

NEW AND IMPROVED TAXPAYER MOBILE APP

BRANDED PHONE APP!!! That's right ladies and gentleman, Boys and Girls of all ages - You now have the ability for your very own branded phone app! And you know what it will cost you? \$0!!!

Getting Started:

1. Simply, get your link by clicking on the Phone Icon in your MyAccount. If you don't know how to access that... call us and we will get it for you!



2. The link will look something like:

<https://taxestogo.com/App/Download/1915555>

3. Upload your logo to your My Account – If you need help, Call us!

4. **IMPORTANT** – Your Logo must be in PNG Format!

5. Blast out YOUR link to YOUR taxpayers and they will be directed to install the TTG.

Taxes To Go Company Profile

Profile Name

My Tax Office

Color Theme

Blue

Referral Link

<https://taxestogo.com/App/Download/19161>

Profile Configuration

Only Show Logo On Mobile Site

Upload Logo

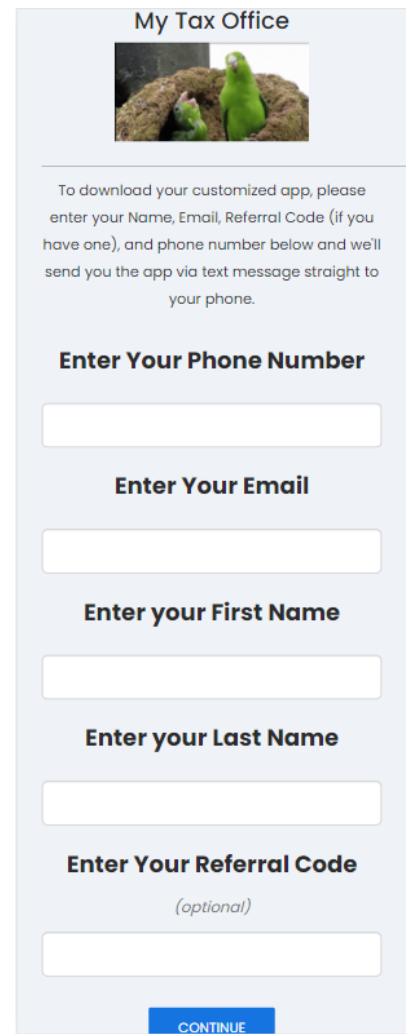
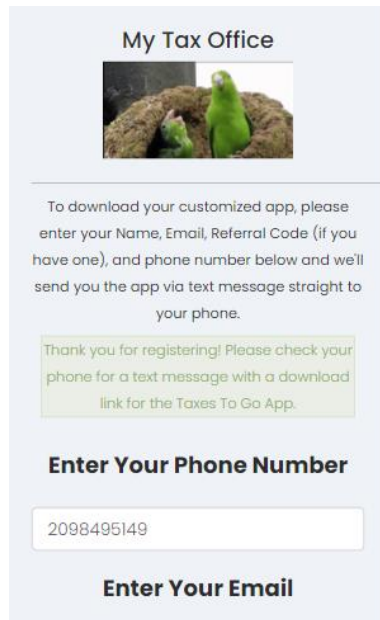
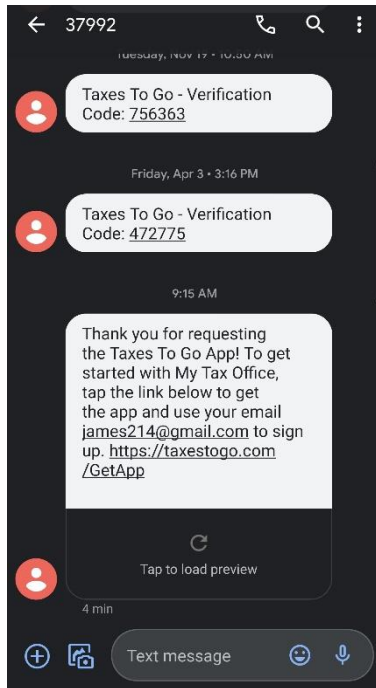
No file chosen

