Customer Portal

- You can now send and receive documents, including signature pages, to you're your clients using the **Customer Portal**.

- The customer portal allows taxpayers to **sign their tax return** documents without 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

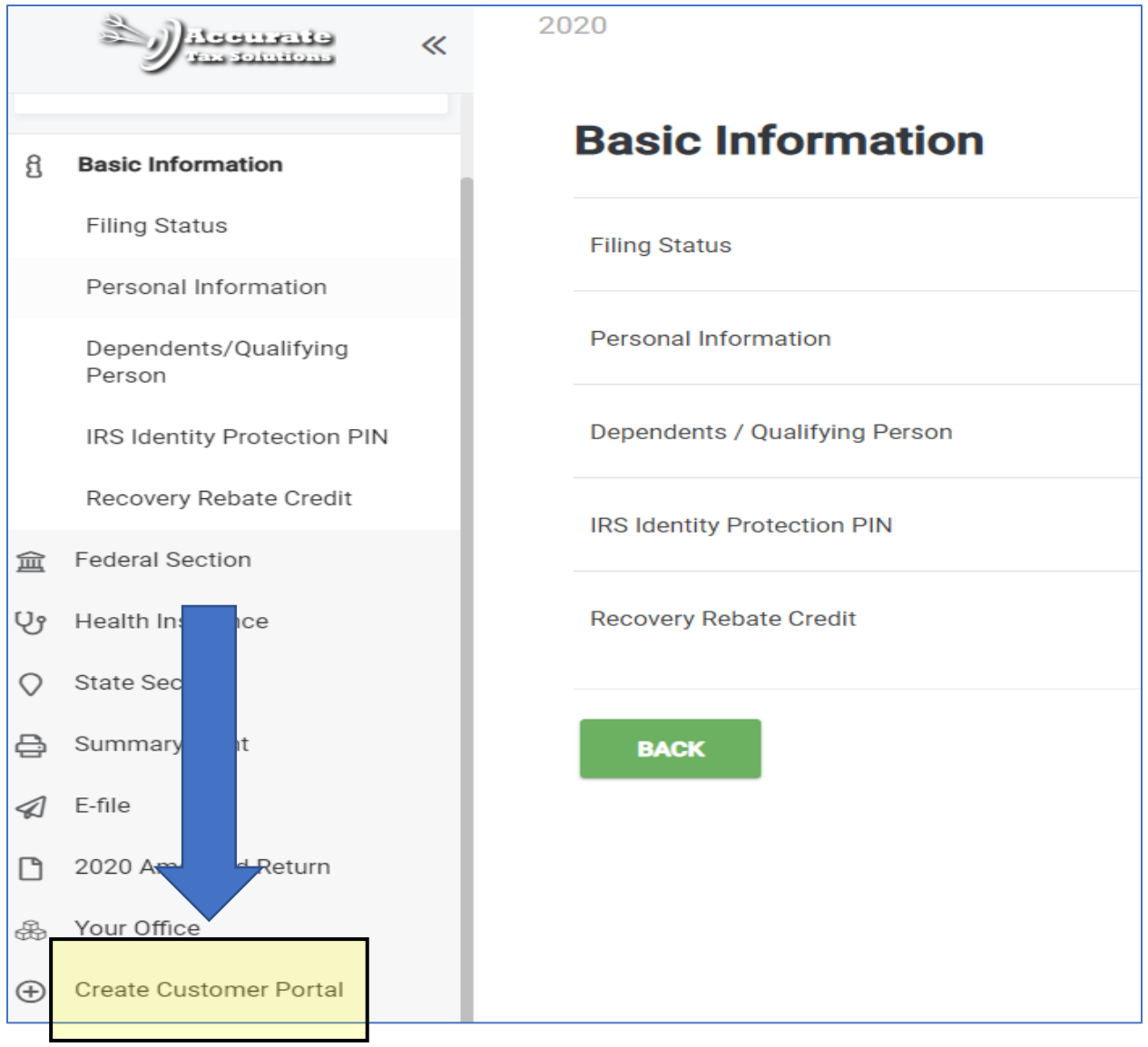
- To create a customer portal for a client, **you must first create their tax return in the tax software**.

- The taxpayer's **correct** SSN, cell phone number and email address must be entered in the return.

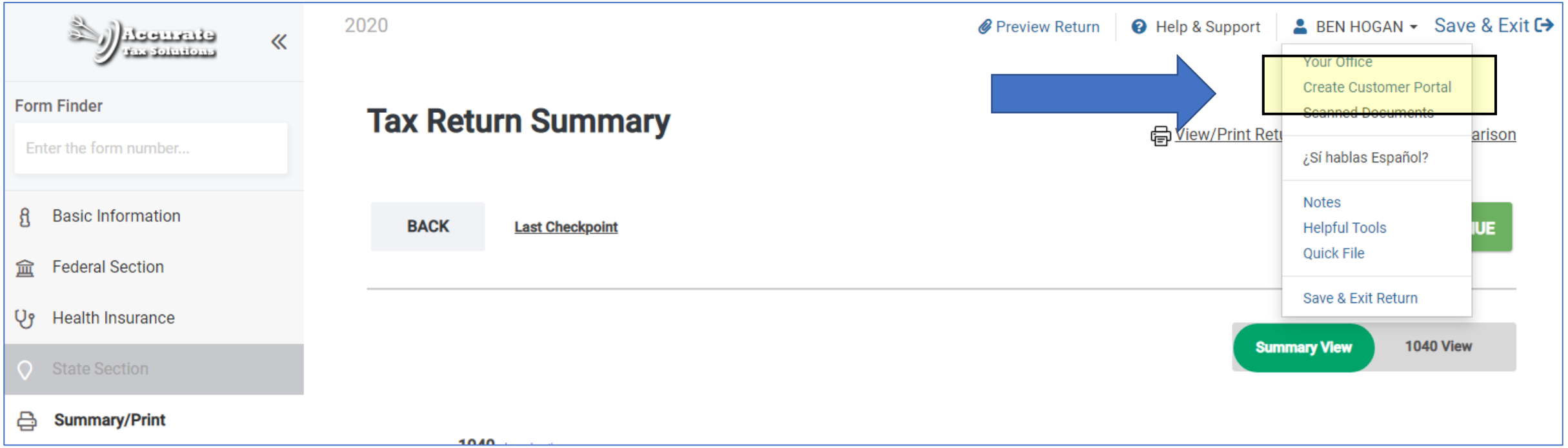
- There are **3 places** to send the invitation for your customer to create a Customer Portal.

Store Actions –
How to send Portal Link

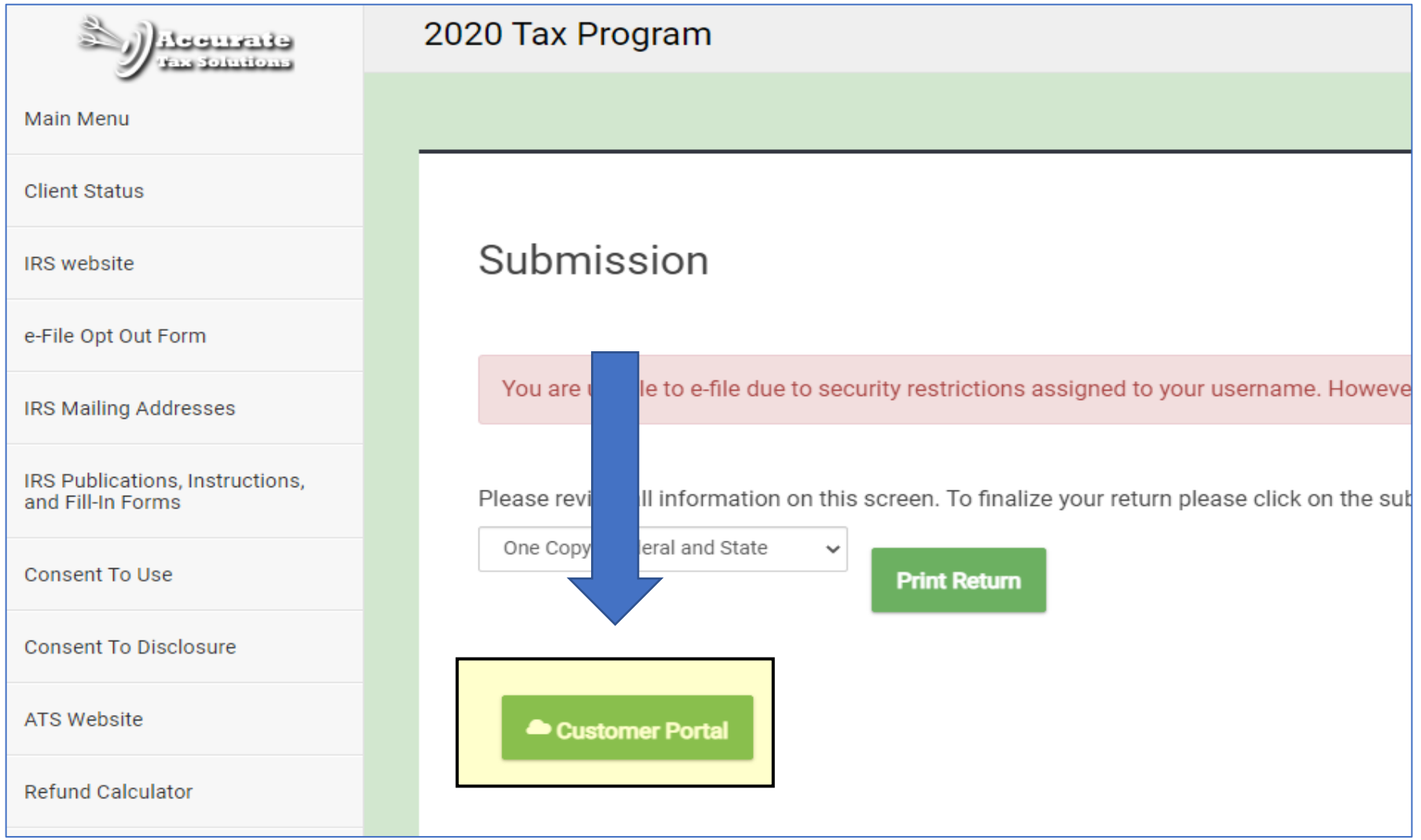
1. From inside the return, you will see the option Create Customer Portal



2. Also inside the return you can click the dropdown under the taxpayer's name

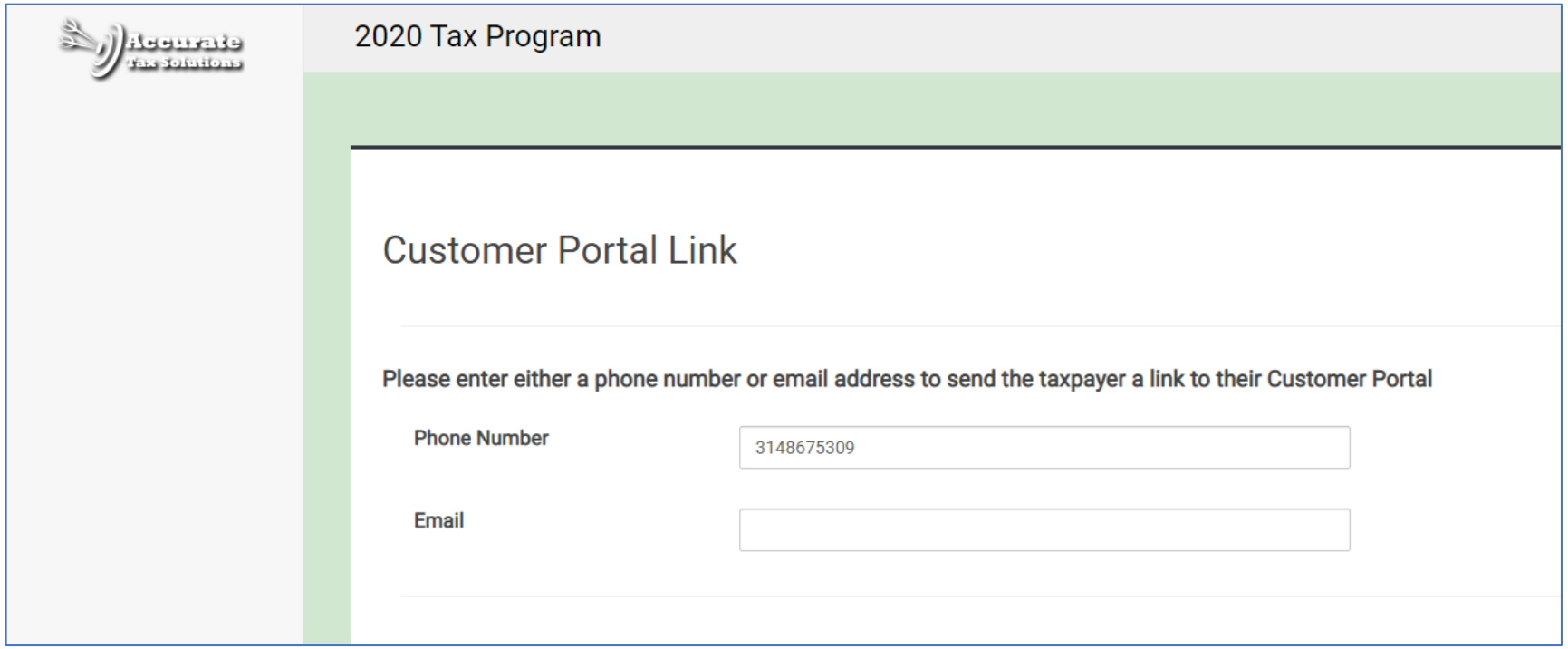


3. The last place is on the Submission screen

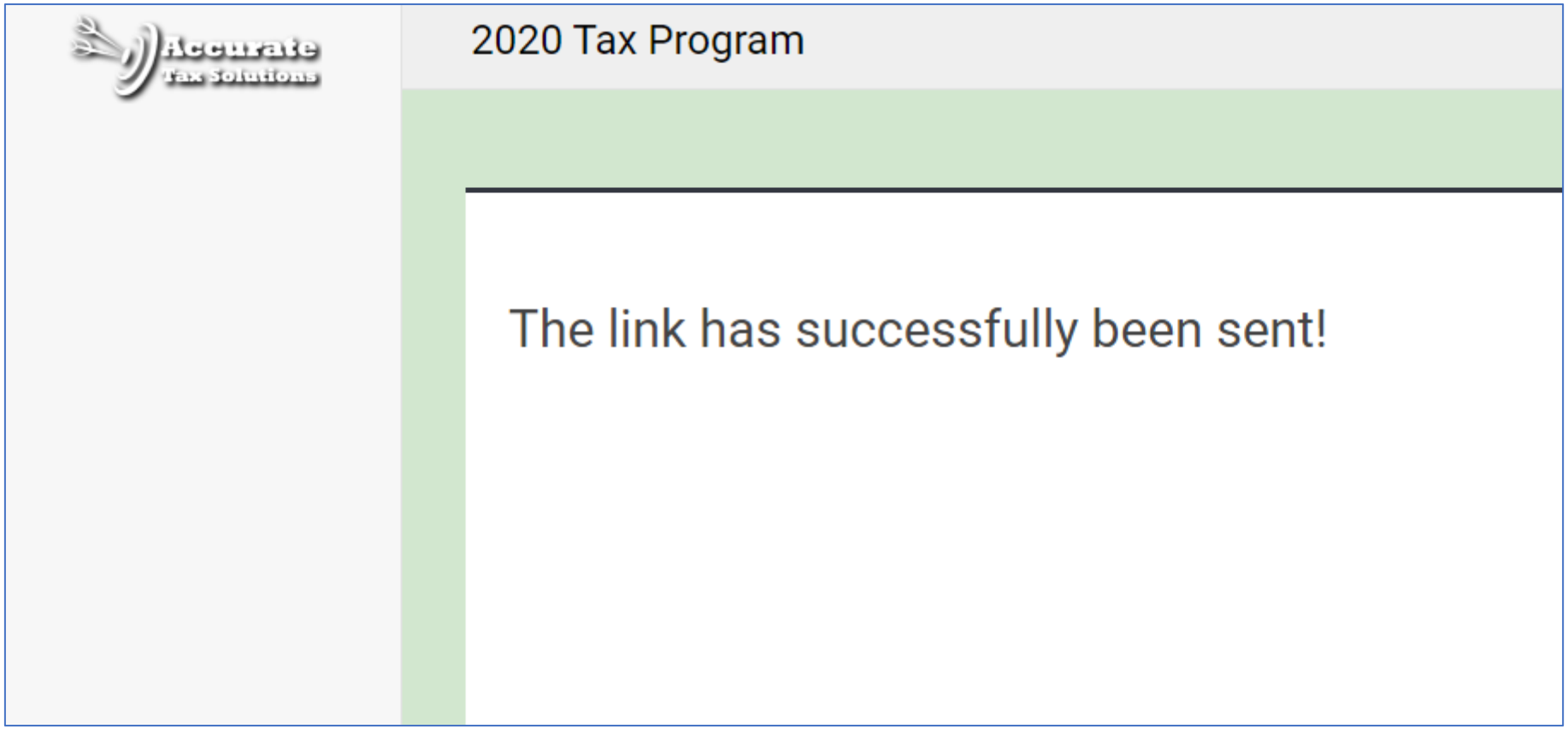


After you click on the **Customer Portal** button, regardless of where you do so, you will be taken to this page:

You will enter either the taxpayer's Phone Number or E-Mail Address to send them the link for the Customer Portal.

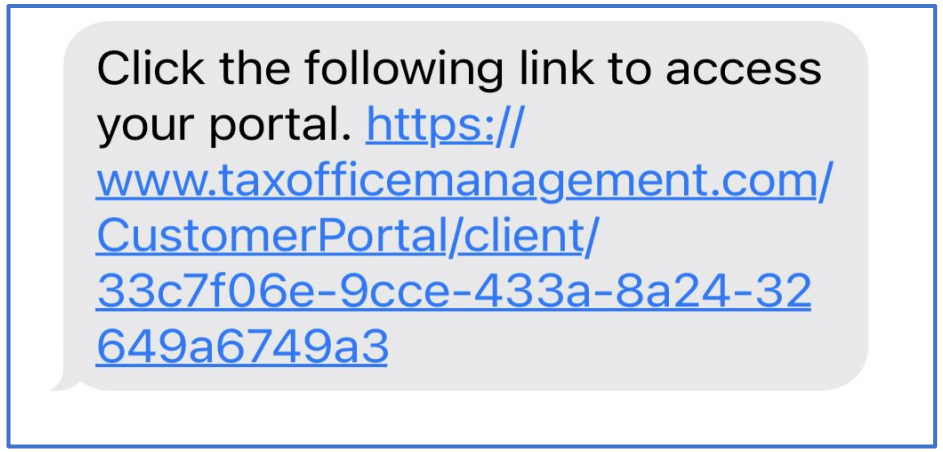


*** You will see this message when the customer portal link is successfully sent ***



Customer Actions – How to set up account

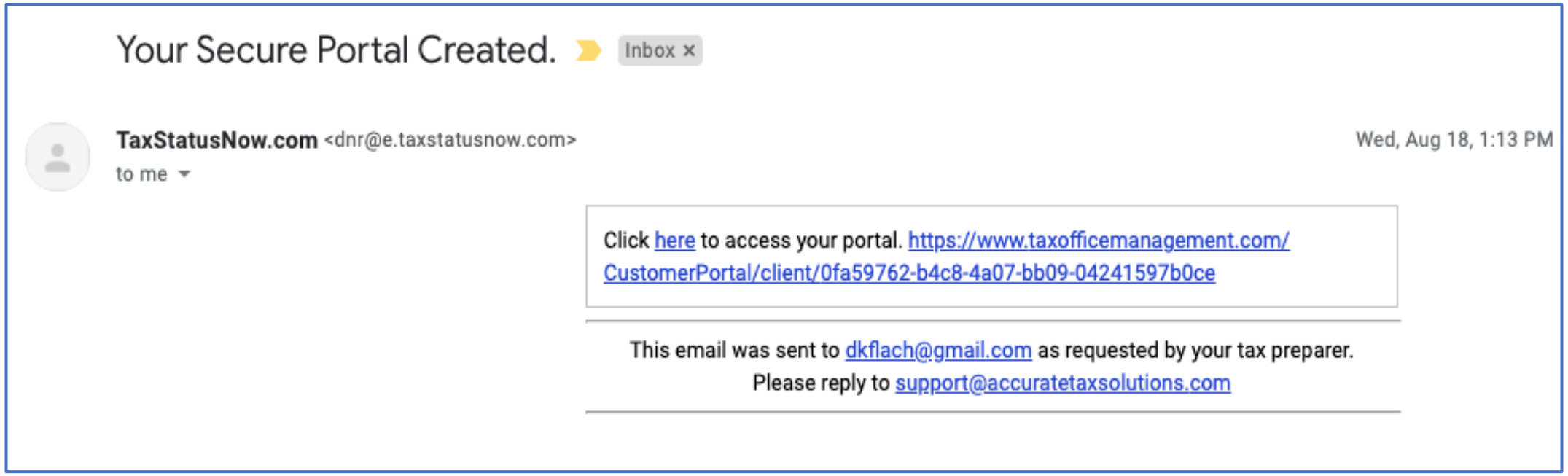
Text link example



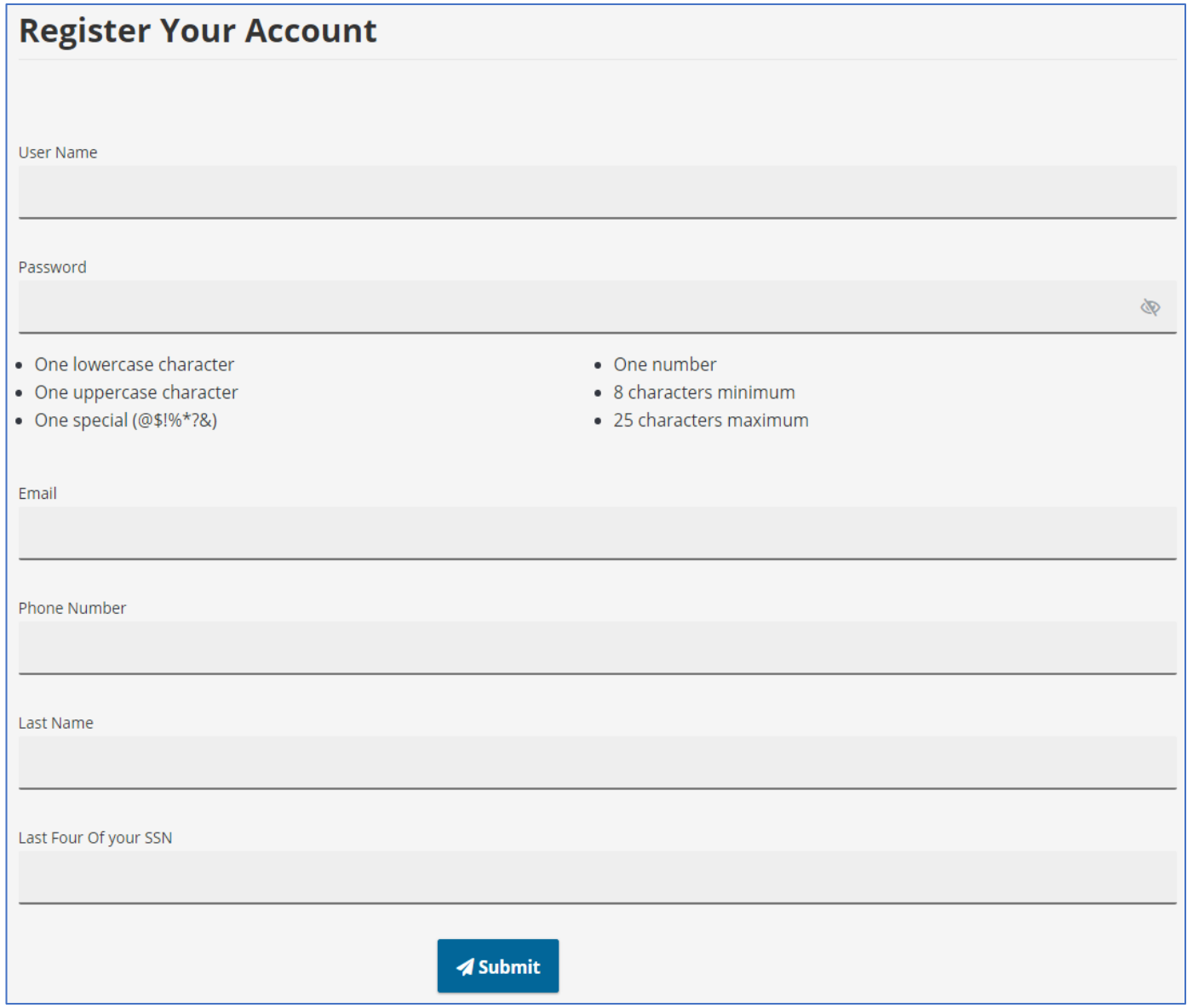
1. The customer will receive a text or e-mail with a link to access their customer portal

2. They will click the link

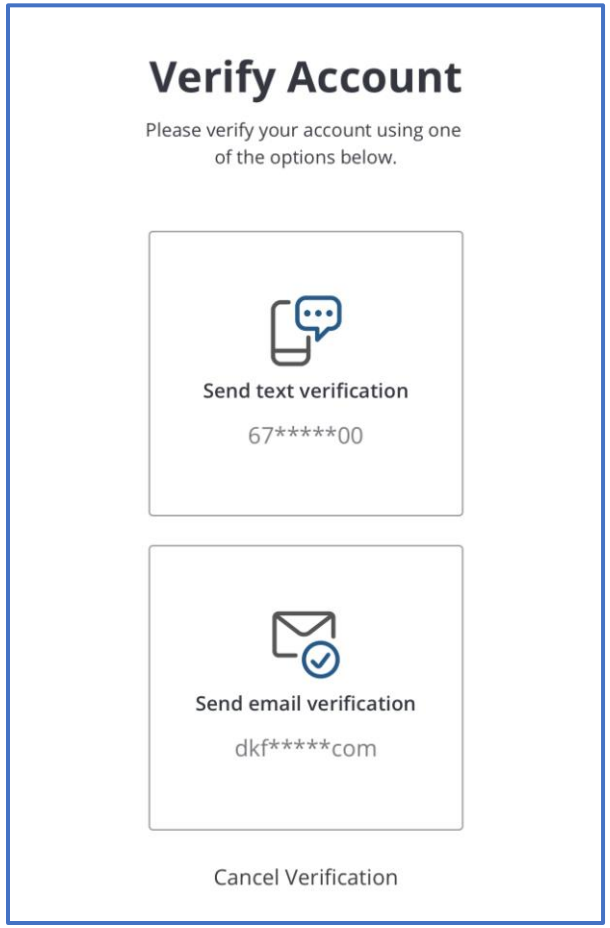
E-Mail link example

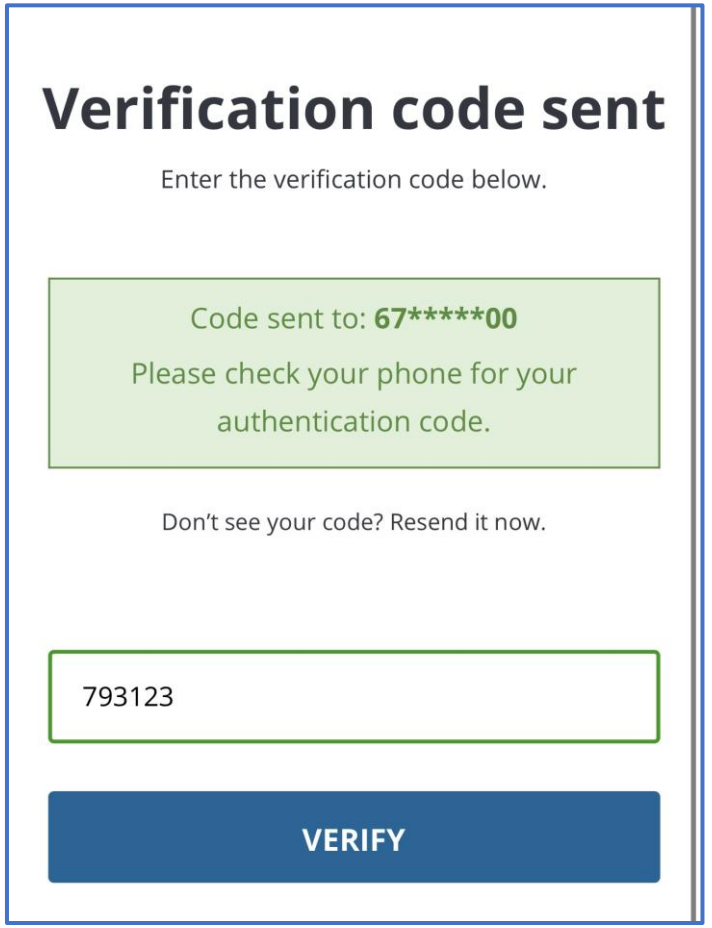


3. Customer will need to register their account and click Submit



3. The customer will need a verification code
4. They can choose to receive the code by text or e-mail
5. They will then enter the code and click VERIFY



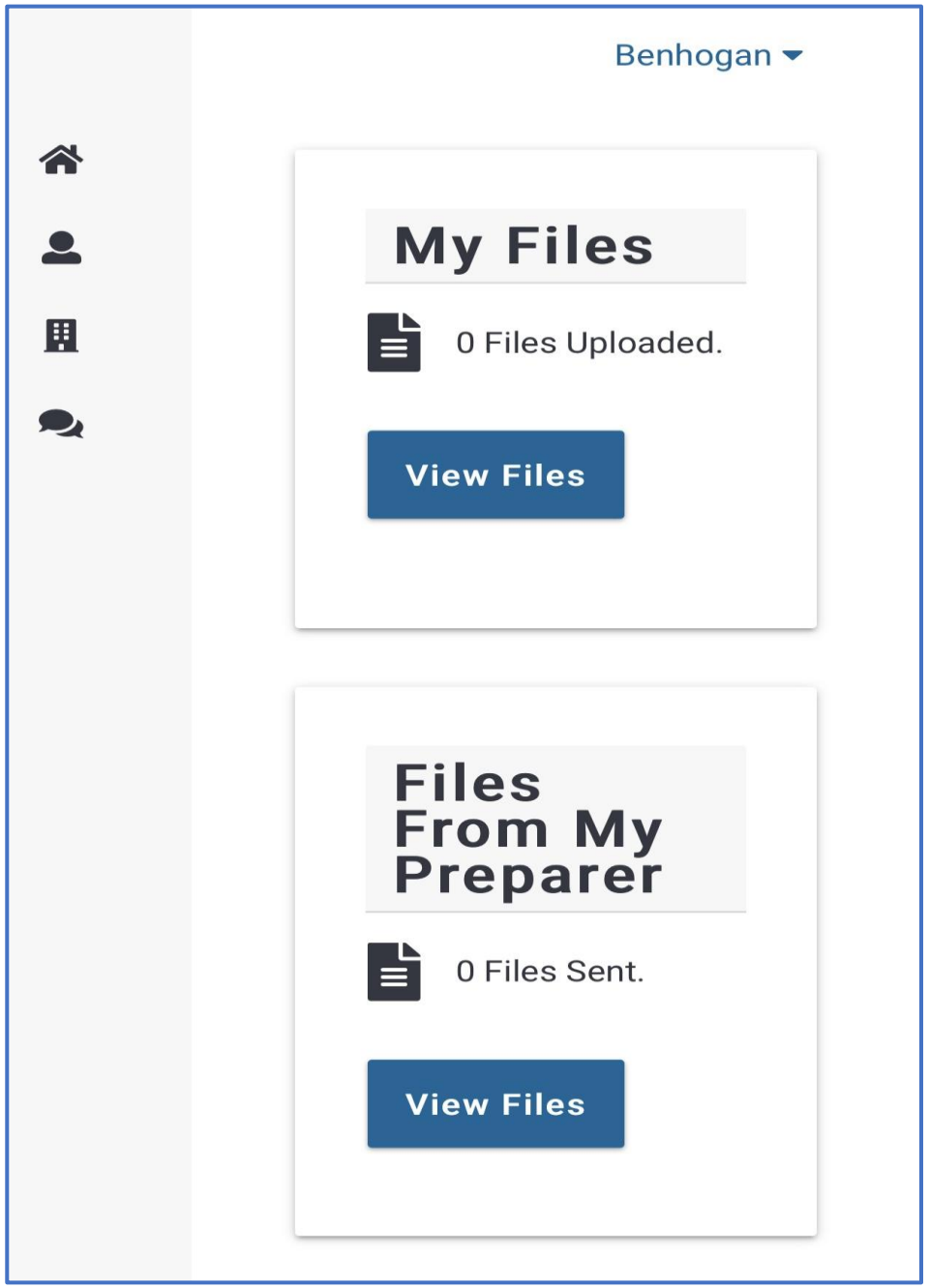


Once logged in the customer can:

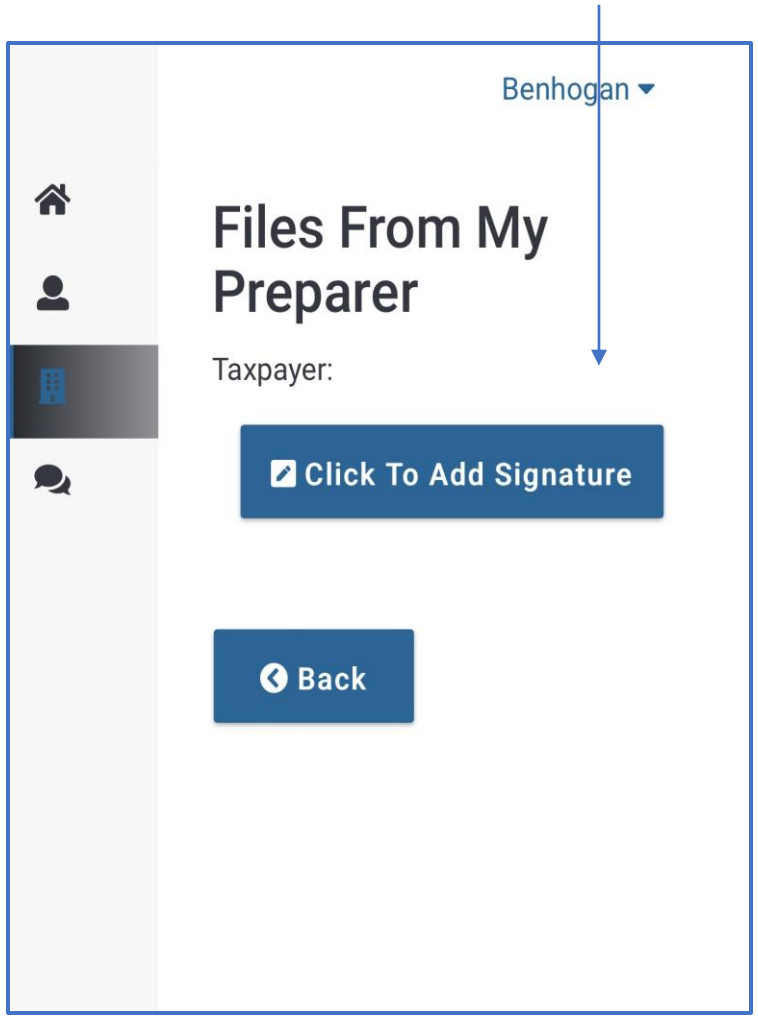
- Receive files from the store

- Upload files to the store

- Save their signature to be applied to documents



1. Click to Add Signature



2. On a computer use your mouse or on a smart phone use your finger to sign inside the box