



Customer Portal

Desktop Edition

What is Customer Portal?

TaxSlayer Pro's PaperCut Customer Portal is more than just a file-sharing tool. It's a secure, efficient, and client-friendly platform that simplifies the tax preparation process by enabling quick, organized, and safe document exchange.

Key Features:

- The portal is designed with encryption and secure authentication, ensuring sensitive tax documents are protected during transfer.
- Documents can be uploaded and accessed instantly, eliminating delays from mailing or in-person drop-offs
- Clients can upload W-2s, 1099s, receipts, or other supporting files directly into the portal, while preparers can send completed returns or requests for additional information.
- The portal fosters two-way communication: clients can see what has been received, and preparers can quickly request missing items.

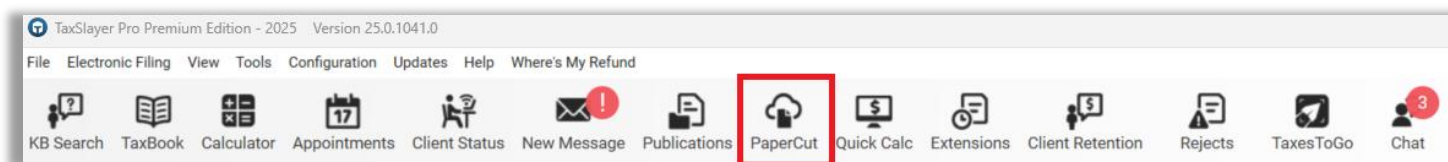
Creating a Customer Portal

Before a portal can be generated, the client must have an active tax return created in the TaxSlayer Pro Tax Program. This ensures the portal is linked directly to the taxpayer's return, keeping all documents and communications organized under the correct file. To begin you will need:

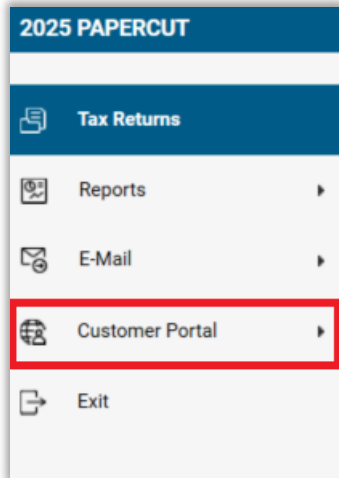
- The taxpayer's **Social Security Number (SSN)**
- The taxpayer's **mobile phone number**
- The taxpayer's **email address**
-

Once this information has been entered in the tax return you can create the portal.

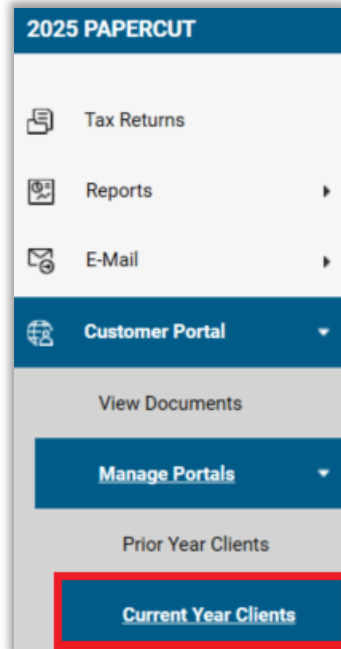
- Select the PaperCut Icon from the top menu.



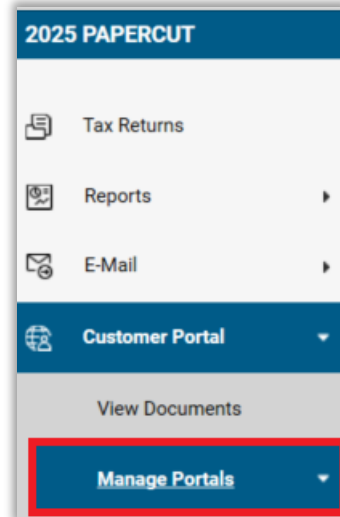
Select **Customer Portal**.



