Customer Portal

Desktop Edition

2023

Customer Portal

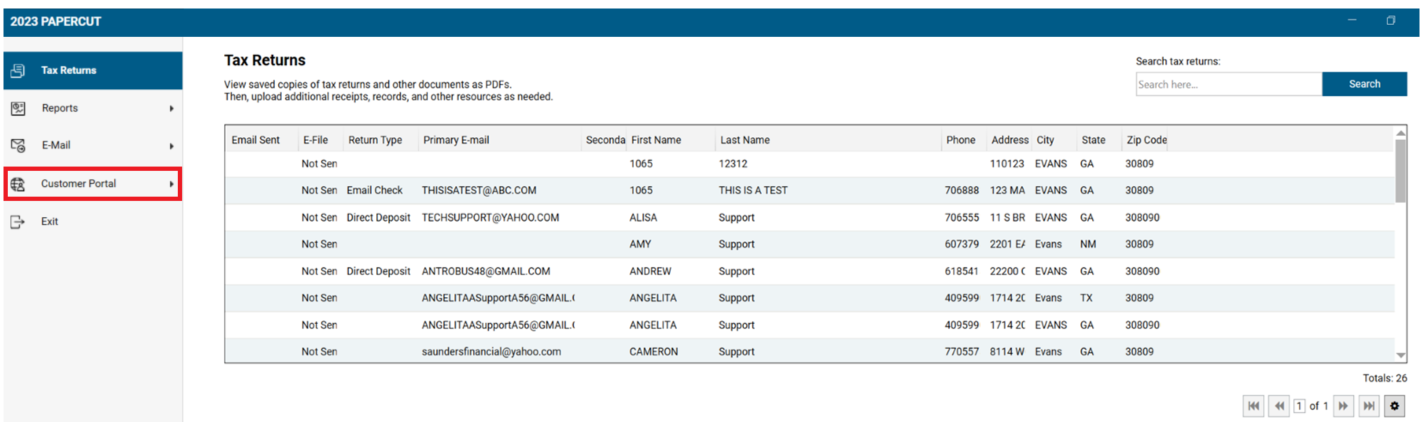
Pro Premium customers can send and receive signature documents to and from their clients using the PaperCut Customer Portal. The customer portal allows taxpayers to sign their tax return documents without ever stepping foot in your office.

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

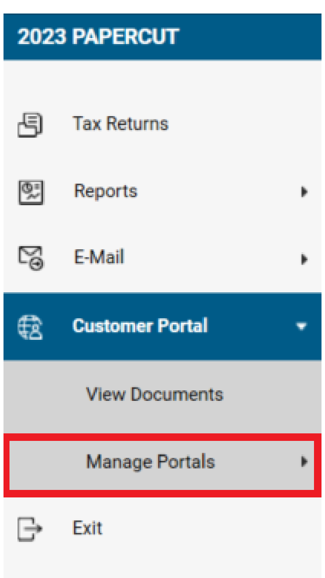
Creating a Customer Portal

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

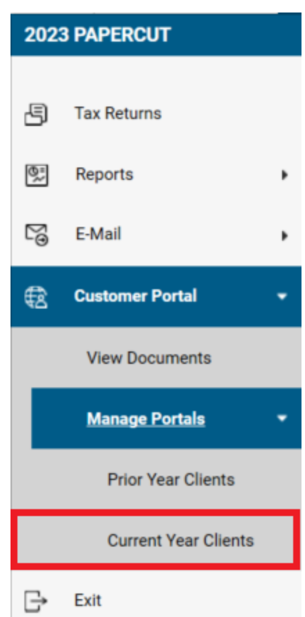
From the Main Menu of the Tax Program, click on the icon to open PaperCut. The program will display the Archive Viewer:



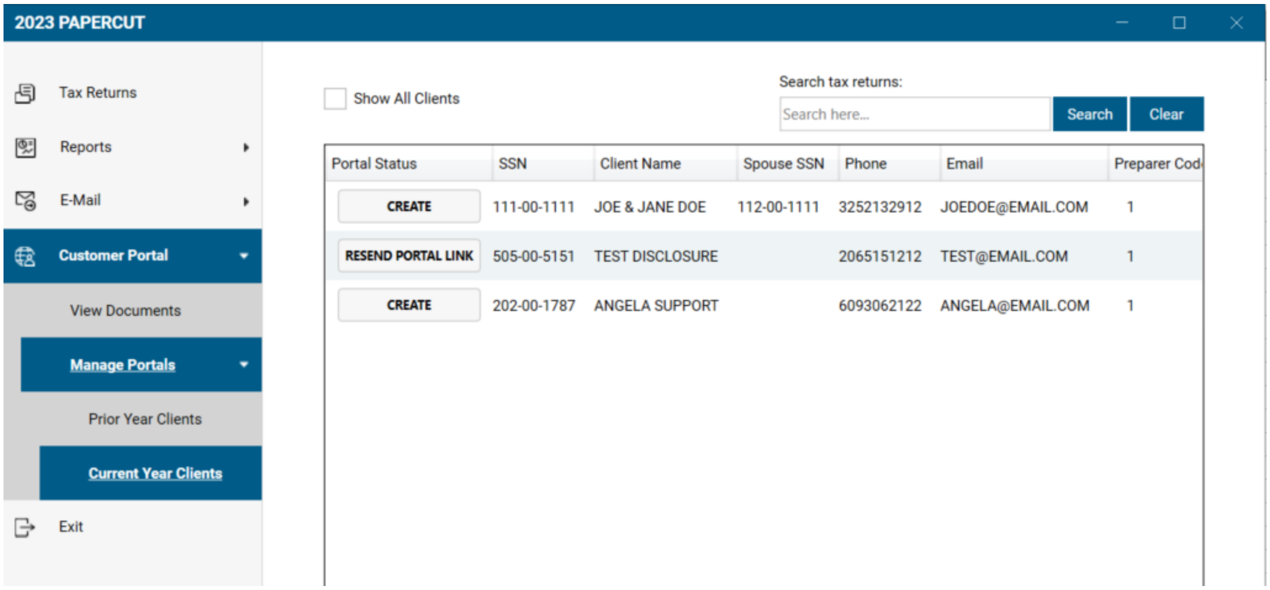
Click **Customer Portal**. The Customer Portal options are displayed.



Click **Manage Portals.** The client lists are displayed. Click **Current Year Clients.**

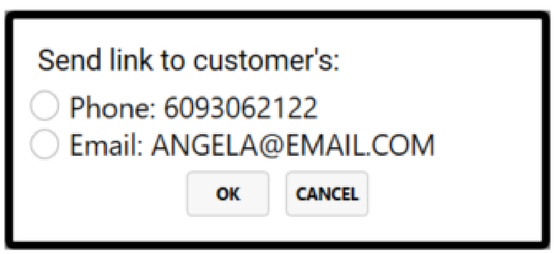


Tax Program will display the current year client list:



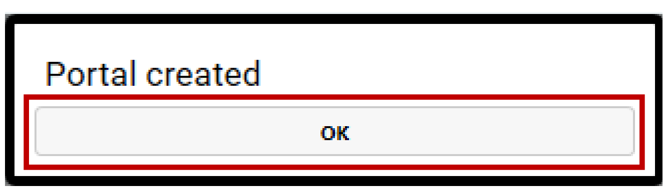
Click the **create button** next to the client you are creating a portal for:

The Program will display the send link menu:

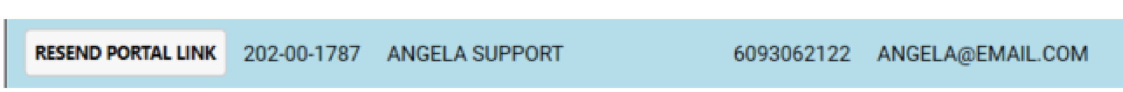


Select **Phone** or **Email** and then click **OK**.

