

# Customer Portal

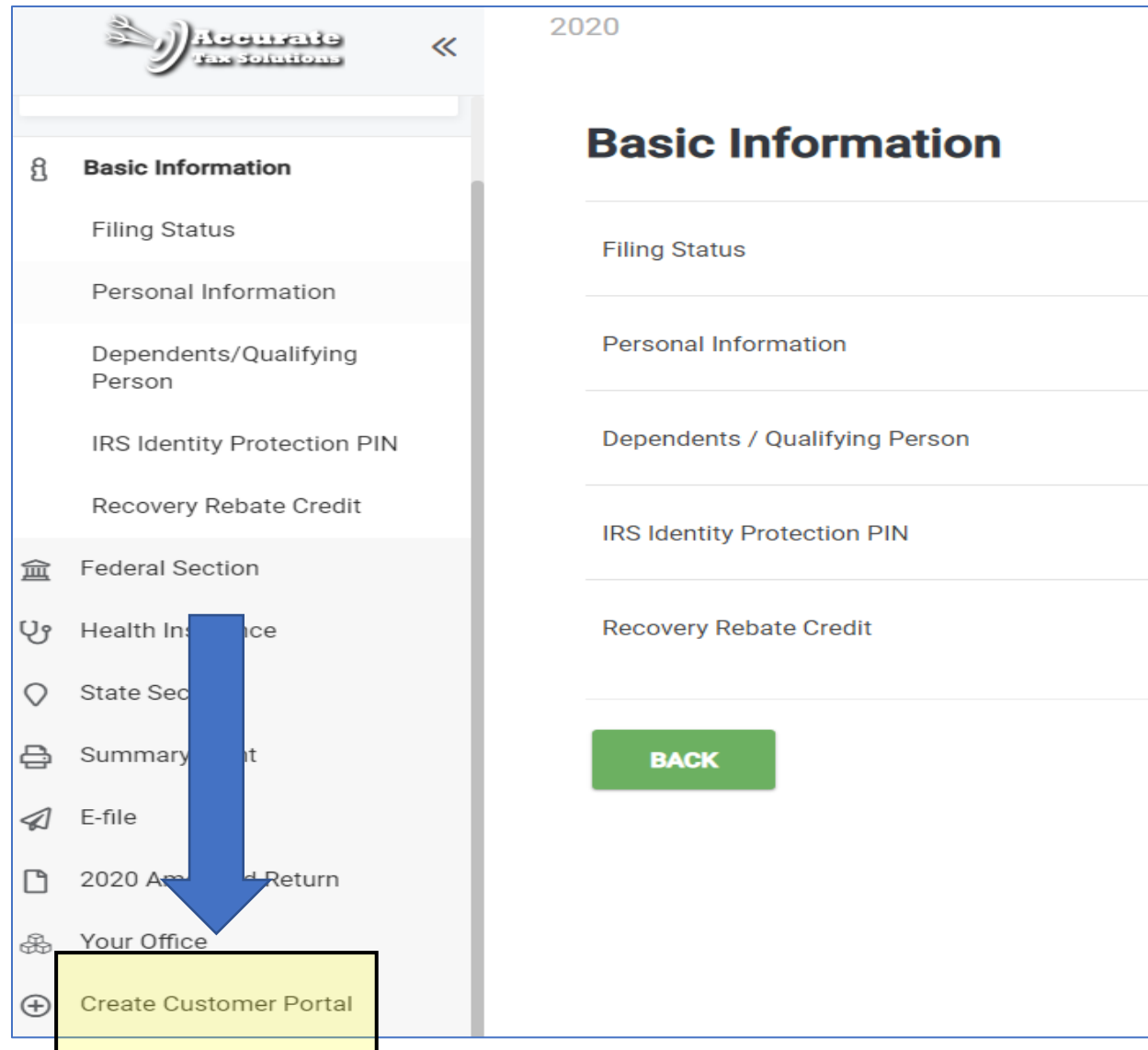
- You can now send and receive documents, including signature pages, to you're your clients using the **Customer Portal**.
- The customer portal allows taxpayers to **sign their tax return** documents without stepping foot in your office.
- **Prepare** the client's tax return, **create** the client's 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

2020

Preview Return | Help & Support | BEN HOGAN ▾ Save & Exit ↔

Accurate Tax Solutions

Form Finder

Enter the form number...

