



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

What does the preparer need to do?

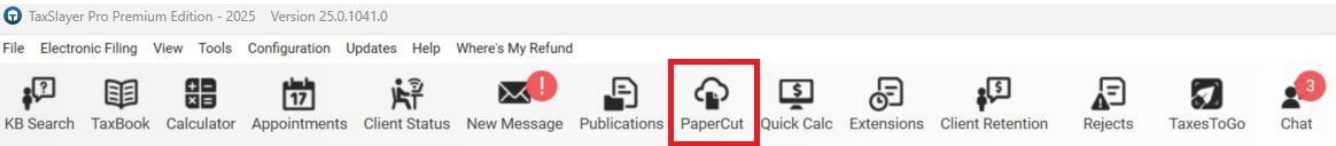
Before a portal can be generated, the client must have an active tax return created in the TaxSlayer Pro Tax Program. This ensures the portal is linked directly to the taxpayer's return, keeping all documents and communications organized under the correct file. To begin you will need:

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

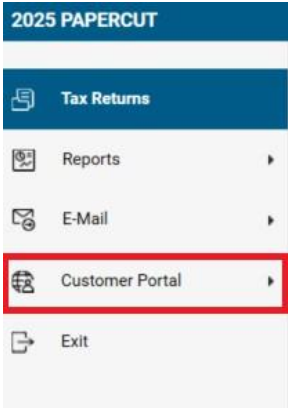
Once this information has been entered in the tax return you can create the portal.



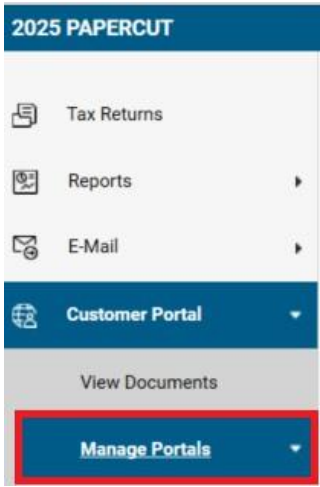
Select the PaperCut Icon from the top menu in the TaxSlayer Pro Desktop program.



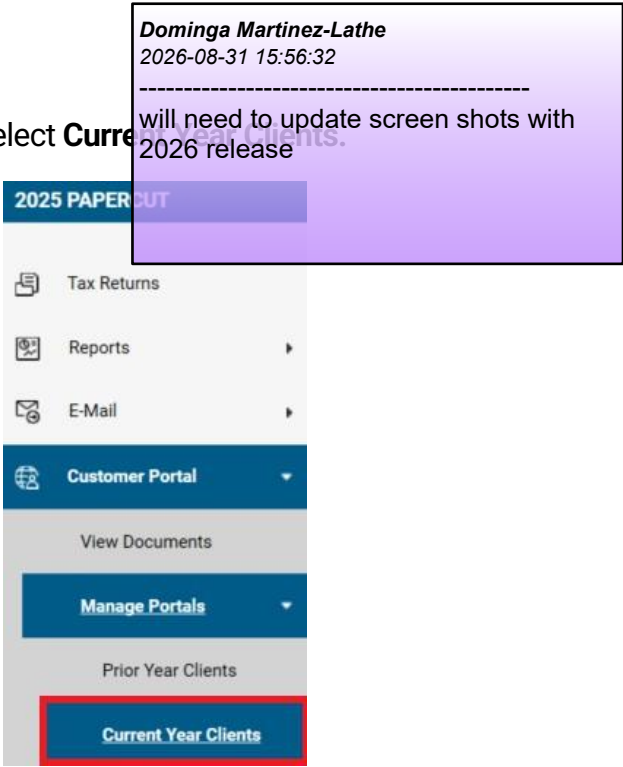
Select **Customer Portal**.