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

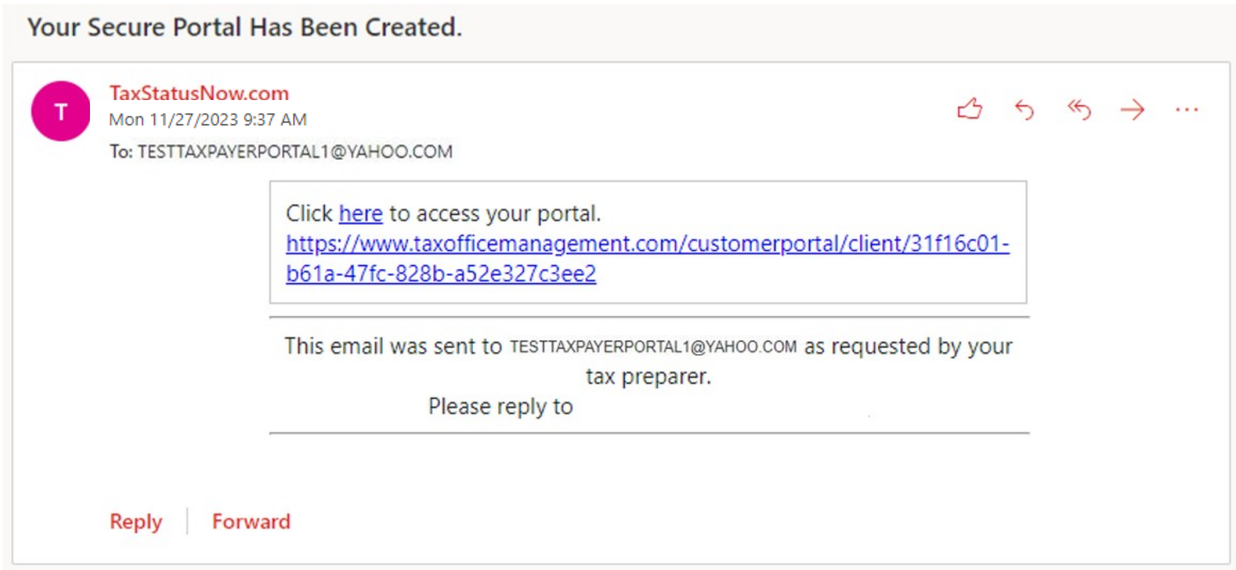


Click **OK**. A link to create their portal will be sent to the taxpayer via text message or email. After doing this, the Create option will change to Resend Portal Link:



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.


Your Secure Portal Has Been Created.

T

TaxStatusNow.com

Mon 11/27/2023 9:37 AM

To: TESTTAXPAYERPORTAL1@YAHOO.COM

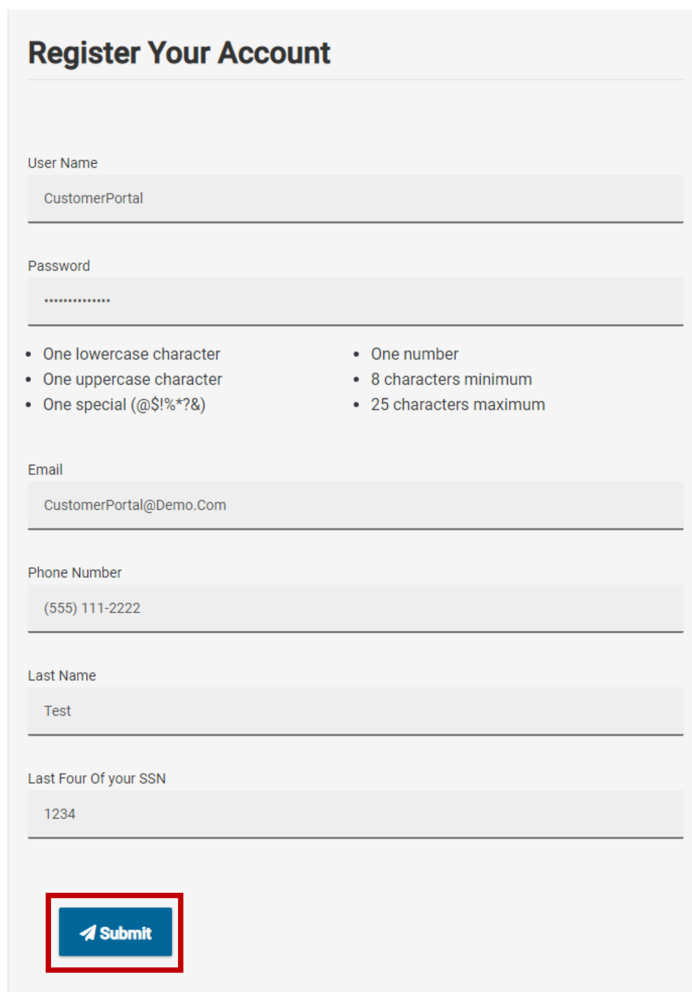
Click here to access your portal.
https://www.taxofficemanagement.com/customerportal/client/31f16c01-b61a-47fc-828b-a52e327c3ee2

This email was sent to TESTTAXPAYERPORTAL1@YAHOO.COM as requested by your tax preparer.
Please reply to

Reply | Forward

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:


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

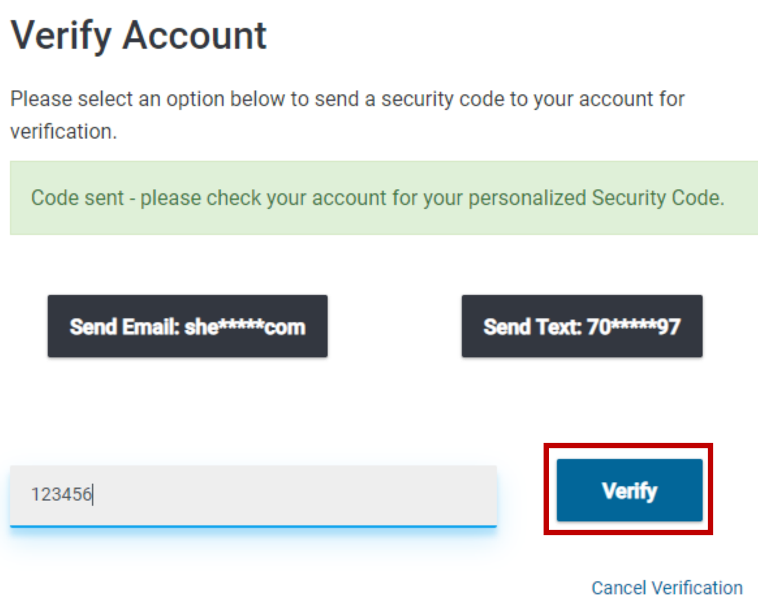
Test

Last Four Of your SSN

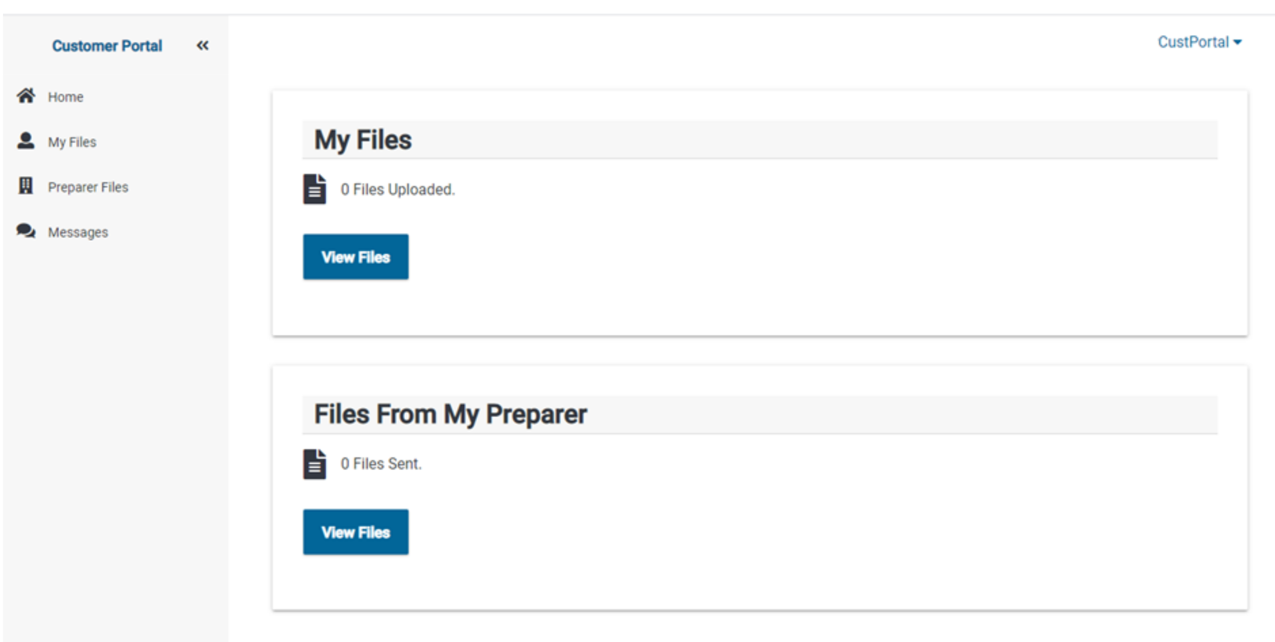
1234

Submit

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.**

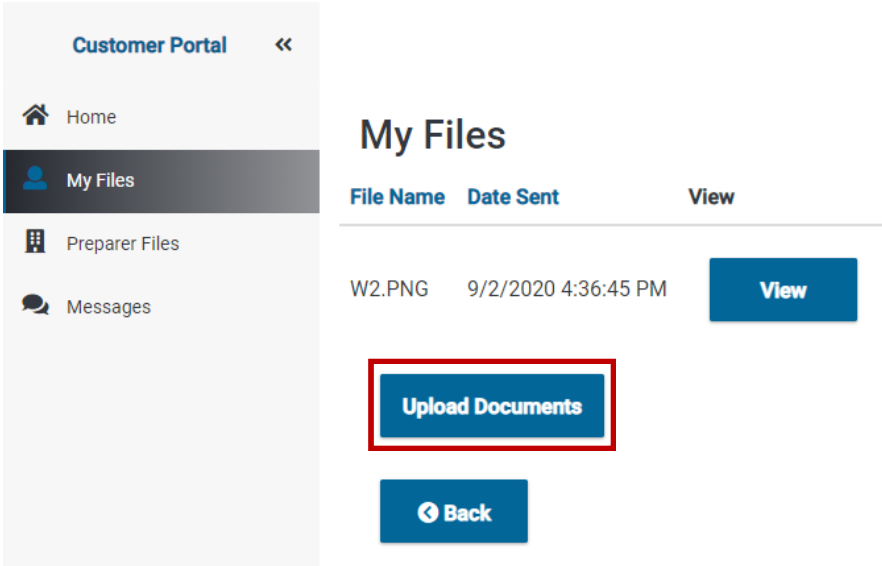


