Customer Portal

ProWeb Edition

Customer Portal

ProWeb customers can now send and receive documents, including signature documents, to and from their clients using the Customer Portal. The customer portal allows taxpayers to sign their tax return documents without ever stepping foot in your office.

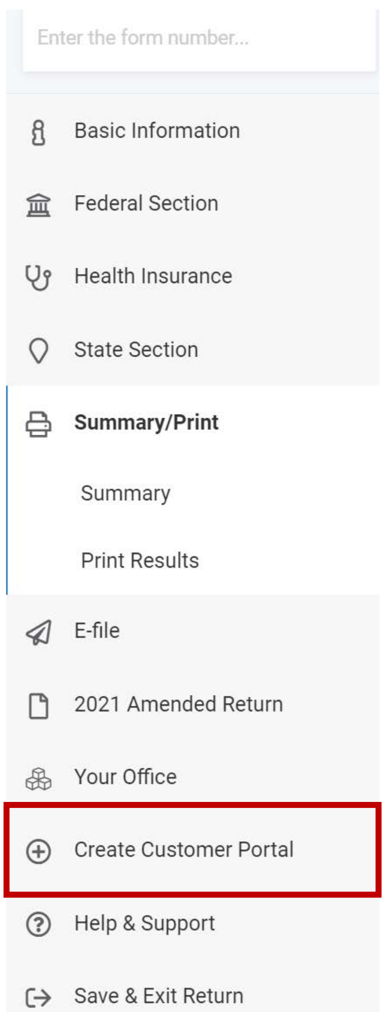
You will prepare the client's tax return, create the client's customer portal and send documents to your client to sign from anywhere.

Creating a Customer Portal

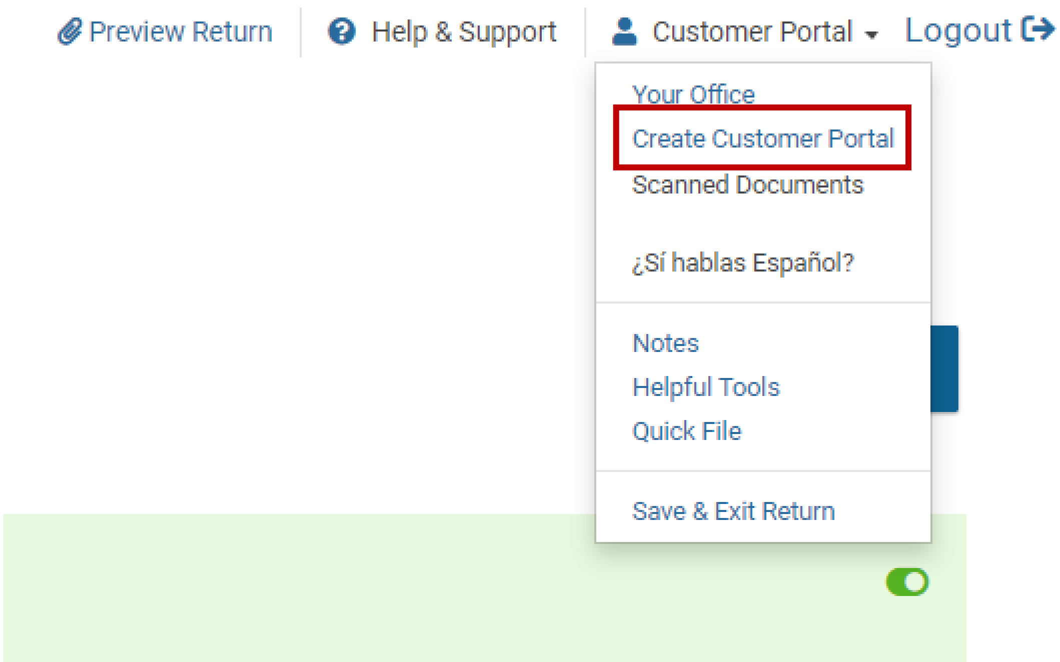
To create a customer portal for a client, you must first create their tax return in the ProWeb program. The taxpayer's *correct SSN*, *mobile* phone number and *email address* must be entered in the return.

There are three places to send the invitation for your customer to create their own Customer Portal.

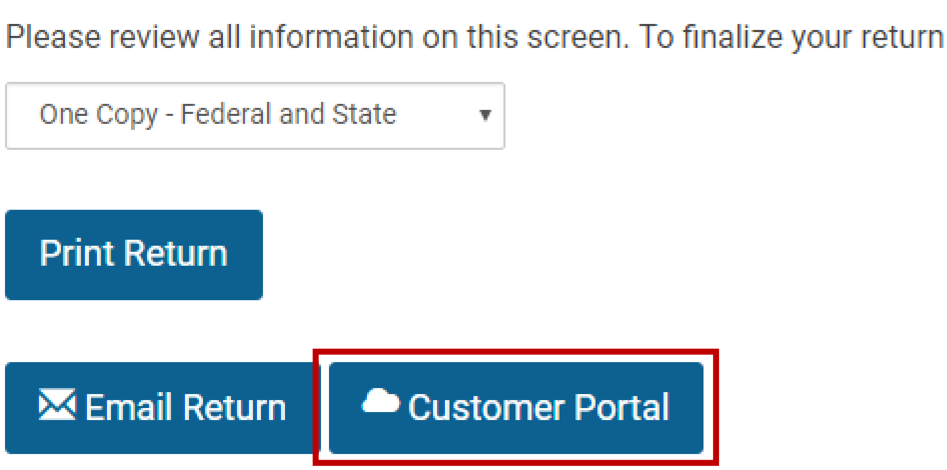
First - From inside the return, you will see the option to Create Customer Portal on the left-side of the page:



Second - You also have the choice to select the taxpayer's name drop down inside the return. The Customer Portal option will be listed above the Scanned Documents option.

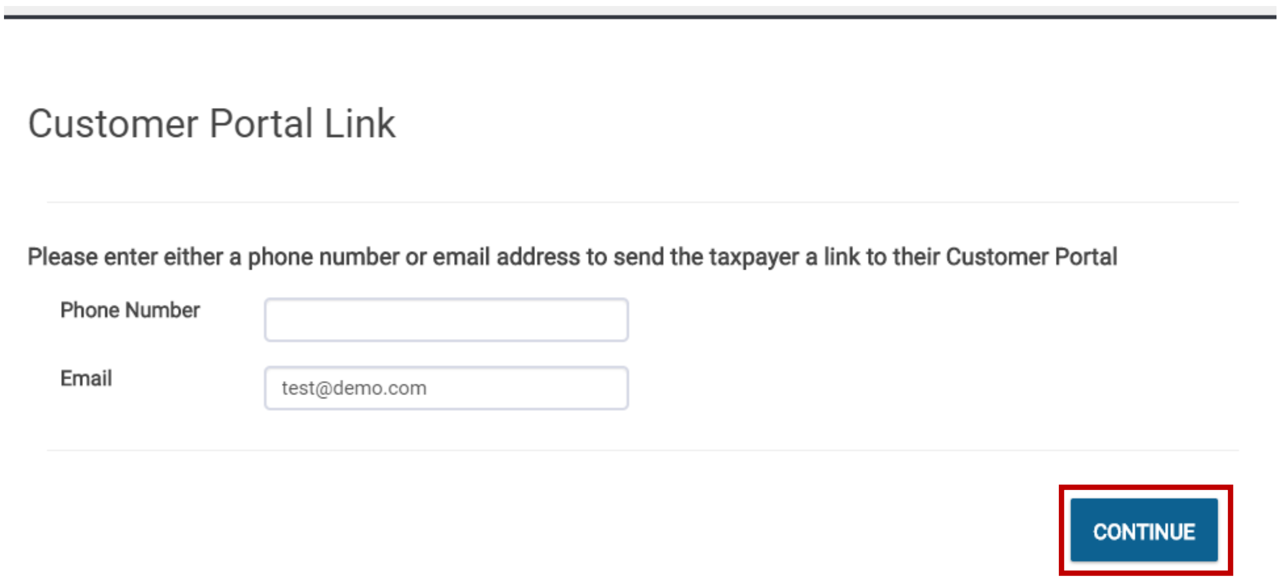


Third - The last option is to access the Customer Portal link from the e-File / Submission page of the return.



After you click on the **Customer Portal** button, regardless of where you do so, you will be taken to this page:

You will enter either the taxpayer's mobile Phone Number or Email Address to send the Creation Link for the Customer Portal.



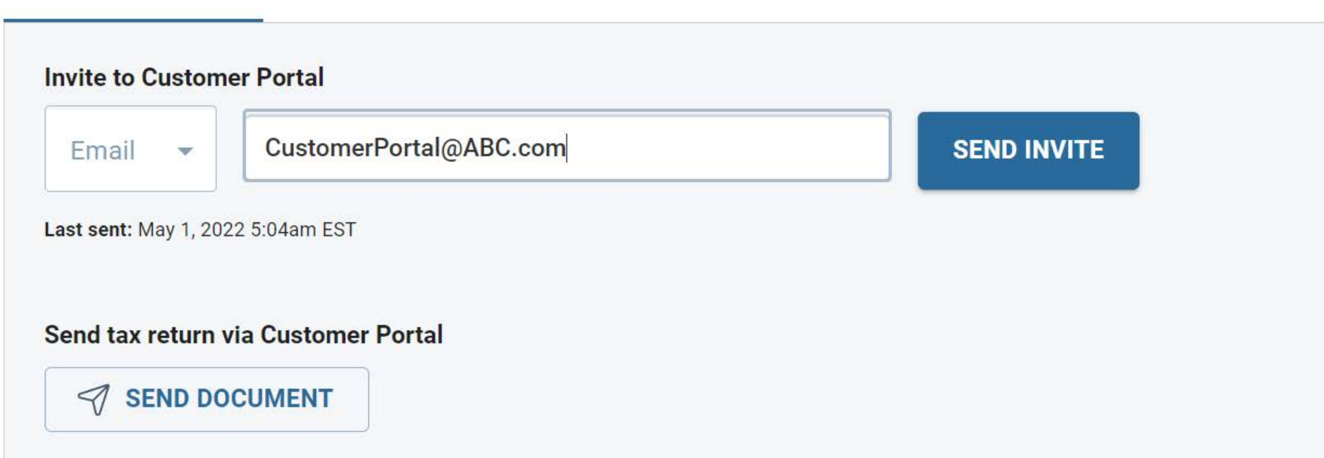
Enter **Mobile Phone** or **Email address** and then click **Continue**.

The program displays a message that the link has been sent:

The link has successfully been sent!

You will then want to exit out of the current Internet Tab. A link to create their portal will be sent to the taxpayer via text message or email. After the link has been sent, the *Send Tax Return Documents to Customer Portal* option will become visible on the e-File / Submission page.

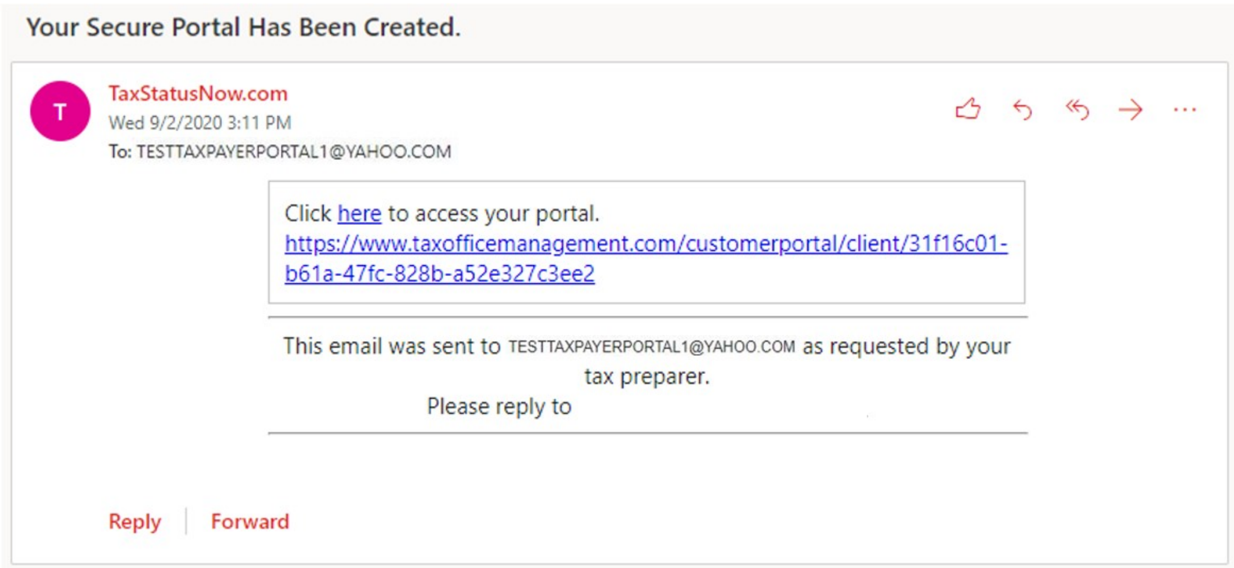
Please Note: You will not be able to send documents until the portal has been created by the customer and the link has been established.



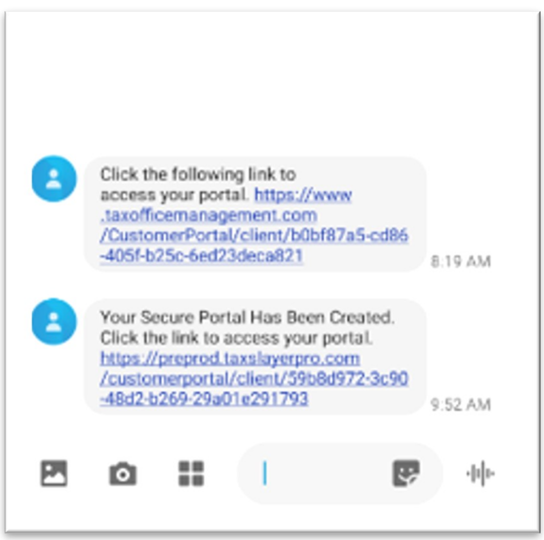
How Does My Client Create and Access Their Portal?

Your client will create their portal either through a text message or an email, depending on if you put in a phone number or email to send the invitation.

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.

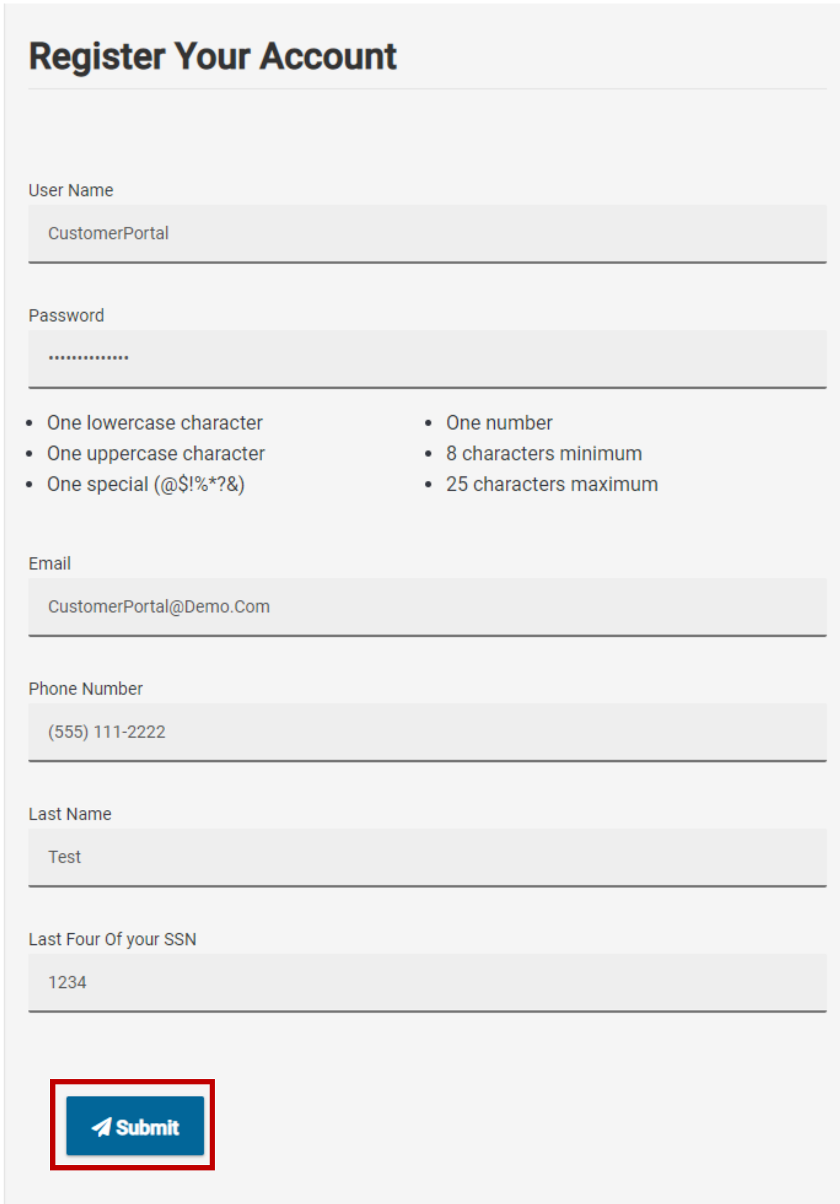


By Text Message: The customer will receive a text message for our automated system with a link to access their portal account.



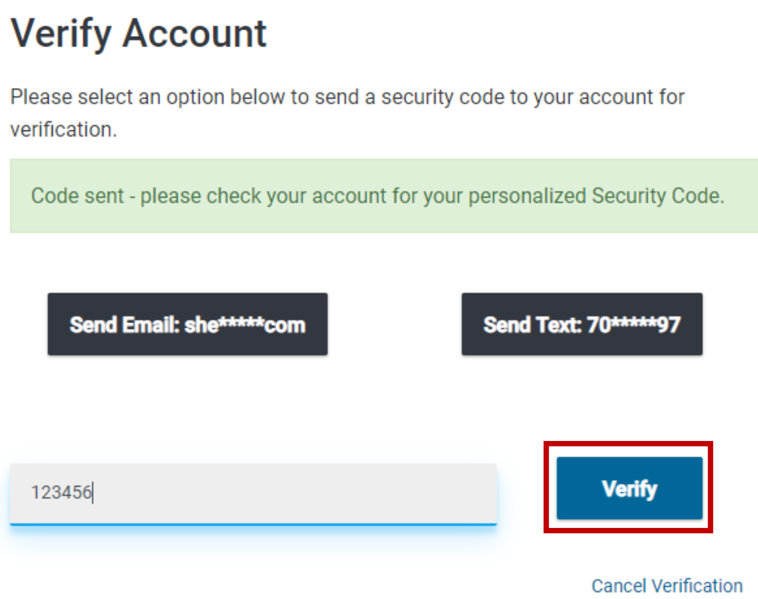
The links will prompt the customer to create their Customer Portal Account.

After the customer click on the link from either their email or phone, they will be guided to a page like this. They will need to pick a username, create a password, and fill out their phone, email, last name and last four of their SSN.

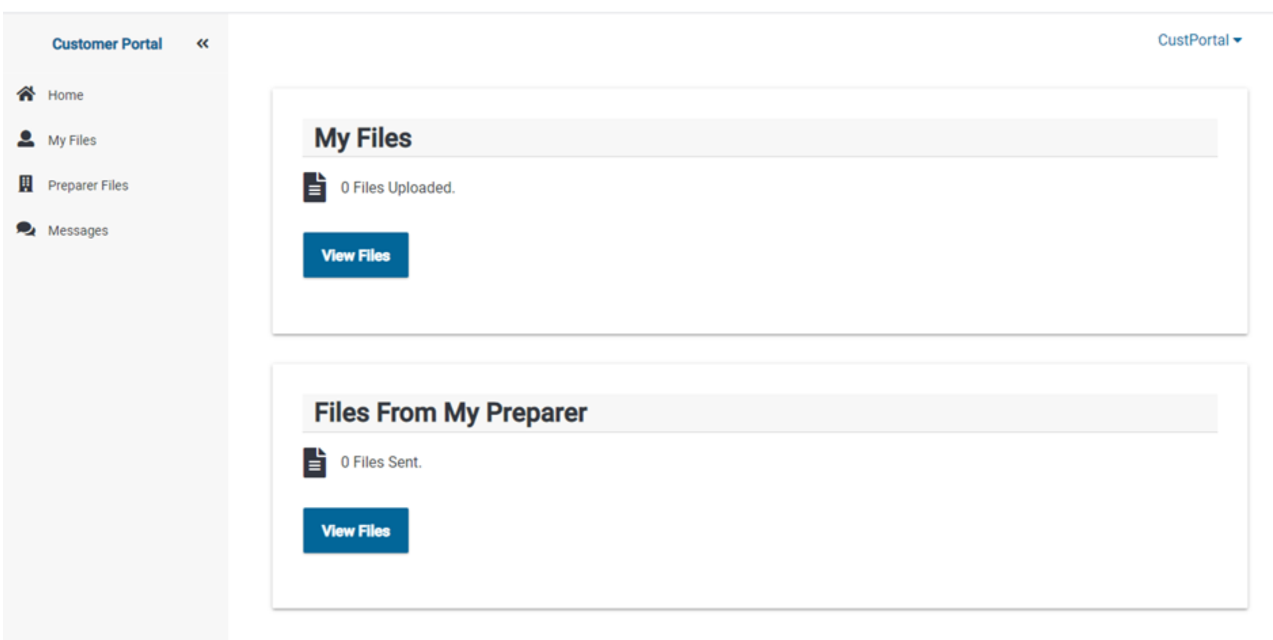


IMPORTANT! To successfully register the account, the taxpayer's last name, SSN and mobile phone number or email address must match what you entered in their tax return:

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.**

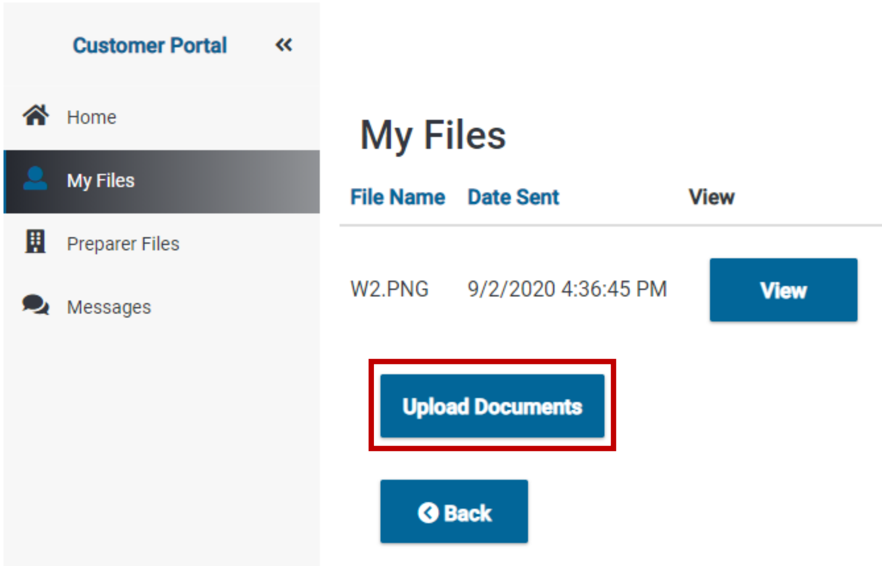


The taxpayer's portal is displayed on the screen:

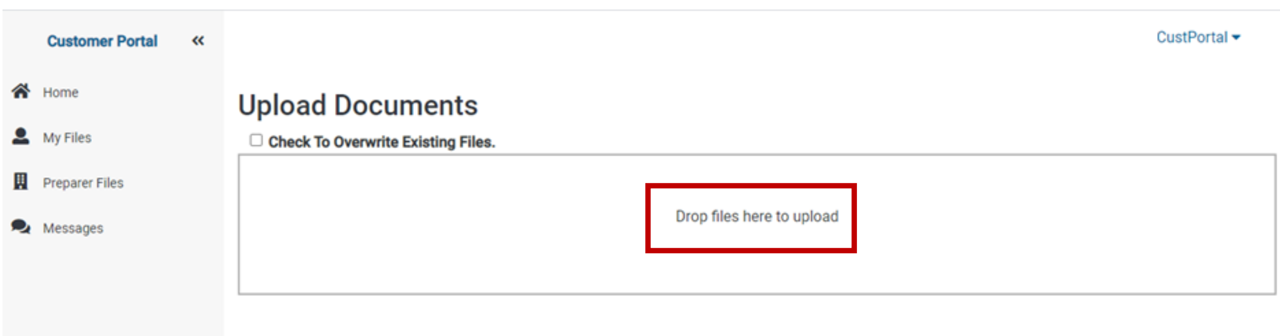


My Files:

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**.

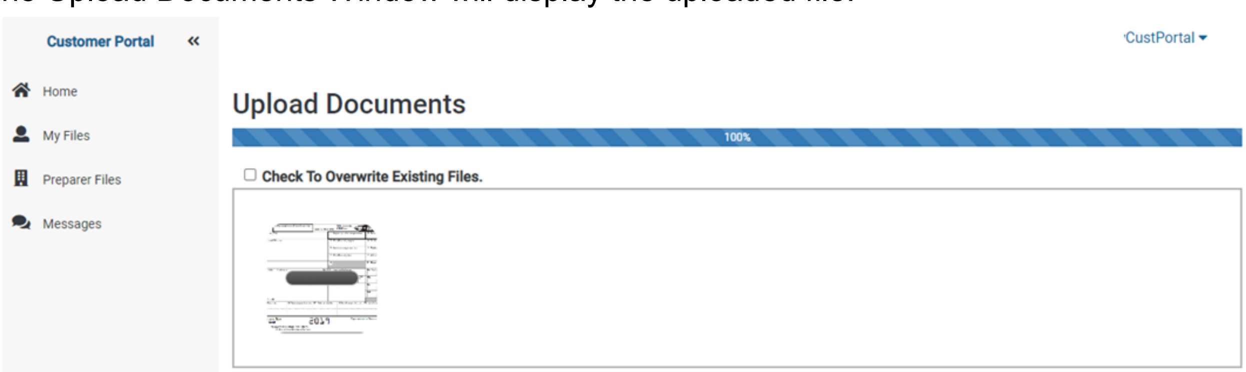


The **Upload Documents Window** is displayed on the screen:



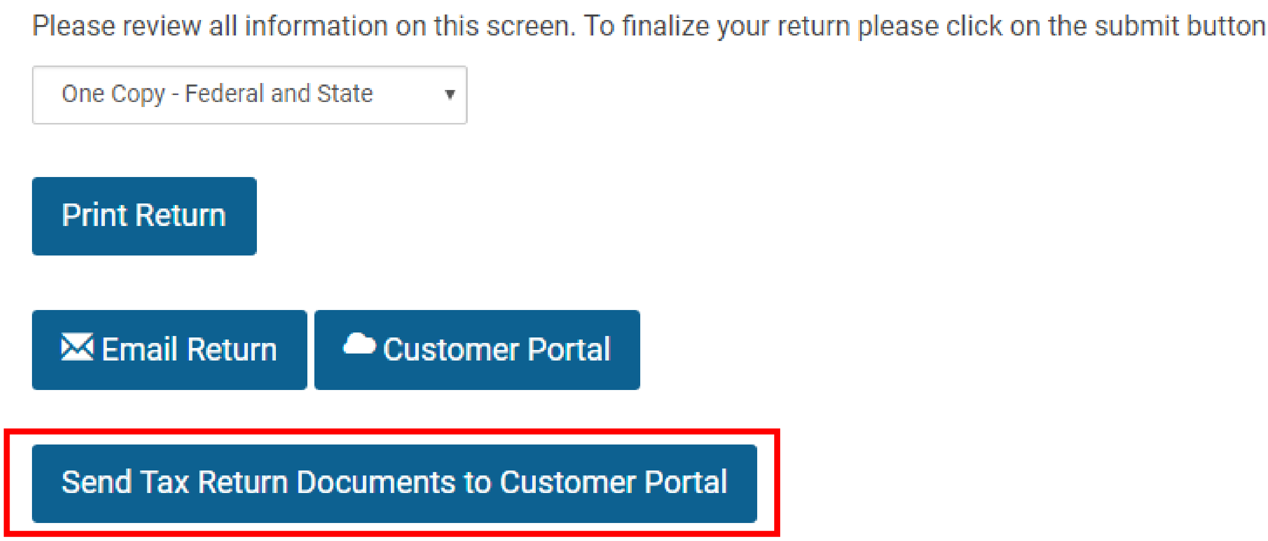
Click **Drop files here to upload** to browse and select documents to upload to the tax preparer. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload.**

The Upload Documents Window will display the uploaded file:

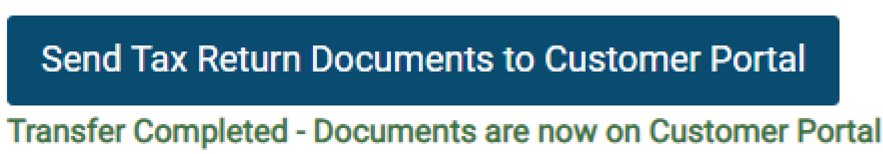


How Do I Send Documents to My Client to Sign?

To send signature documents to a customer's portal, you will click the *Send Tax Return Documents to Customer Portal* option on the Submission page of the tax return.



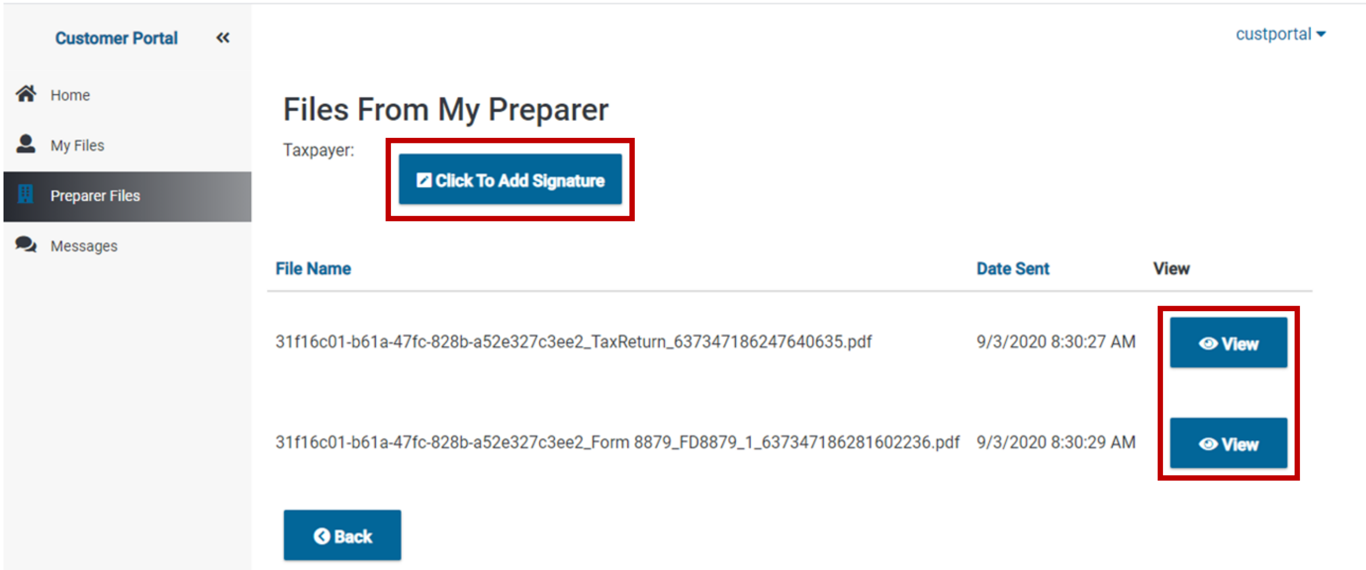
After sending the documents the program will give you confirmation that they have been transferred to the Customer Portal:



From here your client is ready to sign their documents in the Customer Portal!

How Does My Client Sign?

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



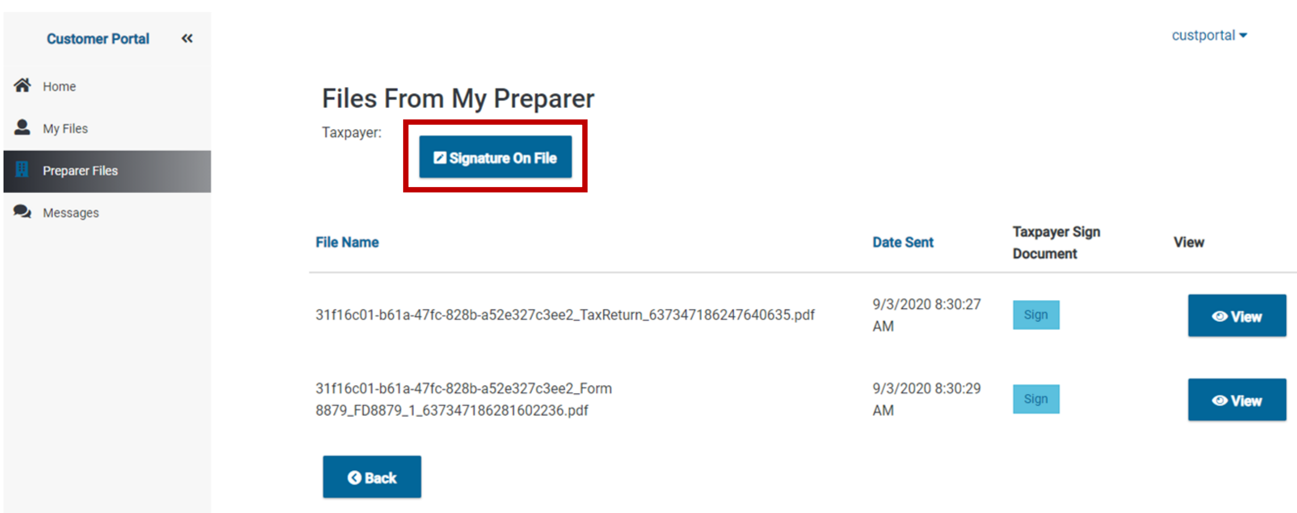
To view the documents to be signed the taxpayer will click on the **View** button **next to each document.** The document will open in a new tab in the taxpayer's browser.

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:

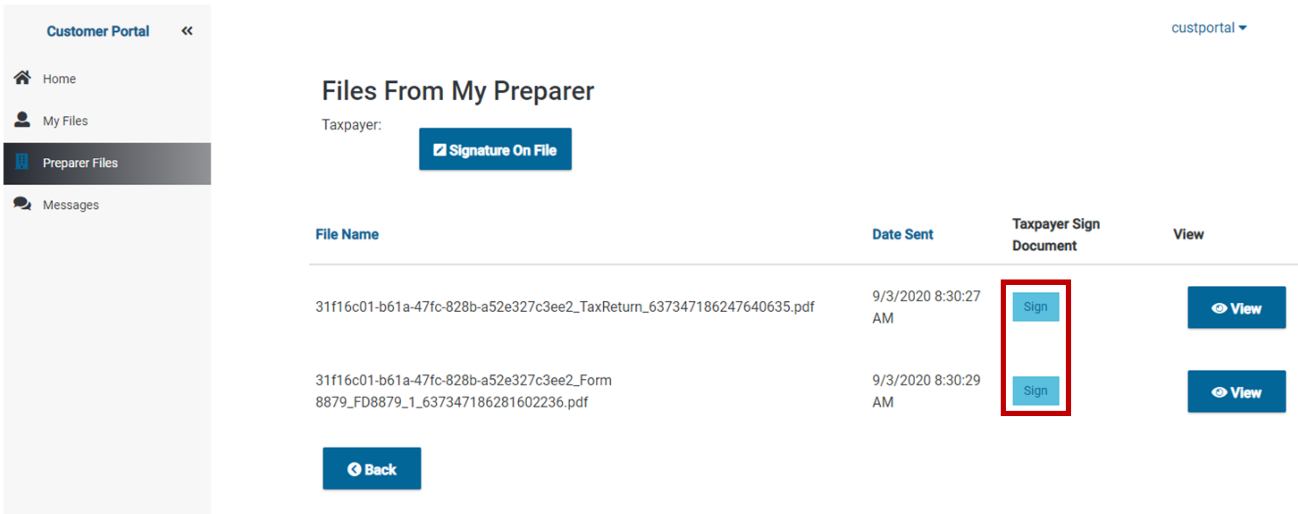
A message is displayed when the signature has successfully saved.

