

Delivered Returns Report Enhancements

SSR V 2.5 included several enhancements to the Delivered Returns Report:

1. Advanced Filtering options
2. Archiving
3. Additional Columns Added
4. Ability to create a Custom Column

Filtering:

A. Users are now able to sort by any column header(s) and save filters for later use

Delivered Returns

Set Access
 Change Status
 Send Reminder
 Archive
 Upload

Search

<input type="checkbox"/>	Name	Client ID	Type	Year	williams	Sent By	Delivered	upload	Last Remin	Downloaded	Actions
<input type="checkbox"/>	ANDERSON, JACK	IN_R_CA_NR_60046537	1040	2015	Williams, Alexander		02/29/2016	Uploaded		Joseph H Wroblewski (1 of 2)	Actions
<input type="checkbox"/>	ANDERSON, JACK	60045541_NY	1040	2014	Williams, Alexander		02/23/2016	Uploaded		Joseph H Wroblewski (1 of 1)	Actions
<input type="checkbox"/>	ANDERSON, JACK	CO_R_CA_NR_60046517	1040	2015	Williams, Alexander		03/04/2016	Uploaded		To Be Downloaded	Actions
<input type="checkbox"/>	Wroblewski, Joe	DC_R_CA_NR_60046528	1040	2015	Williams, Alexander		03/17/2016	Uploaded		To Be Downloaded	Actions

1. Type into the any column fields to filter – you can filter by any number of columns

B. Saving and Loading Filters:

Delivered Returns

Set Access
 Change Status
 Send Reminder
 Archive
 Upload

Search

<input type="checkbox"/>	Name	Client ID	Type	Year	williams	Sent By	Delivered	upload	Last Remin	Downloaded	Actions
<input type="checkbox"/>	ANDERSON, JACK	IN_R_CA_NR_60046537	1040	2015	Williams, Alexander		02/29/2016	Uploaded			Actions
<input type="checkbox"/>	ANDERSON, JACK	60045541_NY	1040	2014	Williams, Alexander		02/23/2016	Uploaded			Actions

Apply recent filter

Save current filter

Williams Awaiting Upload




1. Click the Filter dropdown in the upper right
2. Select “Save current filter”
 - a. You will be asked to name this filter so that you can locate it quickly when needed
3. To load a saved filter, select the filter you would like to access, listed below “Save current filter”
 - a. You can delete any save filter by selecting the red “X” to the right of the filter name
4. To clear your current filter, select the “Clear Filter” icon


Please note: Filters are saved on a user level, not firm wide

Archiving Returns:

A. Returns can now be moved out of the Delivered Returns Report and into Archived Returns

Delivered Returns

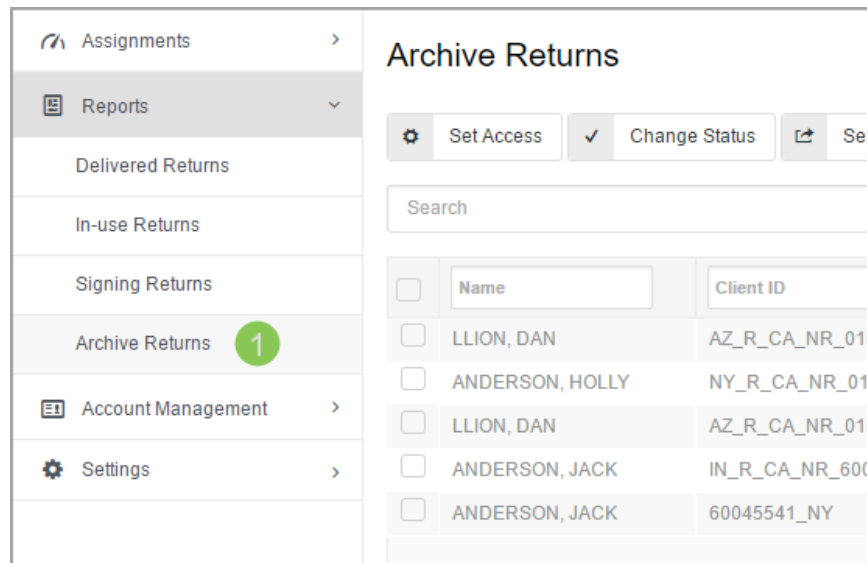
 Set Access
 Change Status
 Send Reminder
 Archive 2