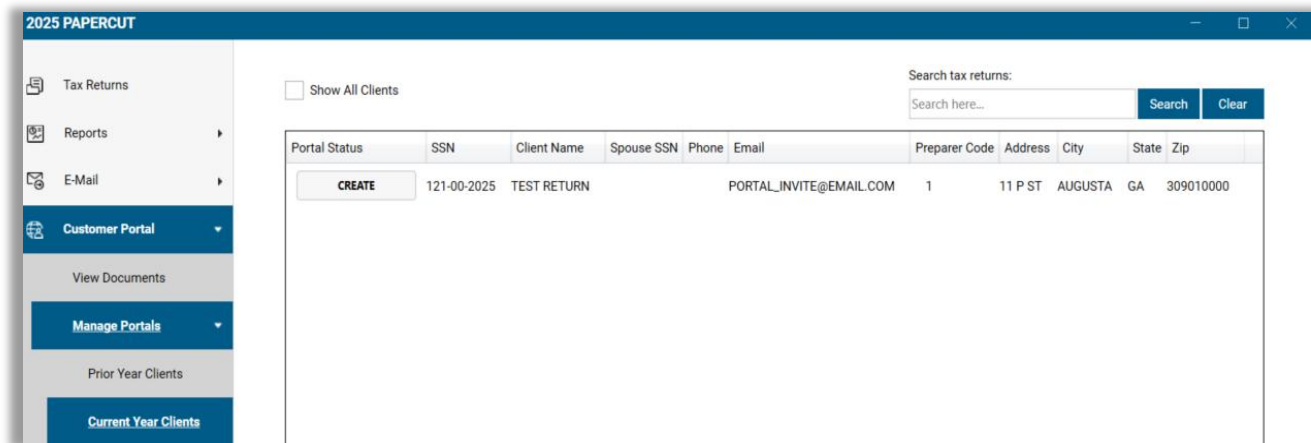
Select **Manage Portals**.



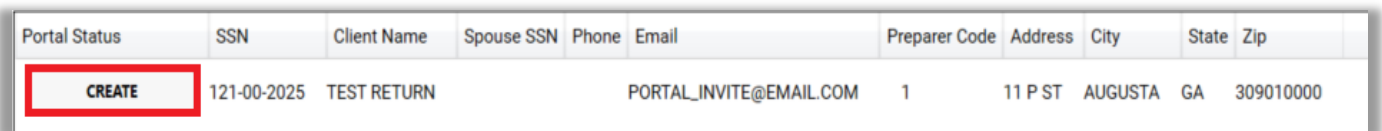
Select **Current Year Clients**.



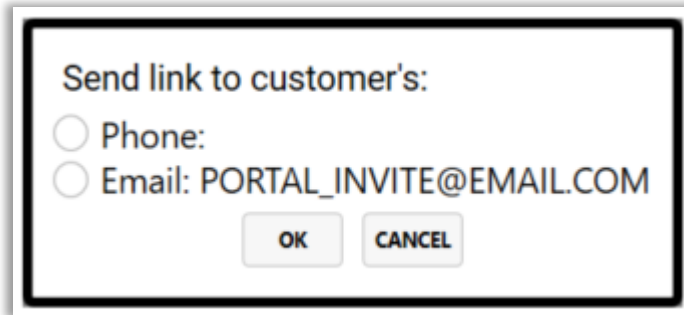
Tax Program will display the current year client list:



Click the **create** button next to the client you are creating a portal for:

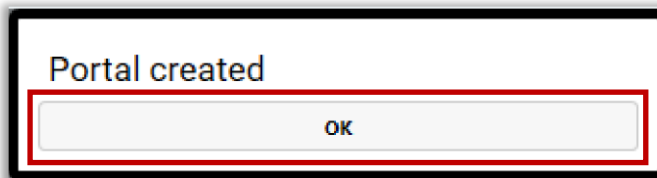


The Program will display the send link menu:



Select **Phone** or **Email** and then click **OK**.

