



Customer Portal

ProWeb Edition

What is Customer Portal?

TaxSlayer ProWeb's 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
- 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 information

Creating a Customer Portal

What does the preparer need to do?

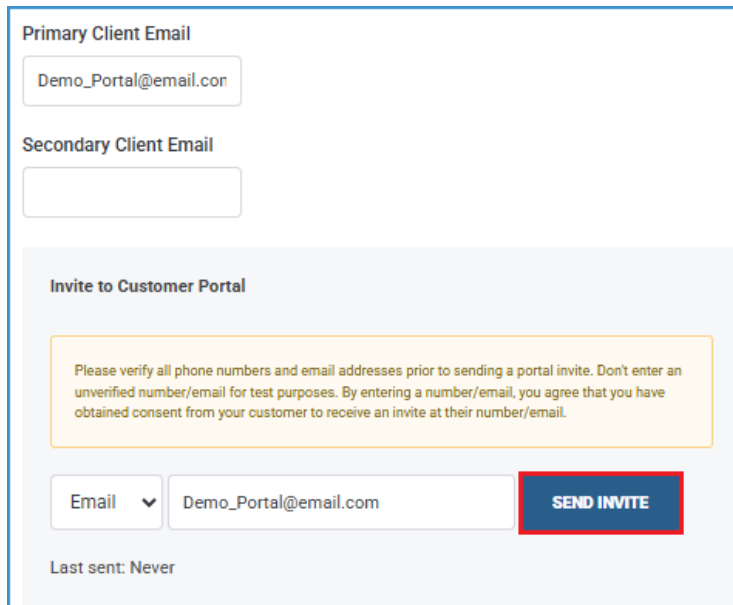
Before a portal can be generated, the client must have an active tax return created in the TaxSlayer ProWeb Program. This ensures the portal is linked directly to the taxpayer's return, keeping all documents and communications organized under the correct file. To begin you will need:

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

In the personal information page of the tax return, the taxpayer's ssn, phone number, and e-mail address must be entered before the customer portal registration link can be sent to the taxpayer.

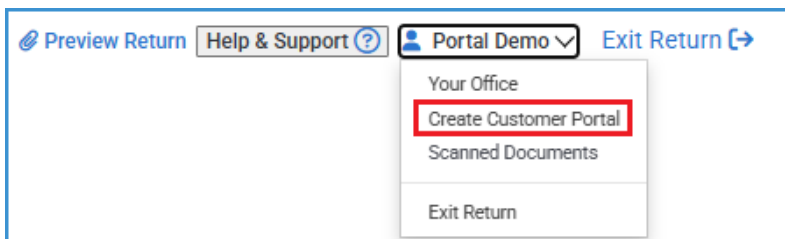
There are **four** different ways for the preparer to create a portal.

First - From the bottom of the Personal Information menu, where the option to send an invite to Customer Portal is displayed:



The screenshot shows a web form titled "Invite to Customer Portal". At the top, there are two input fields: "Primary Client Email" containing "Demo_Portal@email.com" and "Secondary Client Email" which is empty. Below these is a light gray box with the title "Invite to Customer Portal" and a yellow warning box containing text about verifying contact information. At the bottom, there is an "Email" dropdown menu set to "Demo_Portal@email.com" and a red "SEND INVITE" button. Below the button, it says "Last sent: Never".

Second - Select the taxpayer's name drop down in the upper right of the return:



The screenshot shows the top navigation bar of a software interface. It includes links for "Preview Return", "Help & Support", "Portal Demo", and "Exit Return". The "Portal Demo" dropdown menu is open, showing options: "Your Office", "Create Customer Portal" (highlighted with a red box), "Scanned Documents", and "Exit Return".

Third - From inside the return, the option Customer Portal is displayed on the left-hand navigation panel of the page:

The screenshot shows the 'Basic Information' section of the TaxSlayer ProWeb interface. On the left, a navigation panel lists various options, with 'Create Customer Portal' at the bottom highlighted by a red rectangular box. The main content area on the right is titled 'Basic Information' and contains several input fields: 'Filing Status', 'Personal Information', 'Dependents / Qualifying Person', and 'IRS Identity Protection PIN'. A blue 'BACK' button is positioned below these fields.