1	Name	Client ID	Type	Year
<input checked="" type="checkbox"/>	ANDERSON, JACK	IN_R_CA_NR_60046537	1040	2015
<input checked="" type="checkbox"/>	ANDERSON, JACK	60045541_NY	1040	2014
<input checked="" type="checkbox"/>	ANDERSON, JACK	CO_R_CA_NR_60046517	1040	2015
<input type="checkbox"/>	Wroblewski, Joe	DC_R_CA_NR_60046528	1040	2015
<input checked="" type="checkbox"/>	LLION, DAN	AZ_R_CA_NR_01011970 3215	1040	2015
<input checked="" type="checkbox"/>	ANDERSON, HOLLY	NY_R_CA_NR_01011953 9984	1040	2015
<input checked="" type="checkbox"/>	LLION, DAN	AZ_R_CA_NR_01041970 3215	1040	2015
<input type="checkbox"/>	THERMO ENGINEERS	FL_60046866	1120S	2015
<input type="checkbox"/>	LLION, DAN	AZ_R_CA_NR_01041970 3215	1040	2015

1. To move returns from your Delivered Returns Report to the Archive Report, check the boxes to the left of the returns you would like to move.
2. Select the “Archive” button above.
3. **IMPORTANT:** Moving returns to the Archive Report can only be completed by a System Admin user and once moved they cannot be moved back to Delivered Returns

B. Archive Returns Report



<input type="checkbox"/>	Name	Client ID
<input type="checkbox"/>	LLION, DAN	AZ_R_CA_NR_010
<input type="checkbox"/>	ANDERSON, HOLLY	NY_R_CA_NR_010
<input type="checkbox"/>	LLION, DAN	AZ_R_CA_NR_010
<input type="checkbox"/>	ANDERSON, JACK	IN_R_CA_NR_600
<input type="checkbox"/>	ANDERSON, JACK	60045541_NY

1. You can view your archived returns by selecting “Archive Returns”, listed under “Reports”

Additional Columns Added:

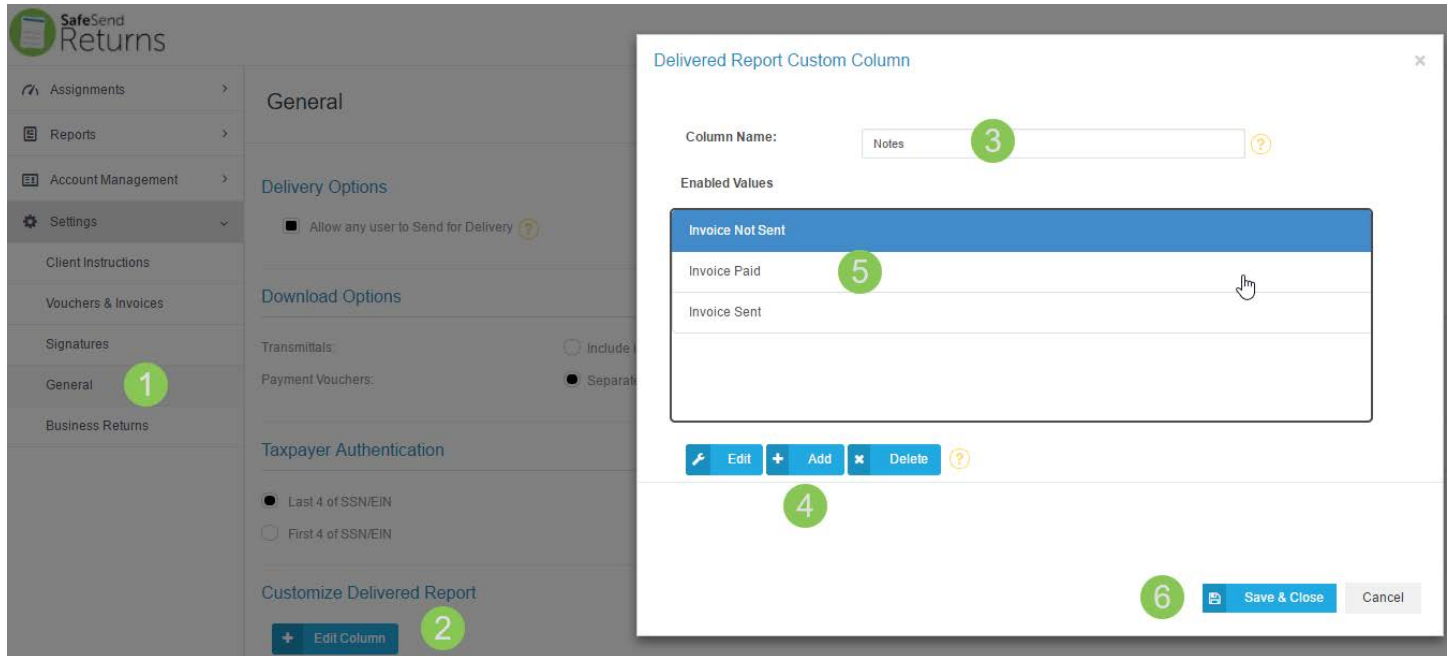
The Delivered Returns Report now includes two additional columns for:

1. Sent By
2. Last Reminder Sent

IMPORTANT: These columns will only populate on a go forward basis. The information was not captured for returns sent before this 2.5 update.

Custom Column:

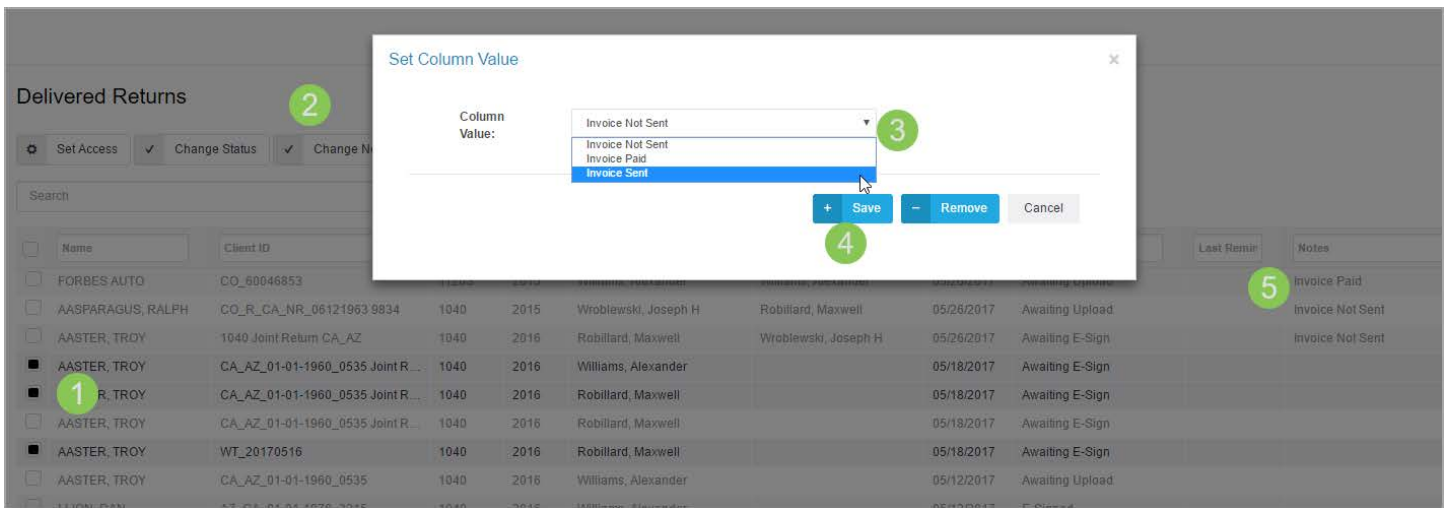
A. You are now able to add your own customized column. These columns will need to be added by a System Administrator and appear on a firm-wide level



1. Select “Settings” and “General” to see the “Customize Delivered Report” option
2. Select “Edit Column” to either *add* a column or *edit* an existing column in your Delivered Returns Report
3. Name your column
4. Select the “Add” button to add values within your new column
5. Name these values to be added
6. Save & Close

IMPORTANT: This custom column is designed for text values only and will not work for dates.

B. Entering values into your Custom Column



The screenshot shows the 'Delivered Returns' report interface. A 'Set Column Value' dialog box is open, allowing the user to select a value for a custom column. The dialog box contains a dropdown menu with three options: 'Invoice Not Sent', 'Invoice Paid', and 'Invoice Sent'. The 'Invoice Sent' option is currently selected. Below the dropdown menu are three buttons: '+ Save', '- Remove', and 'Cancel'. The background shows a table of returns with columns for Name, Client ID, and Last Remit. A 'Change [name of your custom column]' button is visible above the table.

1. From your Delivered Returns Report, select the returns that you would like to add values to for filtering by checking the box(es) to the left
2. Select the “Change [name of your custom column]” button
3. Select the value you would like to appear in the column
4. Select “Save”
5. The selected value will now appear in your Custom Column and you can now filter by these added values