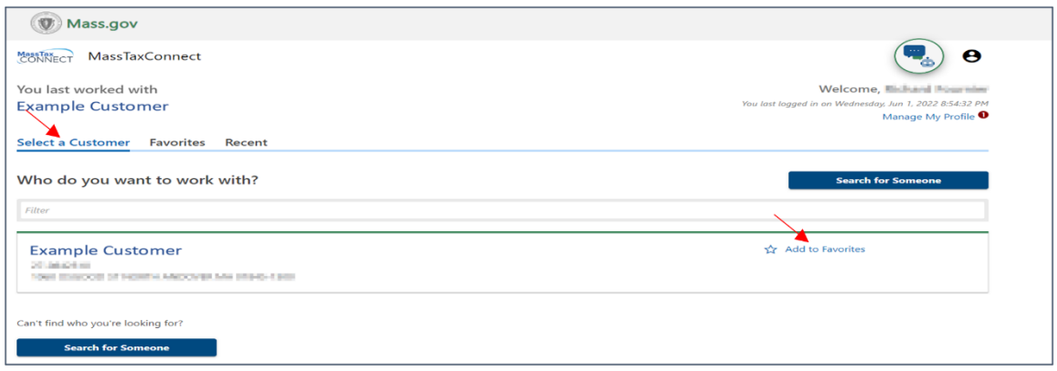
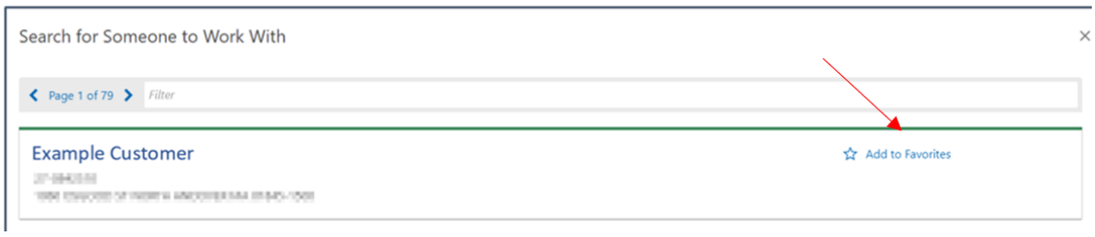
How to designate a client as a favorite

You can designate up to 100 client accounts as favorites. It's easy to assign favorite status and you have three options. You can add a favorite after choosing the Select a Customer tab by selecting Add to Favorites for any clients that you want to include.



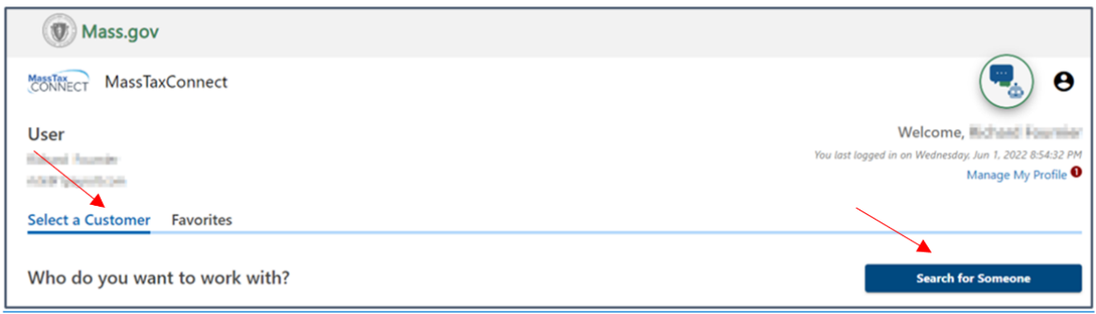
You can also add a favorite from the Search for Someone to Work With window,



and from the summary screen for an account.



How to access all client accounts
You can access a client account that is not designated as a "Favorite" from the "Select a Customer" tab when you log in to MassTaxConnect. Choose "Search for Someone" and filter the search to find a client.



You can "filter" by search terms like name, address or FEIN to easily find the client you are looking for. Once you have selected a client, the client's account will appear on the first screen until your session ends. If you want to keep a client on the first screen after the session ends, add them as a favorite.

Reaching a client list of 100 or more
Once you reach 101 clients, only those clients you have designated as favorites will appear on your initial screen. If you create a favorites list, those are the clients you'll see first, but you can easily search for clients not on the list by choosing "Search for Someone" and filtering the search to find a client.