The Program will display a message that the portal has been created:

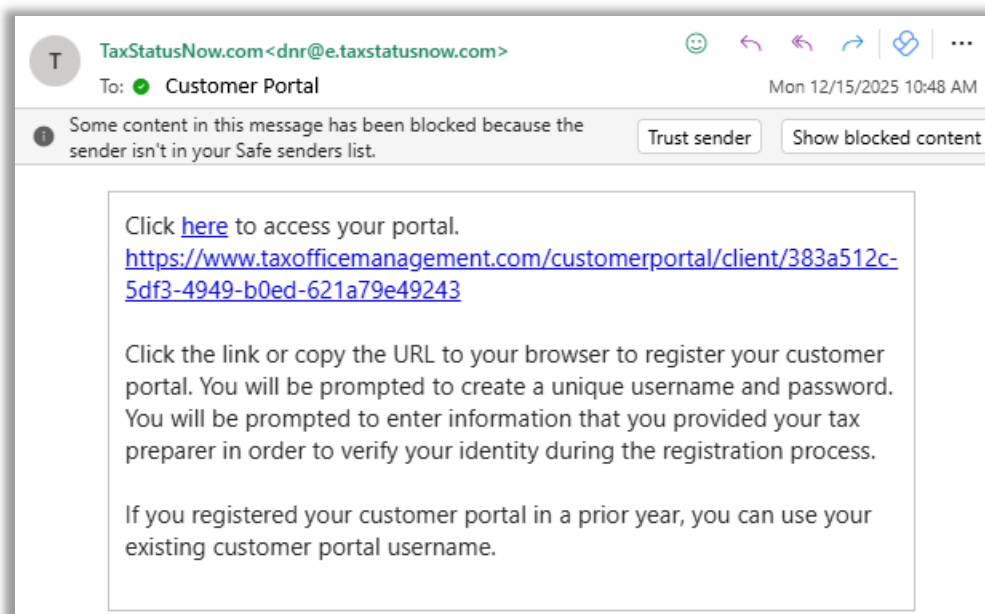


Click **OK**. A link to create their portal will be sent to the taxpayer via text message or email. After doing this, the Create option will change to Resend Portal Link:

Portal Status	SSN	Client Name	Spouse SSN	Phone	Email
RESEND PORTAL LINK	121-00-2025	TEST RETURN			PORTAL_INVITE@EMAIL.COM

How Does My Client Access Their Portal?

By Email - The customer will receive an email from TaxStatusNow.com with the subject line **Your Secure Portal Has Been Created**. The email will contain a link to access their portal.



The taxpayer will be prompted to register their account.

IMPORTANT! To successfully register the account, the taxpayer's last name, SSN, mobile phone number and email address must match what you entered in their tax return:

After submitting the registration, the taxpayer will be prompted to verify their account. They can select to have a verification security code sent via email or text. When the code is received, the taxpayer will enter it in the space provided and click **Verify**.

The taxpayer's portal is displayed on the screen:

Register Your Account

User Name
CustomerPortal

Password
.....


- One lowercase character
- One uppercase character
- One special (@\$!*?&)
- One number
- 8 characters minimum
- 25 characters maximum

Email
CustomerPortal@Demo.Com

Phone Number
(555) 111-2222

Last Name
Test

Last Four Of your SSN
1234



Verify Account

Please select an option below to send a security code to your account for verification.

Code sent - please check your account for your personalized Security Code.