The taxpayer's portal is displayed on the screen:

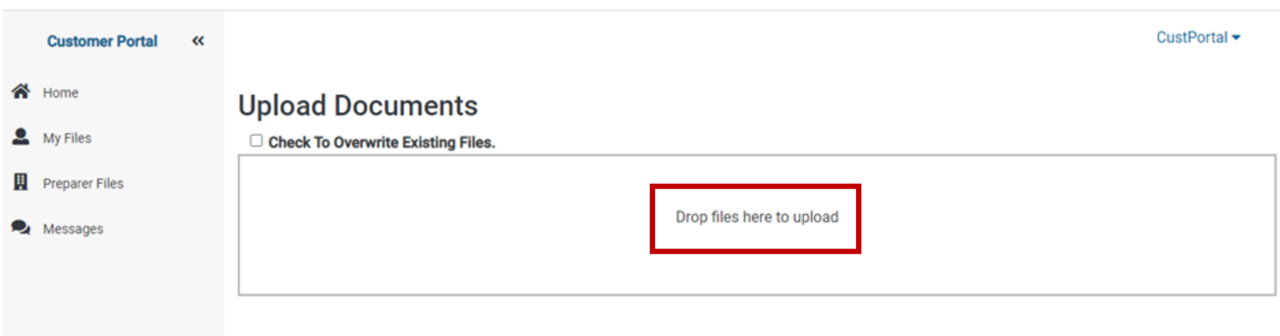


My Files:

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**.

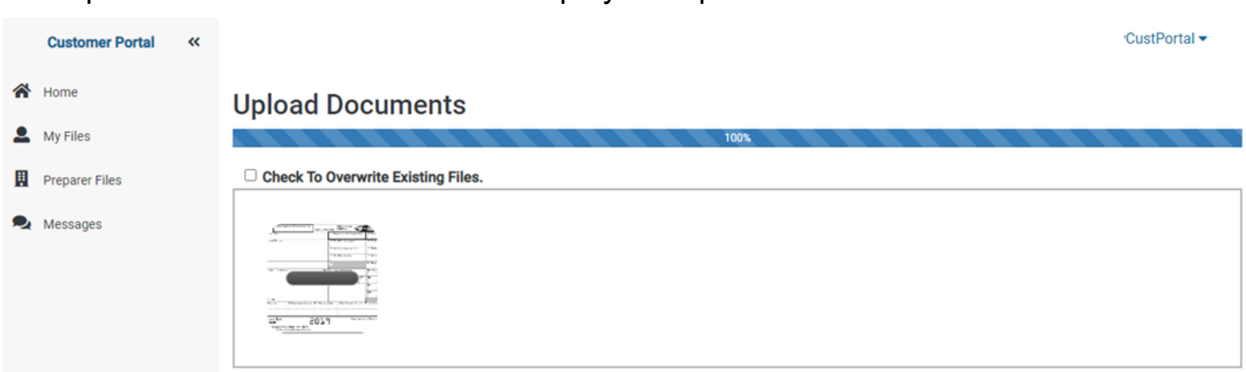


The **Upload Documents Window** is displayed on the screen:



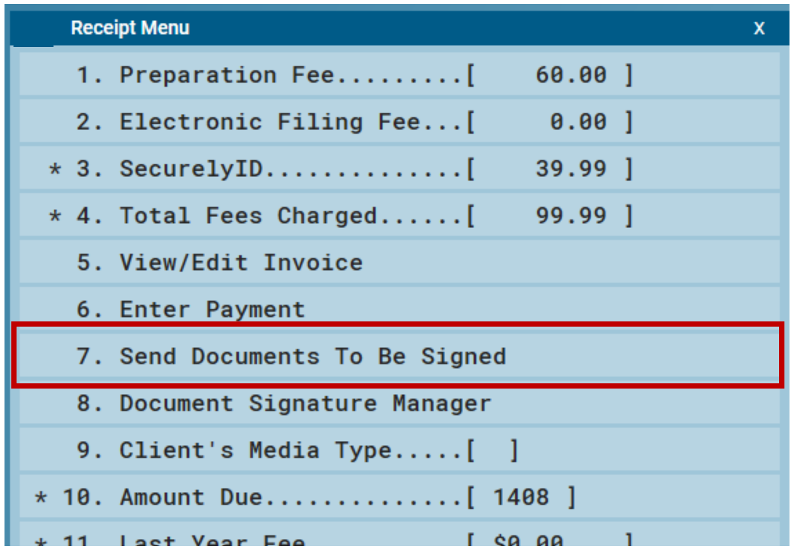
Click **Drop files here to upload** to browse and select documents to upload to the tax preparer. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload.**

The Upload Documents Window will display the uploaded file:

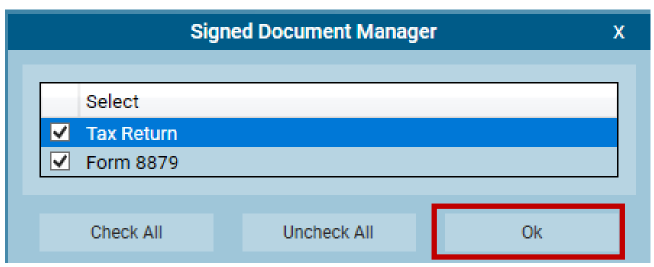


How Do I Send Documents to My Client to Sign?

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



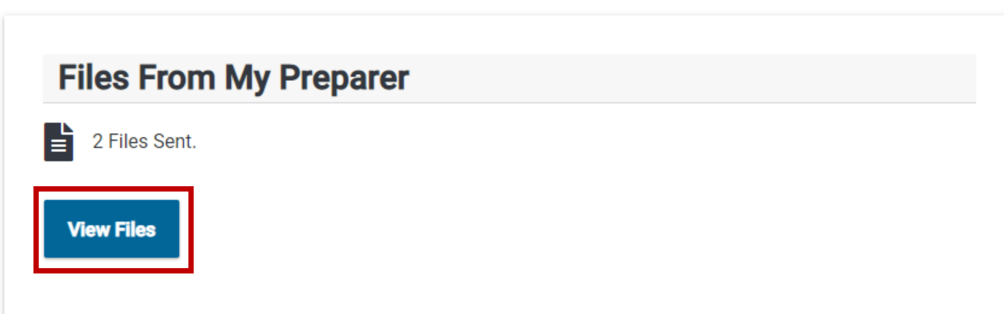
Click **Send Documents to be Signed.** The program displays the **Signed Document Manager:**



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

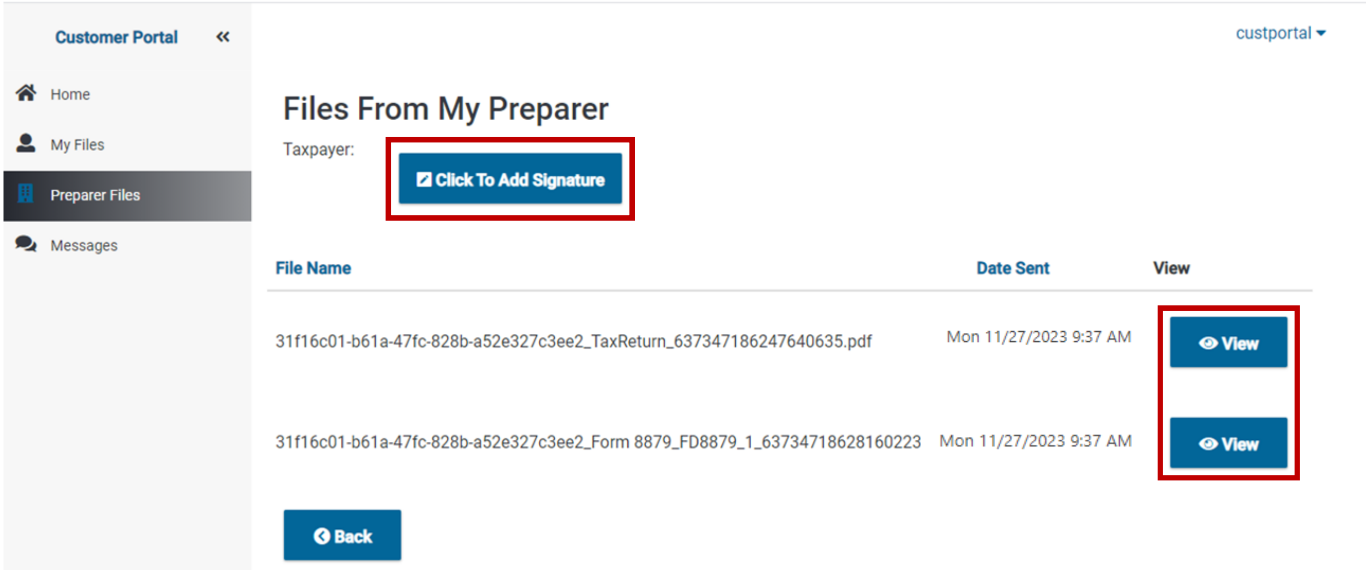
Files From My Preparer:

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.**



How Does My Client Sign?

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



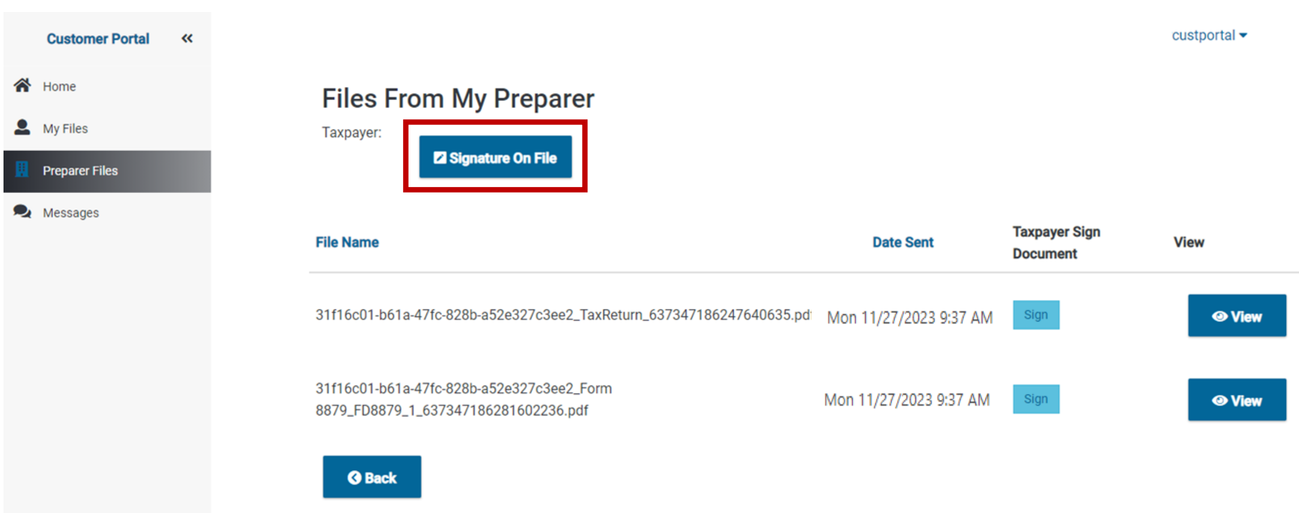
To view the documents to be signed the taxpayer will click on the **View** button **next to each document.** The document will open in a new tab in the taxpayer's browser.

