

The logo for TAXCOMM features the word in a bold, sans-serif font. The letters are color-coded: 'T' is dark blue, 'A' is light green, 'X' is light green, 'C' is light green, 'O' is light green, 'M' is teal, and the second 'M' is teal. The background is white with green geometric shapes on the left and right sides.

TAXCOMM

The Complete Client Communication Tool

Developed for tax professionals

What Is TaxComm?

- ▶ Securely transfer files.
- ▶ Document signatures.
- ▶ Video meeting.
- ▶ Secure messaging.



Secure web based application. Tax client mobile application.

Why Is TaxComm The Tool For You?

- ▶ Designed for the tax professional.
- ▶ Adapt and embrace our new normal. Streamline the process of working with clients and their tax documents remotely.
- ▶ Grow your practice.
- ▶ Keep things personalized.

Main Communication Dashboard Page

TAXCOMM

TAX ORGANIZATION: Scotts Tax Service
TAX CLIENT: Scott TaxClient



HOME



EDIT CLIENT

ACTION CENTER

ADD ACTION

- SIGN DOCUMENT**
Sign US 8879 via Signature Pad EDIT DELETE
- REQUESTED DOCUMENT**
Drivers License EDIT DELETE
- SCHEDULED MEETING**
Join Meeting - 11/17/2020 09:34 AM DELETE



COMPLETED ACTIONS

Completed Actions

RECENT FILES

- TWFED8879.PDF**
Uploaded on 11/17/2020 09:21:05 VIEW DELETE
- TWFED8879.PDF**
Uploaded on 11/14/2020 20:21:15 VIEW DELETE
- TWFED1040.PDF**
Uploaded on 11/17/2020 09:00:57 VIEW DELETE
- US8879.PDF**
Uploaded on 11/14/2020 22:09:44 VIEW DELETE
- TWFED8879.PDF**
Uploaded on 11/14/2020 20:54:13 VIEW DELETE
- US8879.PDF** VIEW

SELECT FILES

Or drop files here

Document Transfer

- ▶ Sharing documents between you and your clients.
- ▶ Tax professional can view/edit. Tax client can only view.
- ▶ Tax client can use the web application or the mobile application.





HOME



EDIT CLIENT

ACTION CENTER

ADD ACTION



SCHEDULED MEETING

Join Meeting - 11/18/2020 09:54 AM

JOIN

EDIT

DELETE



COMPLETED ACTIONS



ESTABLISH SIGNATURE PIN - TAXPAYER

Taxpayer - Please establish a PIN for document signing

DELETE

RECENT FILES



ID VERIFICATION LIKE A DRIVERS LICENSE

CATHERINE_WITHBACKGROUNDSMALLER.JPG

Uploaded on 11/18/2020 09:49:02

VIEW

DELETE



CA BUSINESS TAX UPDATE CTEC CE 10-20

SLIDES.PDF

Uploaded on 11/18/2020 09:39:04

VIEW

DELETE

SELECT FILES

Or drop files here



Actions - When a Tax Pro needs specific things accomplished.

- ▶ The action center is used to create and track specific items: things like a drivers license, a due diligence school record, or please sign this 8879.
- ▶ When you request actions to be done by your client the will receive a text or email notification.
- ▶ When actions are completed by your tax client, you will receive notifications of completion.





HOME



EDIT CLIENT

ACTION CENTER

ADD ACTION



SCHEDULED MEETING

Join Meeting - 11/18/2020 09:54 AM

JOIN

EDIT

DELETE



COMPLETED ACTIONS



ESTABLISH SIGNATURE PIN - TAXPAYER

Taxpayer - Please establish a PIN for document signing

DELETE

RECENT FILES



TWFED1040.PDF

Uploaded on 11/19/2020 07:51:24

VIEW

DELETE



ID VERIFICATION LIKE A DRIVERS LICENSE

CATHERINE_WITHBACKGROUNDSMALLER.JPG
Uploaded on 11/18/2020 09:49:02

VIEW

DELETE



CA BUSINESS TAX UPDATE CTC EC 10-20

SLIDES.PDF
Uploaded on 11/18/2020 09:39:04

VIEW

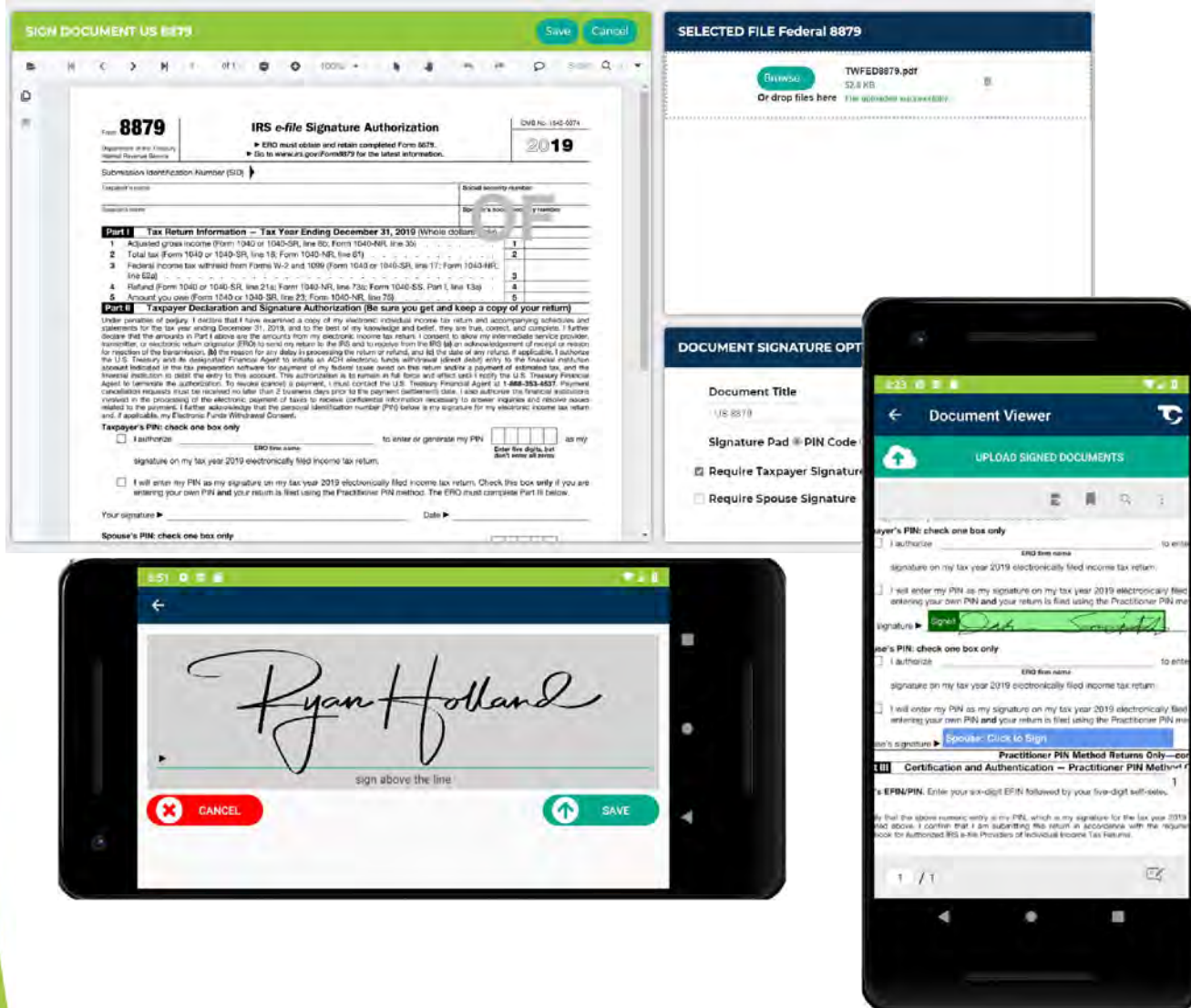
DELETE

SELECT FILES

Or drop files here



Document Signatures

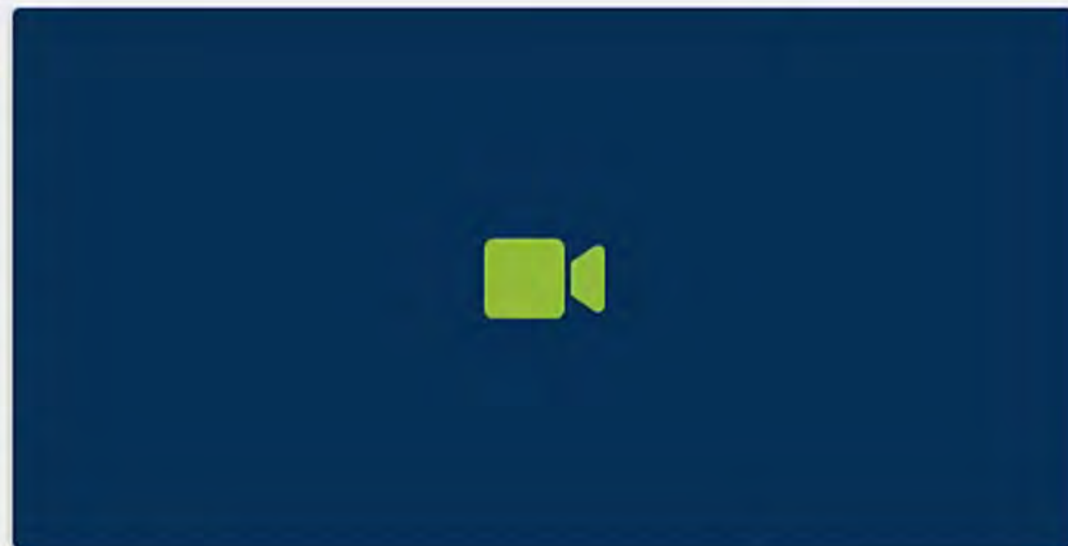


- ▶ Allows for both wet or electronic signatures.
- ▶ Clients can sign from either the web application or the mobile application.
- ▶ Tax forms automatically read the form for signature placement.
- ▶ Other documents can have signatures moved to applicable locations.

MOBILE DEVICES

ACTION CENTER

- | | |
|--|----------------------|
|  SCHEDULED MEETING
Join Meeting - 11/18/2020 09:54 AM | JOIN |
|  REQUESTED DOCUMENT
Please Send your drivers license | OPEN |
|  SIGN DOCUMENT
Sign Document | OPEN |
|  SIGN DOCUMENT
Sign US 8879 via Signature Pad | OPEN |
|  SIGN DOCUMENT
Sign US 8879 via Signature Pad | OPEN |



COMPLETED ACTIONS

- | |
|---|
|  ESTABLISH SIGNATURE PIN - TAXPAYER
Taxpayer - Please establish a PIN for document signing |
|---|

RECENT FILES

- | | |
|--|----------------------|
|  TWFED8879.PDF
Uploaded on 11/19/2020 08:10:42 | VIEW |
|  TWFED8879.PDF
Uploaded on 11/19/2020 08:09:01 | VIEW |
|  TWFED1040.PDF
Uploaded on 11/19/2020 07:51:24 | VIEW |
|  ID VERIFICATION LIKE A DRIVERS LICENSE
CATHERINE_WITHBACKGROUNDSMALLER.JPG
Uploaded on 11/18/2020 09:49:02 | VIEW |
|  CA BUSINESS TAX UPDATE CTEC CE 10-20
SLIDES.PDF
Uploaded on 11/18/2020 09:39:04 | VIEW |

SELECT FILES

Or drop files here



Video Meeting

- ▶ Keep things personalized.
- ▶ Share your screen for client interaction.
- ▶ Grow your practice.

TaxPro Request Meeting

Meeting Title

Sample Meeting

Meeting Date

11/17/2020 09:34



Save

Cancel



SCHEDULED MEETING

Join Meeting - 11/17/2020 09:34 AM

JOIN

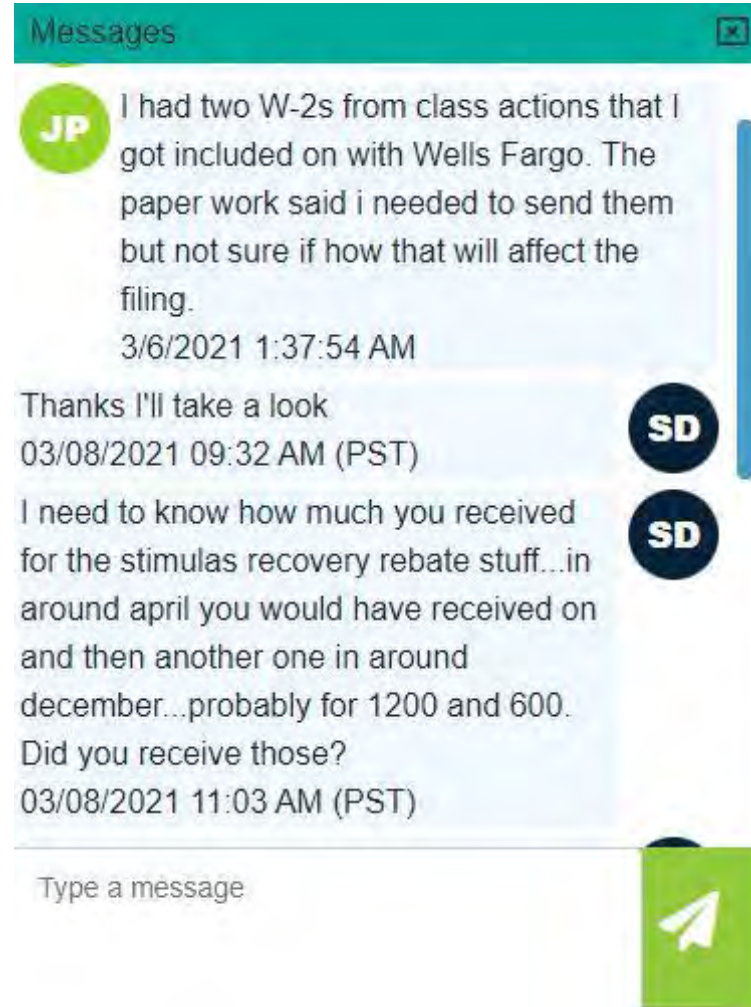
EDIT

DELETE



Messaging

- ▶ Secure format for privileged communications.
- ▶ Notifications are sent via email or text.



Client Selection Page

TAXCOMM TAX ORGANIZATION: Tax Organization

9 All | 5 Not Started | 0 In Progress | 4 Complete | 2 Has Outstanding Action | 0 Has New Activity | 9 Registered | 0 Not Registered

All Clients Search By: Name Q Search...

STATUS	NAME	SSN	PHONE	EMAIL	ACCOUNT	TAX PROFESSIONAL
NOT STARTED 1 OUTSTANDING ACTION NO NEW ACTIVITY	Daltontaxclient, Scott	xxx-xx-		scwam7@gmail.com	REGISTERED	Scott Dalton
NOT STARTED 3 OUTSTANDING ACTIONS NO NEW ACTIVITY	TaxClient, Catherine	xxx-xx-5678	(909) 931-3131	scwam6@gmail.com	REGISTERED	Scott Dalton
COMPLETE						

- ▶ The Tax Pro client selection page allows you to quickly find the tax client you are working with.
- ▶ Filters, status, and color indications help you to find clients that have finished an action, uploaded docs, or sent new messages.

TaxComm

- ▶ The Tax Pro is the licensed paid subscriber. There is no additional charge for the tax client.
- ▶ Tax client mobile app is available in android and iphone.
- ▶ The Tax Pro sets the notification business rules.

Automatically extract data from uploaded documents (requires credits)

Notify client of new actions by

Email



SMS



Mobile App Notification



 ADD CLIENT

Cindy,

I have authorized an account for you with TaxPro.NET so that we can securely communicate regarding anything related to your tax preparation. It can take a minute to complete your account setup then it will give you access to some great web and mobile tools to help secure your tax information throughout the year.

1. Easily capture and view images of important tax documents
2. Securely meet with me in private virtual meetings
3. When necessary sign documents

To setup your account, just [click here](#)

You can also view our [Client Registration Video](#)

Looking forward to working with you for all of your tax preparation needs.

Regards, Eric Holland

TaxComm Quick Start Guide

You can learn more at our FAQ page here: [TaxComm.NET - Communications for Tax Professionals](#)

1. Accept tax pro invitation by clicking on the link in this email while on your computer (not mobile).
2. From the website on your computer (not mobile) create your tax client account on the User Registration page by entering your email address the invite was sent to and follow instructions to receive an SMS text message code on your cell phone. You will also create your own personal password. Instructions for the password are listed above the input field. If you are having trouble receiving a text message please review these notes on how to unlock messages from unknown senders: [Unlock CellPhone](#)
3. Once registration is successful you will need to log in to the website for the first time using the same email and password you created. Review the Terms of Use and Privacy Statement and confirm you have read, then click submit.
4. Welcome to your Client Dashboard! This is where you will associate most of your communication with your tax pro. You can use a web-based program with a mobile application to assist in some actions. Continue the following steps to utilize the mobile app:
 1. Download the TaxComm mobile app from your phone's App store to use the scan and signing capabilities as well as receive notifications of requests from your tax pro. If you want to use the mobile app, continue on to step 5.
 2. From your TaxComm client dashboard website click on the Mobile Devices icon to add your device and complete the pairing process. You will need to enter a verification code that will be texted to you and then when the QR code is populated you will scan it with the TaxComm mobile app to complete the process. If you are unable to unlock the text messages from TaxComm you will likely not be able to use the mobile app as this pairing process is key in the security of the program.

TAXCOMM

TAX ORGANIZATION: Tax Organization

TaxPro Edit

First Name

Scott

Last Name

Dalton

Email Address

scott@taxwaresystems.com

Mobile / Cell Phone Number

9094561956

Office Phone Number

9096313131

Select the default delivery method for action notifications. Note this will be the default settings for new tax clients but can be changed per tax client on the tax client edit page.

Email

SMS

Mobile Notification

Select the method you would like to receive tax pro action notifications.

Email

SMS

Time Zone

Pacific Standard Time: (UTC-08:00) Pacific Time (US & Canada)

Save

Cancel

Wintax and OCR Integration

- ▶ Automatically read and extract data from standard W-2, 1099R, 1099-NEC.
- ▶ OCR review either in the TaxPro page or Wintax.
- ▶ Download and View documents that have been uploaded to TaxComm from within Wintax.

ADD CLIENT

FAQ

3 All	3 Not Started	0 In Progress	0 Complete	1 Has Outstanding Action	0 Has New Activity	1 Registered	2 Not Registered
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All Clients

Search By: Name

Q Search...

STATUS	NAME	SSN	PHONE	EMAIL	ACCOUNT	TAX PROFESSIONAL	
NOT STARTED 1 OUTSTANDING ACTION NO NEWACTMITY		XXX-XX-		sample01@gmail.com	NOT REGISTERED	Eric Holland	
NOT STARTED NO OUTSTANDING ACTIONS NO NEWACTMITY		XXX-XX-		sample02@gmail.com	NOT REGISTERED	Eric Holland	
NOT STARTED NO OUTSTANDING ACTIONS NO NEWACTMITY	Brady, Cindy	XXX-XX-6789		scwam7+client01@gmail.com	REGISTERED	Eric Holland	



Enhancements and Lessons Learned

- ▶ Copy registration email.
- ▶ Wintax API
- ▶ OCR data extraction.
- ▶ Mobile application notifications and alternate registration
- ▶ Alternate two factor authentication(Last four SSN)
- ▶ Not dependent on SMS text



HOME

EDIT CLIENT

FAQ

MAIN TAXPAYER INFORMATION

Save Cancel

First Cindy	Middle Initial 	Last Brady
Address 	City 	State -
Zip 	SSN 400-00-1234	Date of Birth 11/2/2021 <input type="checkbox"/>
Cell Phone 	Email scwam7*client01@gmail.com	
Tax Professional Eric Holland	Filing Status 	2020 Client Status

Automatically extract data from uploaded documents (requires credits)

Notify client of new actions by

Email SMS Mobile App Notification

This client has not completed registration

Registration Details

ADDITIONAL IDENTITIES FOR SIGNATURE/KBA

Add

An identity represents basic information for a person. Add an identity for anyone who will be signing a document. To verify an identity please enter as much information as possible. First name, last name, email address and date of birth are mandatory for KBA authentication.





Two Week Free Trial

- ▶ Two week free trial is available now.
- ▶ Monthly and annual subscriptions are available.
- ▶ www.taxcomm.net
- ▶ sales@taxcomm.net
- ▶ Mobile app is available via Google play store and Apple store.

SUBSCRIPTION OPTIONS

[Return to Home Page](#)

<p>Monthly</p> <p>\$29.99 / mo</p> <p>6,000 video minutes per month 1,000 texts per month 1,000 emails per month 5 GB of storage</p> <p>Subscribe \$29.99 / mo</p>	<p>Annual (17% SAVINGS!!!)</p> <p>\$300 / year</p> <p>72,000 video minutes per year 12,000 texts per year 12,000 emails per year 5 GB of storage</p> <p>Subscribe \$300 / year</p>
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Add on Resource Purchase Options

Knowledge Based Authentication (KBA) \$2 each	Document Data Extraction Credits \$0.25 each
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