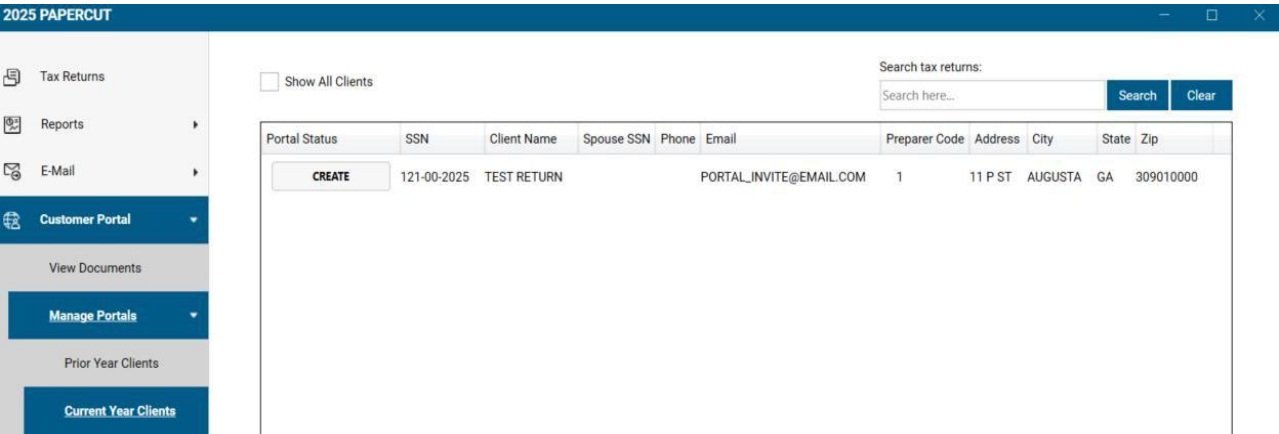
Select **Manage Portals**.



Select **Current Year Clients**.



The Tax Program will display the current year client list:



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

Portal Status	SSN	Client Name	Spouse SSN	Phone	Email	Preparer Code	Address	City	State	Zip
CREATE	121-00-2025	TEST RETURN			PORTAL_INVITE@EMAIL.COM	1	11 P ST	AUGUSTA	GA	309010000

The Program will display the Send Link menu:

Send link to customer's:

☐ Phone:

☐ Email: PORTAL_INVITE@EMAIL.COM

OK CANCEL

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

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

Portal created

OK

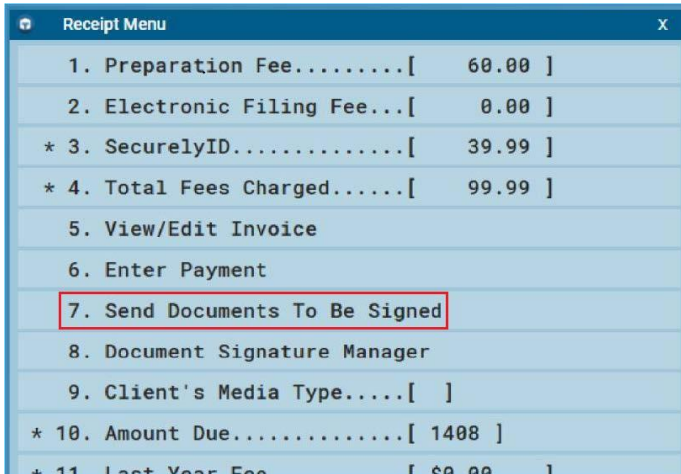
Click **OK**. A link to create their portal will be sent to the taxpayer via text message or email. After doing this, the Create option will change to Resend Portal Link:

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

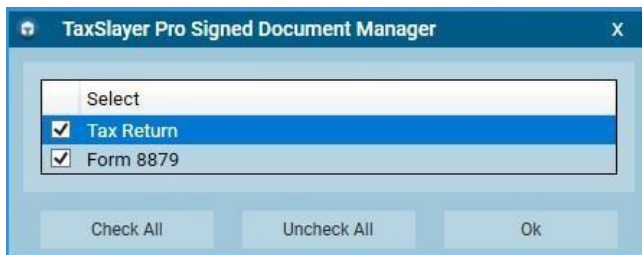
How does the preparer send documents to the taxpayer?

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

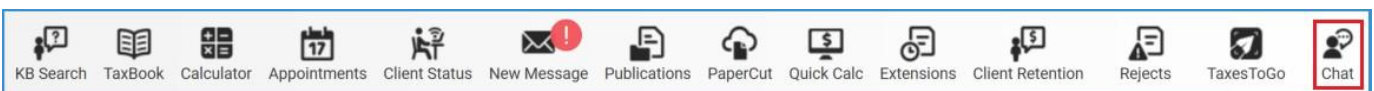
- Click **Send Documents to be Signed**.



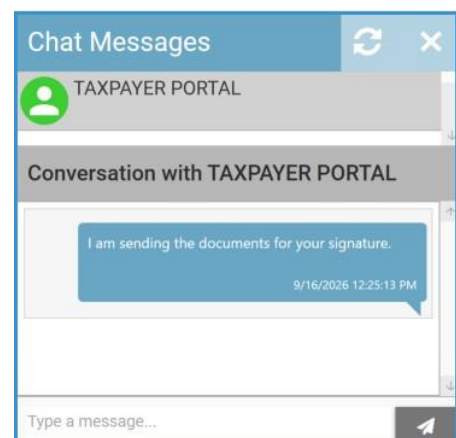
- The program displays the **Signed Document Manager**:
- Select which documents to send to the taxpayer's portal and click Ok.



Communication with the taxpayer is made simple. Select the Chat icon located in the top menu of the desktop program.



A chat box will open up for direct communication. It will appear differently on the taxpayer portal as shown later.