Send Email: she**@com** **Send Text: 70****97**

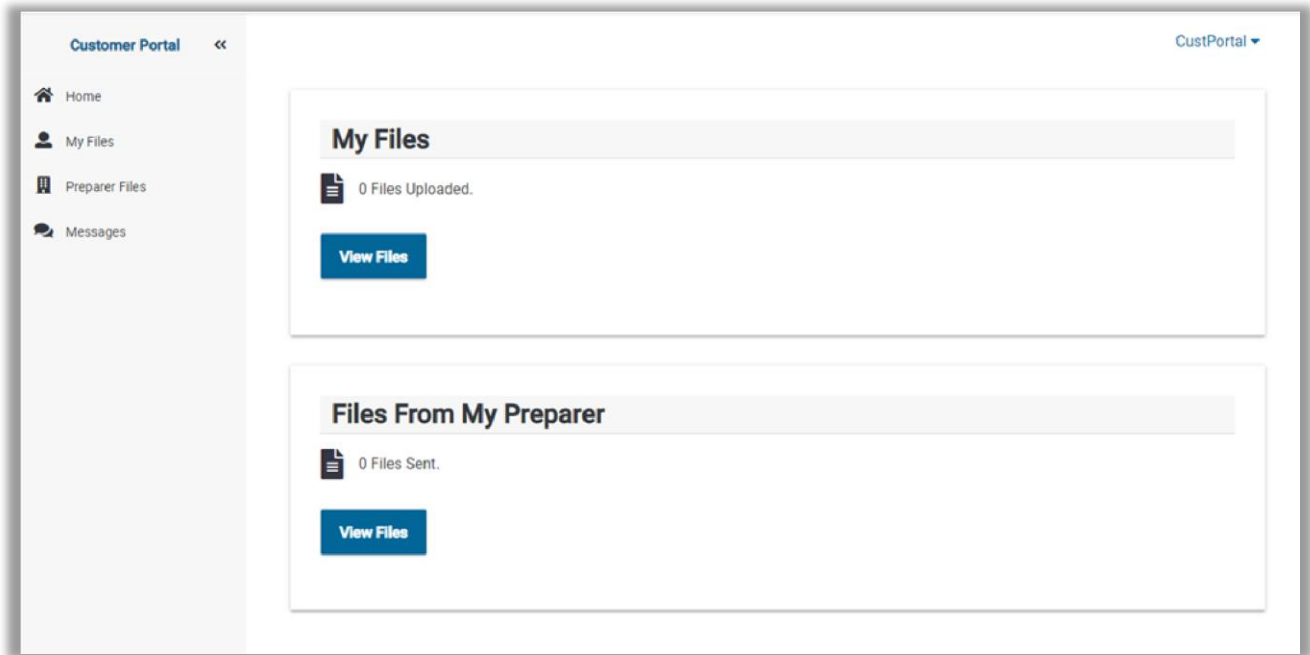
123456 **Verify**

[Cancel Verification](#)

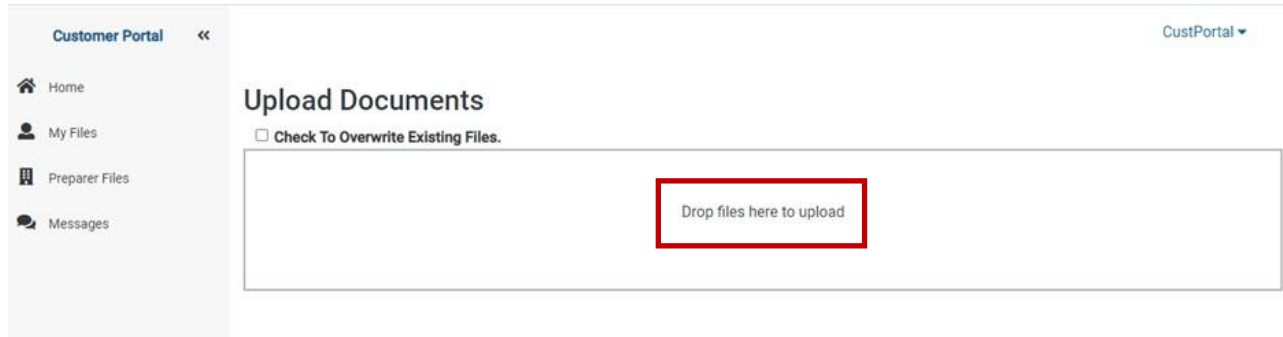
My Files:

The taxpayer can use the **My Files** area of their portal to upload documents to send to the tax preparer (W-2s, 1099s, etc.) To upload a document, click **Upload**

Documents.

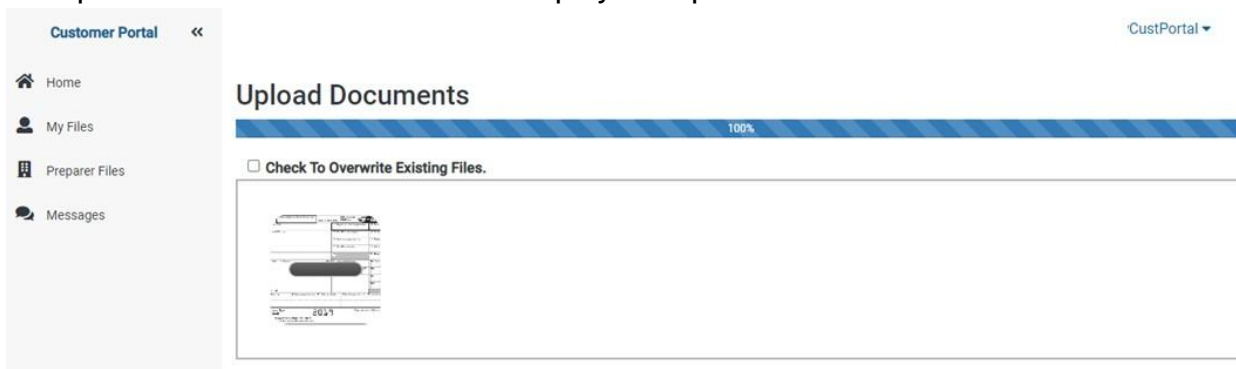


The **Upload Documents Window** is displayed on the screen:



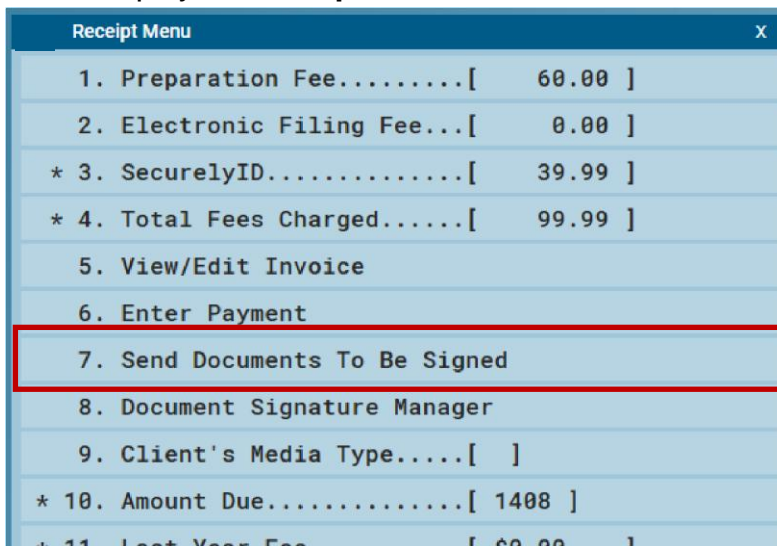
Click **Drop files here to upload** to browse and select documents to upload to the tax preparer. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload**.

The Upload Documents Window will display the uploaded file:



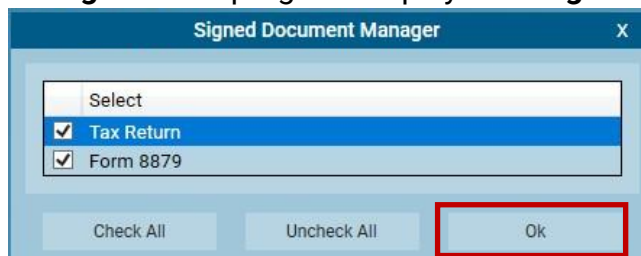
How Do I Send Documents to My Client to Sign?

To send signature documents to a customer's portal, from the main menu of the customer's tax return select **Exit**. This will display the **Receipt Menu**:



Receipt Menu		X
1. Preparation Fee.....	[60.00]	
2. Electronic Filing Fee...	[0.00]	
* 3. SecurelyID.....	[39.99]	
* 4. Total Fees Charged.....	[99.99]	
5. View/Edit Invoice		
6. Enter Payment		
7. Send Documents To Be Signed		
8. Document Signature Manager		
9. Client's Media Type.....	[]	
* 10. Amount Due.....	[1408]	
* 11. Last Year Fee	[\$0.00]	1

Click **Send Documents to be Signed**. The program displays the **Signed Document Manager**:

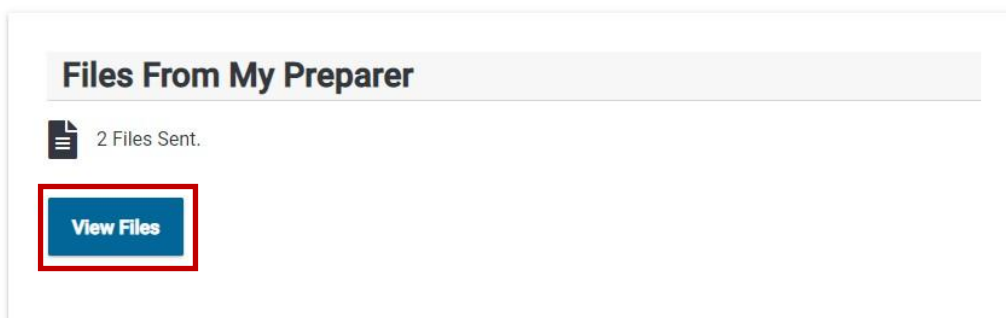


Signed Document Manager		X
Select		
<input checked="" type="checkbox"/>	Tax Return	
<input checked="" type="checkbox"/>	Form 8879	
Check All	Uncheck All	Ok

Select which documents to send to the customer's portal and click **Ok**. The documents will display in the **Files From My Preparer** section of customer's portal.

Files From My Preparer:

Signature files sent from the tax preparer will be displayed in the **Files From My Preparer** section of the taxpayer's portal. To access the files, the taxpayer will click on **View Files**.



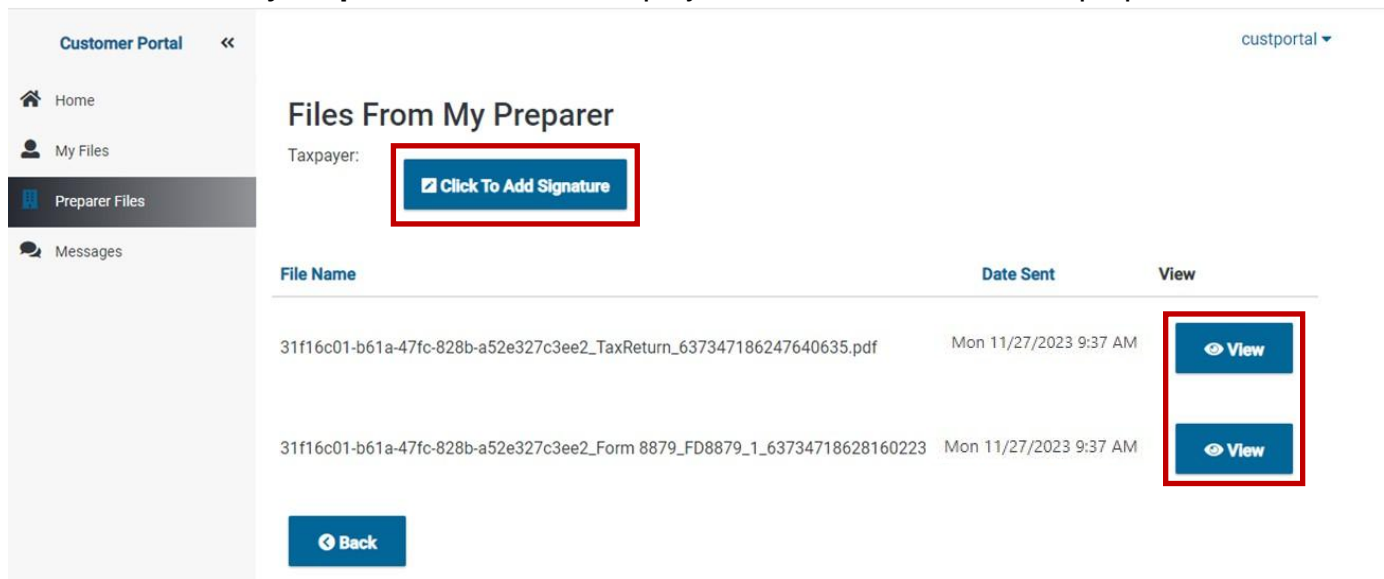
Files From My Preparer

2 Files Sent.

[View Files](#)

How Does My Client Sign?

The **Files From My Preparer Window** will display the files sent from the tax preparer:

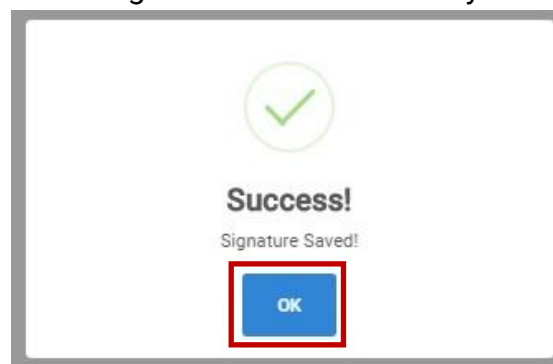


To view the documents to be signed the taxpayer will click on the **View** button **next to each document**. The document will open in a new tab in the taxpayer's browser.

To sign the documents, the taxpayer will click on the **Click to Add Signature** button. The **Edit Signature Window** will be displayed. The taxpayer can use their mouse to enter their electronic signature from a desktop or laptop computer or use their finger to enter their electronic signature from a mobile device. To save their signature, the taxpayer will click on the **Save** button:



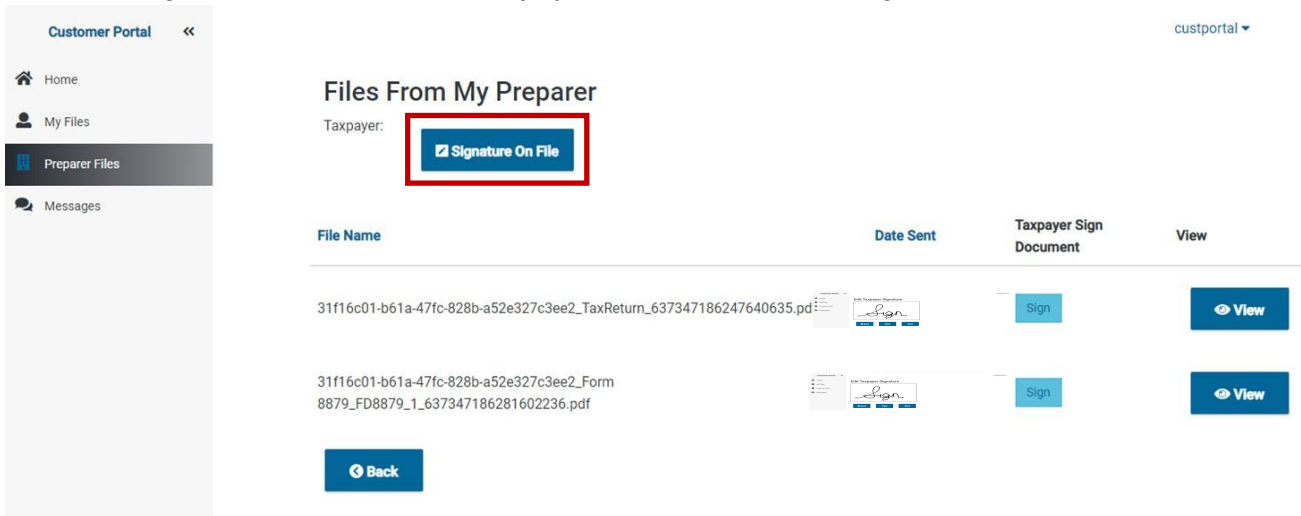
A message is displayed when the signature has successfully saved.