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

The screenshot displays the 'CUSTOMER PORTAL' section of the TaxSlayer ProWeb interface. The main heading is 'Invite to Customer Portal'. Below this, a yellow warning box contains text about verifying phone numbers and email addresses. Underneath the warning, there is an 'Email' dropdown menu and an input field containing 'Demo_Portal@email.com'. A blue 'SEND INVITE' button is highlighted with a red border. Below this, the text 'Last sent: Never' is visible. Further down, there is a section titled 'Send tax return via Customer Portal' with a 'SEND DOCUMENT' button.

TaxSlayer ProWeb will then display the following message:

The screenshot shows a confirmation message box with a green checkmark icon. The text inside reads 'Invite Sent' followed by the date and time 'Sept 16, 2026 03:18pm'. There is a close button (X) in the top right corner of the box.

A link to create their portal will be sent to the taxpayer via text message or email.

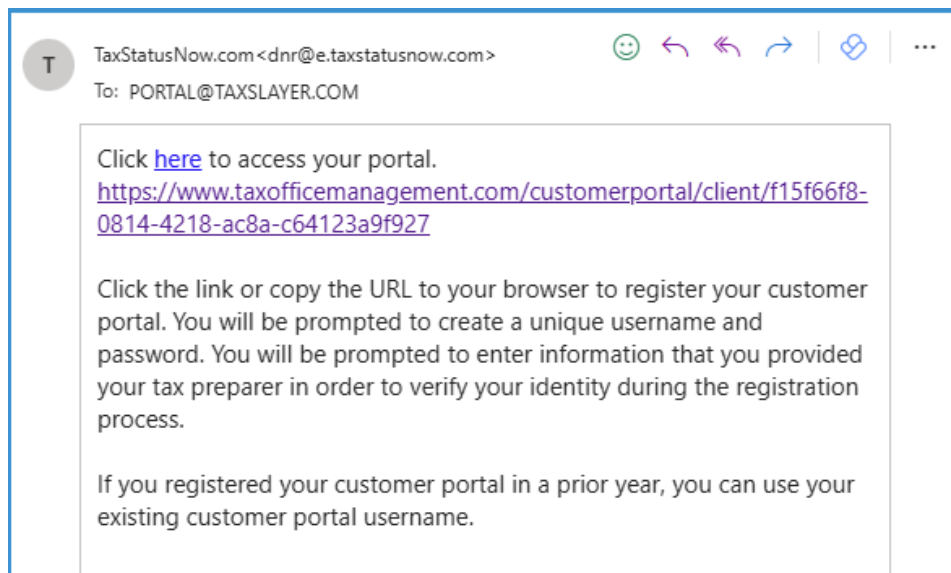
Please Note: Neither preparer or taxpayer will be able to send documents until the portal registration has been completed by the taxpayer.

Creating the customer portal:

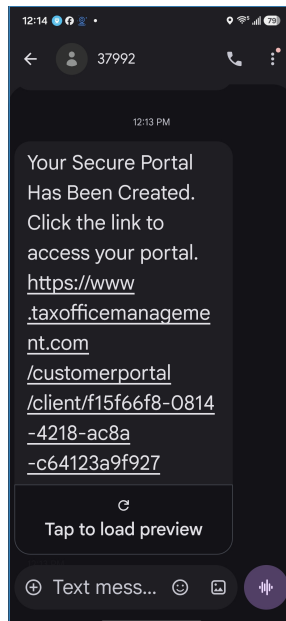
What does the taxpayer need to do?

The customer 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. Clicking on the link will take the taxpayer to the registration page of the Customer Portal

Via email:



Via text:



How does the taxpayer register the 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 (@\$!%*7&)
- ✓ Passwords must match

Email address

Phone Number

Last Name

Last Four Of your SSN

REGISTER

IMPORTANT!

To successfully register the taxpayers 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 their account. They can select to have a verification security code sent via email or text.