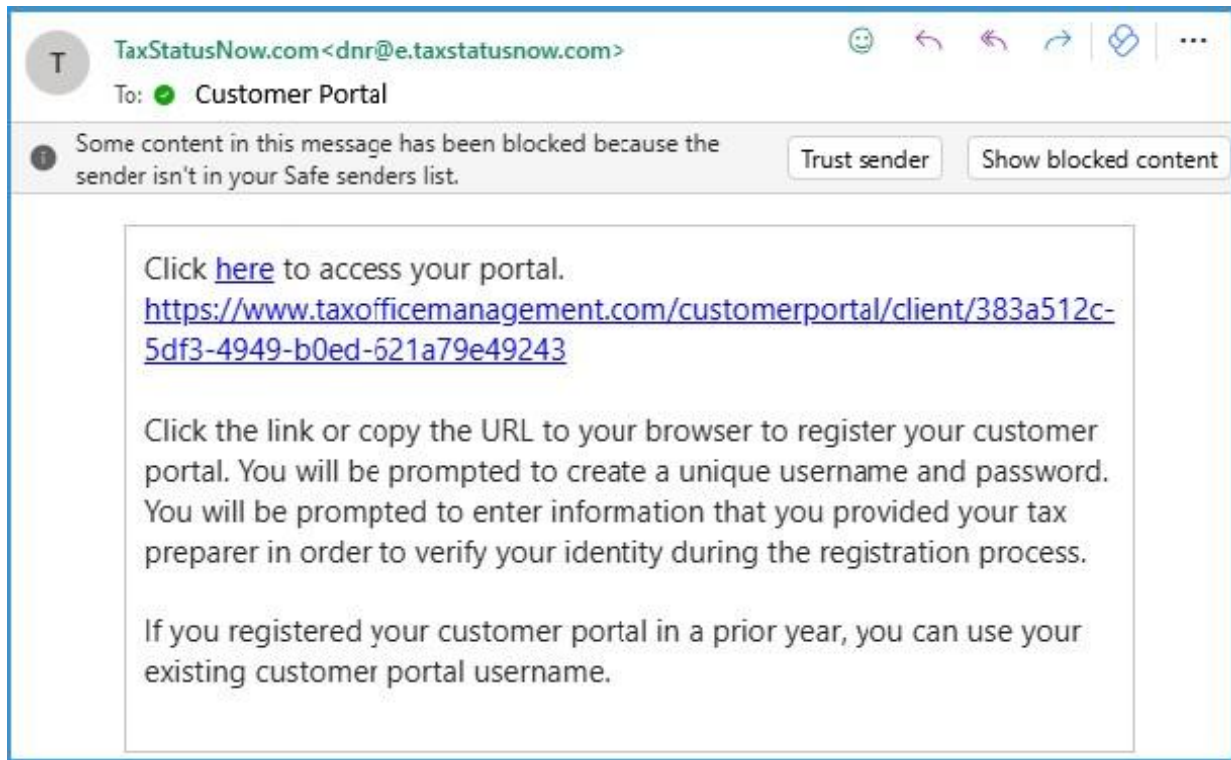


Creating the customer portal

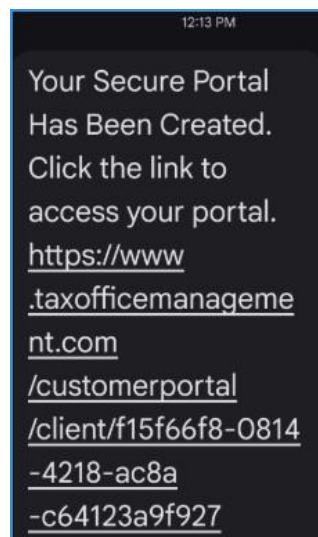
What does the taxpayer need to do?

The taxpayer will receive an email or text from TaxStatusNow.com with the subject line **Your Secure Portal Has Been Created**. The email or text will contain a link to access their portal.

Via Email:



Via cell phone:



Whichever way the link it sent, the portal registration displays the same, as shown next.

How does the taxpayer register their customer portal?

Register Your Customer Portal Account

Register securely to access your tax returns, documents, and account information.

Username

Password

Confirm Password

Your password needs:

- ✓ One lowercase character
- ✓ One uppercase character
- ✓ One number (0-9)
- ✓ Between 8 and 25 characters
- ✓ One special (@\$!%*?&)
- ✓ Passwords must match

Email address

Phone Number

Last Name

Last Four Of your SSN

REGISTER

IMPORTANT!

To successfully register the taxpayer account:

- last name
- SSN
- mobile phone number
- email address

MUST match what was entered in the tax return.

Verify Your Identity

Choose how you'd like to receive your verification code

Your Information Is Protected And Encrypted


Send Text Verification
Send a code to 32****12


Send Email Verification
Send a code to dma*****com

CONTINUE

[Back to sign in](#)

Do not close this browser window until after you have entered your verification code. If you selected to have the code emailed to you, open a new browser tab to access your email account. If the browser is closed, the code will have to be sent again.

Verify Your Code

Enter the passcode you just received on your email dma*****com

Your Information Is Protected And Encrypted

VERIFY

[Back to sign in](#)

The text may take a few minutes to arrive.

Didn't get an authentication code?

RESEND CODE

[Get code by text message instead](#)