Basic Information

Federal Section

Health Insurance

State Section

Summary/Print

### Tax Return Summary

BACK | Last Checkpoint

View/Print Return

¿Sí hablas Español?

Notes

Helpful Tools

Quick File

Save & Exit Return

Summary View | 1040 View

### 3. The last place is on the Submission screen

**Accurate Tax Solutions**

2020 Tax Program

Main Menu

Client Status

IRS website

e-File Opt Out Form

IRS Mailing Addresses

IRS Publications, Instructions, and Fill-In Forms

Consent To Use

Consent To Disclosure

ATS Website

Refund Calculator

## Submission

You are unable to e-file due to security restrictions assigned to your username. However...

Please review all information on this screen. To finalize your return please click on the submit button.

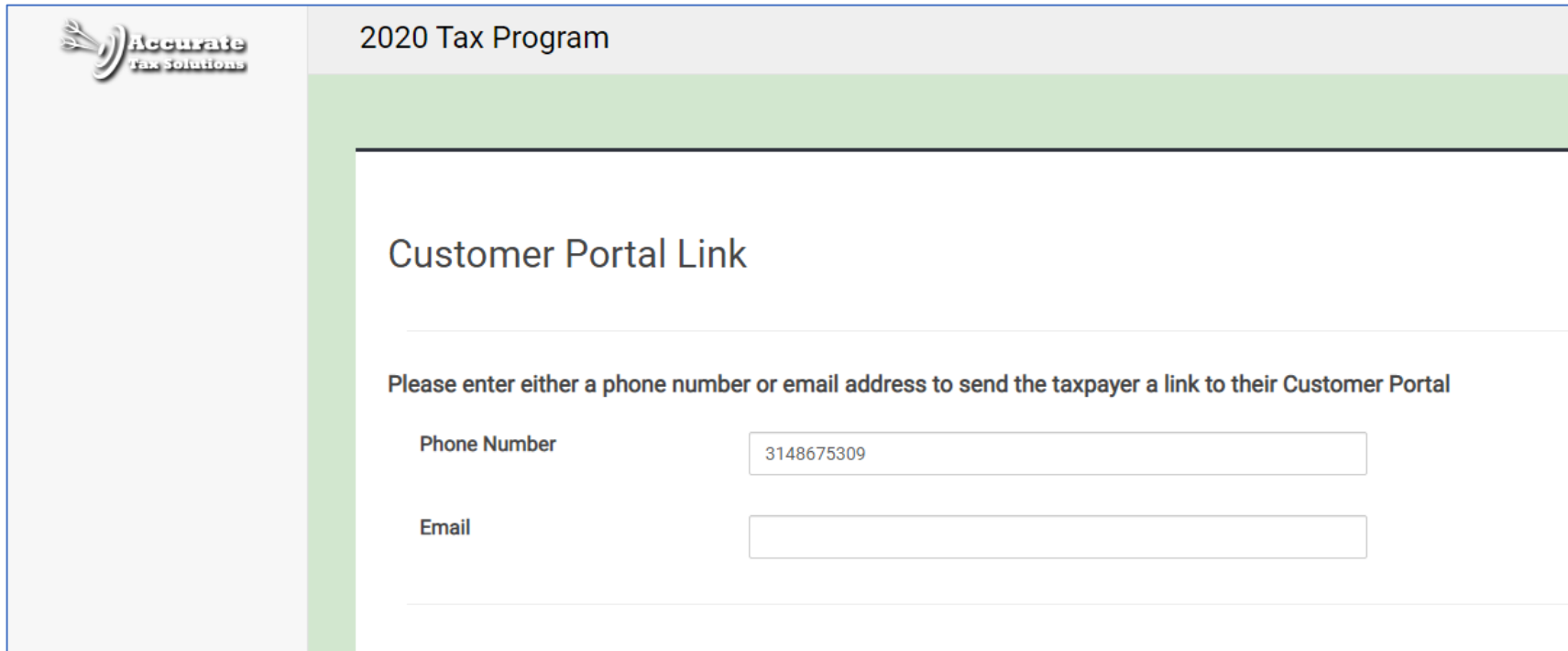
One Copy Federal and State

**Print Return**

**Customer Portal**

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

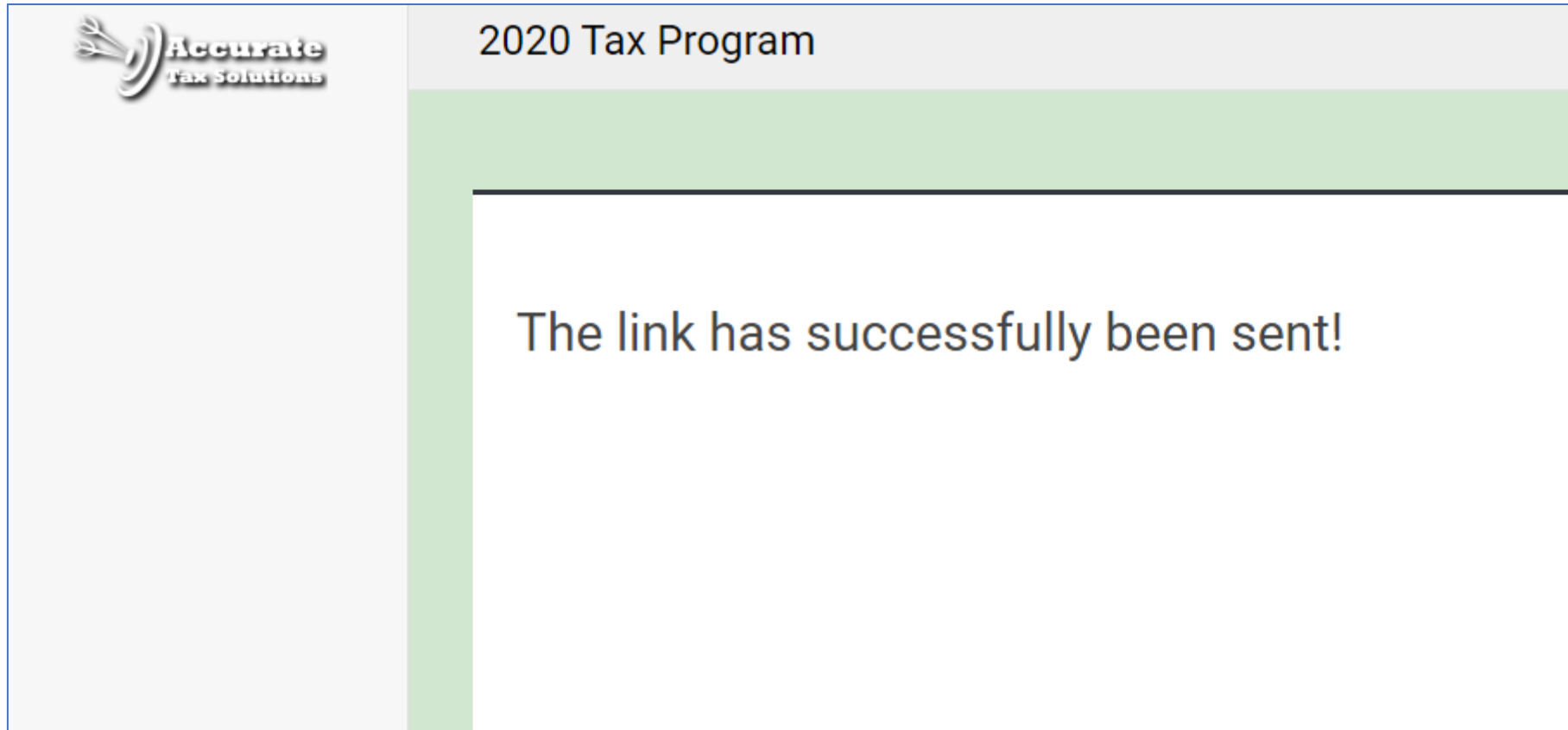
You will enter either the taxpayer's Phone Number or E-Mail Address to send them the link for the Customer Portal.



