TAXCOMM

The Complete Client Communication Tool

Developed for tax professionals

What Is TaxComm?

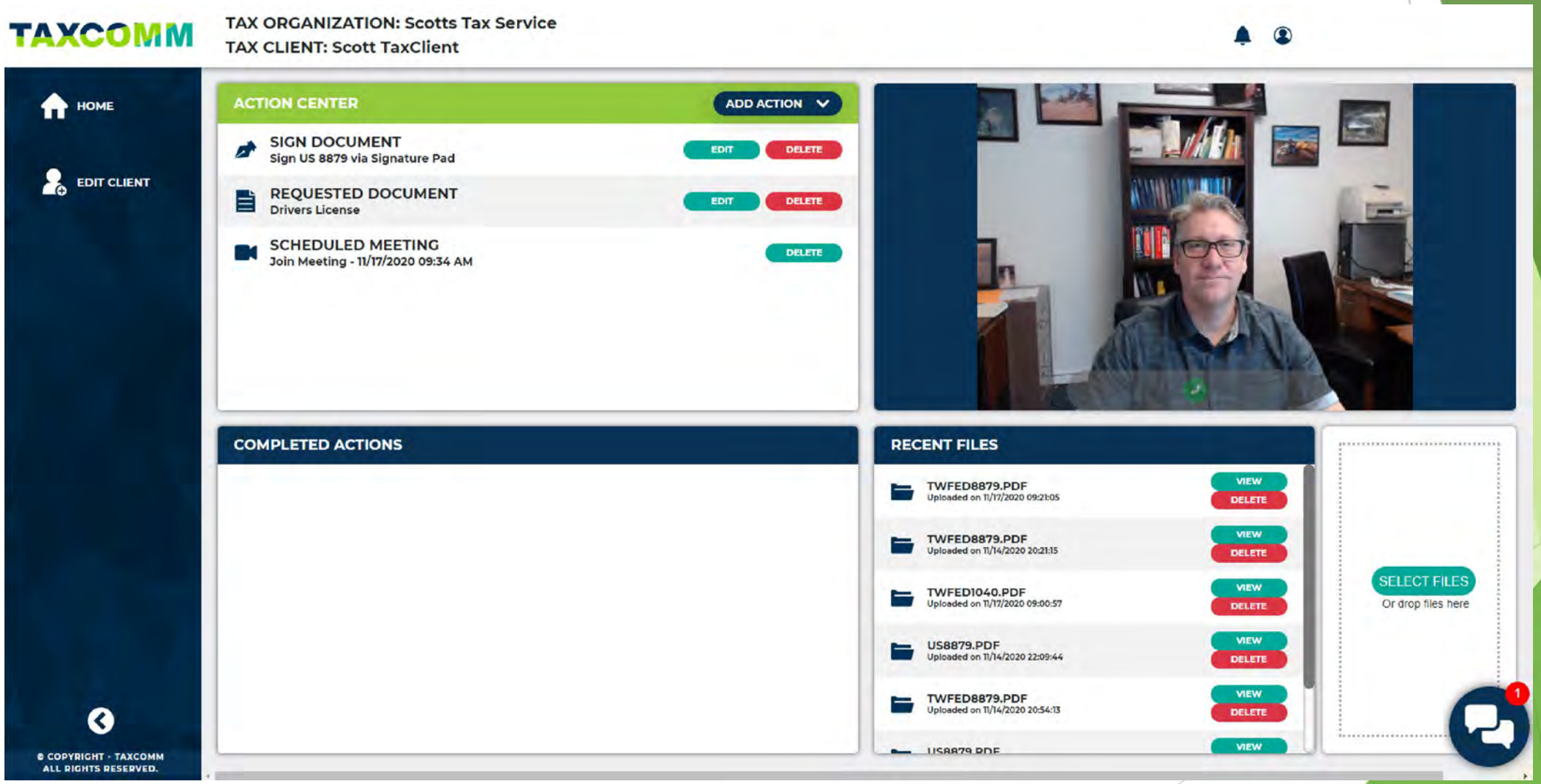
- Securely transfer files.
- Document signatures.
- Video meeting.
- Secure messaging.

Secure web based application. Tax client mobile application.

Why Is TaxComm The Tool For You?

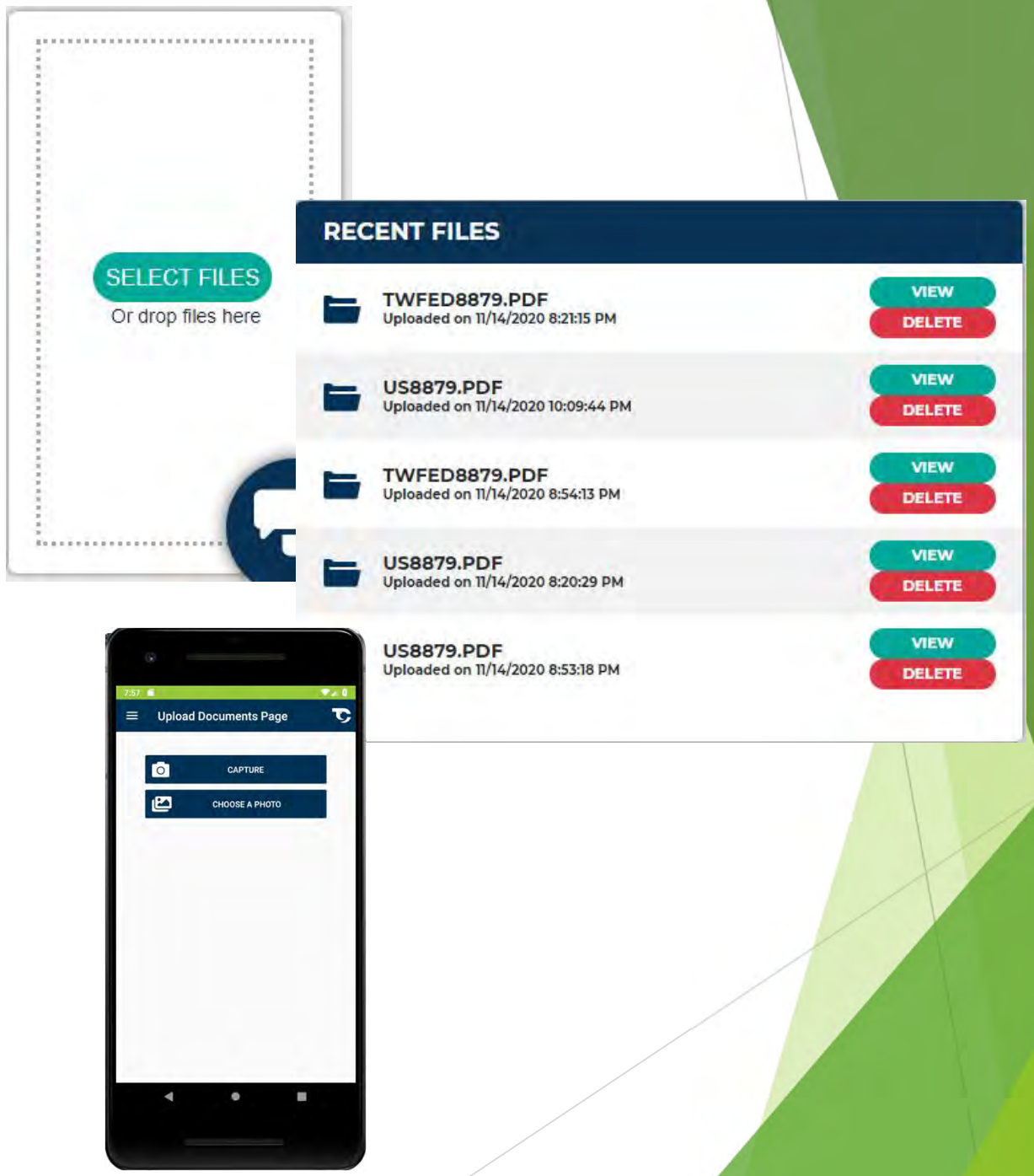
- Designed for the tax professional.
- Adapt and embrace our new normal. Streamline the process of working with clients and their tax documents remotely.
- Grow your practice.
- Keep things personalized.

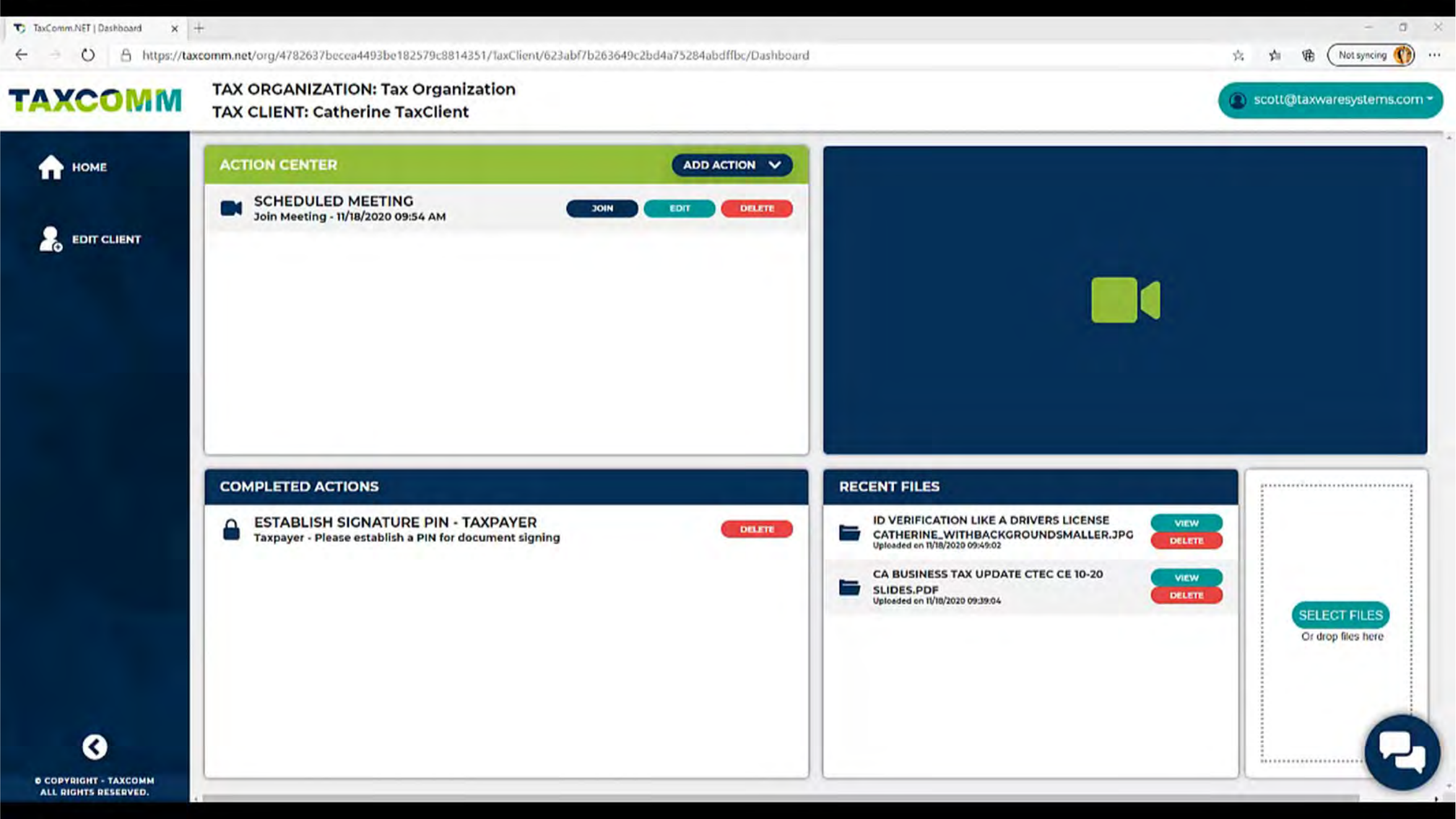
Main Communication Dashboard Page



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.




TaxComm.NET | Dashboard
https://taxcomm.net/org/4782637becea4493be182579c8814351/TaxClient/623abf7b263649c2bd4a75284abdffbc/Dashboard
Not syncing
TAXCOMM
TAX ORGANIZATION: Tax Organization
TAX CLIENT: Catherine TaxClient
scott@taxwaresystems.com
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
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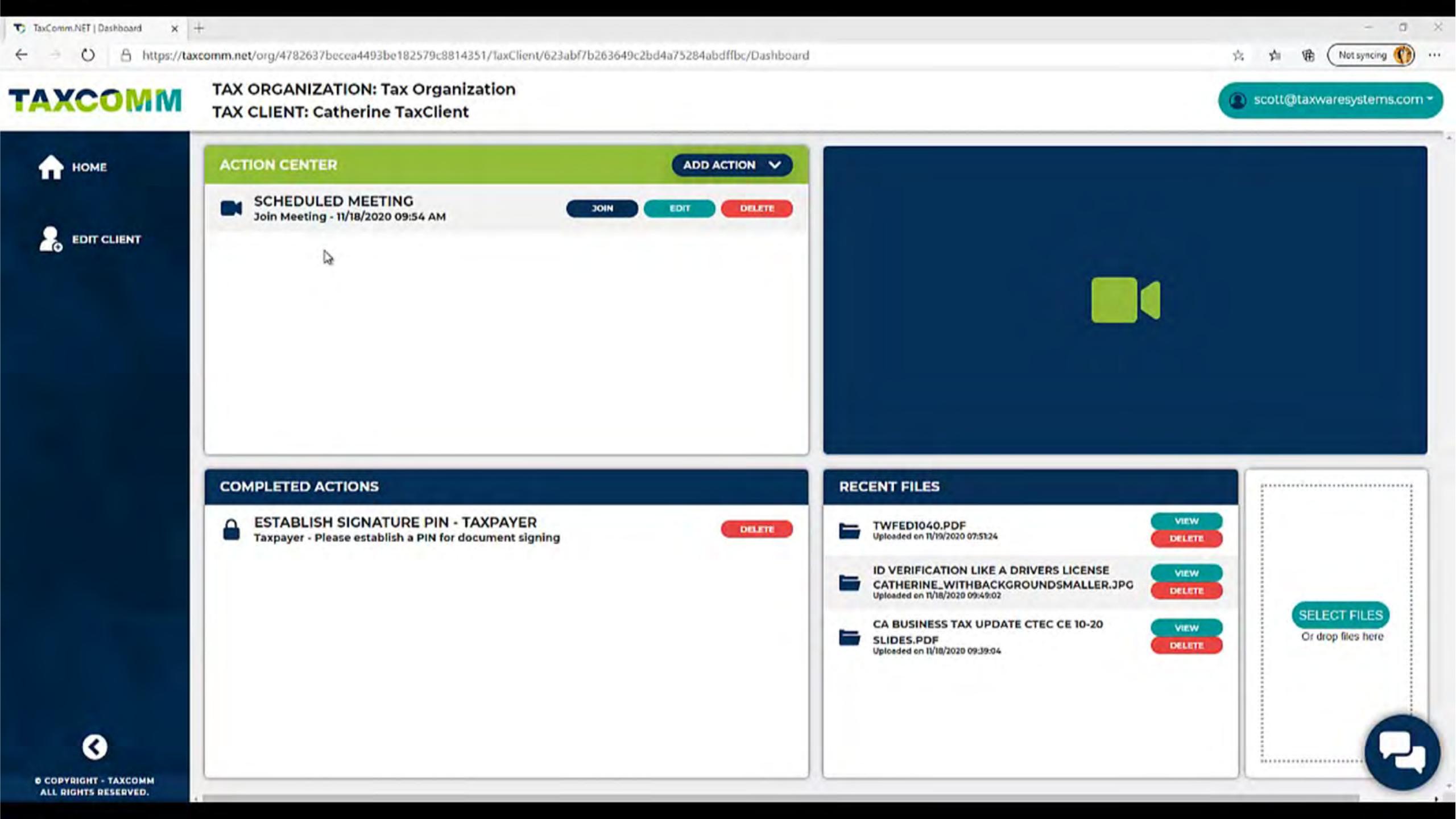
Actions – When a Tax Pro needs specific things accomplished.

- 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.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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 CTEC CE 10-20 SLIDES.PDF
Uploaded on 11/18/2020 09:39:04
VIEW
DELETE
SELECT FILES
Or drop files here
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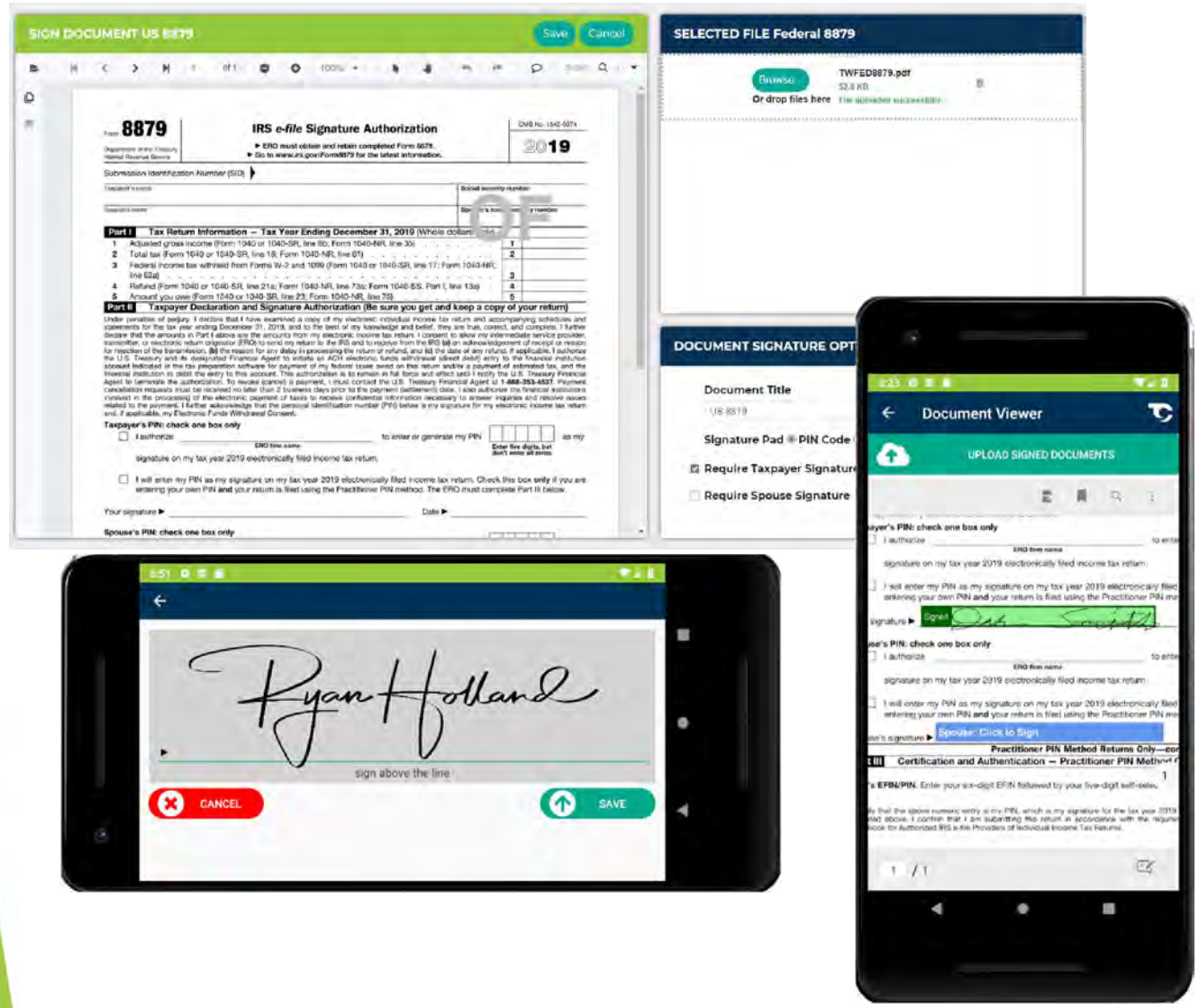
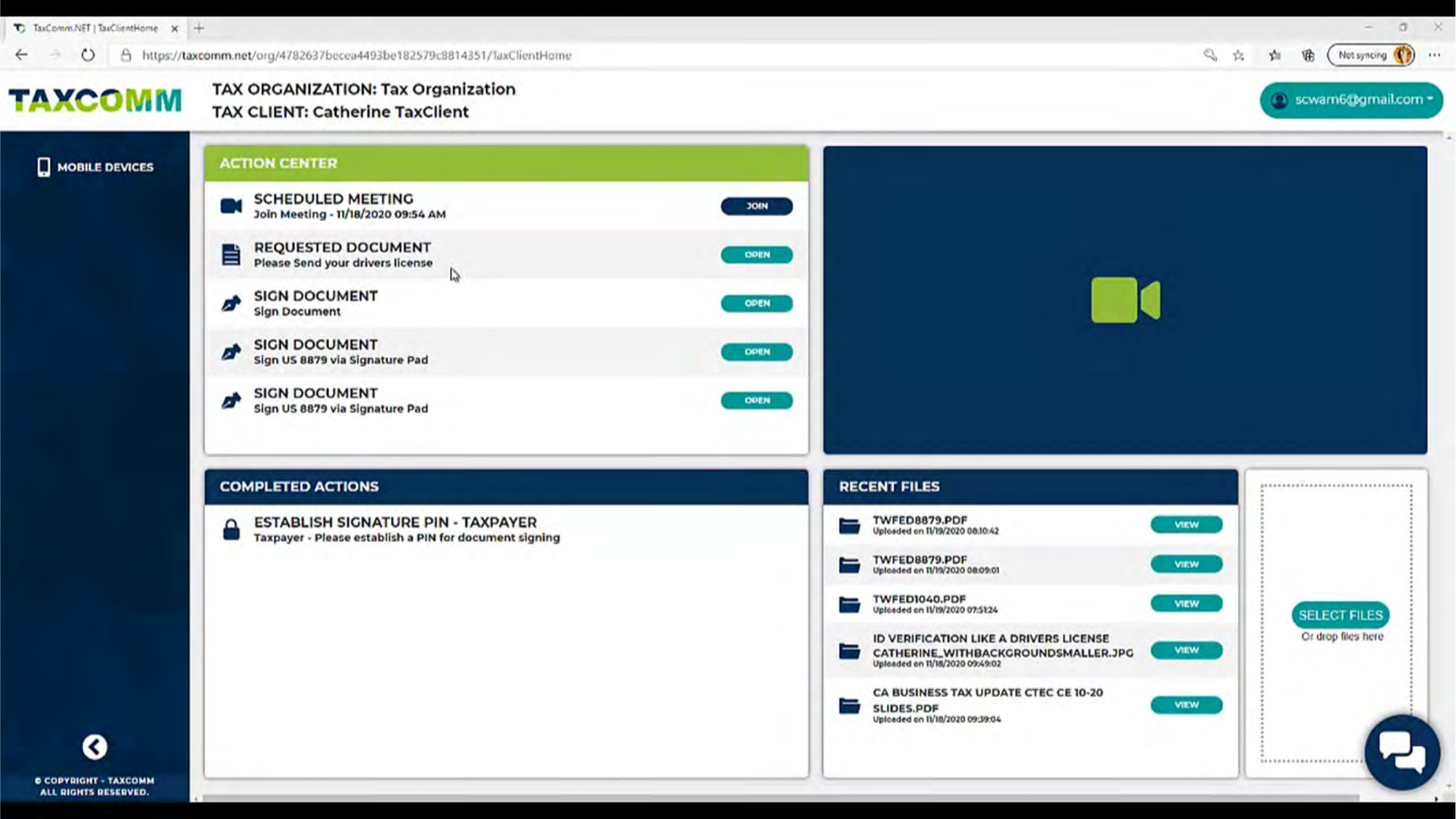
Document Signatures



- 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.


TaxComm.NET | TaxClientHome
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Not syncing
TAXCOMM
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TAX CLIENT: Catherine TaxClient
scwam6@gmail.com
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
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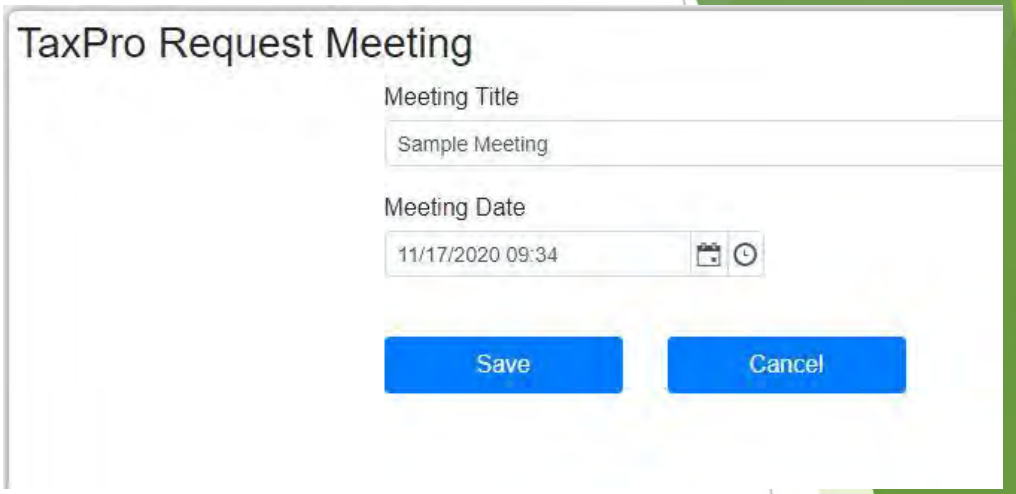
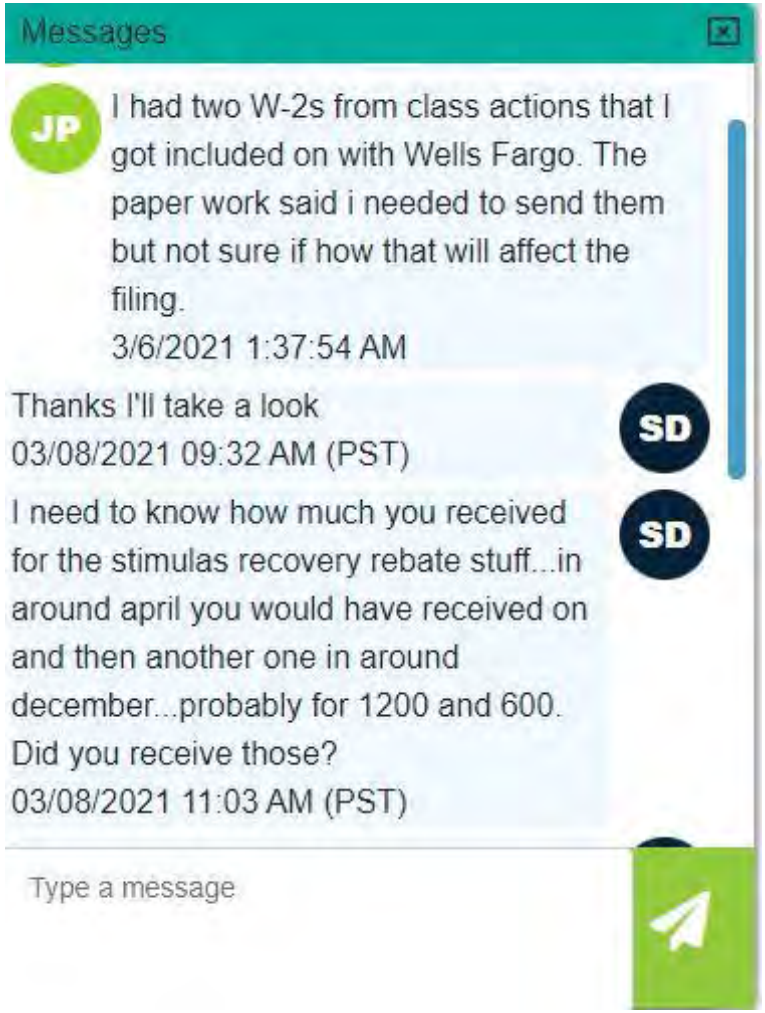
Video Meeting

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

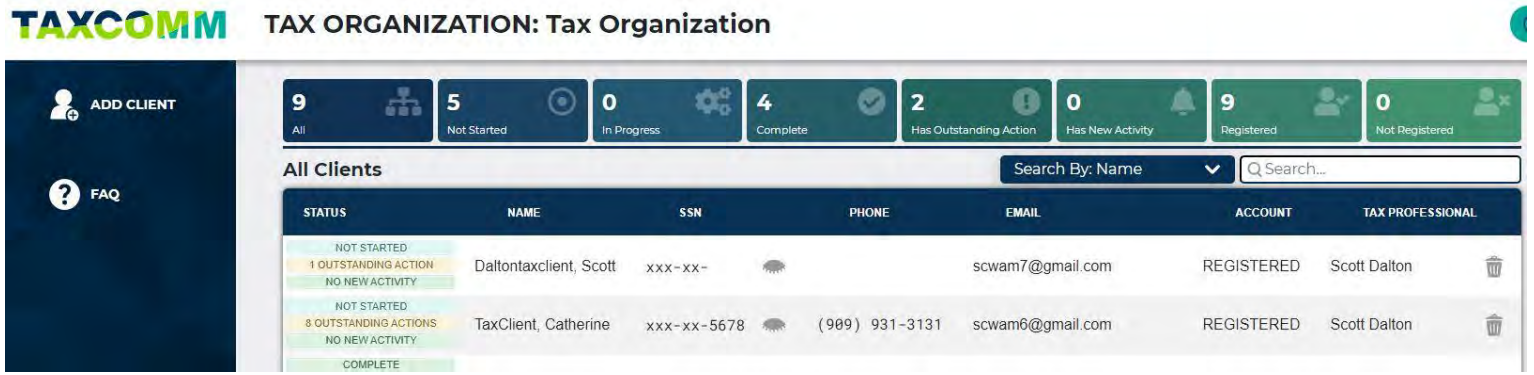


Messaging

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



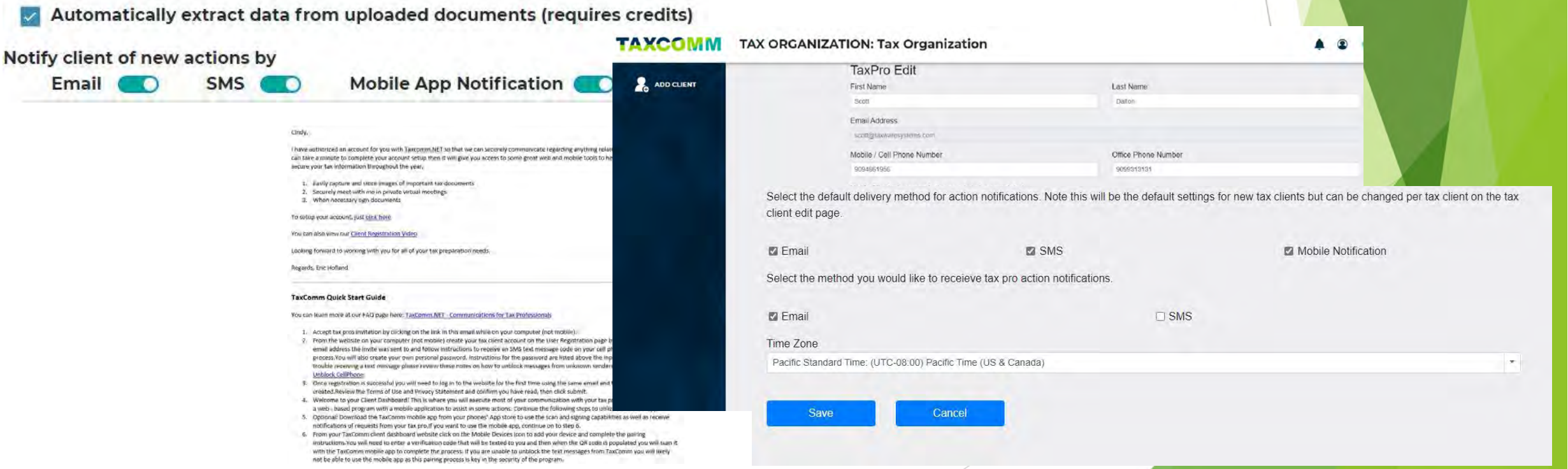
Client Selection Page



- 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.



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.

TAXCOMM

TAX ORGANIZATION: EGH Test Org 01

ericgholland@gmail.com

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

All Clients

Search By: Name

Search...

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

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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

TAXCOMM

TAX ORGANIZATION: EGH Test Org 01
TAX CLIENT: Cindy Brady

ericgholland@gmail.com

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

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.

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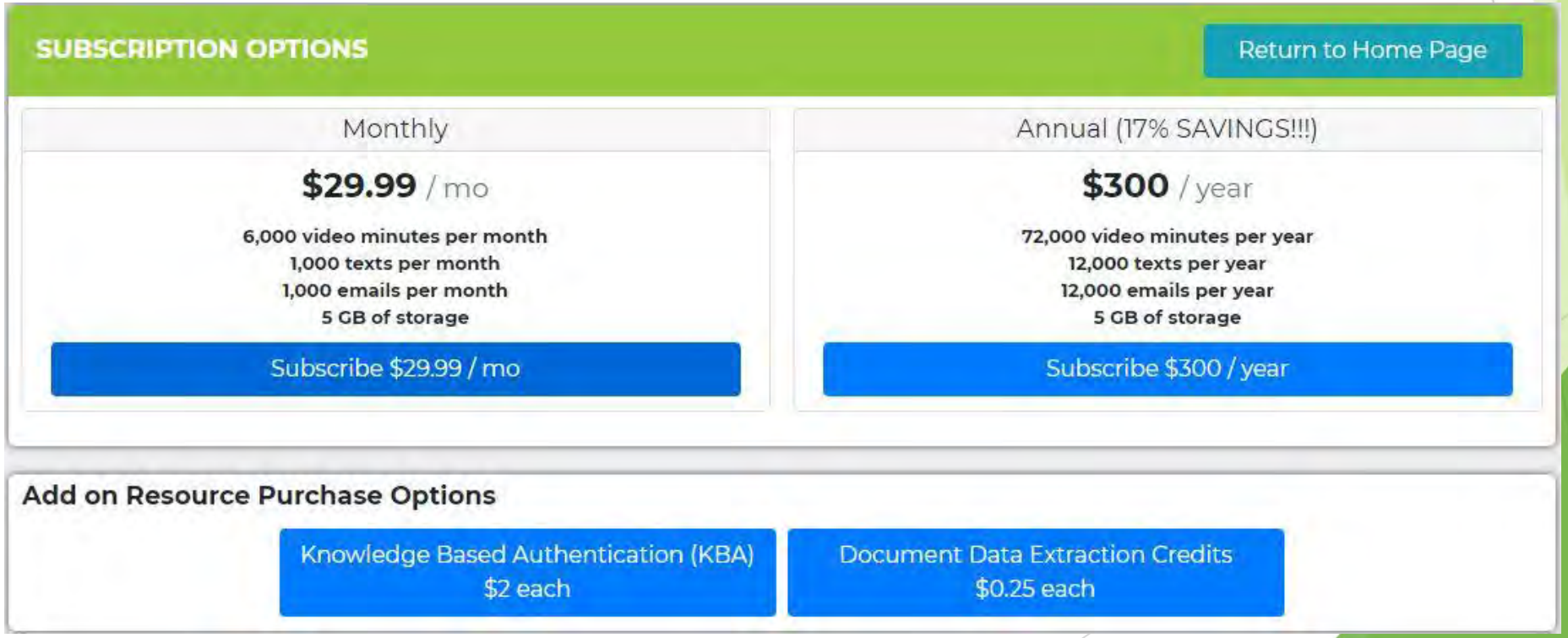
Two Week Free Trial

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