SAVE

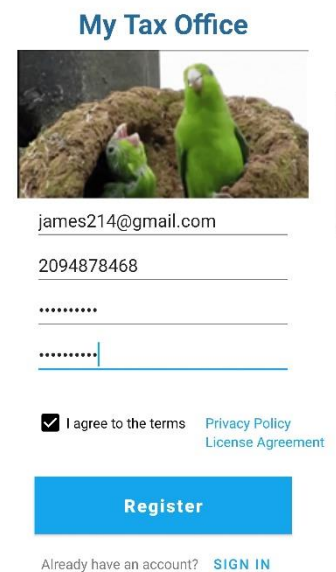
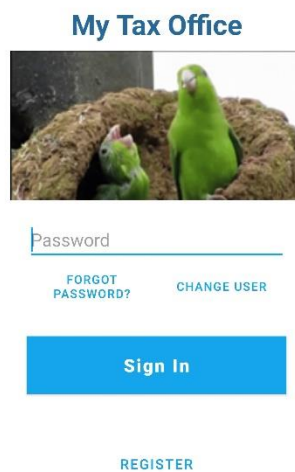
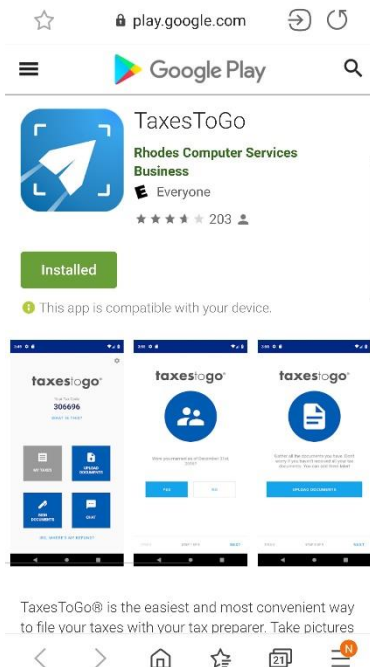
[Need Help?](#)

6. When your client clicks on your link, it will direct them to your branded home page and ask them to enter their mobile number, Email, First and last name.

7. Taxpayers will receive a text mssg inviting them to download your app.

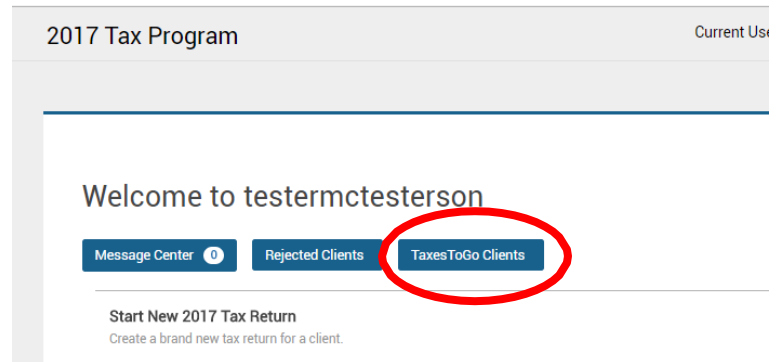


8. Taxpayers will install the app, locate the icon and create an account. Everything else will work similar to last year's TTG app.

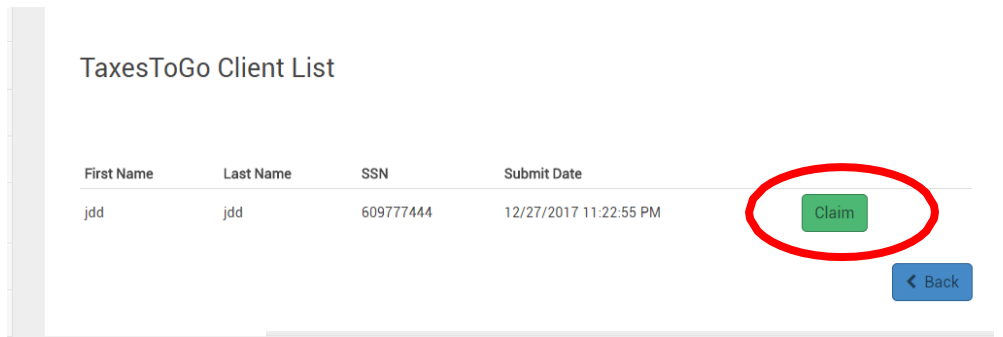


TAX PREPARER EXPERIENCE

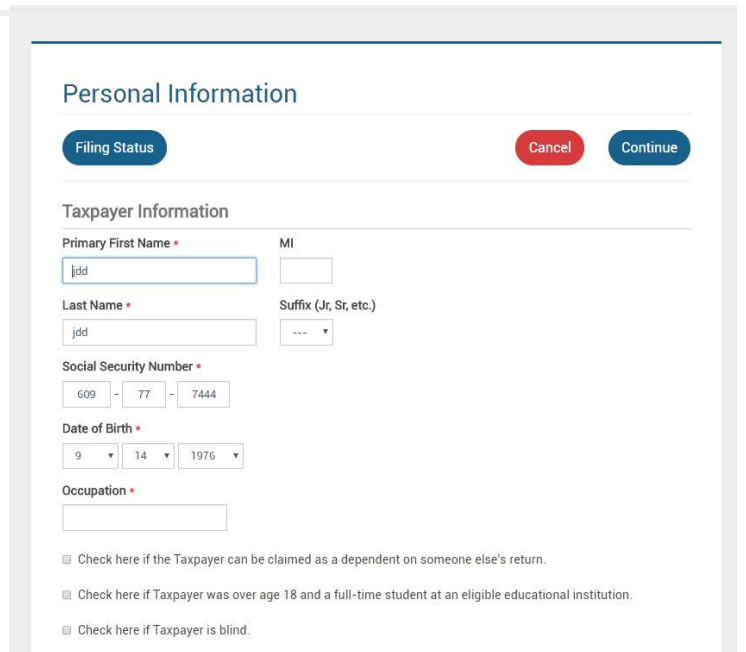
1. Taxes ToGo Clients (TTG) – Utilizing your custom App eliminates the need for your Taxpayer to provide you a code to retrieve their data into your software. Now, when your client is done entering information into the app the data will automatically appear in your *TTG Clients Queue*



2. When you are ready to begin work on that clients return, simply click the Claim button to the right of their name and BOOM!



3. The return will automatically open and take you to the Personal Information Page. Review the page for accuracy and continue.



4. All of the pictures scanned into the app will auto load into your Scanned Documents Tab.

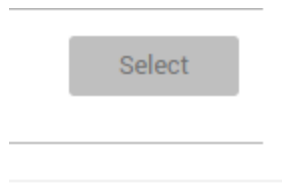
Scanned Documents

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

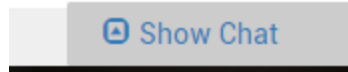
File name	File Size	Uploaded	Download	Delete
1099_DI616.png	474 KB	12/27/2017 6:25 PM	Download	Delete
1099_DI617.png	440 KB	12/27/2017 6:25 PM	Download	Delete
Driver's License_DI615.png	457 KB	12/27/2017 6:25 PM	Download	Delete
Selfie_DI614.png	2 MB	12/27/2017 6:25 PM	Download	Delete
W-2_DI618.png	1 MB	12/27/2017 6:25 PM	Download	Delete



5. You will see the Show Chat function at the bottom right of most every page. This will allow for 2-way communication between you and your client. These conversations are saved, timestamped and dated!



6. The Taxpayers Driver's License information will populate the bank application information should they choose that as a disbursement option!



Taxpayer ID Informatio

[Copy from State Id](#)

Id Type
Driver's License ▼

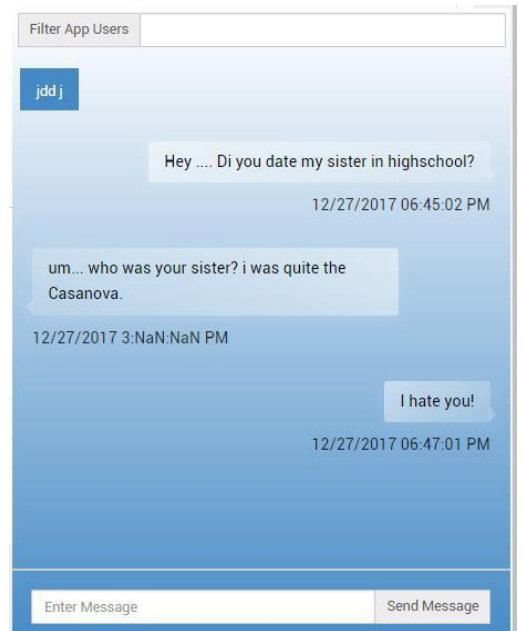
Id Number
d27655777

Issue Date
12/27/2012

Expiration Date
11/06/2024
 No Expiration date

Issue State
California ▼

[Next](#)



7. When the return is complete... you will send the signature docs to be signed in the mobile application! When the taxpayer has signed the signature will populate inside the software and you will be ready to submit!

Submission

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

One Copy - Federal and State ▼

[Print Return](#)

[✉ Email Return](#)

[Send Tax Return Documents to Mobile Application](#)

8. Woohoo... that's AWESOME!

Electronic Signature

Taxpayer Signature