The screenshot shows a web interface for the 2020 Tax Program. On the left is the Accurate Tax Solutions logo. The main content area is titled "2020 Tax Program" and "Customer Portal Link". Below the title is a horizontal line, followed by the instruction: "Please enter either a phone number or email address to send the taxpayer a link to their Customer Portal". There are two input fields: "Phone Number" with the value "3148675309" and "Email" which is empty.

2020 Tax Program	
Customer Portal Link	
Please enter either a phone number or email address to send the taxpayer a link to their Customer Portal	
Phone Number	<input type="text" value="3148675309"/>
Email	<input type="text"/>

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





# **Customer Actions – How to set up account**

## Text link example

Click the following link to access your portal. <https://www.taxofficemanagement.com/CustomerPortal/client/33c7f06e-9cce-433a-8a24-32649a6749a3>

**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

Your Secure Portal Created.  Inbox x



**TaxStatusNow.com** <dnr@e.taxstatusnow.com>  
to me ▾

Wed, Aug 18, 1:13 PM

Click [here](#) to access your portal. <https://www.taxofficemanagement.com/CustomerPortal/client/0fa59762-b4c8-4a07-bb09-04241597b0ce>

This email was sent to [dkflach@gmail.com](mailto:dkflach@gmail.com) as requested by your tax preparer.  
Please reply to [support@accuratetaxsolutions.com](mailto:support@accuratetaxsolutions.com)

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

## Register Your Account

User Name

Password

- One lowercase character
- One uppercase character
- One special (@\$!\*?&)
- One number
- 8 characters minimum
- 25 characters maximum

Email

Phone Number

Last Name


Last Four Of your SSN

 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

### Verify Account

Please verify your account using one of the options below.



Send text verification  
67\*\*\*\*\*00



Send email verification  
dkf\*\*\*\*\*com

Cancel Verification

### Verification code sent

Enter the verification code below.

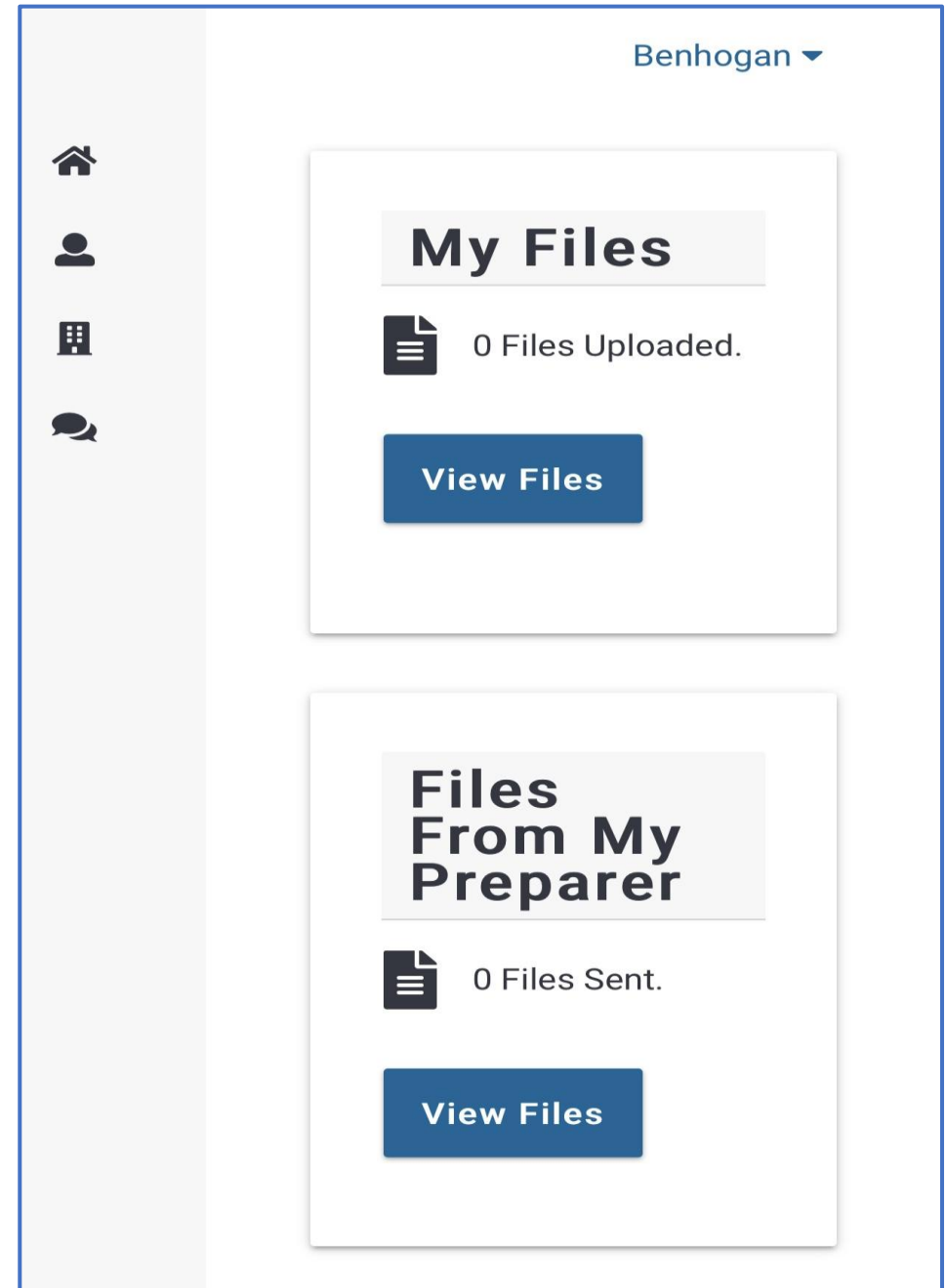
Code sent to: 67\*\*\*\*\*00  
Please check your phone for your authentication code.