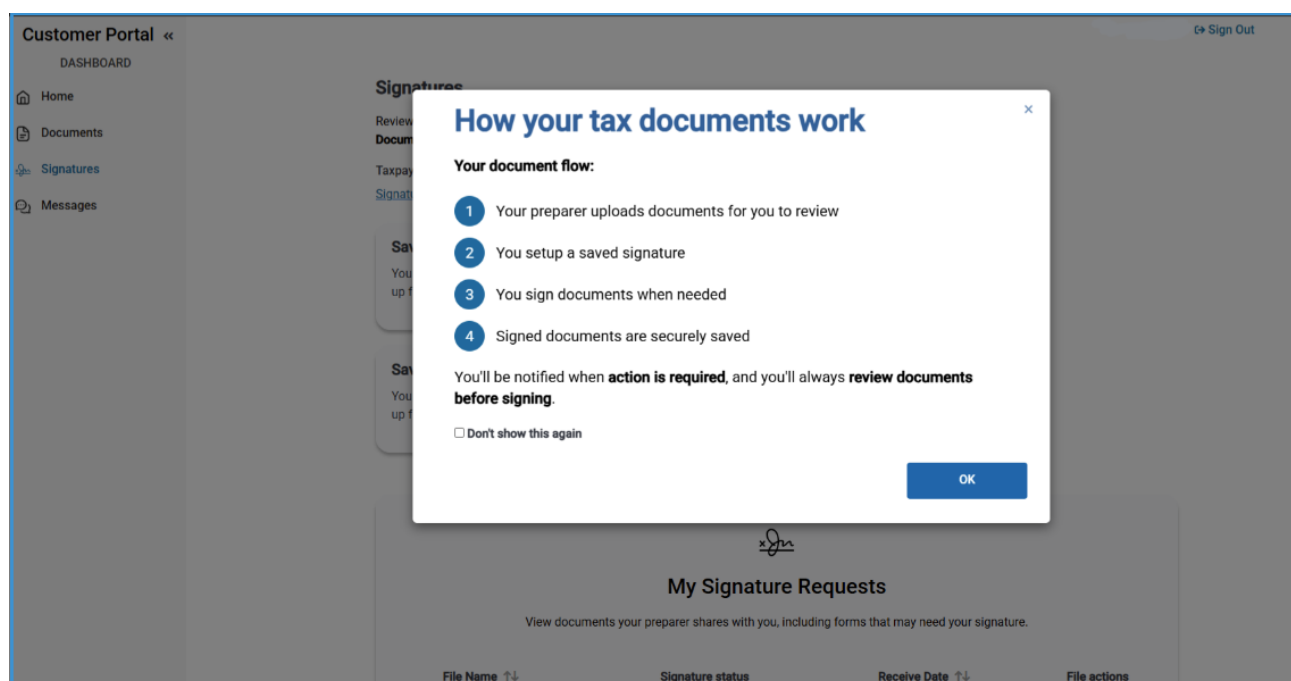
When the code is received, the taxpayer will enter it in the space provided and click Verify.

Customer Portal Dashboard:

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

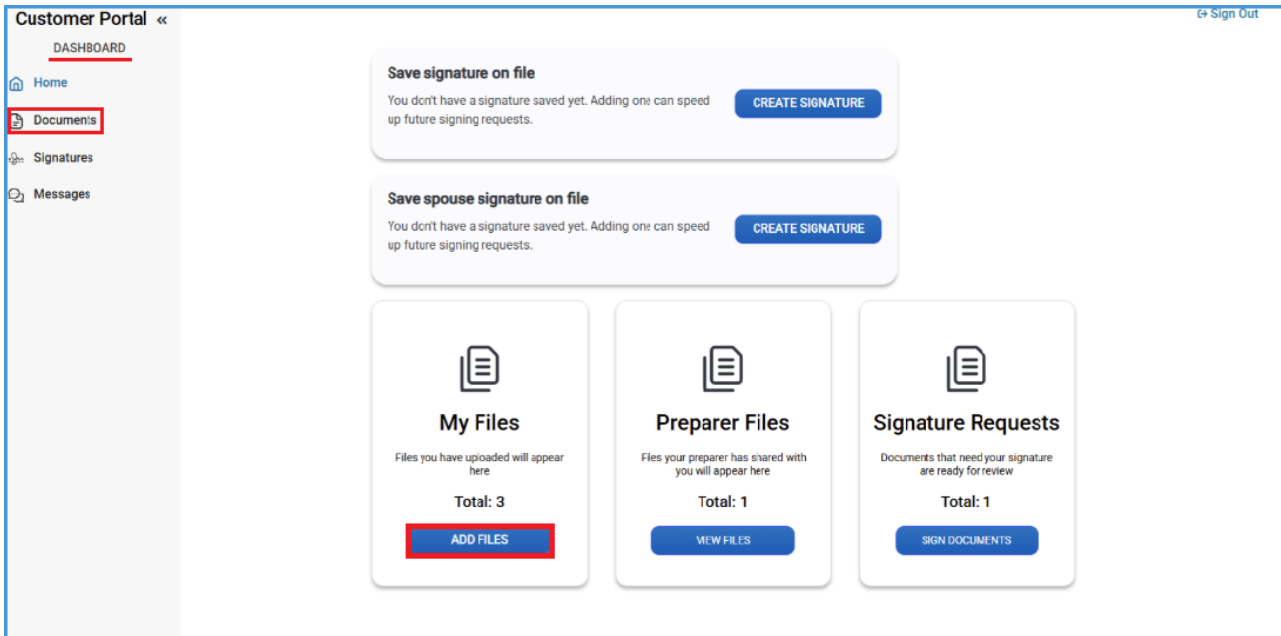
On the left side navigation pane the taxpayer will see:

- **Documents:** Stores all documents shared between the preparer and taxpayer. There are two sub menus:
 - *Preparer Files* - Review documents from the tax professional.
 - *My Files* - View and upload the taxpayers 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?

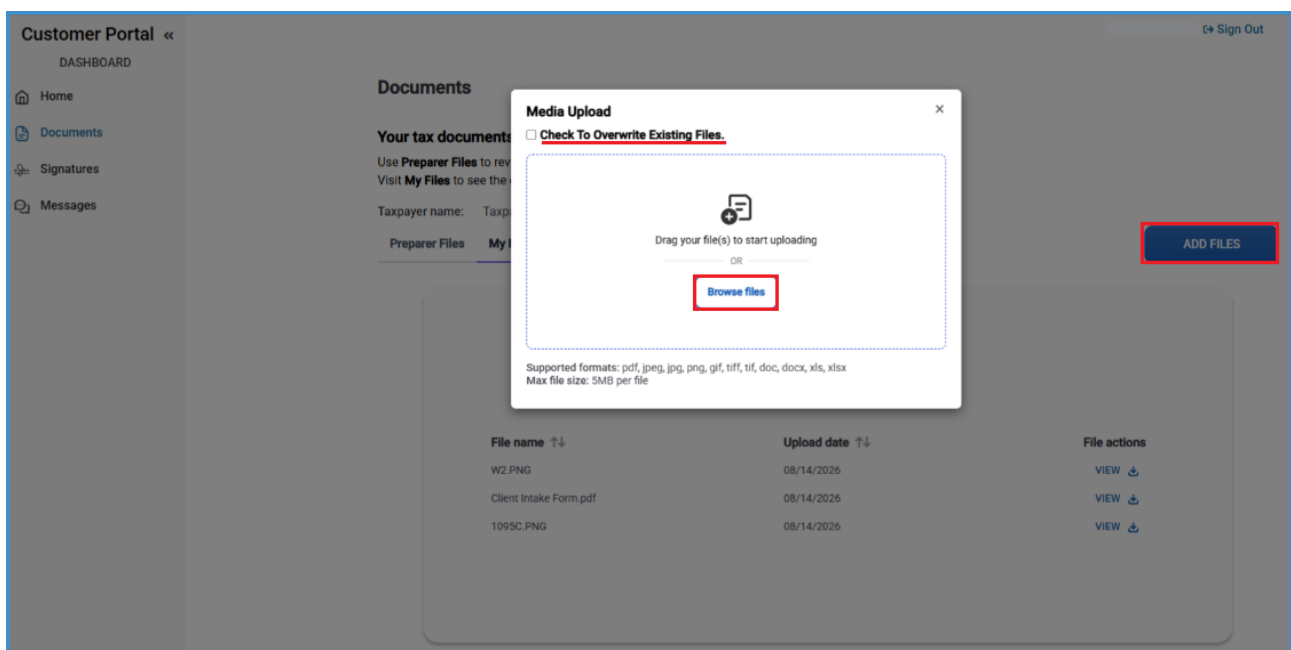
Sharing documents with the preparer is simple and convenient. Users can securely send documents directly from the Dashboard or the Documents section, helping to keep the process organized and efficient.



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 or click on the file and select Upload.

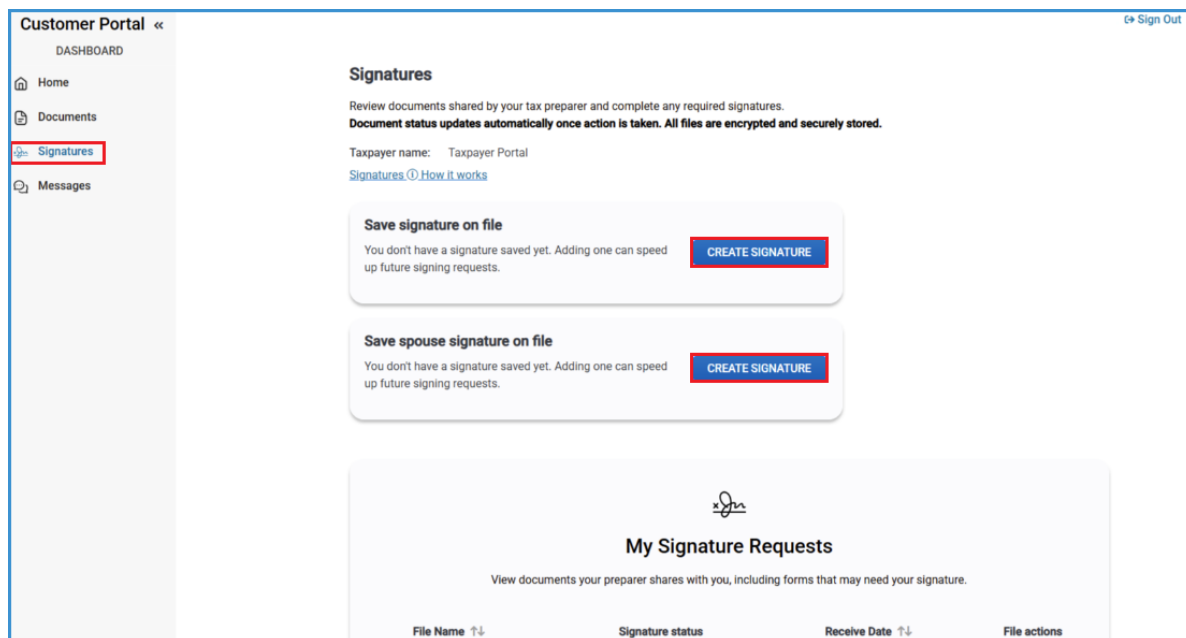
If a file is being added to replace a previously uploaded file, the taxpayer will need to check the box in the upper left corner.



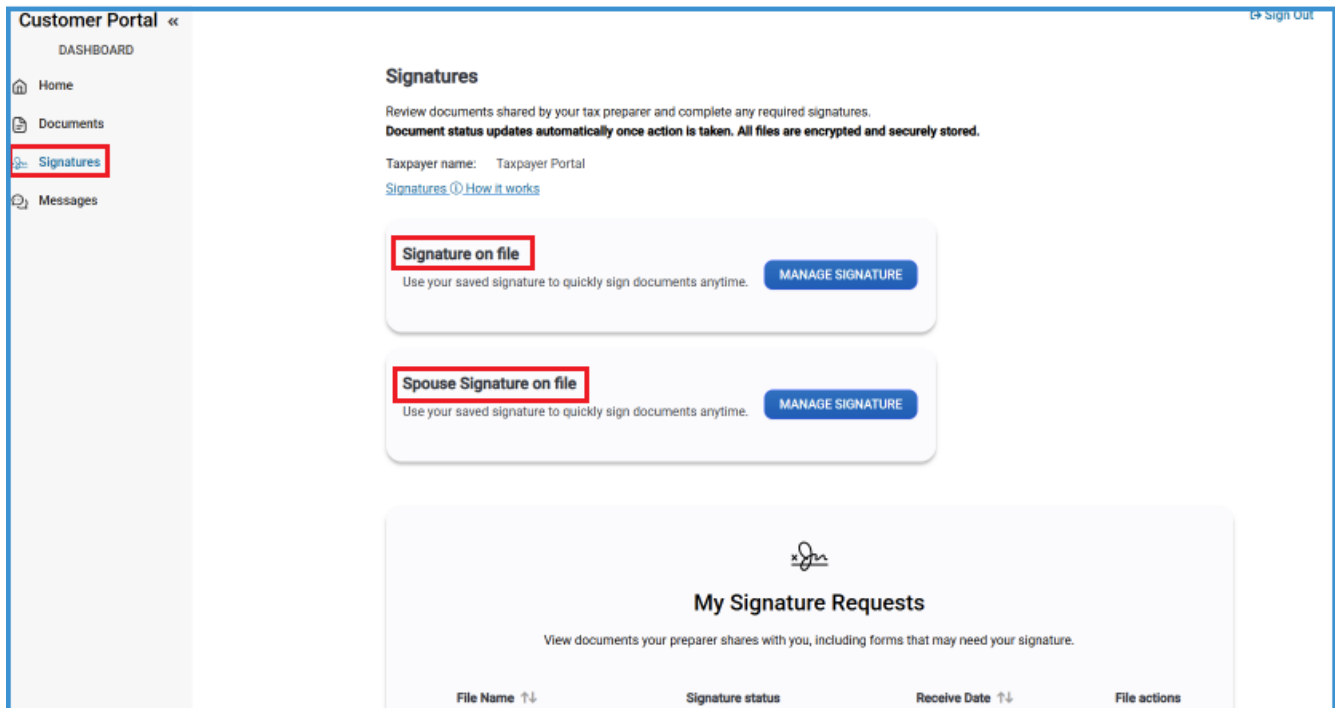
How does the taxpayer add their signature?

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

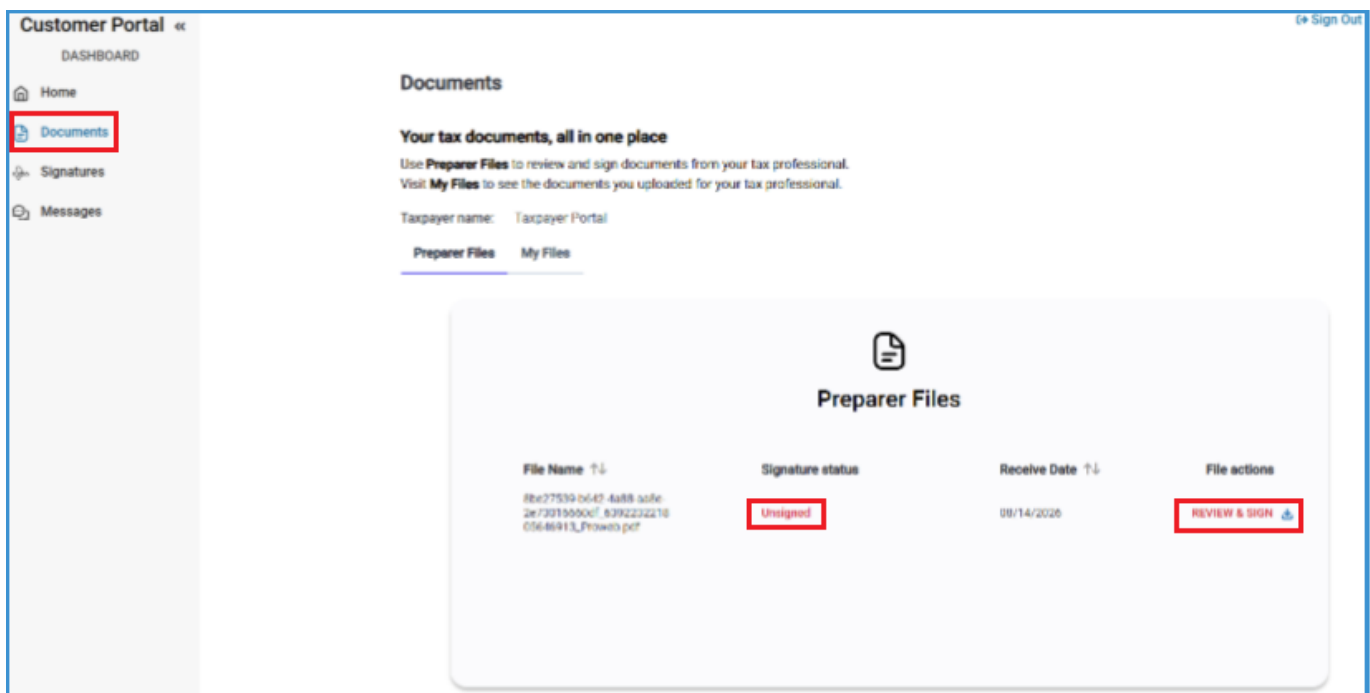
The taxpayer, and spouse if a married filing joint return, will need to add their signatures before they can be applied to the documents. To do this the Taxpayer will select **Signatures** and then **CREATE SIGNATURE**. The taxpayer can use their mouse to enter their electronic signature from a desktop or laptop computer or use their finger to enter their electronic signature from a mobile device. If married filing jointly then the steps can be repeated for the spouse signature.



When the signatures are 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:

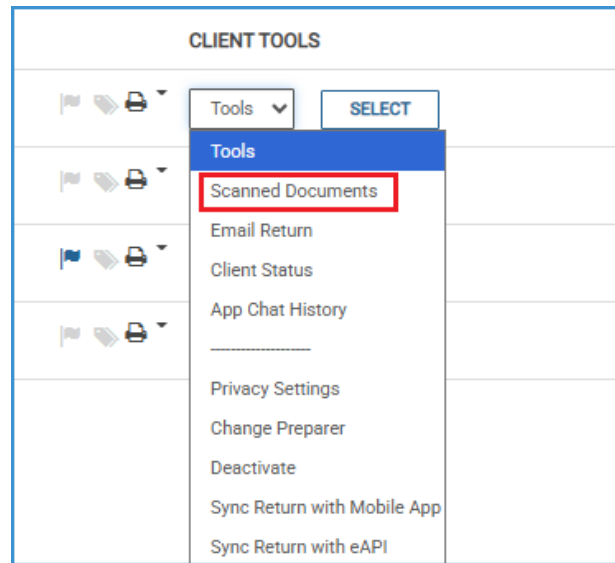


How does the preparer view documents sent by the taxpayer?

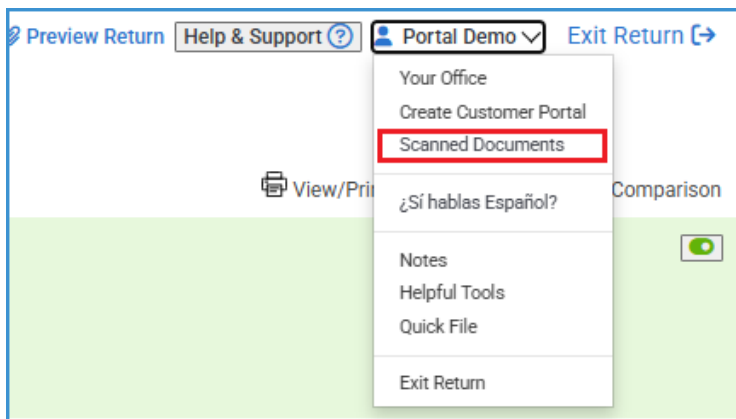
Scanned documents and documents sent by the taxpayer through the Customer Portal can be accessed in the ProWeb program from the main client list or from within a tax return.

To access previously scanned documents, or upload new scanned documents from the main client list, locate a taxpayer in the list and select:

- Tools
- Scanned Documents



Or from the main menu of the tax return select the dropdown menu next to the taxpayer's name at the top of the screen:



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.