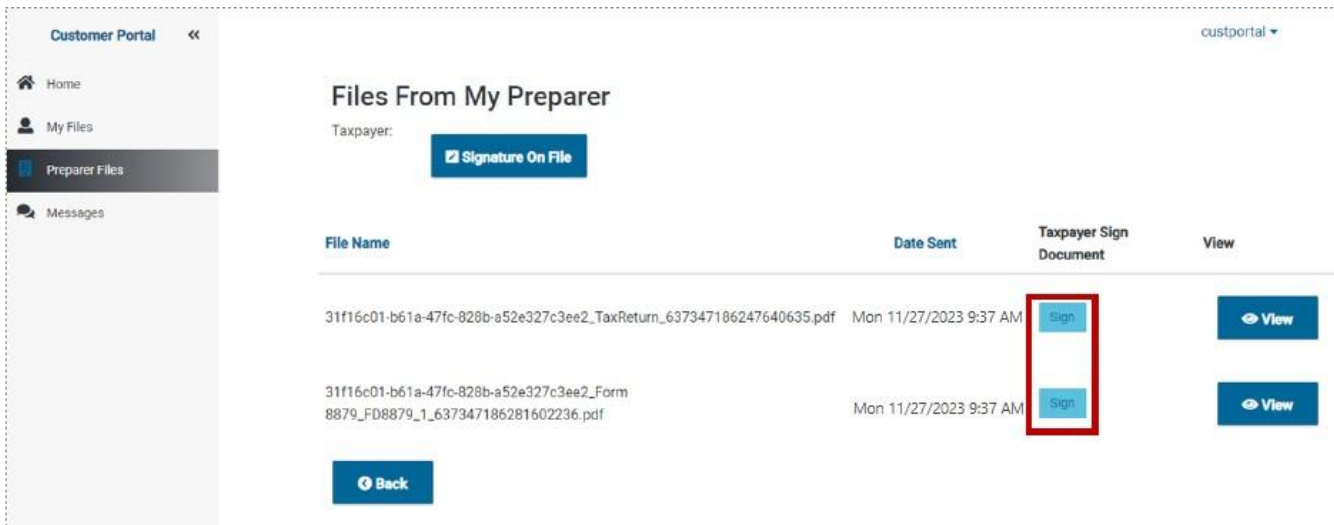
To apply their signature to the documents sent form their preparer, the taxpayer will click on the **Back** button:



After hitting the back button, the taxpayer will see that their signature is **On File**:



Once the signature is On File, the taxpayer will then see the ability to **Sign** their documents:



After viewing the documents, the taxpayer can click **Sign** to apply their signature to the file:

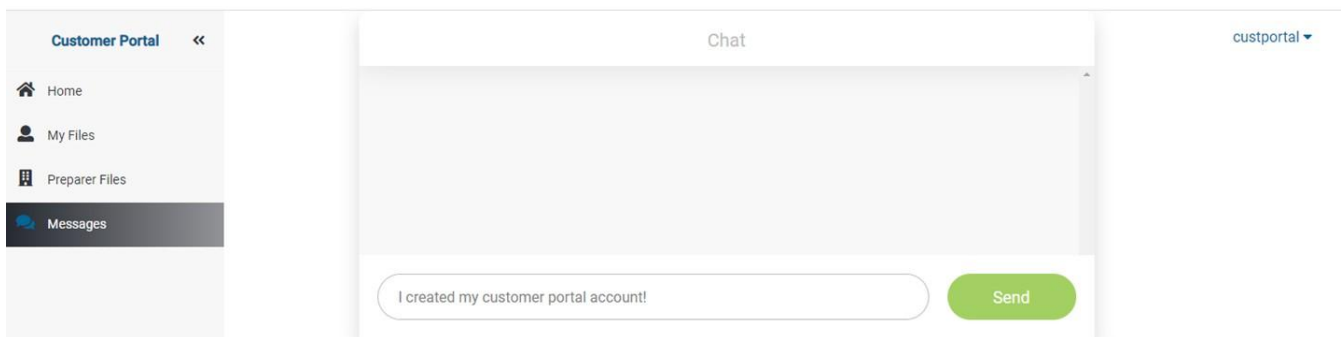
Date Sent	Taxpayer Sign Document	View
Mon 11/27/2023 9:37 AM	Signed!	View
Mon 11/27/2023 9:37 AM	Sign	View

After the signatures have been applied, they will then show in the program.

Please Note: You may need to close and reopen your program to see these changes applied.

How can the taxpayer communicate with me?

Inside the Customer Portal is a **Chat** feature where the taxpayer and tax preparer can communicate.



When the taxpayer sends chats through this feature, you will receive the messages through the

Taxes to Go Chat feature in the program:

