



# taxestogo<sup>®</sup>

A guide on how to use Taxes to Go for both iOS and Android

2019 Tax Year

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## What is Taxes to Go

The Taxes to Go Mobile App allows taxpayers to snap pictures and submit their tax documents to you, complete their tax return and even get a bank product from anywhere, without ever stepping foot in your office. Using the information sent through the app you will prepare the tax return and send it back to the taxpayer to be signed. They will sign the documents inside the app, send it back to you and then the return is ready to e-file! It's fast, easy and secure.

The app includes a chat feature that is fully integrated to your software so you can always stay in contact with your customers. The Taxes to Go Mobile App is available for Android and iOS devices. It can be downloaded in the Google Play Store or from the App Store.

Taxes to Go is a generic mobile app, however you have the option to brand the app to your tax office. The branded Taxes to Go mobile app allows you to customize the color and logo shown within the app.

## How to get Taxes to Go

The Taxes to Go Mobile App is available for all Web1040 Pro users subscribed to Pro, Pro-Plus, or Enterprise plans. To setup the branded Taxes to Go, send an email to [sales@myweb1040pro.com](mailto:sales@myweb1040pro.com) with your logo. You can upload a logo and change the color of the app. After we have completed configuration, you will receive the Referral Link to provide to your customers to begin the Branded Installation process.

For the generic Taxes to Go app, you will direct your customers to go to the App Store or Google Play Store and search for Taxes to Go.


# Taxes to Go for iOS

## Branded App Users

### Initial Download

Before the taxpayer can download your branded mobile app, they will need to follow the Taxes to Go referral link to your branded app. This link will take you to this page where you will need to fill out the information for the taxpayer:

**Demo Taxes to Go Office**

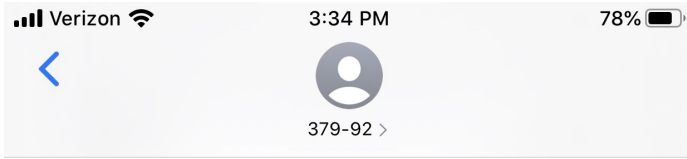


To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

<b>Enter Your Phone Number</b>	<input type="text" value="867-5309"/>
<b>Enter Your Email</b>	<input type="text" value="TestEmail@Gmail.com"/>
<b>Enter your First Name</b>	<input type="text" value="TaxestoGo"/>
<b>Enter your Last Name</b>	<input type="text" value="Test"/>
<b>Enter Your Referral Code</b>	<input type="text" value="123"/>

[CONTINUE](#)

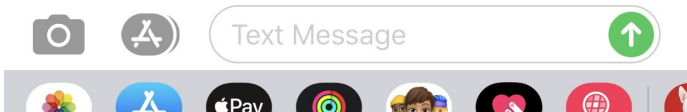
This page includes fields to input the taxpayer’s phone number, email address, name and the referral code for the Tax Preparer (if applicable). If you choose, you can also send the referral link to the taxpayer and they can complete this information themselves. This step is vital for the branding because this is how the app recognizes the branding.



Today 3:33 PM

Thank you for requesting the Taxes To Go App! To get started with Demo Taxes to Go Office, tap the link below to get the app and use your email

[Redacted]@gmail.com to sign up. <https://taxestogo.com/GetApp>



After completing that step, the user will receive a text message from the automated Taxes to Go message system with a link to the App Store to download the Taxes to Go app.

Please Note: The app will not show branded in the app store. The branding is only applied once the user creates an account with the information input on the previous step.



< Search



**Taxes To Go**

Rhodes Computer Services

OPEN



3.3 ★★★★★

54 Ratings

4+

Age

**What's New**

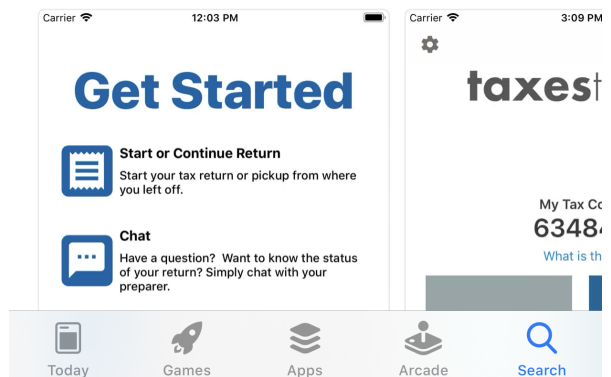
[Version History](#)

Version 3.0.0

1w ago

The latest version includes updates for tax year 2019 (taxes filed in 2020) including the addition of push notifications, chat between taxpayers and their t [more](#)

**Preview**



## Account Creation

Once the app has been downloaded, the user will open it to this page. They will need to use the exact email address from the initial download to see the branding.

The taxpayer will type in the email address and click Create Account. That will take them to this page to Register with the Branded App:

Verizon 10:42 AM 84% Verizon 9:00 AM 92%

### Demo Taxes to Go Office



Already have an account? [Log In](#)

TestEmail@Gmail.com

867-5309

.....



.....



I agree to the terms

[View Terms](#)

Create Account

Enter your email address



Submit

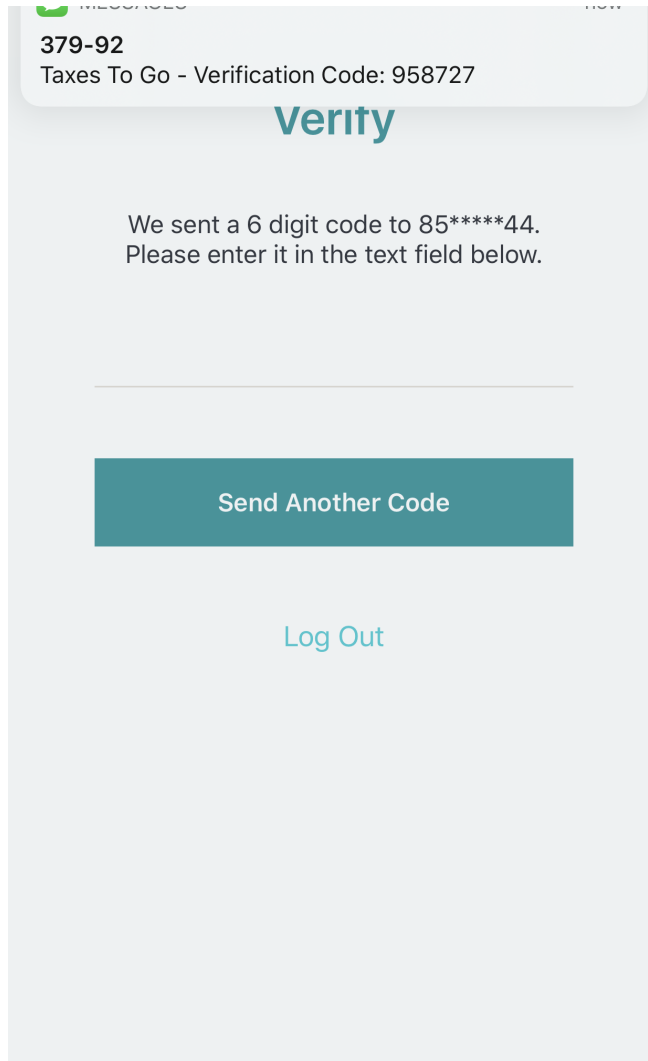
Enter your email address

Done

The taxpayer will need to put in their email address, phone number, create a password and agree to the terms.

*Passwords must include 1 uppercase, 1 lowercase, 1 number, and 1 special character*

After successfully registering, the taxpayer will receive a text with a 6 digit code to the cell phone number used in the creation of the account. They will need to complete this to access the account.



Following the account creation, the app will guide you to the main page after the follow screens.

# Let's Get Started Availability



## Start or Continue Re

Start your tax return or j where you left off.



## Chat

Have a question? Want status of your return? S your preparer.



## Upload

Securely send documen preparer



## Sign Tax Documents

Securely sign documen preparer

CONTINUE



# Push Notifications

Some items will not be availabl enables ther



By enabling push notifications, your preparer can keep you up to date on your return status as well as any information needed to complete your return.

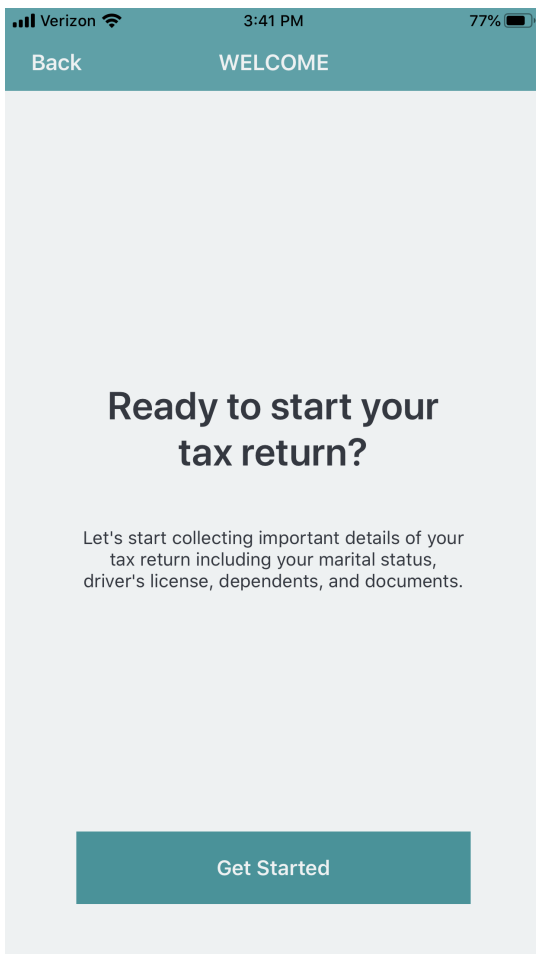
CONTINUE

CONTINUE

Once inside the account, they will see My Taxes and Upload Documents available. My Taxes is where they will go to complete the basic information part of their tax return. This section is covered in the next section, Inside My Taxes.

## Inside My Taxes

The My Taxes section of the app allows the taxpayer to fill out basic information about them, their spouse and dependents and to upload all tax documents they've received.



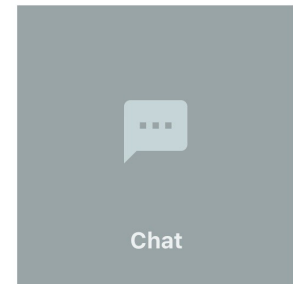
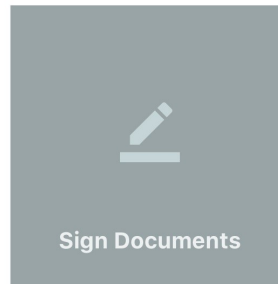
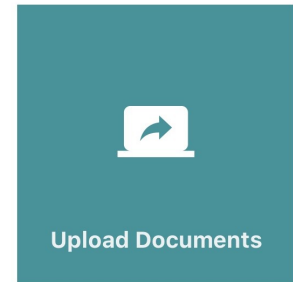
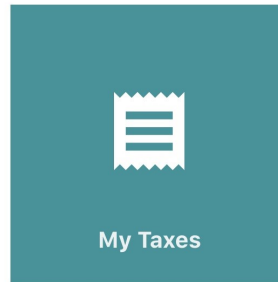
Verizon

9:06 AM

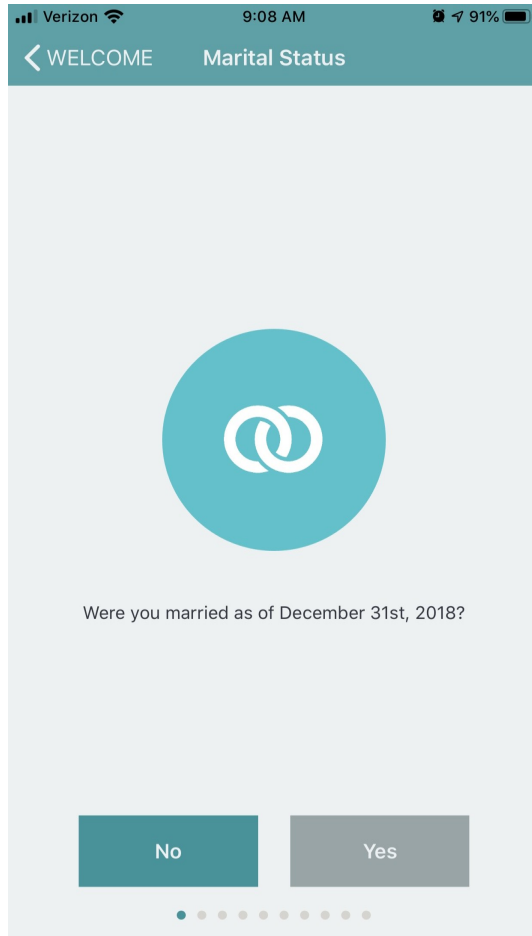
91%



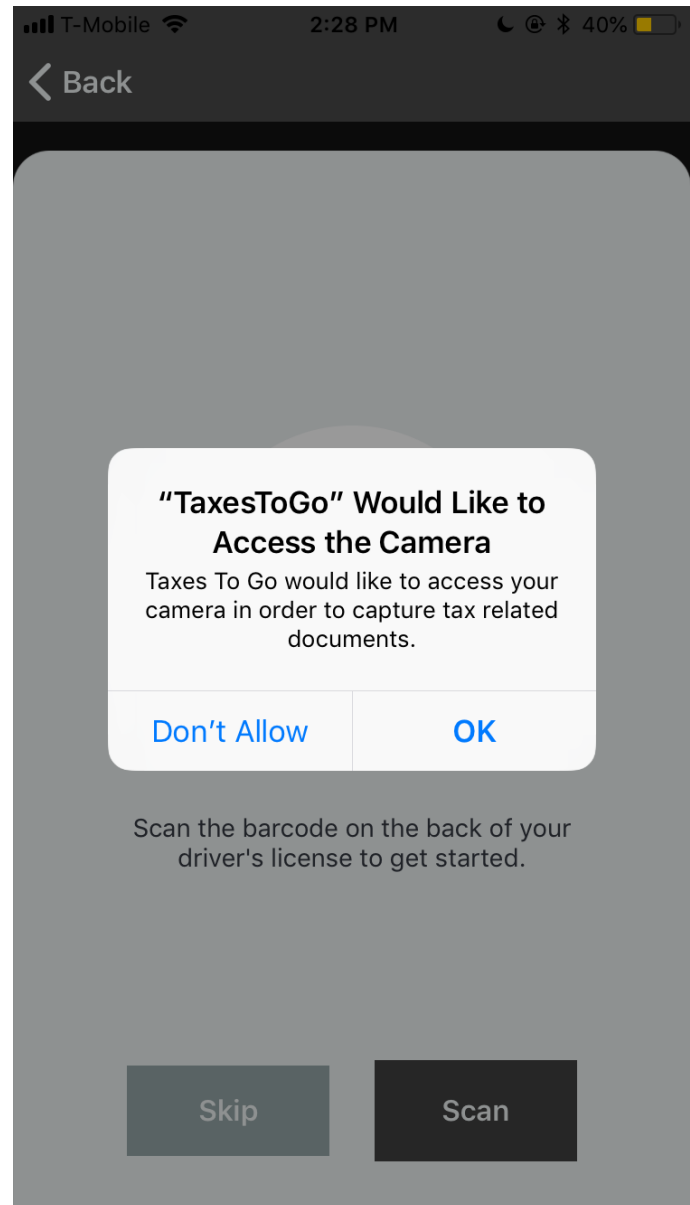
## Demo Taxes to Go Office



The first step is to answer whether or not they were married. This will determine if the taxpayer will need to complete information for a spouse.



After choosing Yes or No, the taxpayer will be directed to the next screen where the app will give them the option to scan barcode on the back of their driver's license. This will pull data from the license onto the necessary fields.



Verizon 3:56 PM 75%

Cancel Enter Information

First Name  
Jonathan

Last Name  
Smith

Date of Birth  
10/18/1988

DRIVER'S LICENSE

Drivers License Number  
129834765

Drivers License Issue Date  
10/18/2015

Drivers License Expiration Date  
10/18/2020

ADDRESS

Street Address  
800 West Main St

City

Verizon 9:15 AM 90%

Cancel Enter Information

DRIVER'S LICENSE

Drivers License Number  
129834765

Drivers License Issue Date  
11/18/2015

Drivers License Expiration Date  
11/18/2020

ADDRESS

Street Address  
800 West Main St

City  
Grovetown

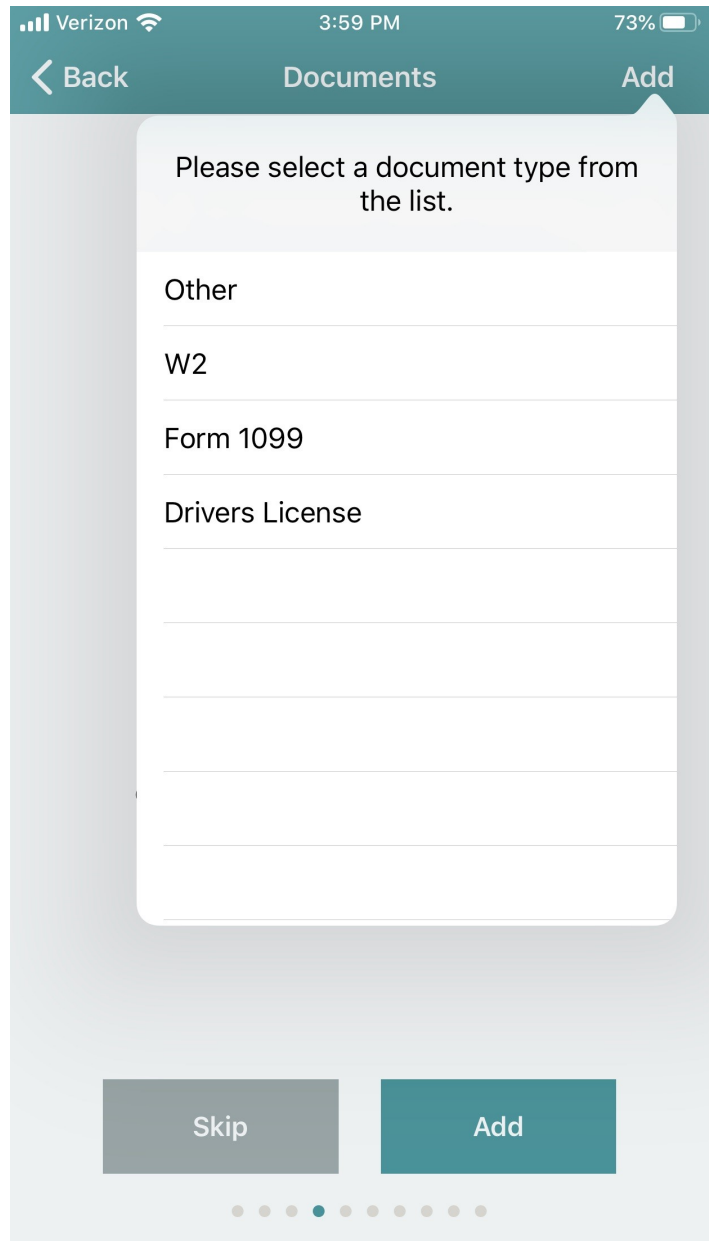
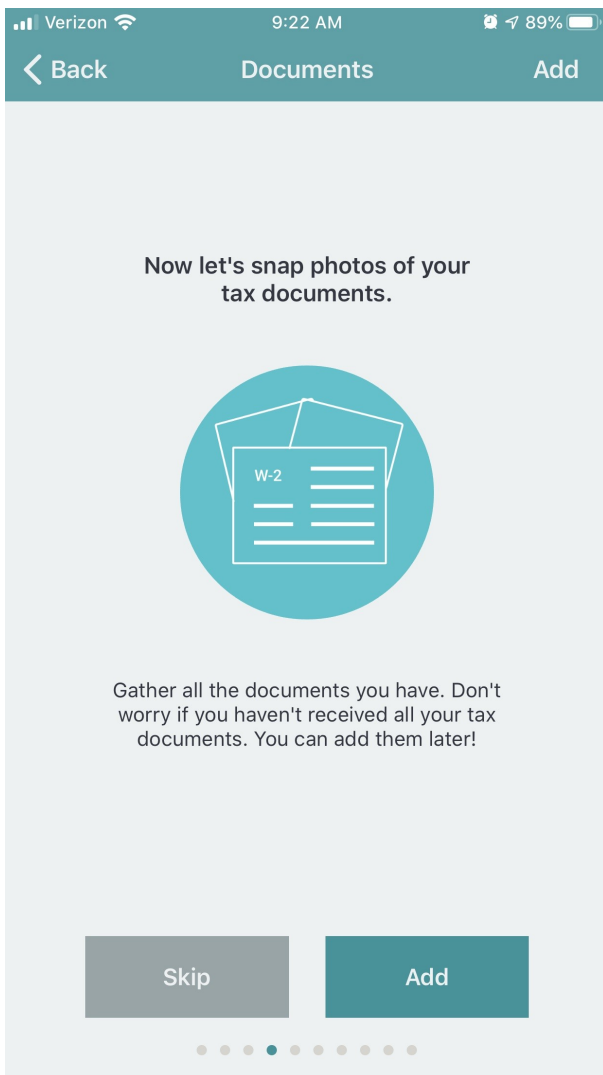
State  
GA

Zip Code  
30813

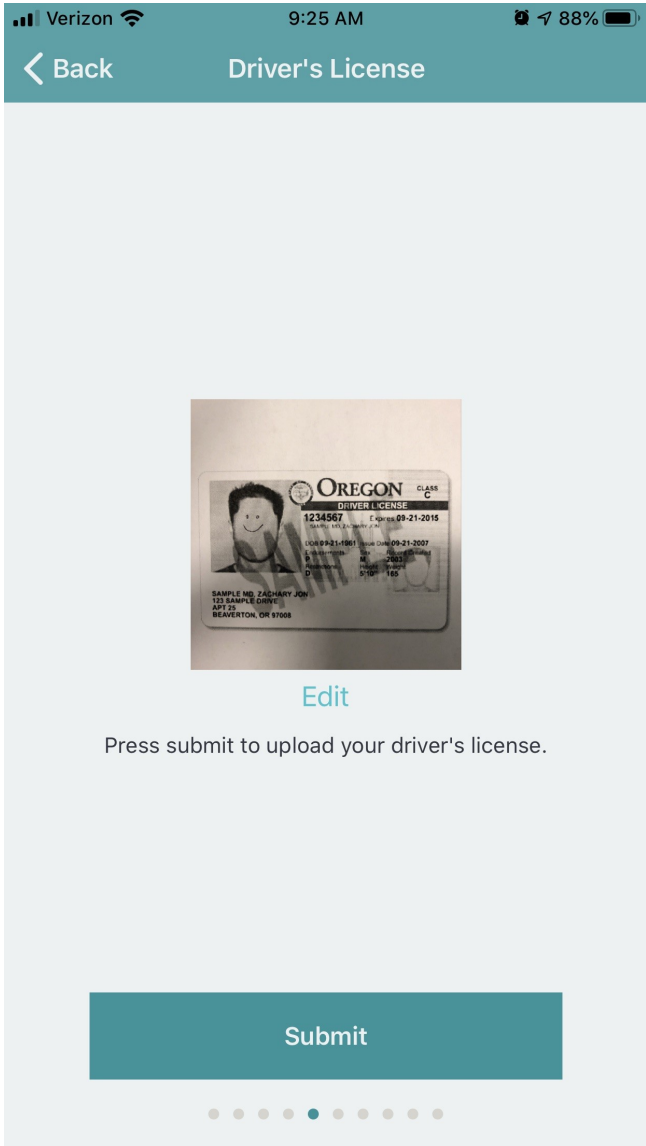
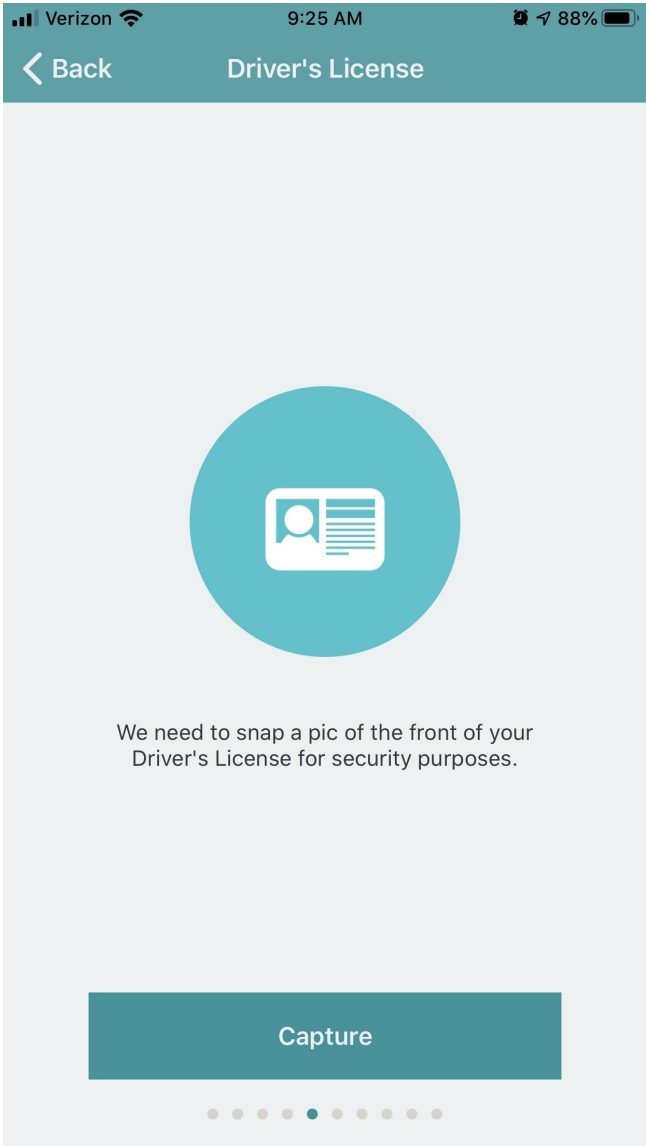
Save

The information for taxpayer and spouse will need to be fully completed before the user will be able to continue on to the next screen.

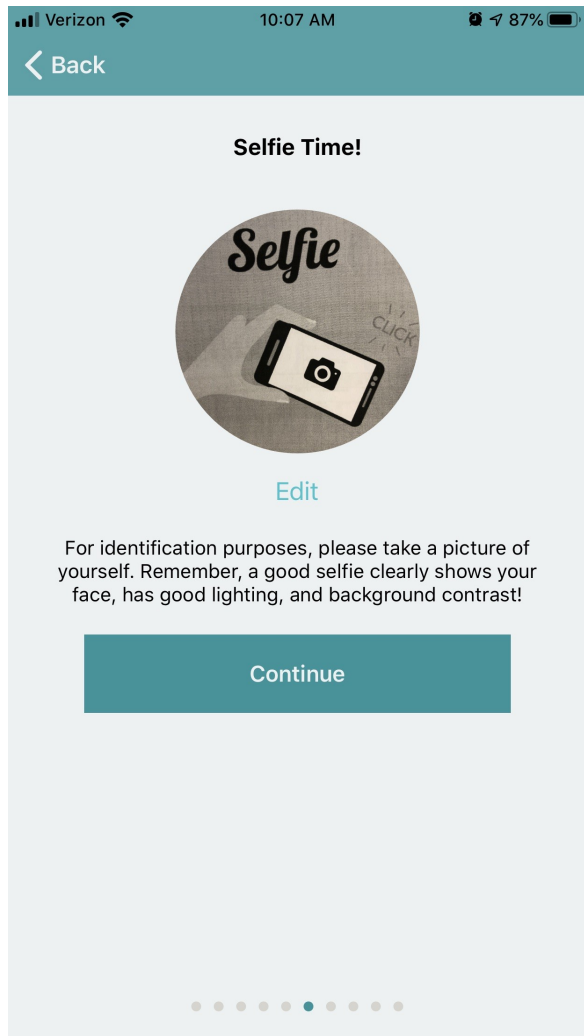
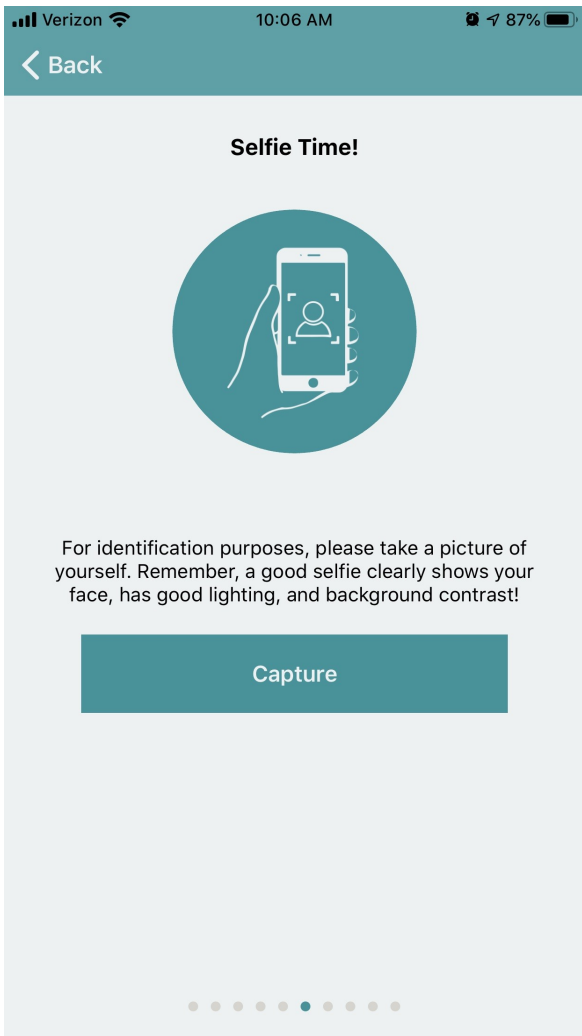
Following the basic information fields, the taxpayer will then be prompted to upload their tax documents to the app. They can choose to take a new photo or select from their pictures.



Next, the app will ask for a photo of the taxpayer's driver's license. This will be compared by the preparer to the selfie (added next) for security purposes.



Then the user will take a Selfie



Verizon 4:01 PM 73%

Back Personal Information

Your tax preparer will need your social security number in order to prepare your tax return.

YOUR SOCIAL SECURITY NUMBER

SSN

123-00-4567

Continue

xxx-xx-xxxx Done

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
	0	⌫

Then, the taxpayer will put in the information for any dependents. Just like the taxpayer and spouse, the dependent information will need to be fully completed before the user can continue to the next page.

On the next page, the app will ask for the taxpayer's (and spouse's if applicable) SSN.

Verizon 10:11 AM 87%

Cancel New Dependent

First Name

Jack

Last Name

Smith

SSN

145-00-1455

Date of Birth

01/18/2017

Months in Home

12

Childcare Expenses

0.00

Relationship

Son

Dependent in school full time

Save

Verizon 10:12 AM 86%

< Back Contact Information

We need your contact number so your preparer can get in touch with you in case any additional information is needed.

Phone Number  
867-5309

Continue

xxx-xxx-xxxx Done

1 2 ABC 3 DEF  
4 GHI 5 JKL 6 MNO  
7 PQRS 8 TUV 9 WXYZ  
0

Next, the taxpayer will be asked to put in Contact Information for the preparer. The number should be one the taxpayer uses regularly. The preparer will use this number to contact the Taxpayer if necessary.

Verizon 10:14 AM 86%

< Back Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you ('you' refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent. You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will

Consent granted by user

Continue

Before the taxpayer can submit their information, they will need to sign the Consent to Use.

Finally, the taxpayer will review their information and submit the app return.

Verizon 10:15 AM 86%

Back Review

Tap to edit any incorrect information. When you are ready, tap Submit to upload your information.

**Your Information** Edit

First Name	Jonathar
Last Name	Smith
Date of Birth	11/18/1981
Social Security Number	
Contact Number	

**Spouse Information**

First Name	
Last Name	
Date of Birth	
Social Security Number	
Contact Number	

**Your Driver's License** Edit

Expiration Date	11/18/2020
License Number	129834765

**Spouse Driver's License** Edit

Address	800 West Main St
City	Grovetown
State	GA
Zip Code	30813
Issue Date	12/18/2015
Expiration Date	12/18/2020
License Number	981276345

**Spouse Driver's License**

**Dependents** Edit

First Name	Jack
Last Name	Smith
Date of Birth	01/18/2017
SSN	145-00-1455
Childcare Expenses	\$0
Relationship	Son
Full Time Student	No

Submit


Progress indicator: 1 of 7 steps completed

Verizon 10:15 AM 86%

## Demo Taxes to Go Office

### Congrats!

You have successfully uploaded your information.



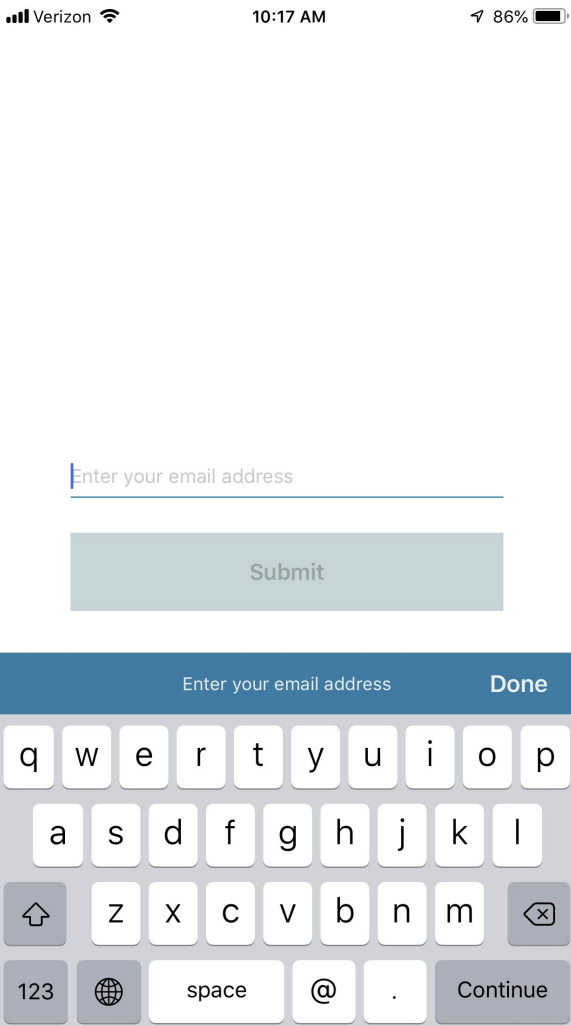
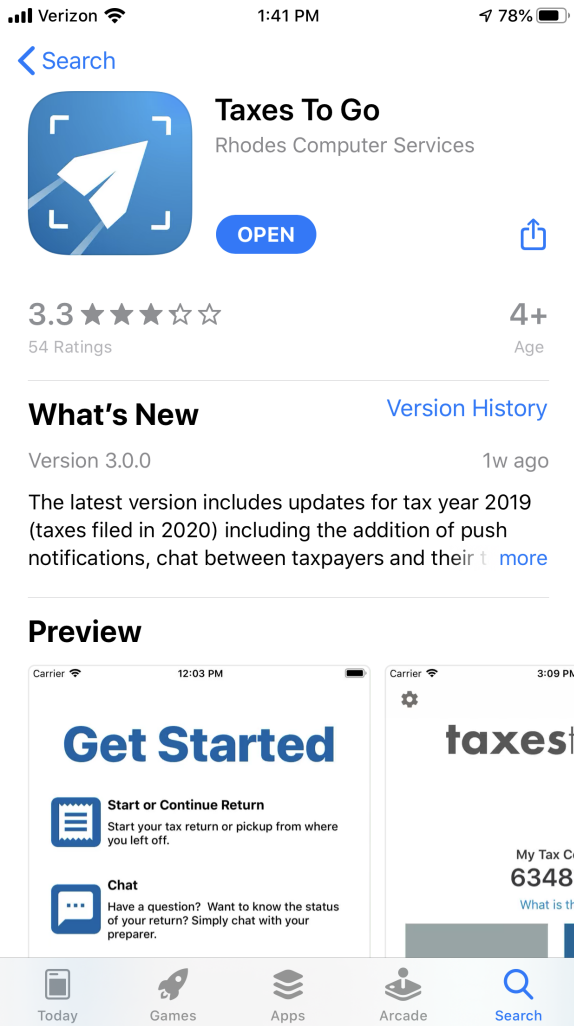
Continue

# Taxes to Go for iOS

## Generic App Users

### Initial Download

For the generic mobile app, the user will go to the App Store and download Taxes to Go directly. After the install is complete, the user will put in their email address and click Submit.



Next, the taxpayer will be prompted to create a new account with Taxes to Go.



Already have an account? [Log In](#)

TestEmail@Gmail.com

867-5309

.....



.....



I agree to the terms

[View Terms](#)

Create Account

MESSAGES

now

379-92

Taxes To Go - Verification Code: 351898

Verify

We sent a 6 digit code to 85\*\*\*\*\*44.  
Please enter it in the text field below.

Send Another Code

Log Out

After the account is created, the user will receive a Verification Code to enter into the app.

Following the account creation, the app will guide you to the main page after the follow screens.

Verizon 11:27 AM 85%

### Let's Get Started

- Start or Continue Return**  
Start your tax return or pickup fr
- Chat**  
Have a question? Want to know return? Simply chat with your pr
- Upload**  
Securely send documents to you
- Sign Tax Documents**  
Securely sign documents from y

## Availability



Verizon 11:27 AM 85%

Some items will not be av  
preparer enables

## Push Notifications



By enabling push notifications, your preparer can keep you up to date on your return status as well as any information needed to complete your return.

Continue



Continue

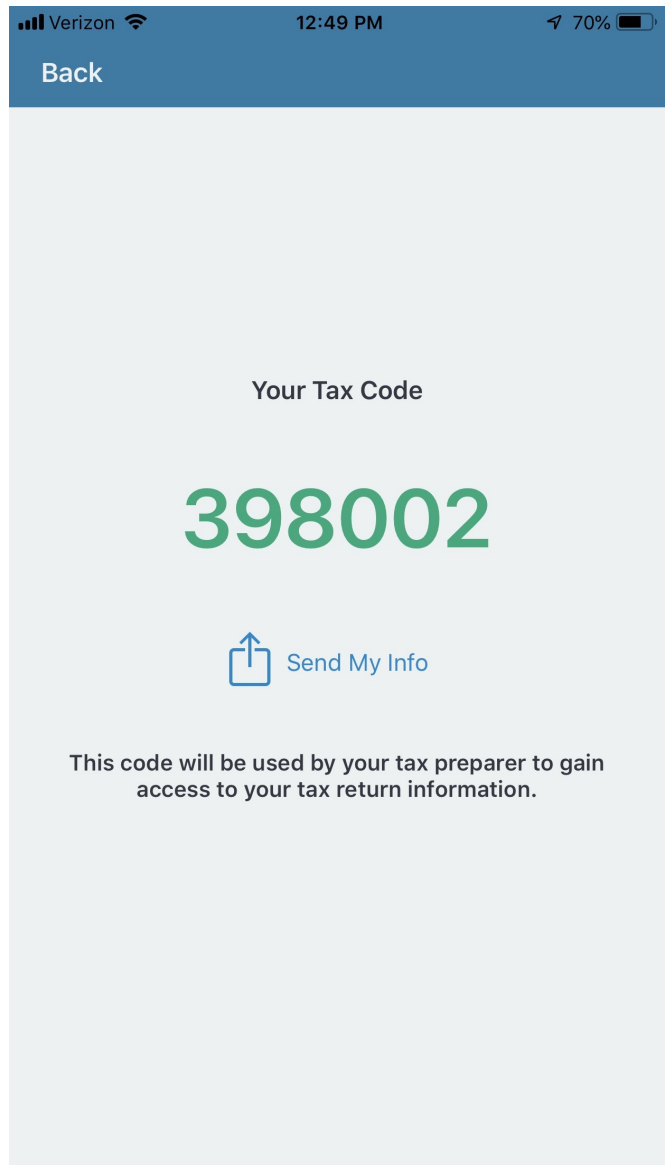
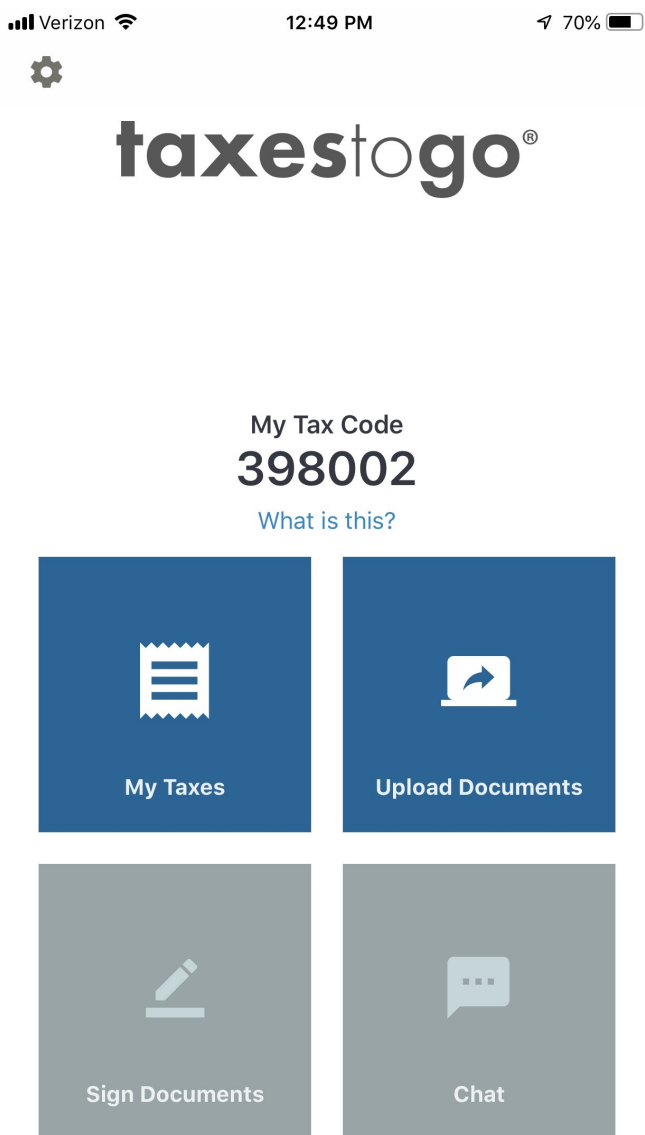


Continue



On the main page of the Generic Taxes to Go app the taxpayer will see a 6 digit code. This code will need to be provided to the preparer for the information to be pulled into the program. This can be given to the preparer by clicking Send My Info.

The My Taxes section for the Generic App is completed exactly as the Branded App is. For reference on this part please see page 7.




# Taxes to Go for Android

## Branded App Users

### Initial Download

Before the taxpayer can download your branded mobile app, they will need to follow the Taxes to Go referral link from the Taxes to Go configuration page in your Account Hub. This link will take you to this page where you will need to fill out the information for the taxpayer:

Demo Taxes to Go Office

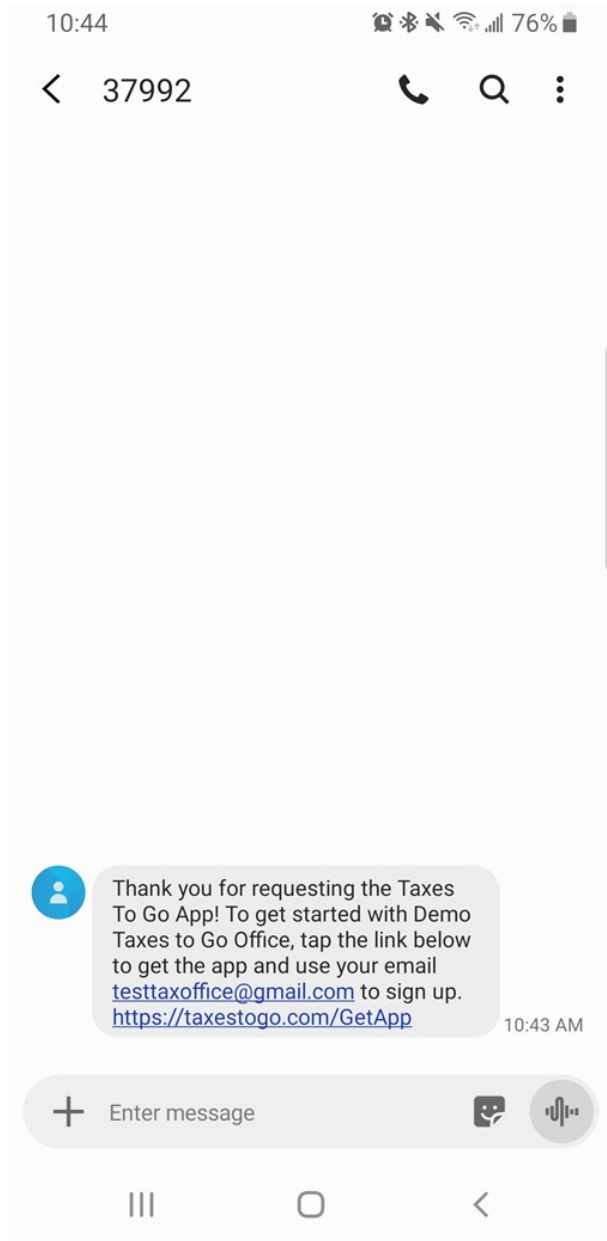


To download your customized app, please enter your Name, Email, Referral Code (if you have one), and phone number below and we'll send you the app via text message straight to your phone.

<b>Enter Your Phone Number</b>	<input type="text" value="867-5309"/>
<b>Enter Your Email</b>	<input type="text" value="TestEmail@Gmail.com"/>
<b>Enter your First Name</b>	<input type="text" value="TaxestoGo"/>
<b>Enter your Last Name</b>	<input type="text" value="Test"/>
<b>Enter Your Referral Code</b>	<input type="text" value="123"/>

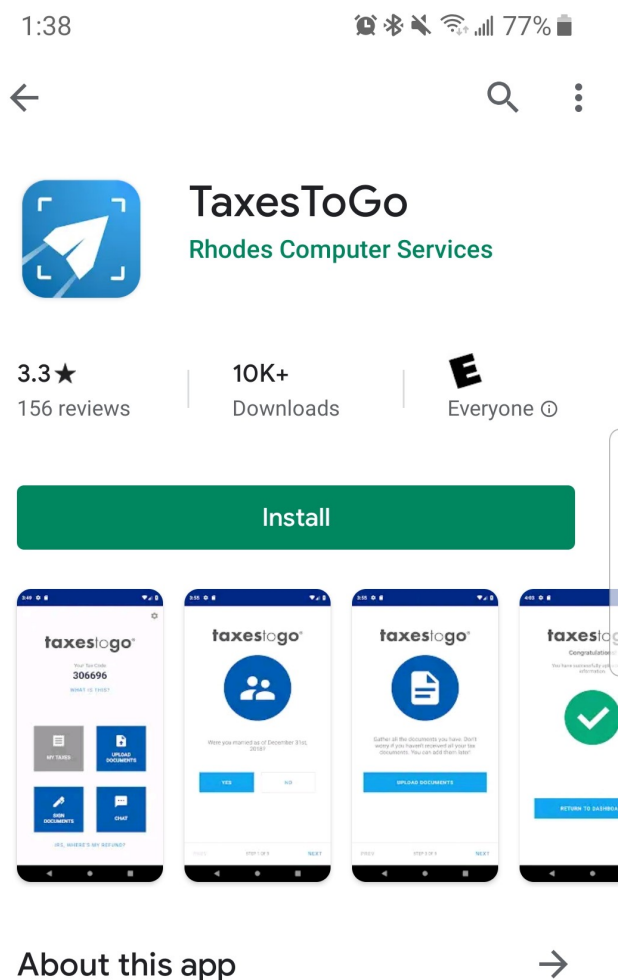
[CONTINUE](#)

This page includes fields to input the taxpayer's phone number, email address, name and the referral code for the Tax Preparer (if applicable). If you choose, you can also send the referral link to the taxpayer and they can complete this information themselves. This step is vital for the branding because this is how the user's account recognizes the branding.



After completing that step, the user will receive a text message from the automated Taxes to Go message system with a link to the Google Play Store to download the Taxes to Go app.

Please Note: The app will not show branded in the app store. The branding is only applied once the user creates an account with the information input on the previous step.



TaxesToGo® is the most convenient way to file

## Account Creation

Once the app has been downloaded, the user will open it to this page. They will need to use the exact email from the initial download to see the branding.

The taxpayer will type in the email address and click Create Account. That will take them to this page to Register with the Branded App:



email@example.com

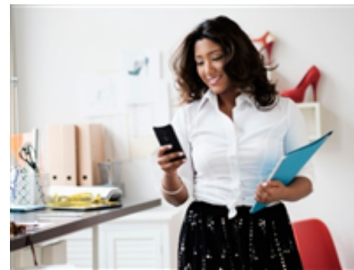
**Sign In**

[CREATE ACCOUNT](#)

The taxpayer will need to put in their email address, phone number, create a password and agree to the terms.

*Passwords must include 1 uppercase, 1 lowercase, 1 number, and 1 special character*

## Demo Taxes to Go Office



testtaxoffice@gmail.com

7061234567

.....

.....

I agree to the terms [View Terms](#)

**Register**

Already have an account? [SIGN IN](#)

After successfully registering, the taxpayer will receive a 6 digit code to the cell phone number used in the creation of the account. They will need to complete this to access the account.



## Demo Taxes to Go Office

We sent you a 6 digit code.  
Please enter it in the text field  
below.

591787

[RESEND CODE](#)   [CHANGE USER](#)

**Submit**



Following the account creation, the app will guide you to the main page after the follow screens.

# Let's Get Started Availability



## Start or Continue Re

Start your tax return or j where you left off.



## Chat

Have a question? Want status of your return? S your preparer.



## Upload

Securely send documen preparer



## Sign Tax Documents

Securely sign documen preparer

CONTINUE



# Push Notifications

Some items will not be availabl enables ther

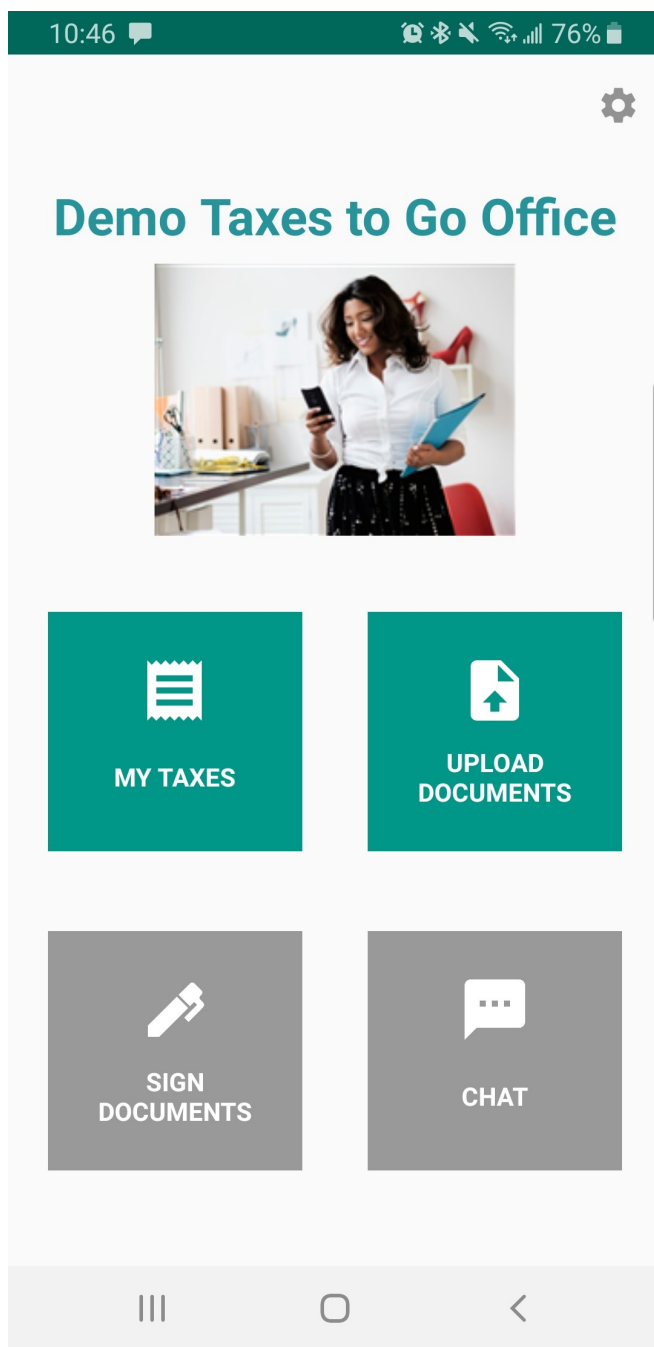


By enabling push notifications, your preparer can keep you up to date on your return status as well as any information needed to complete your return.

CONTINUE

CONTINUE

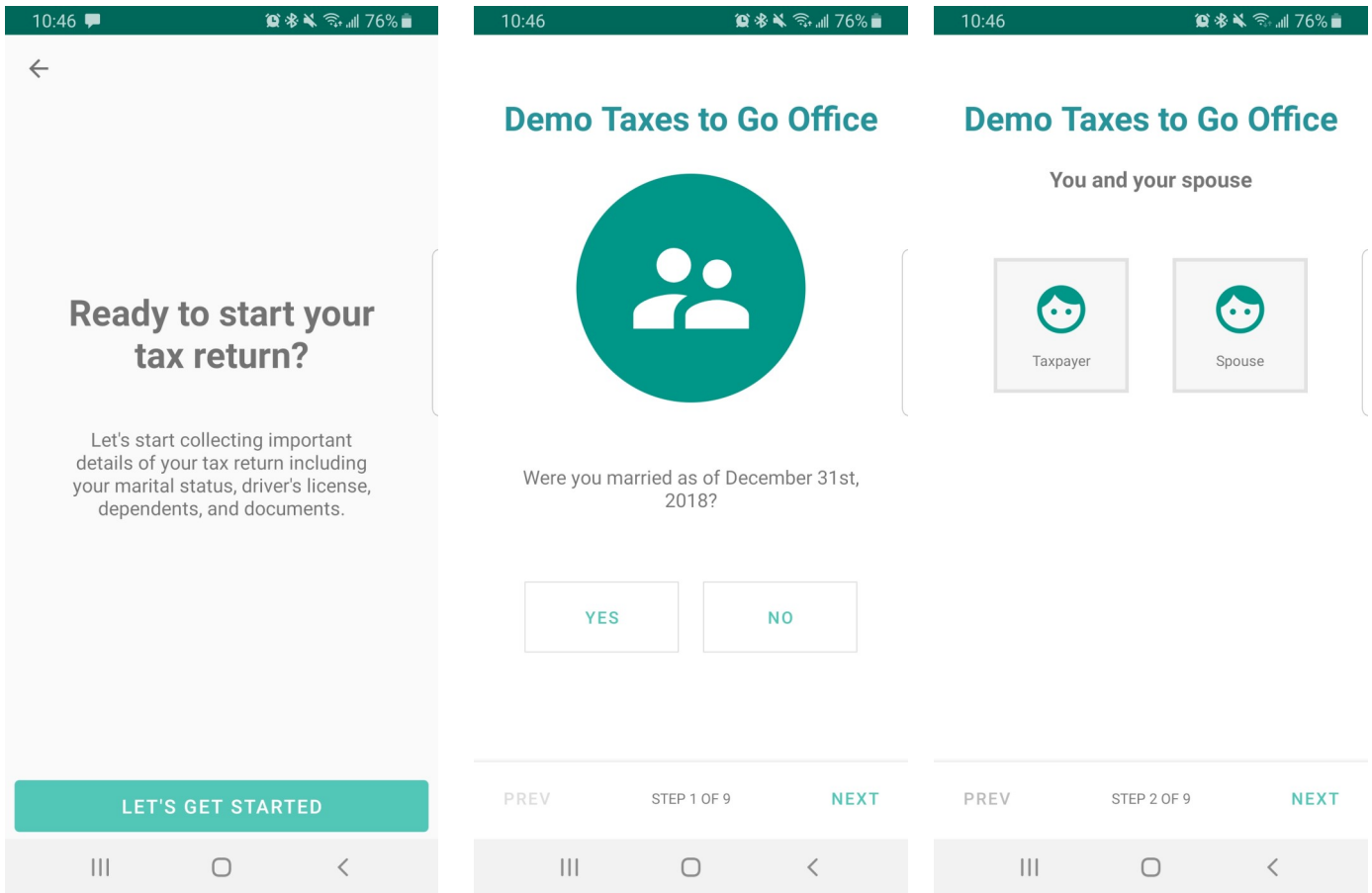
Once inside the account, they will see My Taxes and Upload Documents available. My Taxes is where they will go to complete the basic information part of their tax return. This section is covered in the next section, Inside My Taxes.



## Inside My Taxes

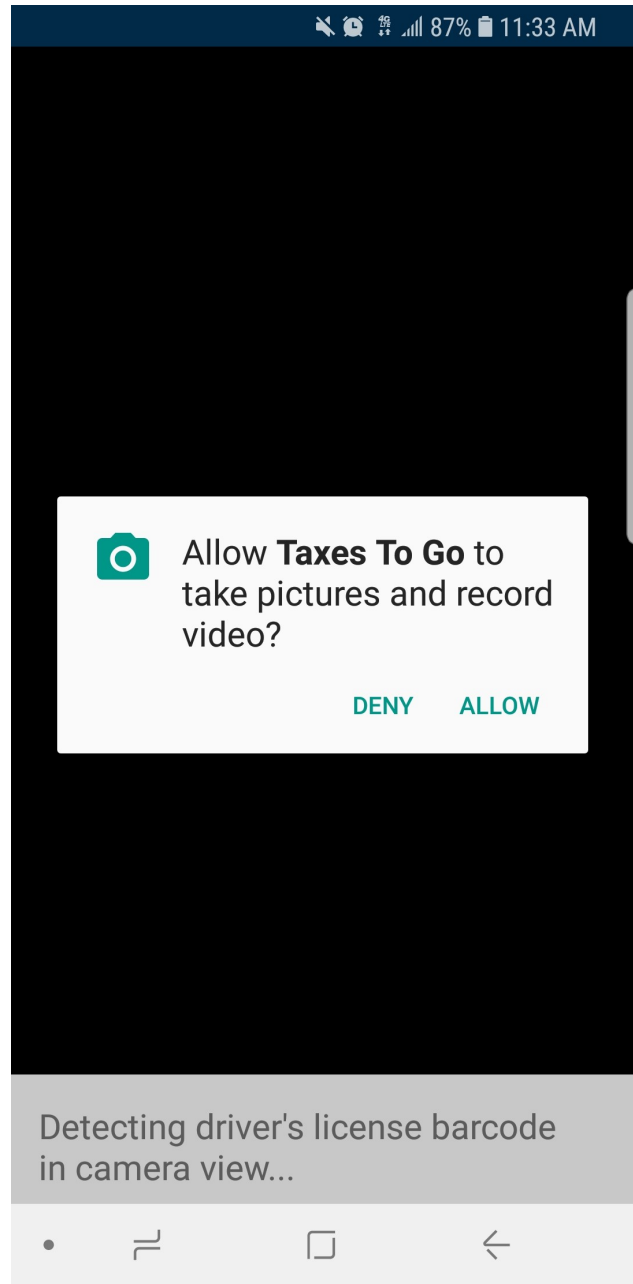
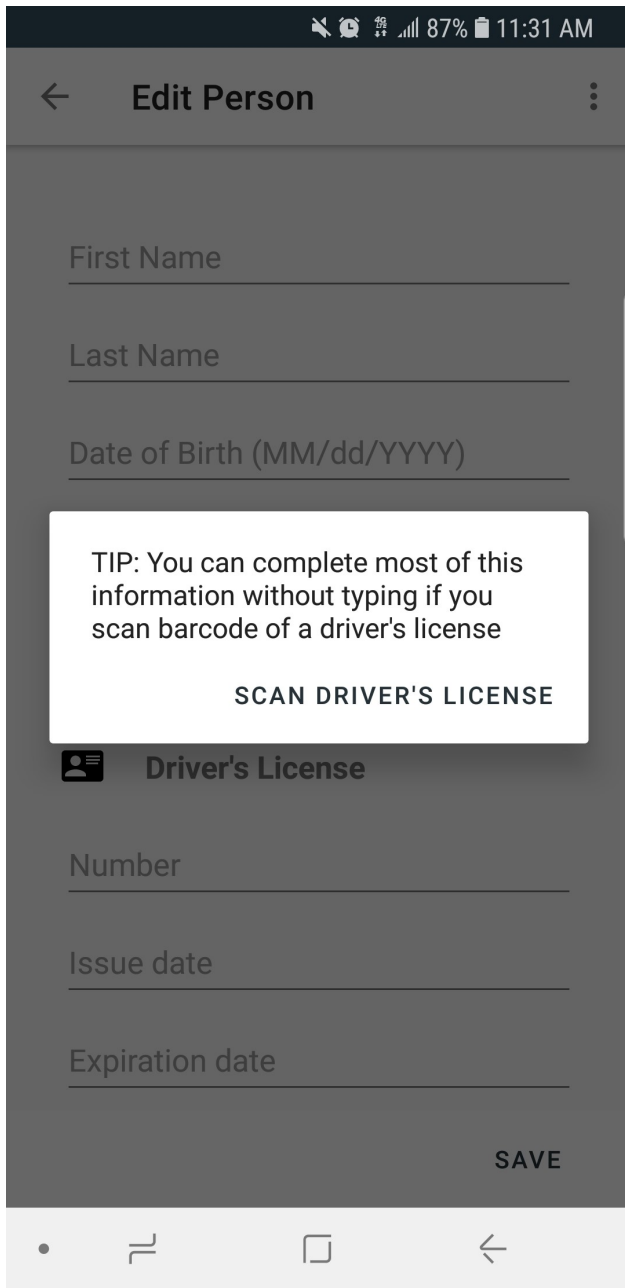
The My Taxes section of the app allows the taxpayer to fill out basic information about them, their spouse and dependents and to upload all tax documents they've received.

The first step is to answer whether or not they were married. This will determine if the taxpayer will need to complete information for a spouse or not.



After the taxpayer clicks on the icon to input information for themselves or their spouse, they will be given the option to scan the back of the Driver's License. This will pull the data from the user's license onto the fields.

Please be sure to Allow Taxes to Go access to the phone's camera.



10:48 [status icons] 75%

← Edit Person ⋮

First Name  
Tax

Last Name  
Office

Date of Birth (MM/dd/YYYY)  
01/01/1980

Social Security Number  
111-00-1111

Phone Number  
706-123-4567

**Driver's License**

Number  
123456789

Issue date  
01/01/2010

Expiration date  
01/01/2025


SAVE

III ○ <

If the taxpayer chooses not to scan their driver's license, they will need to fill out each field listed.

10:48 [status icons] 75%

## Demo Taxes to Go Office



Gather all the documents you have. Don't worry if you haven't received all your tax documents. You can add them later!

UPLOAD DOCUMENTS

PREV      STEP 3 OF 9      NEXT

III ○ <

Once the user clicks SAVE, they will be prompted to upload any tax documents they may have.

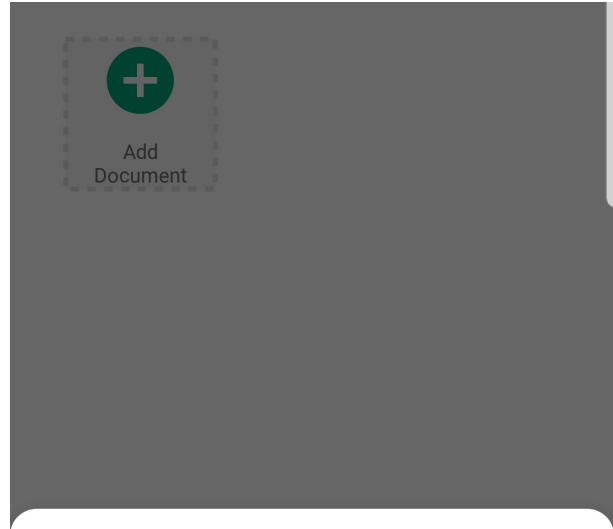
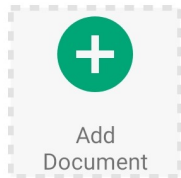
Once the taxpayer clicks Add Document, they will be prompted to select the document type and if they want to take a new photo or select from their gallery.

10:48



## Demo Taxes to Go Office

Upload your first document

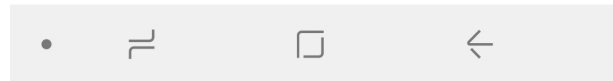


What kind of document do you have?

W2

Other

Form 1099



Let's get a picture of that W2

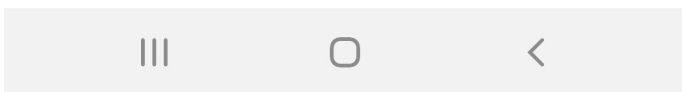
Use camera to take a picture

Select from photos

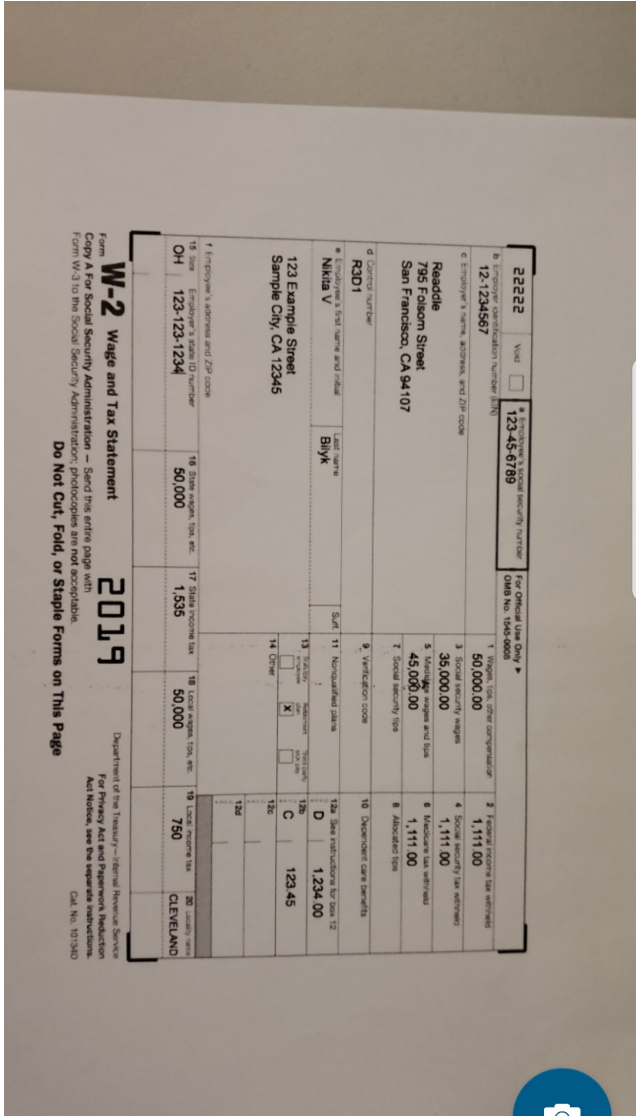
PREV

STEP 3 OF 9

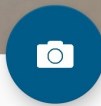
NEXT



As the user uploads photos, they will see the document types listed on this page.



Press button to take a picture



10:50



## Demo Taxes to Go Office

3 Uploaded Documents

**+**  
Add Document

**W2**  
Uploaded

**OTHER**  
Uploaded

**1099**  
Uploaded

PREV

STEP 3 OF 9


NEXT



Next, the app will ask for a photo of the taxpayer's driver's license. This will be compared by the preparer to the selfie (added next) for security purposes.

10:50

### Demo Taxes to Go Office




For identification purposes, please take a picture of the front of your driver's license. This picture is needed to verify your identity.

**CAPTURE DRIVER'S LICENSE**

PREV    STEP 4 OF 9    **NEXT**

10:51

### Demo Taxes to Go Office



Picture of your ID has been captured

**CONTINUE**

RETAKE PICTURE

PREV    STEP 4 OF 9    **NEXT**

Press button to take a picture

Then the user will take a Selfie

10:51



## Demo Taxes to Go Office



For identification purposes, please take a picture of yourself. Remember, a good selfie clearly shows your face, has good lighting, and background contrast!

TAKE A SELFIE

PREV

STEP 5 OF 9

NEXT



10:52



## Demo Taxes to Go Office



Your selfie has been captured

CONTINUE

RETAKE PICTURE

PREV

STEP 5 OF 9

NEXT



Following the selfie, the taxpayer will need to input any information about their dependent (if applicable).

10:52 [status icons] 74%

## Demo Taxes to Go Office



Do you have any Dependents? Qualifying dependents greatly lower your tax bill, helping you get the biggest refund possible.

**ADD DEPENDENTS**

I DO NOT HAVE DEPENDENTS

PREV      STEP 6 OF 9      NEXT

III      ○      <

10:52 [status icons] 74%

## ← Add Dependent

First Name  
Child

Last Name  
Office

Social Security Number  
222-00-2222

Date of Birth (MM/dd/YYYY)  
01/01/2010

Childcare expenses (\$)  
1200

Dependent is a fulltime student

Relationship  
Son ▼

Months in home  
12 ▼

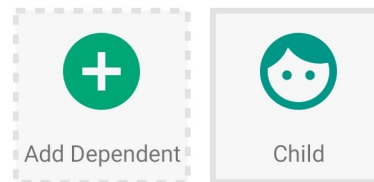
SAVE

III      ○      <

To add more than one dependent, simply click the green plus to Add Dependent.

## Demo Taxes to Go Office

You have 1 dependent



## Demo Taxes to Go Office

### Contact Information

We need your contact information so your preparer can get in touch with you in case any additional information is needed.

Phone Number

706-123-4567

Next, the taxpayer will be asked to put in Contact Information for the preparer. The number should be one the taxpayer uses regularly. The preparer will use this number to contact the taxpayer if necessary.

PREV

STEP 7 OF 9

NEXT



Before the taxpayer can submit their information, they will need to sign the Consent to Use.



## Demo Taxes to Go Office

### Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you (you refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes ot...

MORE

Tax Preparer / Company Name

Demo Taxes to Go Office

Taxpayer Name

Tax Office

CONSENT

PREV

STEP 8 OF 9

NEXT



## Demo Taxes to Go Office

### Consent To Use

Your tax preparer needs your consent to use your tax information.

Federal law requires this consent form be provided to you (you refers to each taxpayer, if more than one). Unless authorized by law, we cannot use your tax return information for purposes ot...

MORE



Consent to use granted

PREV

STEP 8 OF 9

NEXT



Finally, the taxpayer will review their information and submit the app return.

10:53



## Demo Taxes to Go Office

### Review

Check your information carefully and click to edit any incorrect information. When you are ready, press Submit button to upload your information.

Phone number <b>706-123-4567</b>	<a href="#">EDIT</a>
Granted Consent to Use <b>Yes</b>	<a href="#">EDIT</a>
Uploaded documents <b>3</b>	<a href="#">EDIT</a>
Captured selfie <b>Yes</b>	<a href="#">EDIT</a>

	<a href="#">EDIT</a>
--	----------------------

PREV

STEP 9 OF 9

**SUBMIT**



10:56



## Demo Taxes to Go Office

### Congratulations!

You have successfully uploaded your information.



**RETURN TO DASHBOARD**

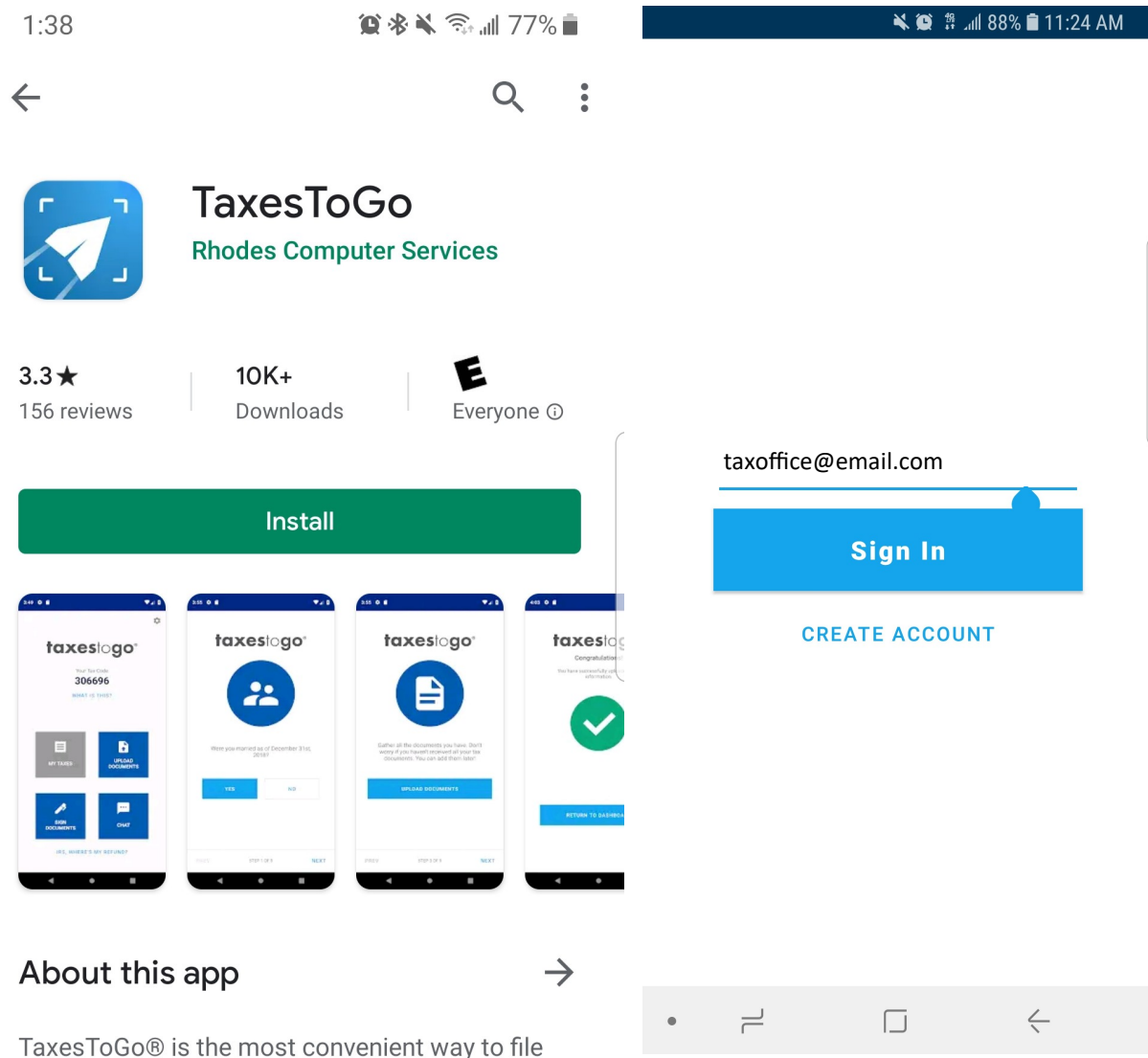


# Taxes to Go for Android

## Generic App Users

### Initial Download

For the generic mobile app, the user will go to the App Store and download Taxes to Go directly. After the install is complete, the user will put in their email address and click Create Account.



10:03

🔔 📶 🔒 📶 80%

Next, the taxpayer will be prompted to create a new account with Taxes to Go.

**taxestogo**<sup>®</sup>

taxofficetest@gmail.com

7061234567

.....

.....

I agree to the terms [View Terms](#)

**Register**

Already have an account? [SIGN IN](#)

|||

○

<

After the account is created, the user will receive a Verification Code to enter into the app.

10:03

🔔 📶 🔒 📶 79%

**taxestogo**<sup>®</sup>

We sent you a 6 digit code.  
Please enter it in the text field below.

[RESEND CODE](#)

[CHANGE USER](#)

**Submit**

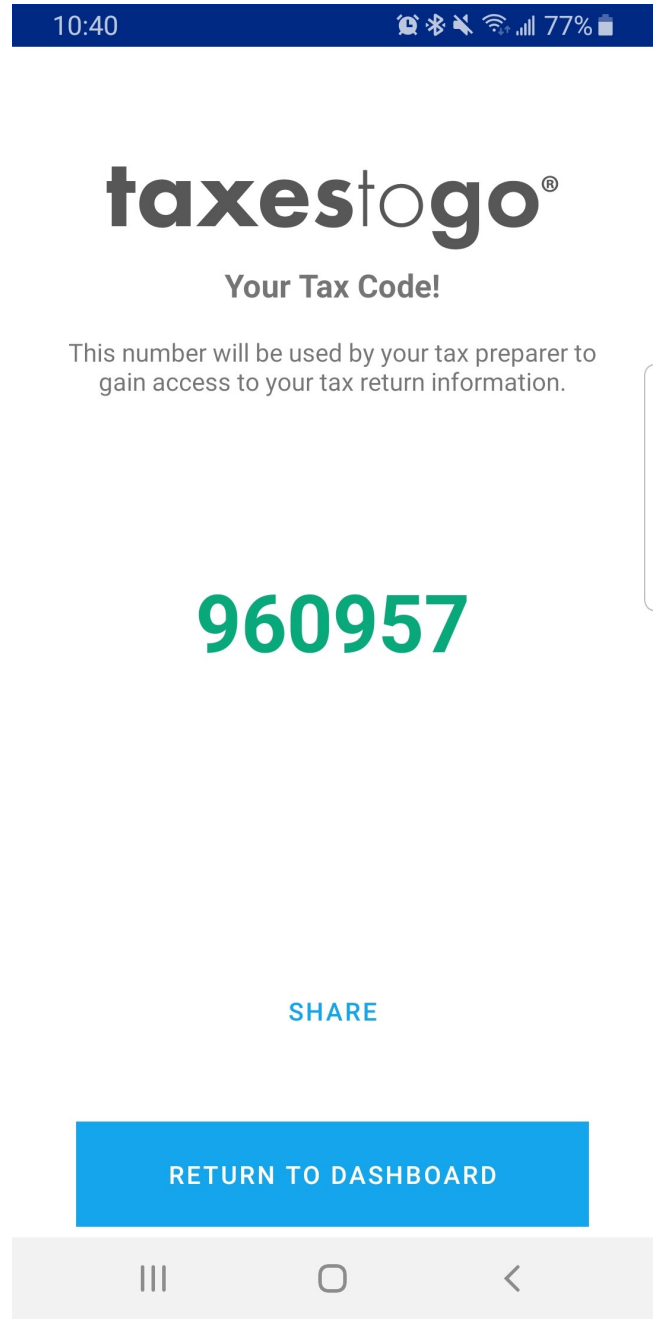
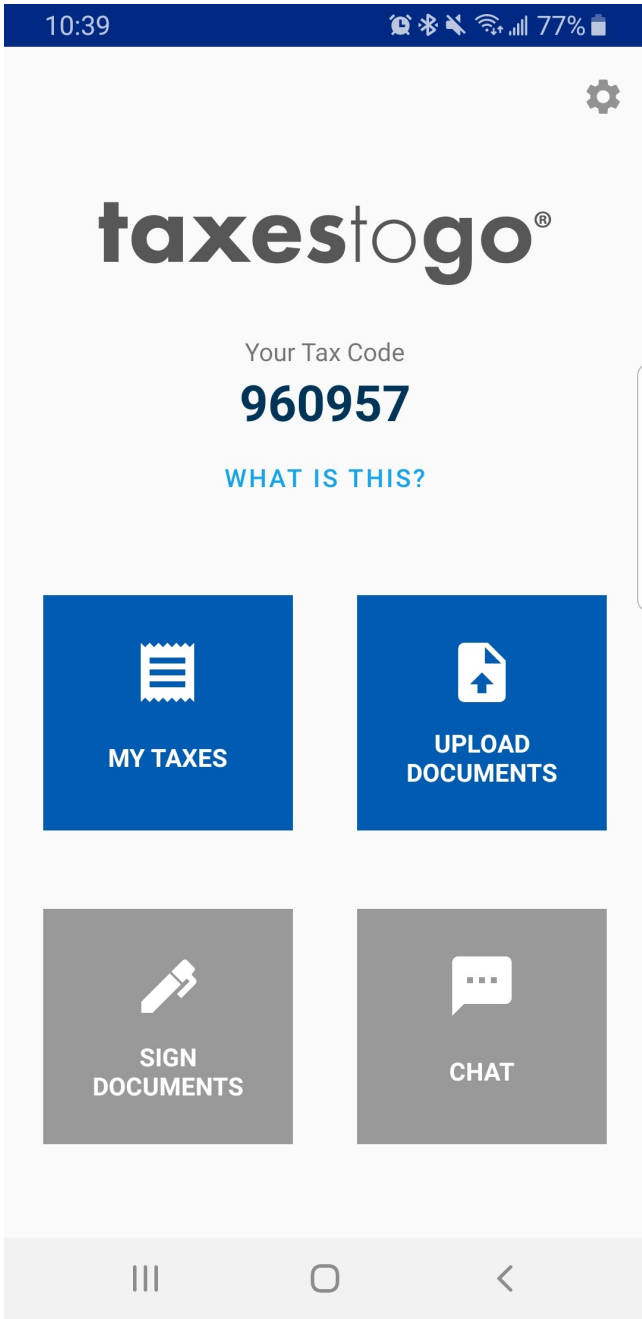
|||

○

<

On the main page of the Generic Taxes to Go app the taxpayer will see a 6 digit code. This code will need to be provided to the preparer for the information to be pulled into the program. This can be given to the preparer by clicking Share.

The My Taxes section for the Generic App is completed exactly as the Branded App is. For reference on this part please see page 25.



# App Returns in the Program

## Web1040 Pro App Returns

### Pulling a Branded App Return into Web1040 Pro

To pull a Branded App Return into Web1040 Pro, you will need to click on the branded app queue from the Welcome page of your Web1040 Pro Account. This will bring up a list of every branded app client you have under your EFIN that has not been claimed in the program.

### Welcome to Tax Office

Message Center 0

Rejected Clients 0

TaxesToGo Clients 8

#### Start New 2018 Tax Return

Create a brand new tax return for a client.

#### Import App User

Import a user from the Mobile App

#### Client Search

Edit returns you previously started.

#### Review Returns

Returns that are currently waiting to be reviewed

#### Configuration

Setup the configuration options for your office.

In the list, you will have the option to Claim the return. Claiming the return will take you directly into the Personal Information section to begin the tax return. From this point you will complete the return as normal.

TaxesToGo Client List

Search:

Show  entries

Showing 1 to 9 of 9 entries

Taxpayer Name	Email Address	SSN	Submit Date	
Taxpayer Test	TestAccount@Gmail.com	111001111	01/16/2019 06:14 PM	<a href="#">Claim</a> <a href="#">Delete</a>

To access the uploaded documents for the user, you will need to select the client's name from inside the tax return and choose Scanned Documents.

Preview Return | Help & Support | TEST RETURN | Logout


3,397 | Refund

- Your Office
- Scanned Documents**
- ¿Sí hablas Español?
- Notes
- Helpful Tools
- Quick File
- Save & Exit Return

From there you can download the documents and use them to complete the tax return.

### Scanned Documents

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

File name	File Size	Uploaded	
W2.PNG	62 KB	1/22/2019 7:27 PM	 <a href="#">Download</a>

## Pulling a Generic App Return into Web1040 Pro

To pull a Generic App Return into Web1040 Pro, you will need to click on Import App User from the Welcome page of your Web1040 Pro Account.

### Welcome to Tax Office

Message Center 0

Rejected Clients 0

TaxesToGo Clients 8

#### Start New 2018 Tax Return

Create a brand new tax return for a client.

#### Import App User

Import a user from the Mobile App

#### Client Search

Edit returns you previously started.

#### Review Returns

Returns that are currently waiting to be reviewed

#### Configuration

Setup the configuration options for your office.

From there you will need to enter the email address and 6 digit Import Code for the client. Once you import app return, you will complete the return as normal.

Enter App User Information

Email  
TestEmail@Gmail.com

Import Code (6 Digits)  
123456

*By using this software in conjunction with the TaxesToGo app you acknowledge that you will abide by all authentication and disclosure requirements to include but not limited to IRS and State requirements as well as bank requirements as they relate to financial products. Use of this integration is subject to the license agreement and terms.*

Import App User

To access the uploaded documents for the user, you will need to select the client's name from inside the tax return and choose Scanned Documents.

Preview Return | Help & Support | TEST RETURN | Logout

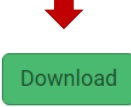
- Your Office
- Scanned Documents**
- ¿Sí hablas Español?
- Notes
- Helpful Tools
- Quick File
- Save & Exit Return

From there you can download the documents and use them to complete the tax return.

3,397  
Refund

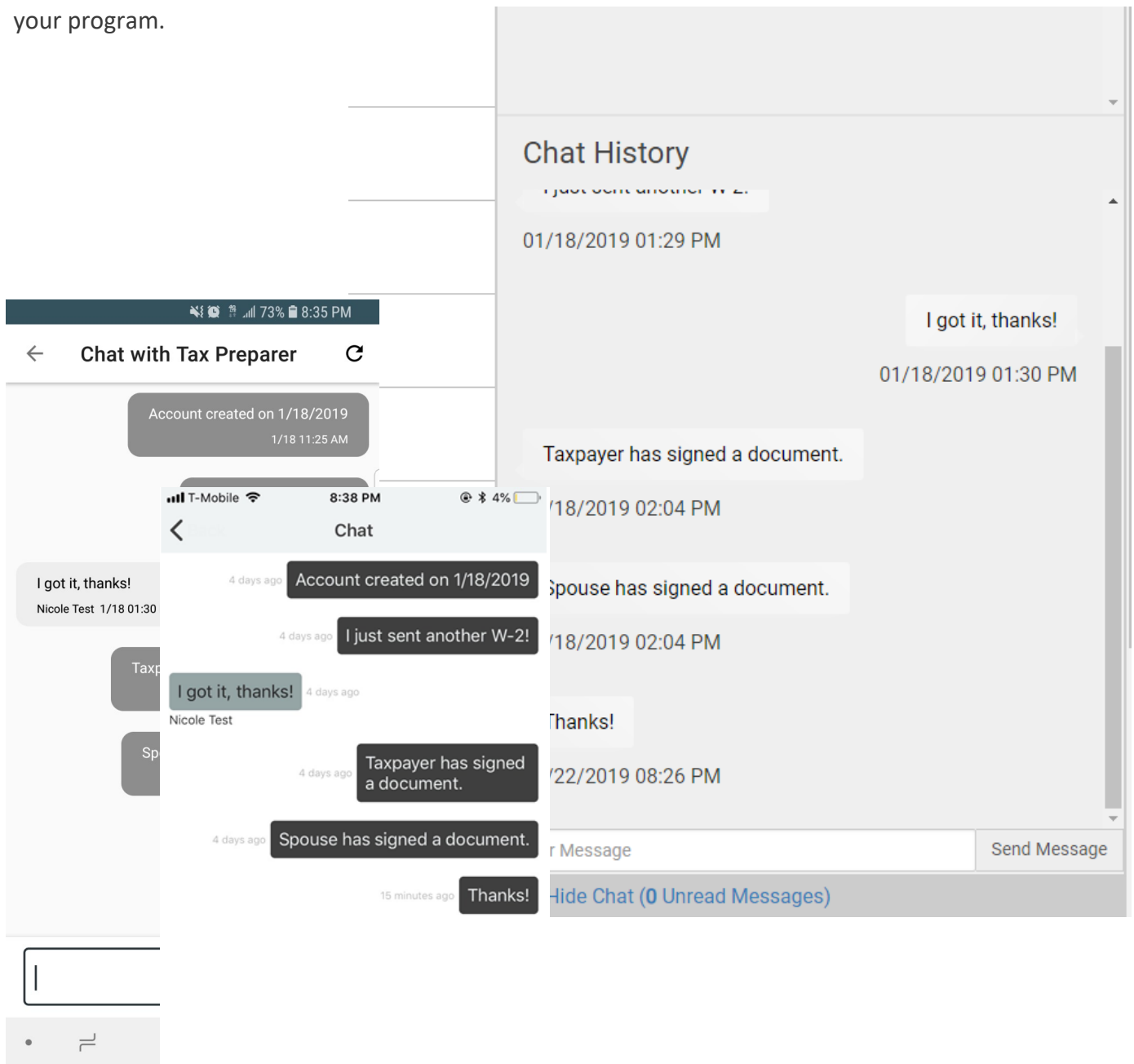
### Scanned Documents

+ Upload Documents | Close Window

File name	File Size	Uploaded	
W2.PNG	62 KB	1/22/2019 7:27 PM	

## Using the Chat Feature in Web1040 Pro

The Chat Feature in Web1040 Pro is available at the bottom of the screen. When there are new chats, it will show as a notification. This feature is only available for the clients once you start the App Return in your program.



## Sending Documents to be Signed in Web1040 Pro

On the Submission Page of the tax return, there is an option to send the documents back to the app for the taxpayer to sign. Once you click this button, you will see a notification that the documents have been successfully sent.

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

One Copy - Federal and State

Print Return

Email Return

Send Tax Return Documents to Mobile Application

Preparer Information

Send Tax Return Documents to Mobile Application



Transfer Completed - Documents are now on Mobile Application

After the documents have been signed by the taxpayer, the signatures will show in the program on the Submission Page. From here you can transmit the return.

Electronic Signature

Taxpayer Signature

Change Signature

*Sign*

Spouse Signature

Change Signature

*Sign*

## Signing Documents on iOS

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.

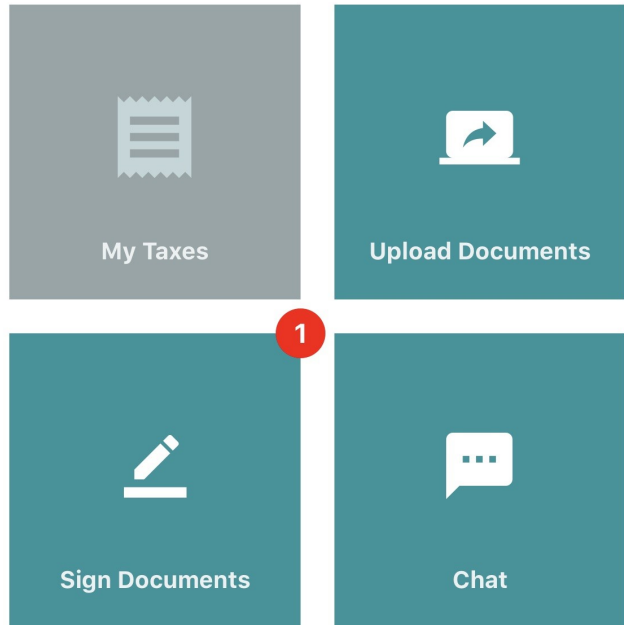
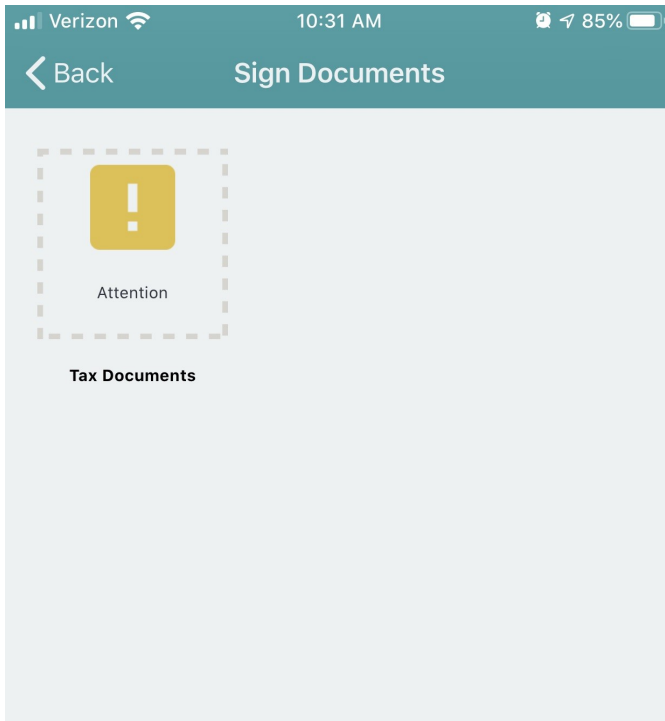
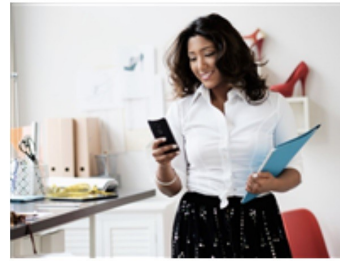
Verizon

10:31 AM

85%



## Demo Taxes to Go Office



TEST & SPOUSE PERSON  
554 TEST DR  
EVANS, GA 30809  
2018 INCOME TAX RETURN

Add signature for

Test Person

Spouse Person

Cancel

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and Spouse (if applicable) to sign.

Once the taxpayer clicks Save, the signature will be applied to all necessary forms and this information will be sent back to the program.

Cancel

A large, stylized handwritten signature in black ink that reads "Jonathan". The signature is written in a cursive style with a large initial 'J' and a horizontal line crossing through the middle of the name.

10/07/2019

Clear

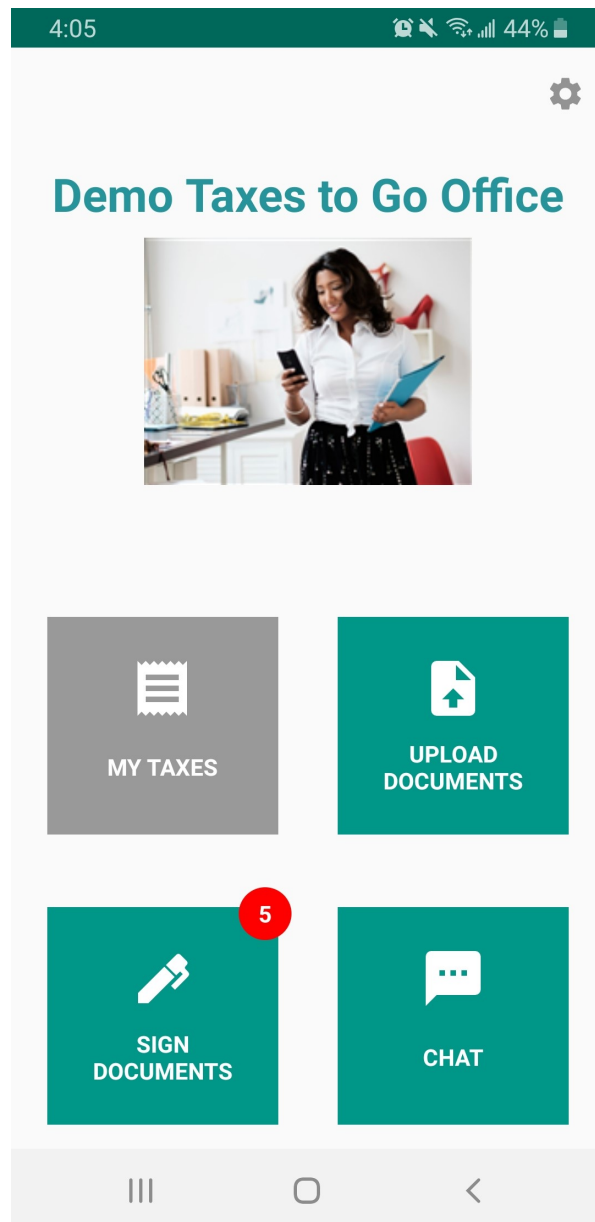
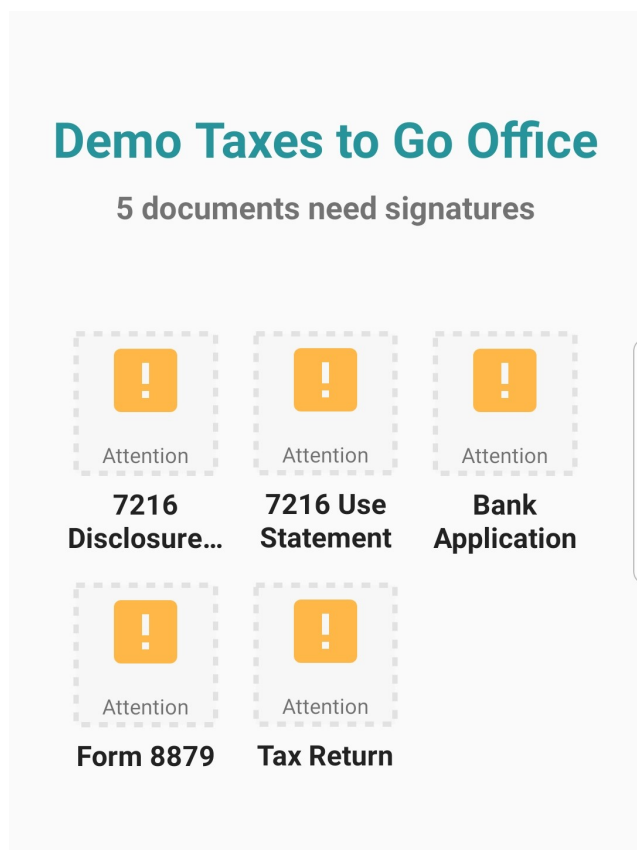
Save

## Signing Documents on Android

In the app, the taxpayer will see the Sign Documents feature become available.

Please Note: If the taxpayer does not see the icon change or become available, they will need to close and reopen the Mobile App.

When the taxpayer clicks on Sign Documents, they will see an alert that signatures are needed.



TAX OFFICE  
123 TEST  
AUGUSTA, GA 30906  
2018 INCOME TAX RETURN

When they select the icon, they will see a PDF of their tax return, as well as a place for both taxpayer and spouse (if applicable) to sign.

Once the taxpayer clicks Submit Signature, the signature will be applied to all necessary forms and this information will be sent back to the program.



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## Associating App Returns in the Program with Existing Returns

If you have already started your client's tax return in your program, the taxpayer can still use the Mobile App to send you their information and to sign documents.

Associating App Returns with Existing Returns allows you to take a return you've already created in your program and connect it to an app return. Once this connection is made, your client will be able to upload documents to you and you will be able to send documents back to them.

In order to connect the two, your client will need to download the Taxes to Go app. Once the taxpayer has downloaded the Mobile App (whether Branded or Generic), you will need to get the email address and Tax Code from them. For Branded App users, their Tax Code will be available from the settings menu inside the app.

## Associate App Return in Web1040 Pro

To Associate an App Return with an Existing Return in Web1040 Pro, you will need to navigate to the Client Search list of your program. Once you find the client you want to associate with an App Return, select the Tools drop-down and choose Sync Return with Mobile App.

The screenshot shows a client search list with columns: FIRST, LAST, PHONE, PREPARER, STATUS, and a set of icons. The first row contains: Pro, Web, (850) 776-8044, In Progress. A 'Tools' dropdown menu is open, listing options: Tools, Scanned Documents, Email Return, Client Status, Privacy Settings, Change Preparer, Deactivate, App Chat History, and Sync Return with Mobile App. The 'Sync Return with Mobile App' option is highlighted with a red box. Other UI elements include 'Previous 1 Next' navigation, a 'Select' button, and 'Back' and 'Create 2019 Return' buttons.

This will bring you to a page where you will need to enter the taxpayer's Email Address and Tax Code. (The Tax Code and the Security Code are the same thing.)

### Sync Return with Existing App

Email Address

Security Code

Save

After the Tax Code is added, both returns will be successfully linked.

## Taxes to Go FAQ

### **How do my customers get the branded app?**

Your customers will get your branded app by using the custom Referral Link that is created in your Account Hub. After they put their information on the Referral Link website, their email address will be associated with your branded app. When they login to the app with this email address, it will show your branding.

### **How long does it take for a return to show in my branded app queue after it's submitted?**

This process is nearly instantaneous. If a user sends you their documents and you don't see it in your program, please close and reopen the program. If the problem persists please call our Customer Support team for assistance.

### **Why don't I see my branded app in the app store?**

Your branded app will not be shown in the app store. The branding is just a filter over the base Taxes to Go app. The branding is applied when the user logs into the app with the information entered on the Referral Link website.

### **Will information from last year's app pull forward into this year?**

No. For security purposes, every year we discard the data from the prior year's app. Any information entered by the user into the app is only specific to the current year.

### **Does the information from the documents automatically upload into the data fields in the program?**

The information from the documents will not automatically pull into the programs. You will need to view/print the documents to fill out the information for the tax return.

### **Can I create a new app account with the same email and phone number?**

Taxes to Go accounts are created based on email address. You cannot use the same email for more than one account. You can, however, use the same phone number.

### **I pulled the app return into the program, but I need to restart. Can I pull it again?**

Yes! In both programs if you delete/deactivate the return it will go back into the queue for you to pull again. For branded apps you will see it back in the list available to claim. For generic apps you will use the same email address and 6 digit code to repull.

### **My customer accidentally downloaded the generic app. Can I switch it to branded?**

In order for the Mobile App to be branded, the taxpayer will need to start on the Referral Link Website. Unfortunately, once the account has been created there isn't a way to switch from generic to branded. The user will need to uninstall the app and create a new account with a different email using your referral link.