

Tax Portal

- You can now send/receive documents and collect signatures using the **Tax Portal**.
- The customer can now get their tax return prepared without having to go to an office.

1. **Start** the tax return
2. **Create** the customer portal
3. **Receive/Send** Documents
4. **Collect** signature

Creating a Tax Portal

- To create a customer portal, **you must first start their tax return in the tax software.**
- You only need to complete the taxpayer information screen including:
Taxpayer name, SSN, phone, and email.
- There are **multiple places** to send the portal invitation to the customer.

STORE



Store actions

Store sends portal invite from
Personal Information screen
or dropdown under taxpayer's name

Customer Portal Invite

WESLEY MARCS

SSN: xxx-xx-0010
DoB: Apr 27, 1993

Invite to Customer Portal

Email

Enter an email address

SEND INVITE

Last sent: Never

Preview Return Help & Support ? WESLEY MARCS Save & Exit ↗

- Your Office
- Create Customer Portal
- Scanned Documents
- Notes
- Helpful Tools
- Quick File
- Save & Exit Return

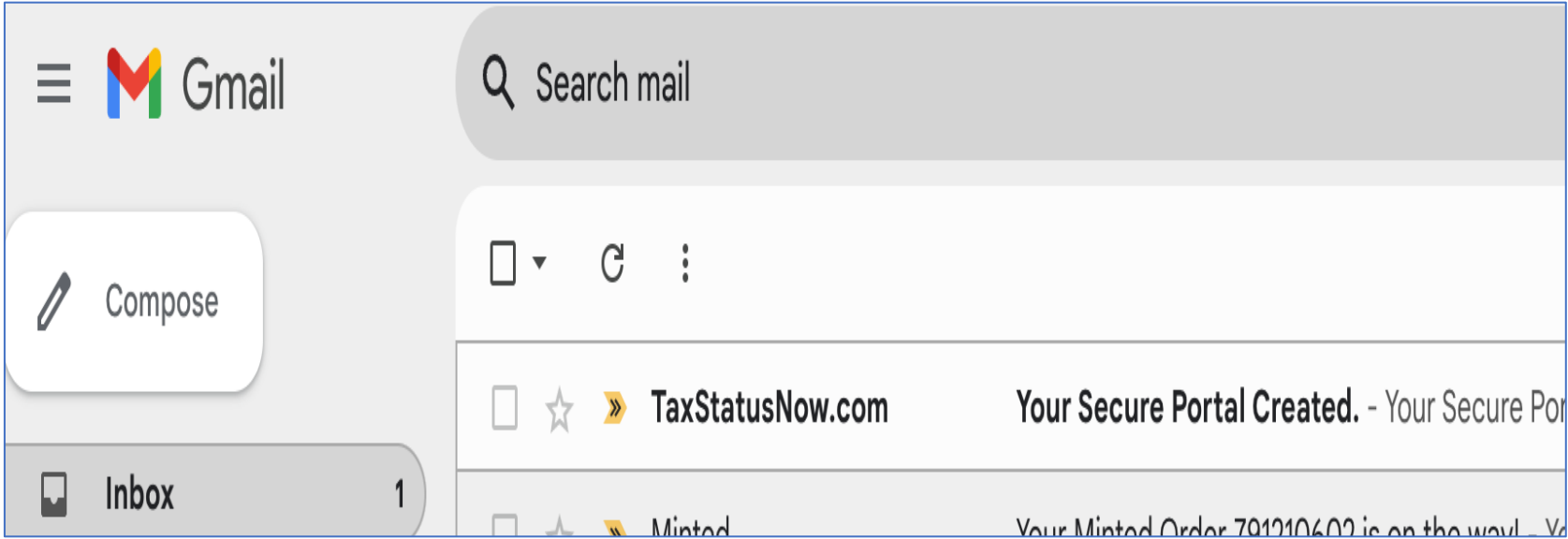
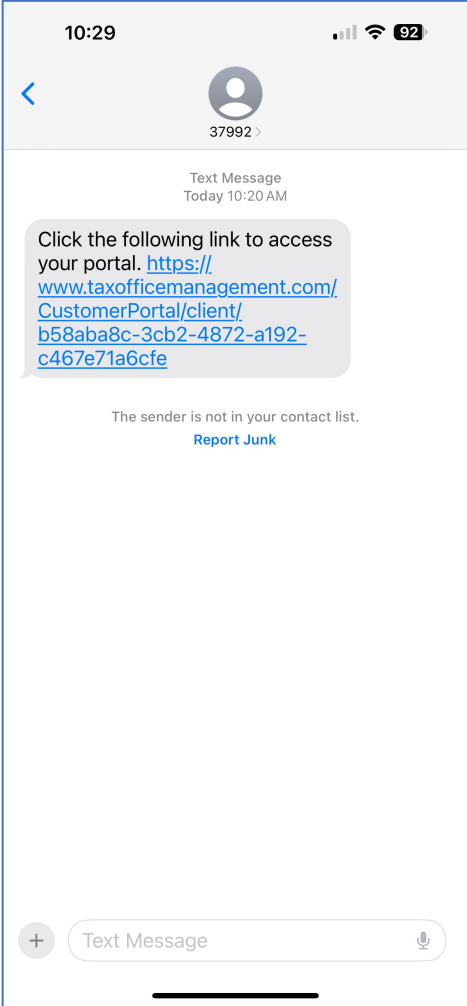
View/Print Comparison

Summary View 1040 VIEW

TAXPAYER



Taxpayer actions



Taxpayer opens e-mail or text

TAXPAYER

Your Secure Portal Created.  Inbox x



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

Your Secure Portal Created.

Click [here](#) to access your portal. <https://www.taxofficemanagement.com/CustomerPortal/client/b58aba8c-3cb2-4872-a192-c467e71a6cfe>

This email was sent to dkflach@gmail.com as requested by your tax preparer.
Please reply to Danielle@ACCURATETAXSOLUTIONS.COM

Taxpayer clicks on the link

TAXPAYER

Register Your Account screen opens

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

TAXPAYER

Taxpayer creates Username & Password.
They enter their email, phone number,
last name and last four of their SSN.

Information must match exactly what the
store entered in the tax software.

Click Submit

Register Your Account

User Name

wesleymarcs

Password

.....

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

Email

dkflach@gmail.com

Phone Number

(470) 321-9647

Last Name

Marcs

Last Four Of your SSN

0010

 Submit

TAXPAYER

This screen will open.

Taxpayer must verify their account.

Choose e-mail or text.

Verify Account

Please verify your account using one of the options below.



Send text verification

47*****47



Send email verification

dkf*****com

Cancel Verification

[Privacy Policy](#)

TAXPAYER

After choosing method this screen will open

Verification code sent

Enter the verification code below.


Code sent to: **dkf*****com**

Please check your email for your authentication code.

Enter 6-digit code

VERIFY

Don't see your code? **Resend it now.**

 Select another verification method

[Privacy Policy](#)

TAXPAYER

Taxpayer needs to check their email or text for code

Customer Portal: Login Code  Inbox x



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

Customer Portal: Login Code

479598

If you are still experiencing issues with your account, please contact our support team.

 Reply

 Forward

TAXPAYER

Taxpayer enters code and clicks
VERIFY

Verification code sent

Enter the verification code below.

Code sent to: **dkf*****com**

Please check your email for your authentication code.

479598

VERIFY

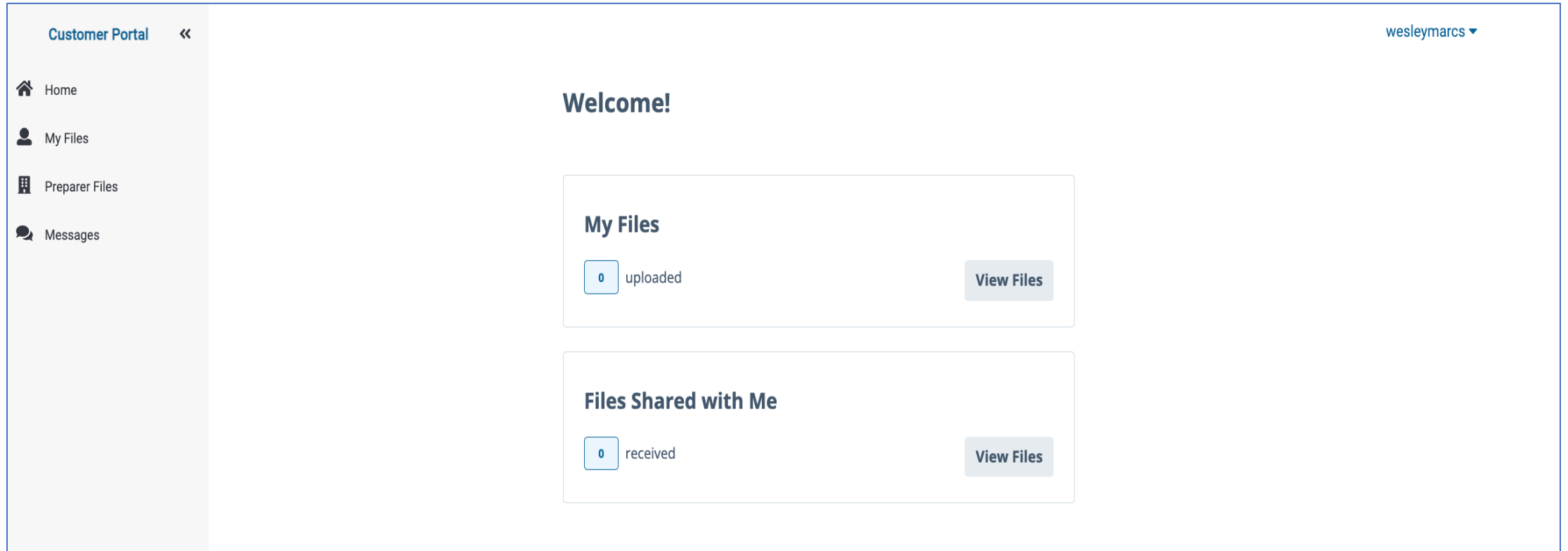
Don't see your code? **Resend it now.**



Select another verification method

[Privacy Policy](#)

TAXPAYER



This is the Portal homepage that will open

TAXPAYER

The screenshot displays a mobile application interface for a taxpayer. On the left is a navigation menu with the following items: 'Home' (with a house icon), 'My Files' (with a person icon and highlighted in a dark grey bar), 'Preparer Files' (with a grid icon), and 'Messages' (with a speech bubble icon). The main content area is titled 'My Files' and features a table header with columns for 'File Name', 'Date Sent', and 'View'. Below the header are two prominent blue buttons: 'Upload Documents' and 'Back' (with a left-pointing arrow icon).

Click on My Files to upload documents

TAXPAYER


Customer Portal << wesleymarcs ▾

- Home
- My Files
- Preparer Files
- Messages

Upload Documents

100%

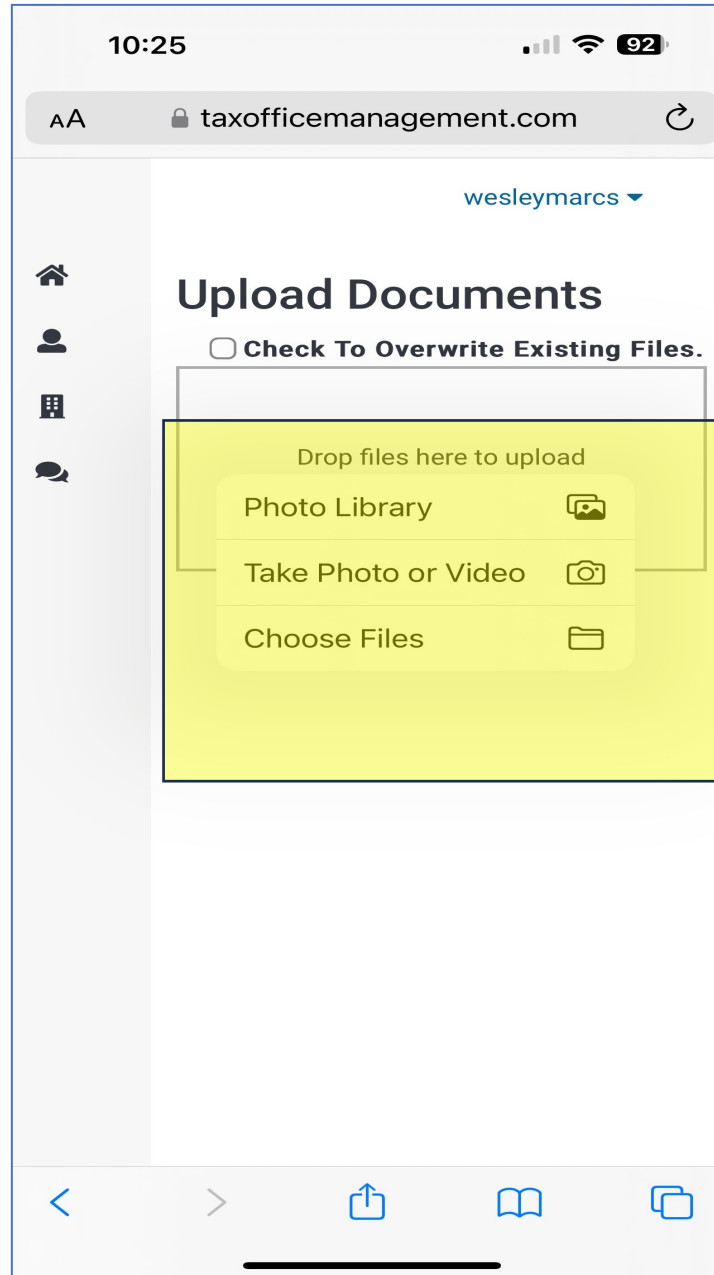
Check To Overwrite Existing Files.



Drag and drop or choose a file from computer to upload

TAXPAYER

On a smart phone you will see this option to upload a document



TAXPAYER

Customer Portal <<

- Home
- My Files
- Preparer Files
- Messages

Welcome!

My Files

1 uploaded

[View Files](#)

Files Shared with Me

0 received

[View Files](#)

After uploaded number will change to 1

TAXPAYER

Customer Portal <<

- Home
- My Files**
- Preparer Files
- Messages

My Files

File Name	Date Sent	View
licensed-image.jpeg	12/9/2023 10:47:58 AM	View

[Upload Documents](#)

[Back](#)

Click on My Files to upload additional documents

TAXPAYER


Customer Portal << wesleymarcs ▾

- Home
- My Files
- Preparer Files
- Messages

Upload Documents

100%

Check To Overwrite Existing Files.



Drag and drop or choose file to upload

TAXPAYER

The screenshot displays a web interface for a taxpayer's Customer Portal. On the left is a navigation sidebar with the following items: 'Home', 'My Files', 'Preparer Files', and 'Messages'. The main content area features a 'Welcome!' message at the top. Below it are two summary cards. The first card, titled 'My Files', shows '2 uploaded' files and a 'View Files' button. The second card, titled 'Files Shared with Me', shows '0 received' files and a 'View Files' button. A yellow box highlights the 'My Files' card.

Customer Portal <<

Home

My Files

Preparer Files

Messages

Welcome!

My Files

2 uploaded

View Files

Files Shared with Me

0 received

View Files

After uploaded number will change to 2

TAXPAYER

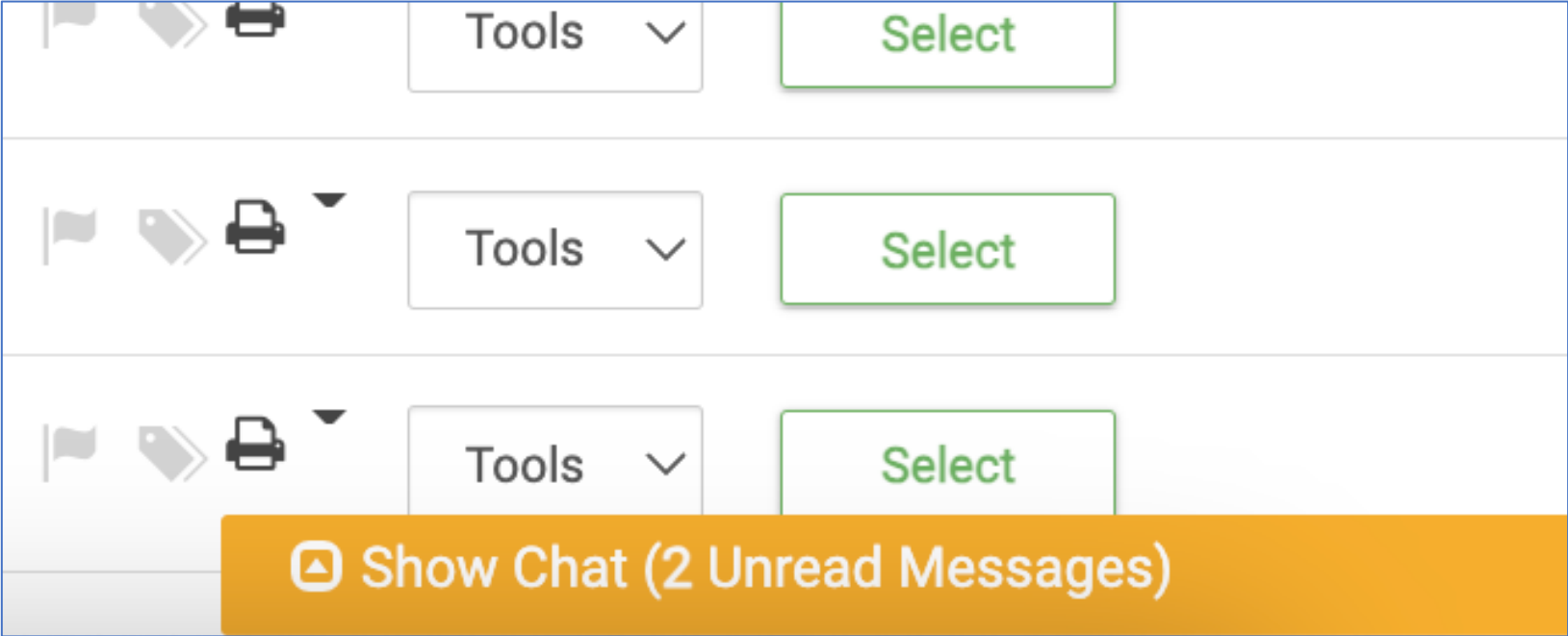
Documents uploaded will be listed here under My Files

The screenshot displays a mobile application interface for a Customer Portal. On the left is a navigation sidebar with the following items: 'Home' (with a house icon), 'My Files' (with a person icon and highlighted in dark grey), 'Preparer Files' (with a grid icon), and 'Messages' (with a speech bubble icon). The main content area is titled 'My Files' and contains a table with the following data:

File Name	Date Sent	View
W2.png	12/9/2023 10:49:18 AM	View
licensed-image.jpeg	12/9/2023 10:47:58 AM	View

Below the table, there are two buttons: 'Upload Documents' and 'Back' (with a left-pointing arrow icon).

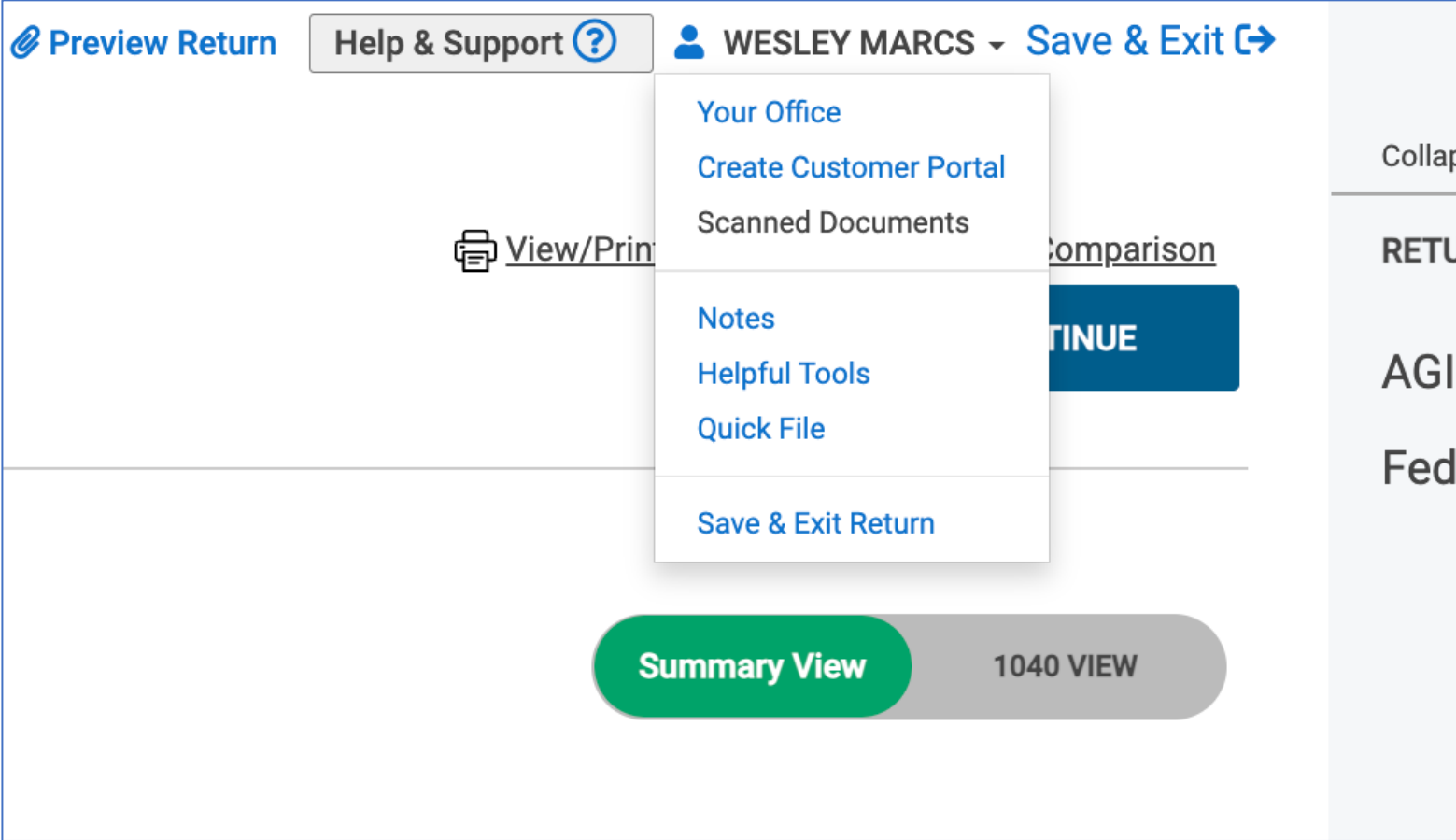
STORE



Store will see this message when they login to the tax software showing they have Portal activity

STORE

Store enters tax return and clicks on taxpayer name and choose Scanned Documents from the dropdown list.



STORE

Scanned Documents

[+ Upload Documents](#) [+ Download All](#) [Close Window](#)

File name	File Size	Uploaded	
licensed-image.jpeg	243 KB	12/9/2023 10:47 AM	Download
W2.png	188 KB	12/9/2023 10:48 AM	Download

This screen opens. Store will click Download to open the document. Once downloaded they can open/print them to enter the information into the tax software.

STORE

Scanned Documents

[+ Upload Documents](#) [+ Download All](#) [Close Window](#)

[Upload Documents](#)

File name	File Size	Uploaded	
licensed-image.jpeg	243 KB	12/9/2023 10:47 AM	Download
W2.png	188 KB	12/9/2023 10:48 AM	Download

Store can upload documents to the Portal by clicking Upload Documents

STORE

This screen opens.

Store will choose documents and click Save Uploaded Documents.

Upload Documents

Save Uploaded Documents

→ **Drop files** to upload
(or click)

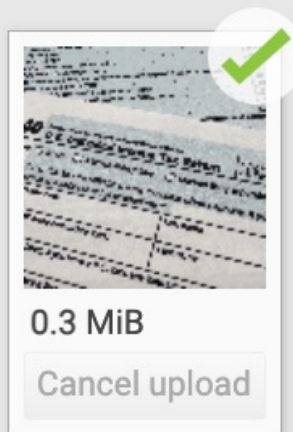
Note: maximum file size for a single file is 10 MB.
Supported file types: pdf, jpeg, jpg, png, gif, tiff, tif, doc, docx, xls, xlsx

STORE

Upload Documents

Save Uploaded Documents

Click Save Uploaded Documents



STORE

Scanned Documents

+ Upload Documents

+ Download All

Close Window

Store will click Add to Customer Portal

File name	File Size	Uploaded		
licensed-image.jpeg	243 KB	12/9/2023 10:47 AM	Download	
tax return.jpeg	306 KB	12/9/2023 10:55 AM	Download	Add to Customer Portal
W2.png	188 KB	12/9/2023 10:48 AM	Download	



TAXPAYER

The screenshot displays a web interface for a 'Customer Portal'. On the left is a vertical navigation menu with the following items: 'Home' (house icon), 'My Files' (person icon), 'Preparer Files' (calendar icon), and 'Messages' (speech bubble icon). The main content area features a 'Welcome!' heading. Below it are two summary cards. The first card, 'My Files', shows '2 uploaded' files and a 'View Files' button. The second card, 'Files Shared with Me', is highlighted with a yellow border and shows '1 received' files and a 'View Files' button.

Customer Portal <<

- Home
- My Files
- Preparer Files
- Messages

Welcome!

My Files

2 uploaded [View Files](#)

Files Shared with Me

1 received [View Files](#)

Taxpayer will see 1 Files Shared with Me

TAXPAYER

Taxpayer can add their signature by clicking here



Files From My Preparer

Taxpayer:

[Click To Add Signature](#)

File Name	Date Sent	View
tax return.jpeg	12/9/2023 10:57:15 AM	View

[Back](#)

TAXPAYER

Files From My Preparer

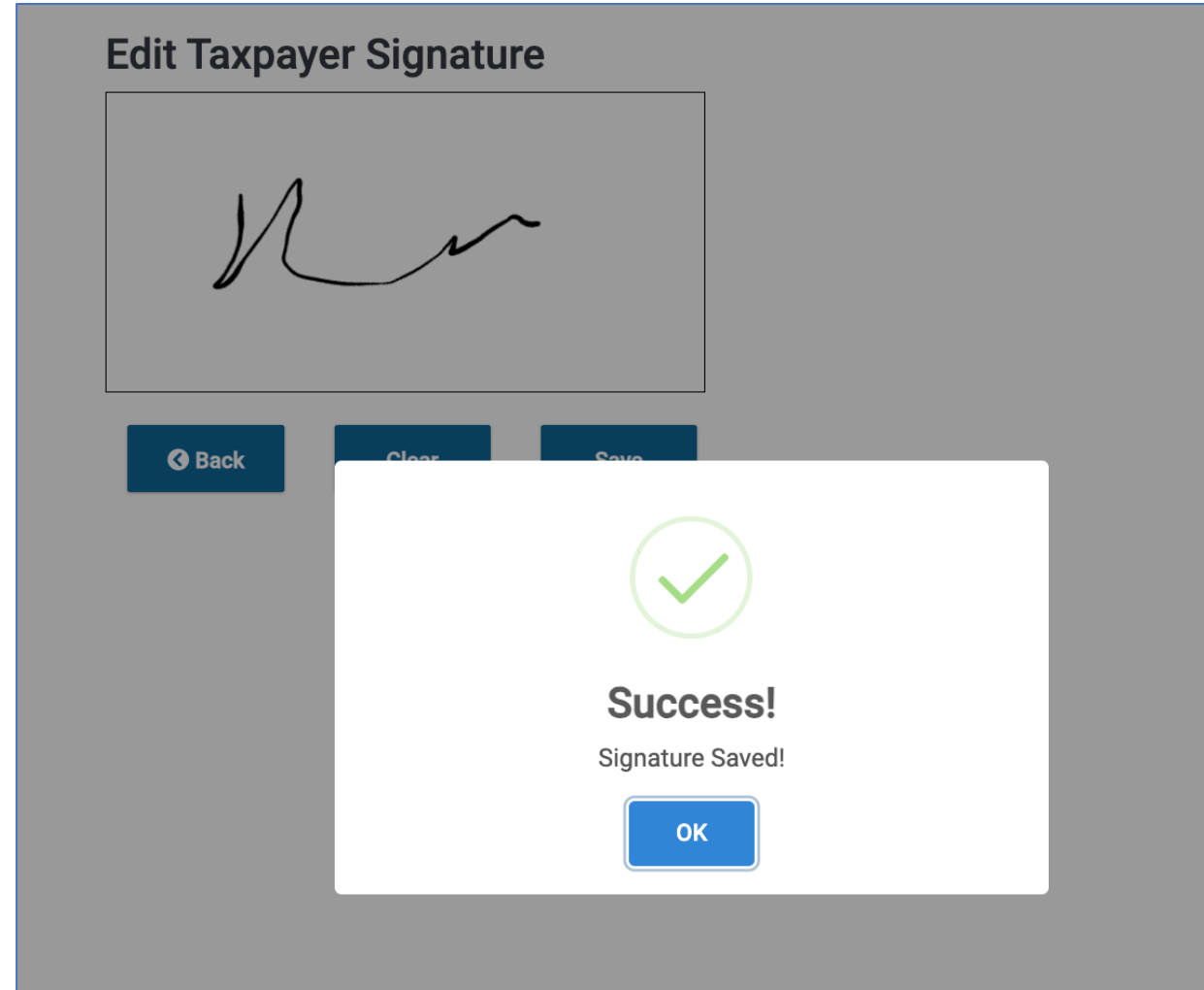
Taxpayer:

[Click To Add Signature](#)



Click here

TAXPAYER



Using mouse or finger sign in the box. They will see Success message after clicking Save