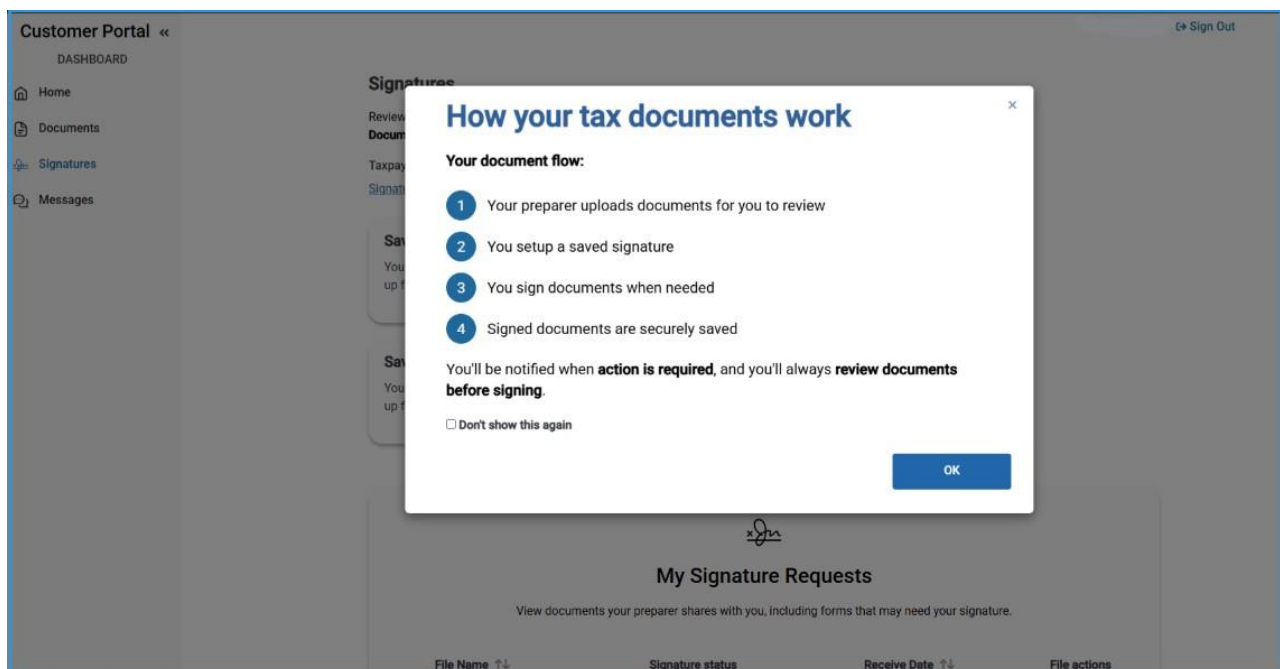
After submitting the registration, the taxpayer will be prompted to verify the account. The taxpayer can select to have a verification security code sent via email or text. When the code is received, the taxpayer will enter it in the space provided and click Verify.

Customer Portal Dashboard:

After the registration has been complete on initial log in, the taxpayer will land on the Customer Portal Dashboard.

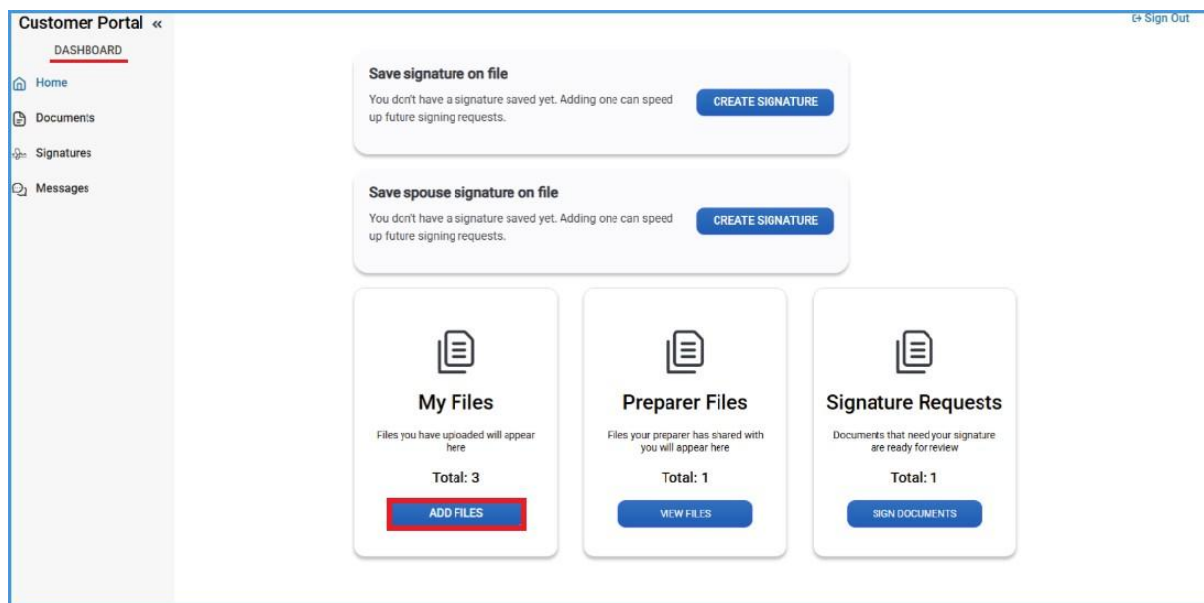
On the left side navigation pane the taxpayer will see:

- **Documents:** Stores all documents shared between the preparer and taxpayer. There are two sub menus:
 - *Preparer Files* - Review documents from the tax preparer.
 - *My Files* - View and upload the taxpayer's shared documents.
- **Signatures:** Review documents shared by the tax preparer and create signatures.
- **Messages:** Displays messages between taxpayer and preparer.



How does the taxpayer share documents with the preparer?

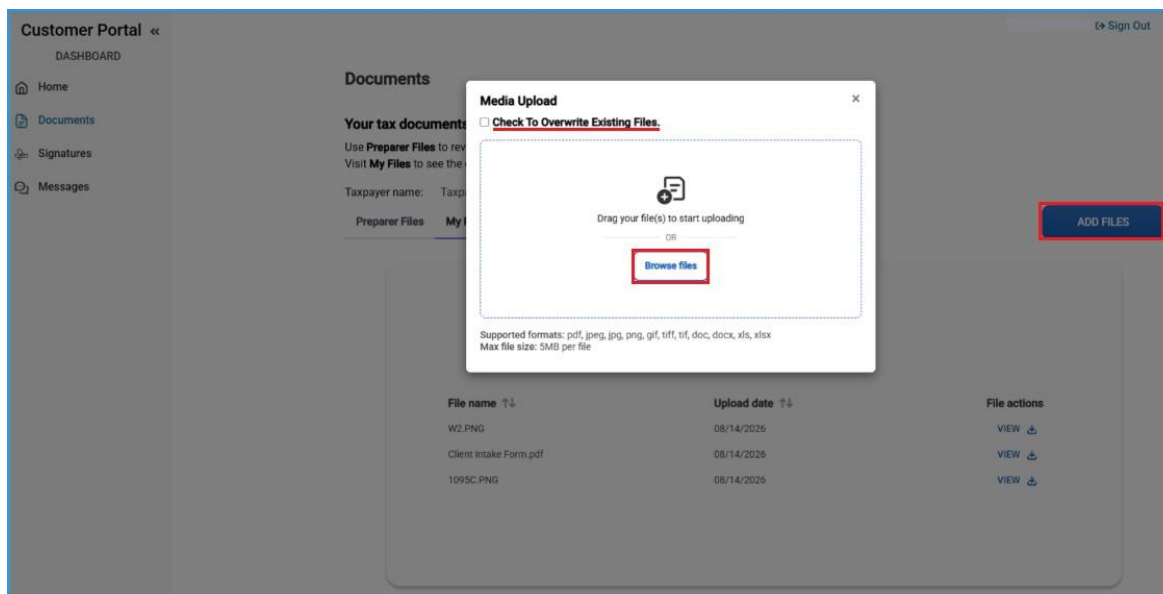
Sharing documents with the preparer is simple and convenient. Taxpayers can securely send documents directly from the Dashboard or the Documents section, helping to keep the process organized and efficient.



Select Add Files again.

Click Browse files 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, click on the file and select Upload.

If a file is being added to replace a previously uploaded file, the taxpayer will need to check the box in the upper left corner.



How does the taxpayer add their signature?

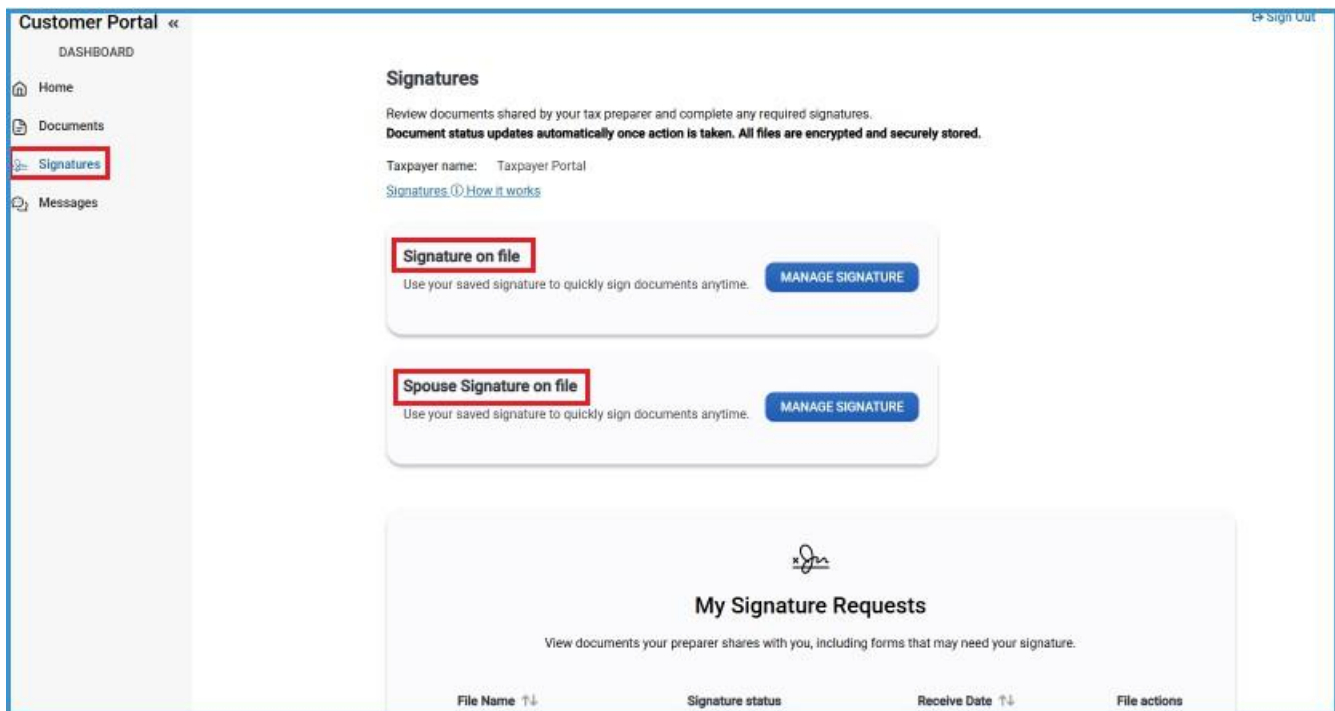
Documents sent for signature by the preparer will be displayed in the Preparer Files section of the taxpayer's portal.

The taxpayer will need to add their signature before it can be applied to the documents. To do this the taxpayer will select Signatures and then CREATE SIGNATURE. The taxpayer can use their mouse to enter an electronic signature from a desktop or laptop computer or use their finger on a mobile device. If married filing jointly, repeat the steps to add the spouse signature.

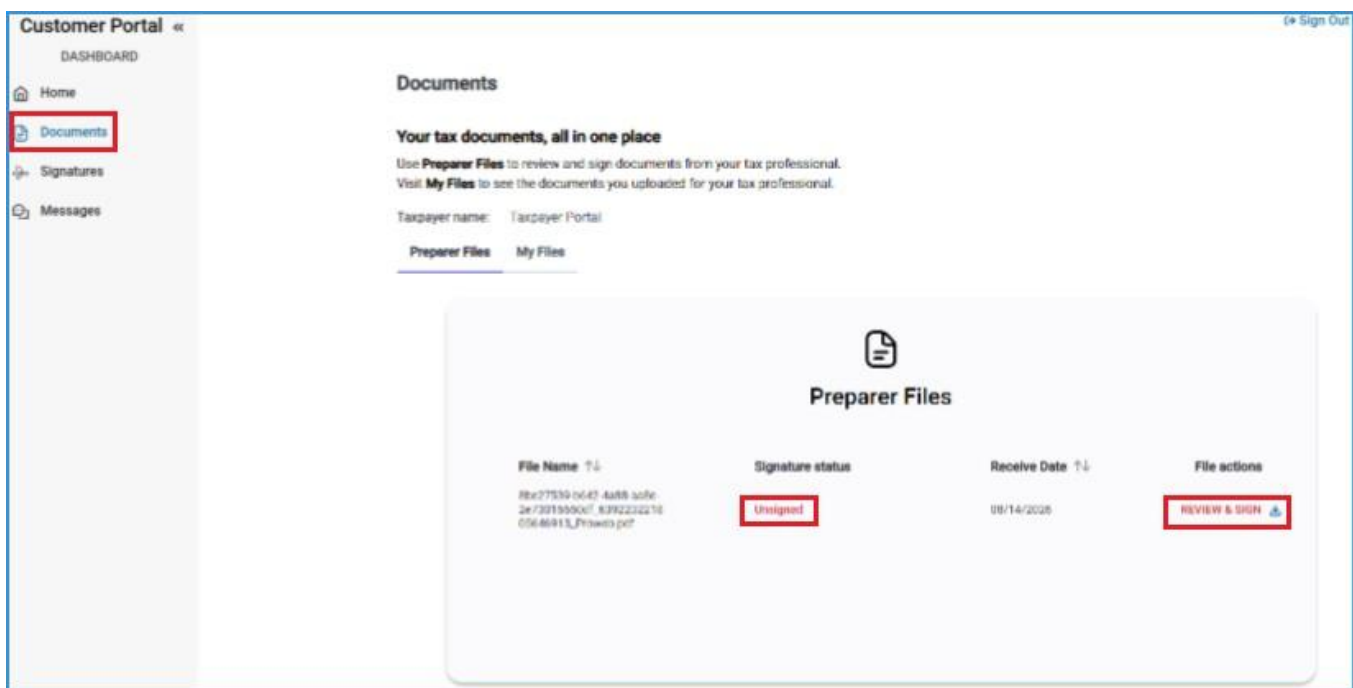
The screenshot shows the 'Customer Portal' interface. On the left is a sidebar with a 'DASHBOARD' header and links for 'Home', 'Documents', 'Signatures' (highlighted with a red box), and 'Messages'. The main content area is titled 'Signatures' and includes instructions: 'Review documents shared by your tax preparer and complete any required signatures. Document status updates automatically once action is taken. All files are encrypted and securely stored.' Below this, it shows 'Taxpayer name: Taxpayer Portal' and links for 'Signatures' and 'How it works'. There are two sections: 'Save signature on file' and 'Save spouse signature on file', each with a 'CREATE SIGNATURE' button. At the bottom, there is a 'My Signature Requests' section with a table header containing 'File Name', 'Signature status', 'Receive Date', and 'File actions'.

This screenshot shows a modal dialog titled 'Save Your Signature' overlaid on the portal. The dialog contains the text: 'This signature will be saved to your profile and can be used to pre-fill eligible documents. You'll always review before submitting.' Below this, it says 'Create your signature:' and features a large blue rectangular box with a handwritten signature 'Sign' and a small 'X' icon at the bottom left. At the bottom of the dialog are three buttons: 'CLEAR SIGNATURE' (in blue), 'CANCEL' (in grey), and 'SAVE SIGNATURE' (in red). The background portal interface is dimmed.

When the signature is saved successfully, the taxpayer will see Signature on file displayed on the Signature screen.



With the signature On File, the taxpayer will see the ability to Review & Sign their documents:



How can the taxpayer communicate with the preparer?

The Customer Portal includes a secure chat feature that allows taxpayers and tax preparers to communicate directly with one another. On the left navigation pane, the taxpayer can select Messages to view the chat feature. This tool provides a convenient way to ask questions, share updates, and discuss tax-related matters throughout the preparation process, all within a centralized and secure environment.