Don't see your code? Resend it now.

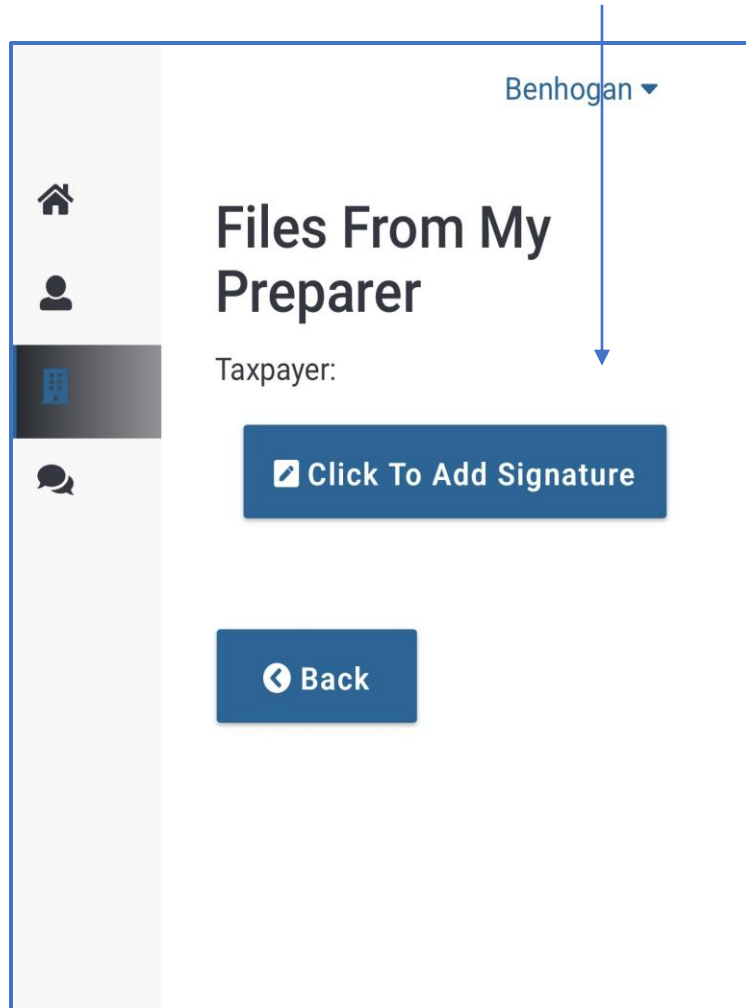
**VERIFY**

**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