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

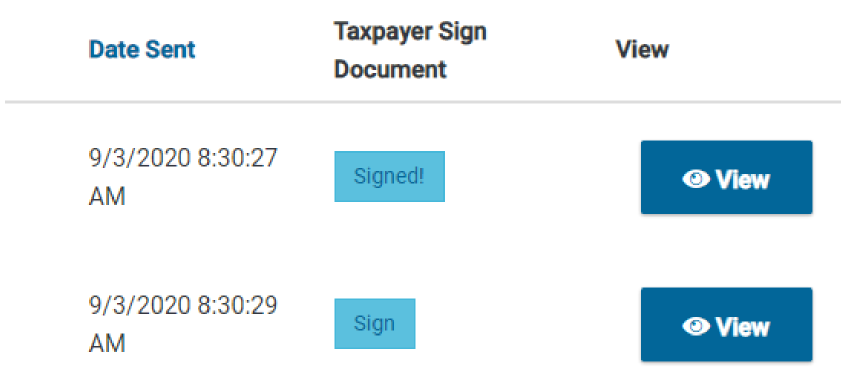
After hitting the back button, the taxpayer will see that their signature is **On File**:



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**:

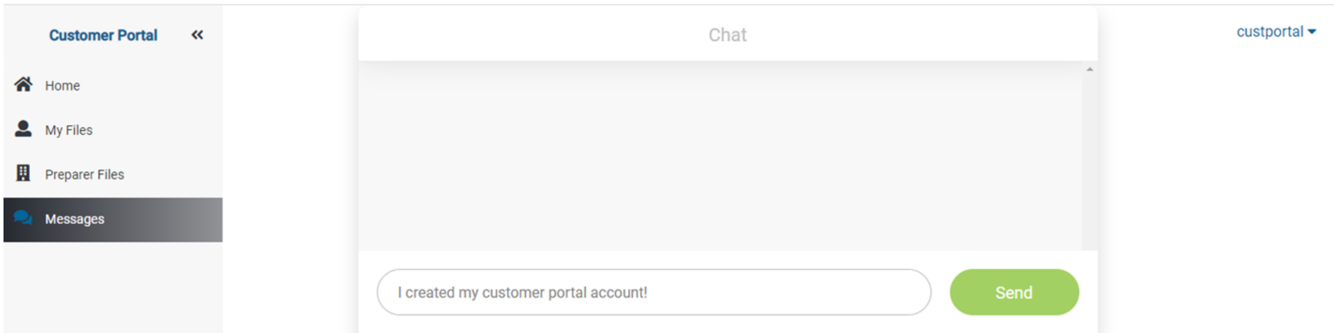


After the signatures have been applied, they will then show in the program.

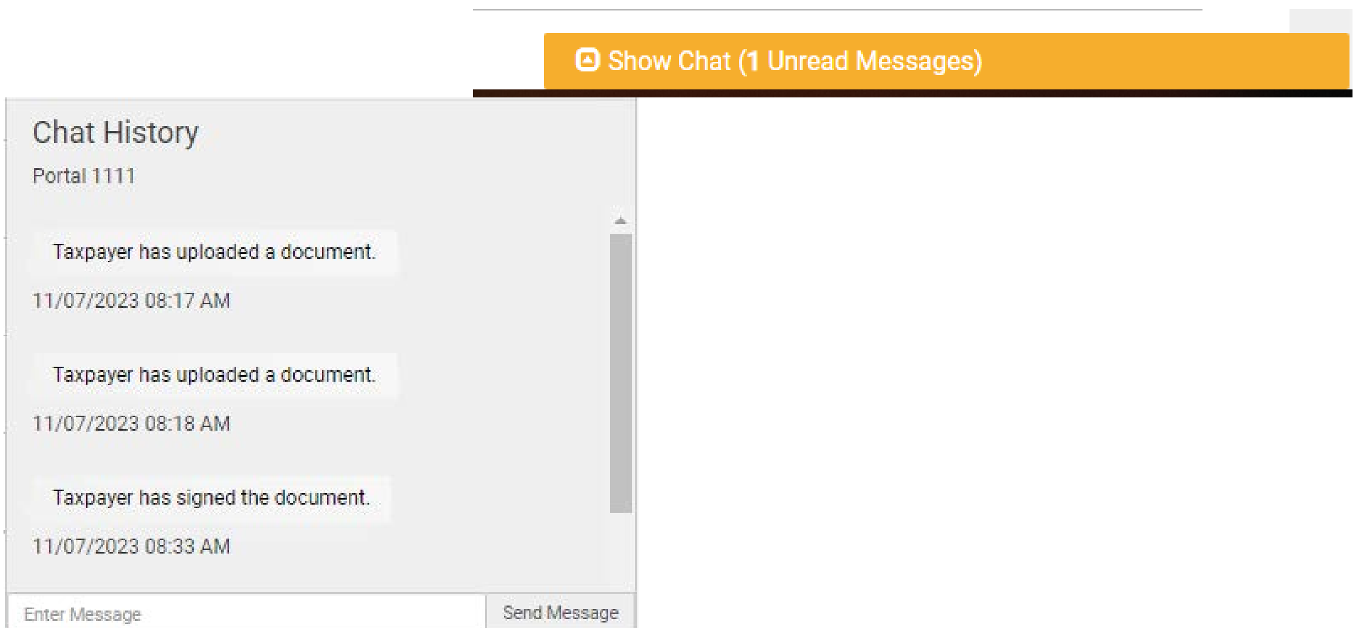
Please Note: You may need to close and reopen your program to see these changes applied.

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 or documents through their customer portal app, you will receive the messages through the **Chat feature** in the ProWeb program:



When you send documents or a reply to the taxpayer, the indicator in their customer portal will display a number for any unread messages.