 11:18 | 11/16/17 09:53 | |
| 2016 | 099999 | 48099 | 16-099999-48099 RFP - Copy.PDF | 11/15/17 10:58 | 11/16/17 09:53 | |
| 2016 | 099999 | 48098 | 16-099999-48098 RFP - Copy.PDF | 11/15/17 10:58 | 11/16/17 09:53 | |





Track Returns

Track ELF

Upload Input

Back To Home

File Name *

Browse...

Upload

File uploaded successfully.

First part of file name must follow yy-012345-98765 where yy=year, 012345=Account# and 98765=Log #

After completion the system will give you a "File uploaded successfully" message.

Upload list

| YEAR | ACCNT | LOG # | FILE NAME | UPLOAD DATE | PULL DATE | COMMENTS |
|------|--------|-------|---|----------------|----------------|--|
| 2016 | 099999 | 40577 | 16-099999-40577 SAMPLE, JOH P & MARGARET A.pdf | 12/21/17 15:11 | | The client was added to the "Upload List" on Dec. 21 at 15:11. |
| 2016 | 099999 | 99999 | 16-099999-999999 AUDIT.pdf | 11/16/17 10:43 | 11/16/17 13:12 | Pull date shows the date ExactTax downloaded the file. |
| 2016 | 099999 | 48097 | 16-099999-48097 testing lenght of file name RFP - Copy - Copy.PDF | 11/15/17 11:18 | 11/16/17 09:53 | |
| 2016 | 099999 | 48099 | 16-099999-48099 RFP - Copy.PDF | 11/15/17 10:58 | 11/16/17 09:53 | A file cannot be resent (uploaded) if there is a Pull Date. |
| 2016 | 099999 | 48098 | 16-099999-48098 RFP - Copy.PDF | 11/15/17 10:58 | 11/16/17 09:53 | |





Track Returns

Track ELF

Upload Input

Back To Home

File Name *

Browse...

Upload

File uploaded successfully.

First part of file name must follow yy-012345-98765
where yy=year, 012345=Account# and 98765=Log #

Upload list

| YEAR | ACCNT | LOG # | FILE NAME | UPLOAD DATE | PULL DATE | COMMENTS |
|------|--------|-------|---|-------------------|-----------|----------|
| 2016 | 099999 | 40077 | 16-099999-40077 SAMPLE, FRANK & SUSAN.pdf | 12/21/17 15:56 | | |
| 2016 | 099999 | 40111 | 16-099999-40111 DOE, JOH P.pdf | 12/21/17 15:56 | | |
| 2016 | 099999 | 40222 | 16-099999-40222 JOHNSON, JOHN .pdf | 12/21/17 15:56 | | |
| 2016 | 099999 | 40577 | 16-099999-40577 SAMPLE, JOH P & MARGARET A - Copy - Copy.pdf | 12/21/17 15:56 | | |
| 2016 | 099999 | 40577 | 16-099999-40577 SAMPLE, JOH P & MARGARET A.pdf | 12/21/17 15:11 | | |

You can send up to 10 files at a time.