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:

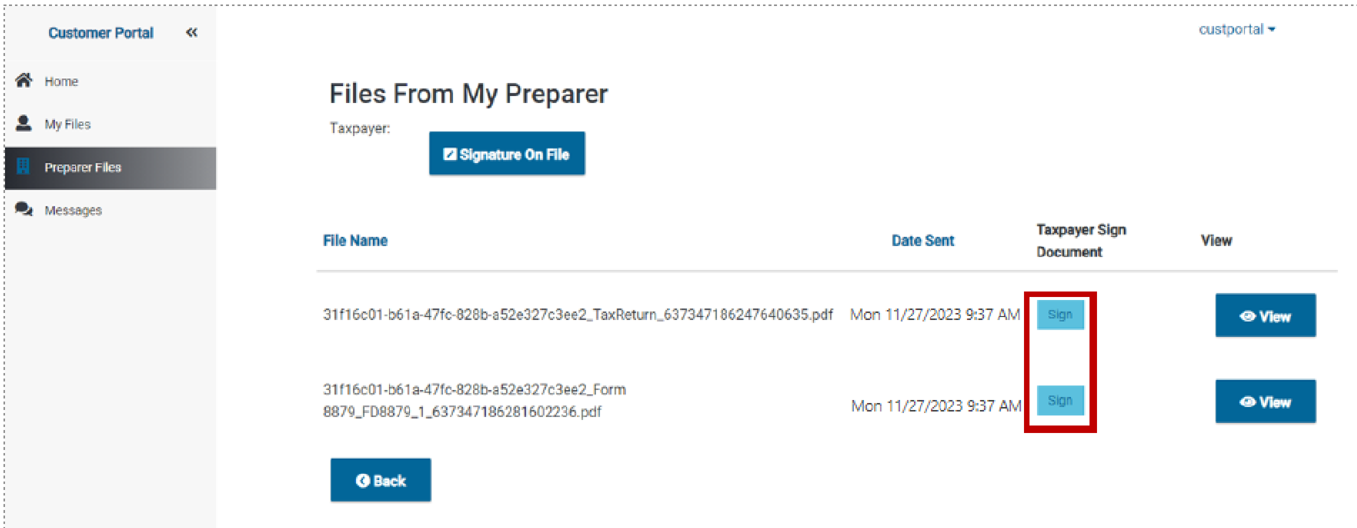
A message is displayed when the signature has successfully saved.

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

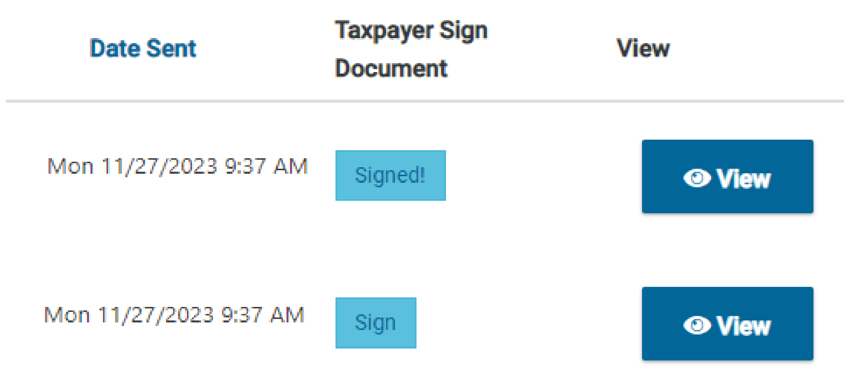
After hitting the back button, the taxpayer will see that their signature is **On File**:



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**:

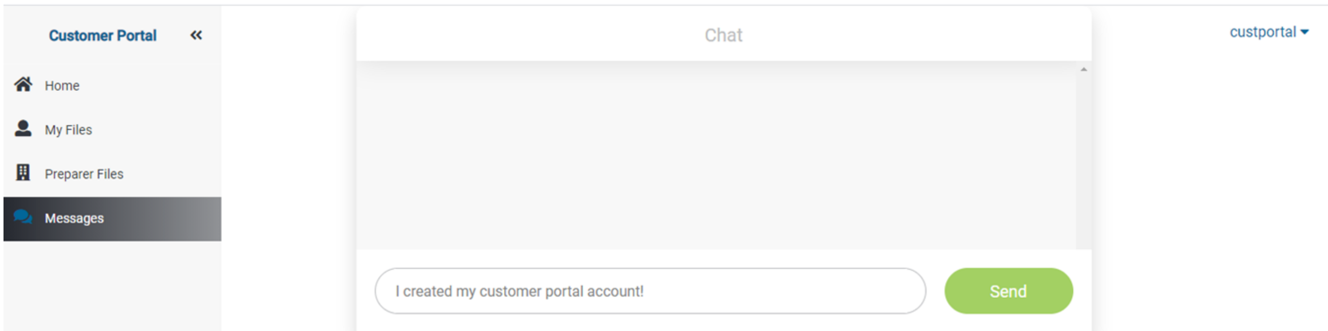


After the signatures have been applied, they will then show in the program.

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 through this feature, you will receive the messages through the **Taxes to Go Chat feature** in the program: