



Customer Portal

Desktop Edition

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:



Email Sent	E-File	Return Type	Primary E-mail	Seconda	First Name	Last Name	Phone	Address	City	State	Zip Code
Not Sen				1065	12312			110123	EVANS	GA	30809
Not Sen	Email Check		THISISATEST@ABC.COM	1065		THIS IS A TEST	706888	123 MA	EVANS	GA	30809
Not Sen	Direct Deposit		TECHSUPPORT@YAHOO.COM	ALISA		Support	706555	11 S BR	EVANS	GA	308090
Not Sen				AMY		Support	607379	2201 E/	Evans	NM	30809
Not Sen	Direct Deposit		ANTROBUS48@GMAIL.COM	ANDREW		Support	618541	22200 C	EVANS	GA	308090
Not Sen			ANGELITAASupportA56@GMAIL.C	ANGELITA		Support	409599	1714 2C	Evans	TX	30809
Not Sen			ANGELITAASupportA56@GMAIL.C	ANGELITA		Support	409599	1714 2C	EVANS	GA	308090
Not Sen			saundersfinancial@yahoo.com	CAMERON		Support	770557	8114 W	Evans	GA	30809

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:

The screenshot shows the '2023 PAPER CUT' application window. On the left is a navigation menu with options: Tax Returns, Reports, E-Mail, Customer Portal (selected), View Documents, Manage Portals, Prior Year Clients, Current Year Clients, and Exit. The main area displays a table of clients with columns: Portal Status, SSN, Client Name, Spouse SSN, Phone, Email, and Preparer Code. A search bar at the top right is labeled 'Search tax returns:'. A 'Show All Clients' checkbox is present. The table contains three rows, each with a 'CREATE' button. The third row, for 'ANGELA SUPPORT', is highlighted.

Portal Status	SSN	Client Name	Spouse SSN	Phone	Email	Preparer Code
CREATE	111-00-1111	JOE & JANE DOE	112-00-1111	3252132912	JOEDOE@EMAIL.COM	1
RESEND PORTAL LINK	505-00-5151	TEST DISCLOSURE		2065151212	TEST@EMAIL.COM	1
CREATE	202-00-1787	ANGELA SUPPORT		6093062122	ANGELA@EMAIL.COM	1

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

A close-up of the 'CREATE' button for the client 'ANGELA SUPPORT' with SSN '202-00-1787', phone '6093062122', and email 'ANGELA@EMAIL.COM'. The preparer code is '1'.

The Program will display the send link menu:

A dialog box titled 'Send link to customer's:' with two radio button options: 'Phone: 6093062122' and 'Email: ANGELA@EMAIL.COM'. At the bottom are 'OK' and 'CANCEL' buttons.

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

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

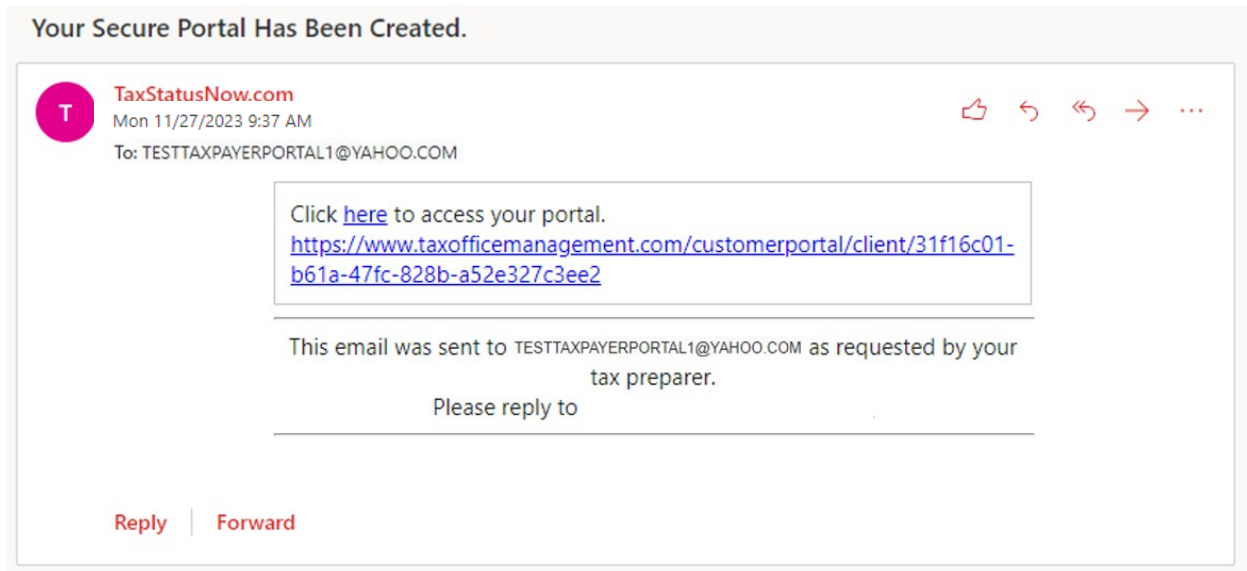
A message dialog box titled 'Portal created' with an 'OK' button at the bottom.

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:

A close-up of the 'RESEND PORTAL LINK' button for the client 'ANGELA SUPPORT' with SSN '202-00-1787', phone '6093062122', and email 'ANGELA@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:

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

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**.

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

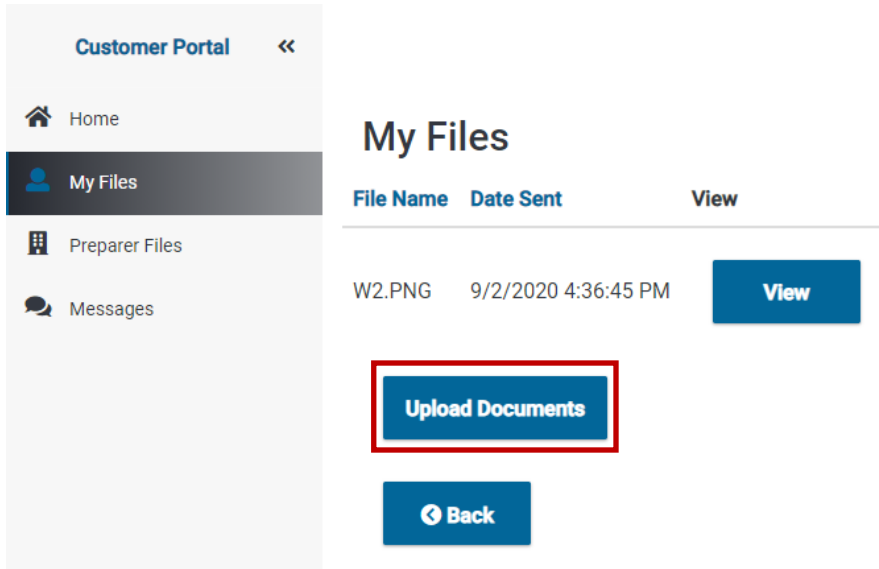
Cancel Verification

The taxpayer's portal is displayed on the screen:

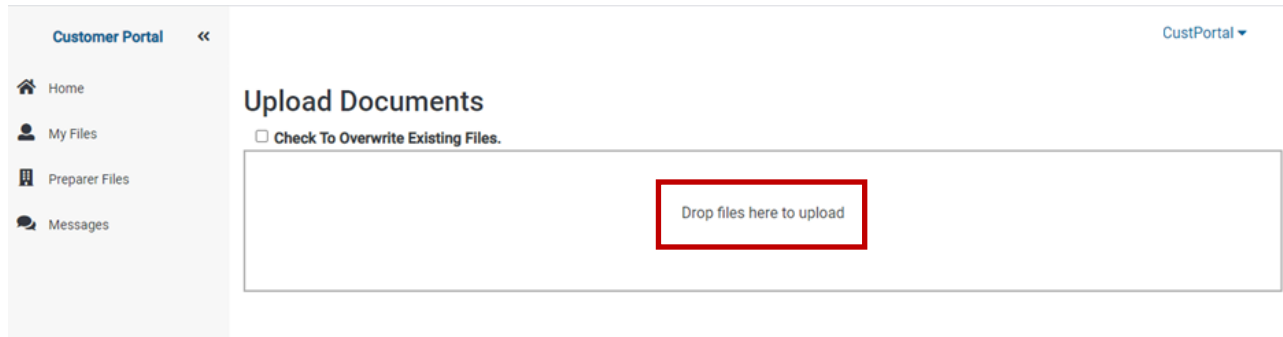
The screenshot displays the Customer Portal interface. On the left is a navigation sidebar with the following items: Home, My Files, Preparer Files, and Messages. The main content area is titled "Customer Portal" and includes a "CustPortal" dropdown menu. It features two primary sections: "My Files" and "Files From My Preparer". The "My Files" section shows "0 Files Uploaded" and a "View Files" button. The "Files From My Preparer" section shows "0 Files Sent" and a "View Files" button.

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**.

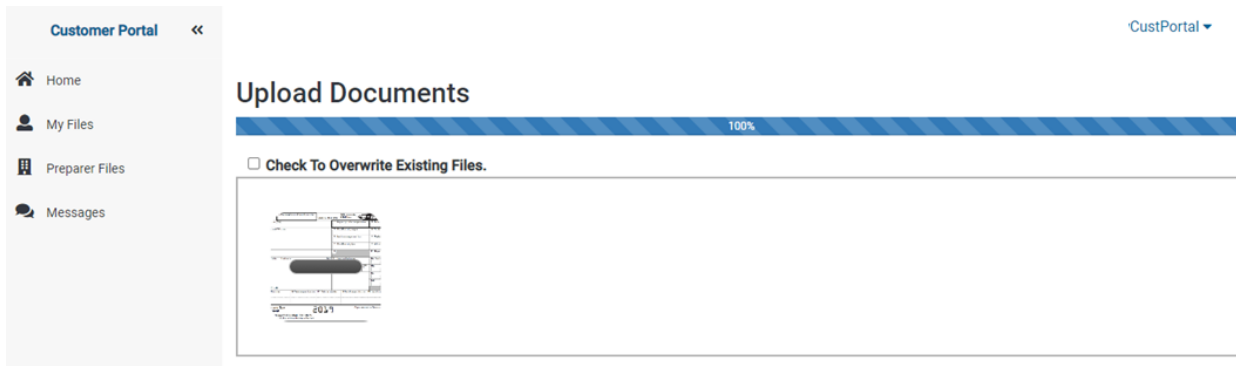


The **Upload Documents Window** is displayed on the screen:



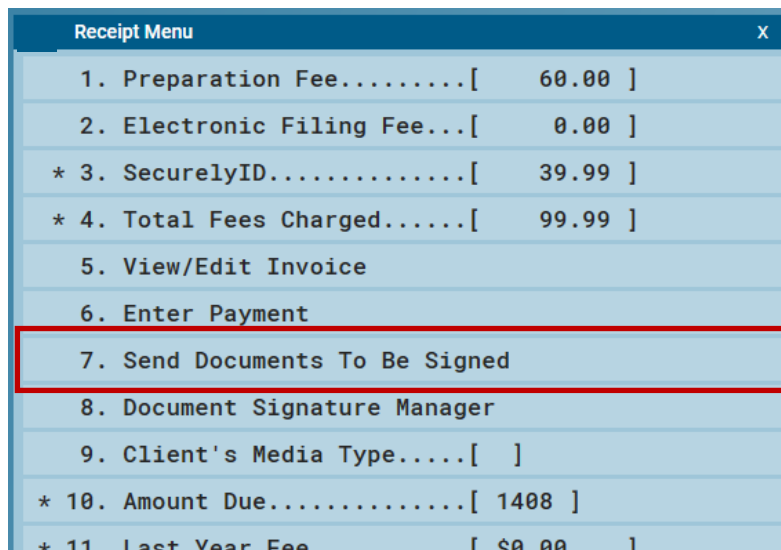
Click **Drop files here to upload** to browse and select documents to upload to the tax preparer. Navigate to the local copy of the document to upload and either drag and drop it into the file area in the portal or click on the file and select **Upload**.

The Upload Documents Window will display the uploaded file:

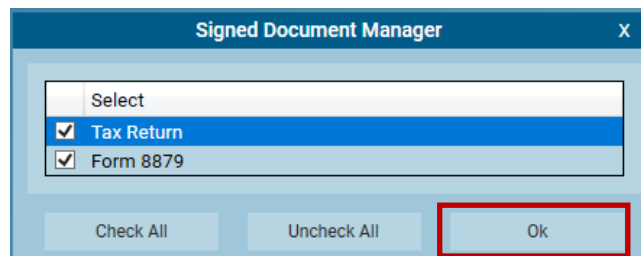


How Do I Send Documents to My Client to Sign?

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**:



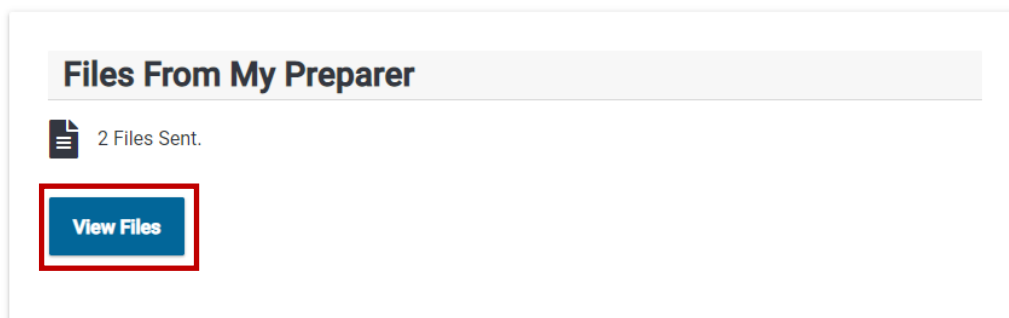
Click **Send Documents to be Signed**. The program displays the **Signed Document Manager**:



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:

Customer Portal << custportal ▾

Home
My Files
Preparer Files
Messages

Files From My Preparer

Taxpayer: Click To Add Signature

File Name	Date Sent	View
31f16c01-b61a-47fc-828b-a52e327c3ee2_TaxReturn_637347186247640635.pdf	Mon 11/27/2023 9:37 AM	View
31f16c01-b61a-47fc-828b-a52e327c3ee2_Form 8879_FD8879_1_63734718628160223	Mon 11/27/2023 9:37 AM	View

Back

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:

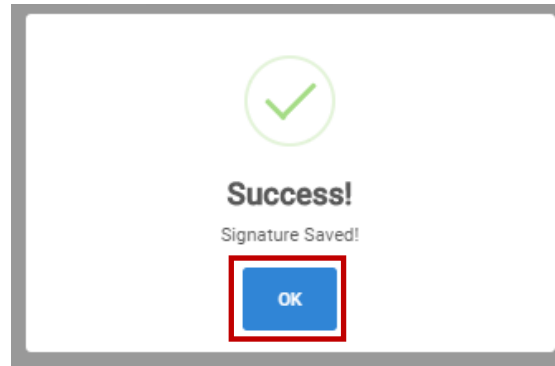
Customer Portal << custportal ▾

Edit Taxpayer Signature

Sign

Back Clear Save

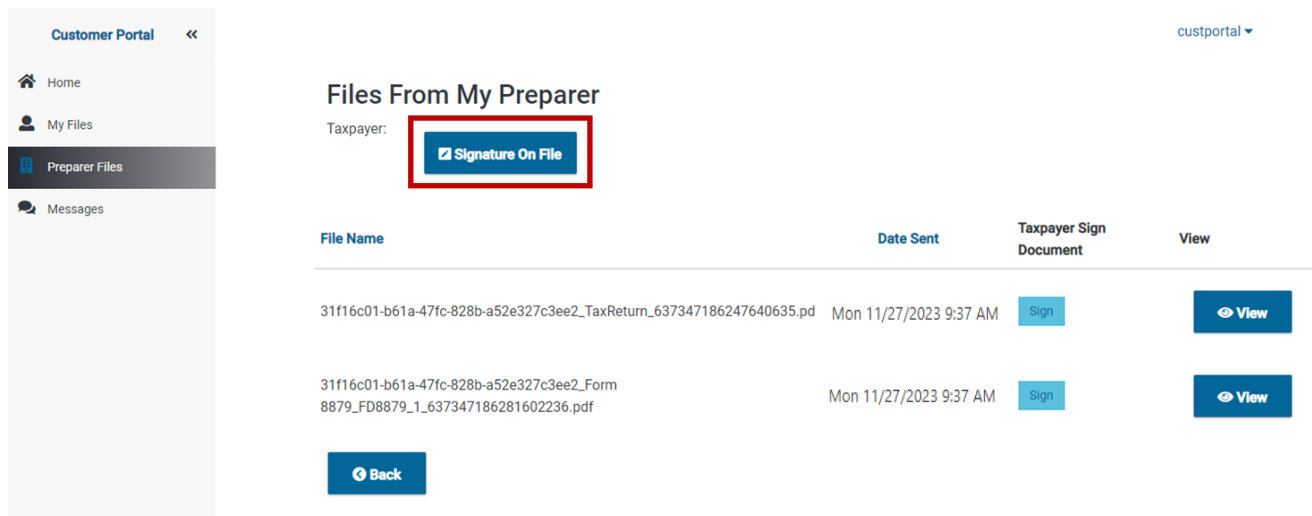
A message is displayed when the signature has successfully saved.



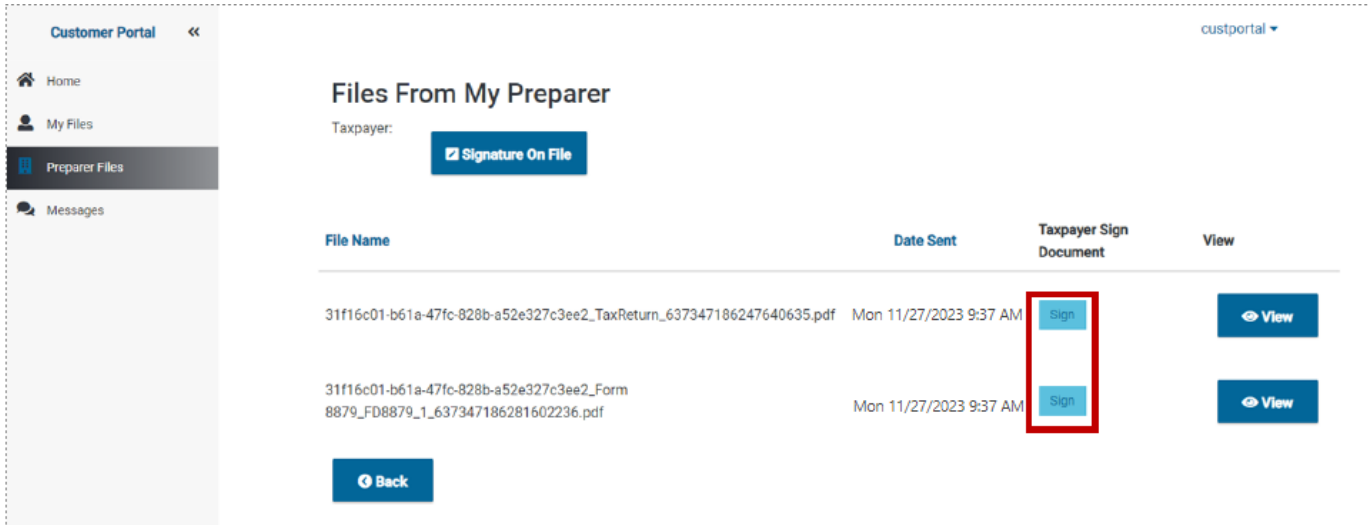
To apply their signature to the documents sent from their preparer, the taxpayer will click on the **Back** button:



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**:

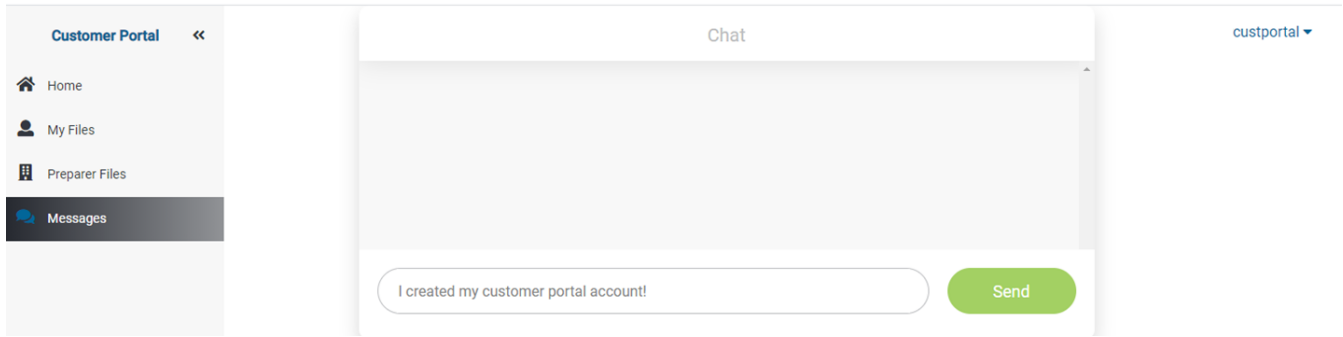
Date Sent	Taxpayer Sign Document	View
Mon 11/27/2023 9:37 AM	Signed!	View
Mon 11/27/2023 9:37 AM	Sign	View

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:

