

TAX PRACTICE PORTAL

User Guide

How firm staff and clients use TPP: setup, the Staff Console, clients and returns, documents, billing, the client portal, privacy and security.

Contents

1. Introduction
2. Getting started
3. Firm dashboard tour
4. Managing clients and engagements
5. Documents, communications and team chat
6. Firm management
7. The client portal
8. Support, privacy and data rights
9. Security and troubleshooting

1. Introduction

Tax Practice Portal (TPP) runs a tax practice in one place: clients, returns, documents, tasks, billing and a secure, branded client portal.

It is built for CPA firms, tax preparers and enrolled agents. Each firm has its own isolated workspace with its own name, colors, logo and portal name.

This guide has two audiences:

- **Firm staff** (sections 2–6 and 8–9) use the Staff Console at `/dashboard`.
- **Clients** (section 7) use the Client Portal at `/portal`.

Roles at a glance

A staff member can hold more than one role. Your role decides which menus, clients and actions you see.

Role	What it can do
Owner	Full access to every client, return and firm setting, including billing and staff management
Admin	Same as Owner for clients, returns, staff and billing, but cannot delete the firm account
Preparer	Assigned clients only; prepares returns, uploads documents, messages clients
Reviewer	Reads and approves assigned engagements; cannot edit source documents
Billing	Invoices and payment status only; no view of tax document content
Read Only	View-only access for auditors or temporary staff
Client	Their own portal only, never another client's

Only Owners and Admins can invite or remove staff, change roles, accept firm Terms, start billing and handle data-rights requests.

2. Getting started

New firms sign up and get a 30-day free trial with every feature unlocked. No credit card is needed. Staff join an existing firm through an emailed invitation.

Create a new firm

1. Go to **Sign up** and create your account. You land on the dashboard.
2. TPP creates a firm named "{your name}'s Firm" and makes you its **Owner**. You can rename it and add branding under **Firm Management** → **Branding**.
3. Open **Accept Terms & Conditions**, tick both boxes (you've read and agree, and you're authorized to accept for the firm), then confirm. Only an Owner or Admin can do this. Other staff see "Firm-level acceptance required".
4. Invite your team (section 6) and add your first clients (section 4).

Accept a staff invitation

1. Open the email titled "You're invited to join Tax Practice Portal". The link expires in **7 days**.
2. On the **Staff Invitation** page, click **Accept Invitation**.
3. If you aren't signed in, click **Continue to sign in** and sign in or create an account. **Use the email address the invitation was sent to.**
4. You join the firm with the roles you were invited with, then click **Go to your dashboard**.

If you already belong to another firm, you join right away. Switch between firms from the avatar menu in the top right.

Sign in

Sign in at **Sign in** with your email. Manage your password and multi-factor authentication (MFA) from the avatar menu under **Security**.

Invitation problems

Message	What to do
This invitation link has expired	Ask your firm administrator to resend it
This invitation has already been accepted	Sign in normally
This invitation was sent to {email}	Sign out, then sign in with that address
This invitation link is invalid (or revoked)	Ask your administrator for a new invitation
Too many attempts	Wait a few minutes; the limit is 20 attempts per 15 minutes

3. Firm dashboard tour

The Staff Console has three parts: the header across the top, the sidebar on the left and the dashboard home in the middle.

Features your plan doesn't include still appear, with a lock icon. Clicking one opens the upgrade dialog.

Header

- **Search:** finds the clients and audits you can access. Document, task and return search is coming.
- **Portal name pill** (next to the firm name): Owners and Admins can click it to preview the Client Portal as a client sees it (section 7).
- **Help icon:** emails your firm's own support contact.
- **Bell (Recent Activity):** your @mentions, overdue and due-today tasks, and recent client messages, for the clients you can access.
- **Trial badge:** days left in your trial, or a warning if payment needs attention.
- **Avatar menu:** Firm Management, Security, Contact TPP Support, Privacy & My Data, User Guide, firm switcher and Sign Out.

Sidebar

Group	Items
Workspace	Dashboard, Reminders, Clients, My Clients, Tax Returns, Audits, Tax Organizers, Document Portal, Tasks & Workflow, Time & Billing, Tax Planning (Beta), Calendar, Communications, Onboarding
Firm	Firm Files, Reports, Firm Management, Integrations

The **Security & Trust Center** card at the bottom of the sidebar explains how TPP protects firm data.

Dashboard home

- **+ New:** New Client, New Task, New Appointment, Upload Document, Send Message or Request Signature. Each opens its form straight away; for Upload Document, Send Message and Request Signature you pick the client (or tax return) first. Cancel brings you back to the Dashboard.
- **Stat cards:** Active Clients, Returns in Progress, Returns Ready, Appointments Today and Outstanding Balance. Click a card to see the list behind the number.
- **Reminders & Action Center:** items grouped as Urgent, Client Action Needed and Firm Action Needed.
- **Today's Schedule, Recent Tasks, Unread Messages:** your day at a glance.
- **Document Work Queue** and **Engagement Letters:** what needs review or signature.
- **Returns by Status:** a chart of returns In Progress, Ready for Review, Ready to File and Filed.
- **Plan-based widgets:** Time & Billing, Tax Organizers and Team Chat appear when your plan includes them.

What you see depends on your role. For example, Preparers see only their assigned clients, and Billing staff see invoices but not tax documents.

4. Managing clients and engagements

Every return starts with a client record. Add the client, give them portal access, send an engagement letter, then move the return through its stages.

Add clients

1. Go to **Clients** and click **Add client**.
2. Enter the client or business name, entity type, primary email, phone (optional) and primary preparer.
3. Click **Create & Invite Client** to create the client and email them a secure portal invitation. Click **Create Client Only** to add them without an invitation; you can invite them later.

The invitation comes from your connected firm mailbox. If none is connected, TPP warns you before you create the client, and you can send the invitation once a mailbox is connected.

Portal invitations. The invitation email links to a page where the client clicks **Create My Account** and picks their own password. The link expires after **7 days**.

The **Portal Access** column on Clients, and the Portal access line on the client's profile, show where each client stands:

Status	Meaning	Action on the profile
Not invited	No invitation sent yet	Invite to portal
Invitation pending	Sent, but the client hasn't created their account	Resend invitation or Revoke
Invitation expired	The 7-day link ran out	Resend invitation or Revoke
Invitation not sent	The email failed, for example because no mailbox is connected	Retry invitation
Invitation revoked	You withdrew the invitation, so its link no longer works	Send new invitation
Active	The client has a working portal account	None needed

Resending sends a new link and the old one stops working. To withdraw an invitation you sent by mistake, click **Revoke**: the emailed link stops working, and the client sees that the invitation was cancelled. A client needs an email address on file before you can invite them.

The same person can be a client of more than one firm using one email address and one account. Within your own firm, though, each email address can belong to only one client.

To add many at once, click **Import clients**, then **Download a CSV template**, fill it in and upload it.

My Clients lists only the clients you're assigned to as Primary Preparer, Reviewer or Audit Staff.

The client profile

Open a client to see the tabs Overview, Tax Returns, Engagements, Organizers, Documents, Tasks, Communication and Audits. Only Owners and Admins can delete a client.

- **Engagement letters:** click **Start engagement**, then **Save & Send Engagement**. The client gets an email titled "Action Required: Review and Sign Your Engagement Letter" with a link to sign in the portal. An engagement is executed once the client signs and the preparer countersigns. If the email couldn't be sent, TPP says why; fix it and click **Resend**.
- **Emailing a client:** click **Contact Client** to send a message from your connected firm mailbox. Communication History marks it **Sent** only once the mail provider accepts it; otherwise it's marked **Failed** with the reason. Writing your own messages needs the Professional or Firm plan. Automatic notices, such as signature requests, engagement letters, document requests, invoices and organizers, go out on every plan.

Track tax returns

Tax Returns lists every return in motion this season. A return moves through these stages:

1. Received
2. Preparing
3. Internal Review
4. Client Review
5. Signature Requested
6. Ready to File
7. E-Filed
8. Filed
9. Accepted

On a return, use **Mark E-Filed**, then record the acceptance, rejection or resubmission. You can also **Add State Filing**, upload documents and **Publish** the return to the client portal.

Tasks, reminders and calendar

- **Tasks & Workflow:** create tasks, set up recurring tasks and view the dependency graph. Statuses run from Not Started through In Progress, Waiting on Client, Blocked, Under Review, On Hold, Completed and Cancelled. Priority is Low, Medium, High or Urgent.
- **Reminders:** complete, snooze or dismiss reminders, or turn one into a task or document request.
- **Calendar:** book appointments, see tax deadlines and click Connect a calendar to show your Google Calendar or Microsoft Outlook Calendar events in TPP. You can accept, reschedule or mark an appointment completed or no-show.
- **Onboarding:** follow each new client through 8 stages, from "Client Signs Up in Portal" to "Tax Preparer E-Files Return".

Organizers, audits and billing (Professional and Firm plans)

- **Tax Organizers:** send questionnaires, track completion and send reminders.
 - **Create & Send** emails the client a secure link to the organizer. A client without a portal account creates one from that link and lands straight on the organizer.
 - Each organizer shows whether the email went out and whether the client has activated their portal account.
 - If the email fails, fix the cause (usually a missing mailbox) and click **Retry Send**.
 - Reminders aren't automatic. Click **Send Reminder** to email one.
- **Audits:** manage federal and state examinations, with deadlines, extensions, notes and eFax.
- **Time & Billing:** log time and manage WIP, invoices, accounts receivable and profitability.
- **Tax Planning (Beta):** planning engagements built from the client's Profit & Loss and Balance Sheet.
 - On an engagement's **Financial Data** tab, click **Connect a Source** and sign in to QuickBooks Online, Xero, Zoho Books, FreshBooks, Microsoft Dynamics 365 Business Central or another listed accounting system.
 - Click **Sync Now**, choose the statement and period, and TPP pulls the figures straight from the accounting system.
 - No accounting system? Use **Upload CSV** or **Enter Financial Data Manually**.
 - Disconnecting a source keeps past imports and sync history.
- **Reports:** all plans get Client List, Tax Return Status and Missing Documents. Professional adds productivity, workload, filing and revenue reports.

5. Documents, communications and team chat

Documents and messages are internal by default. Clients see a document only when you share or publish it.

Document Portal

- **Upload Document** or **Request Documents** from a client. The maximum file size is **15 MB**.
- **Mark Reviewed** when you've checked a client upload.
- **Share with Client** to show a document in the client's portal.
- Mark sensitive working papers **Internal Only** so they are never shared with the client automatically.
- **Move to folder, Archive** or **Delete Permanently**. A permanent delete can't be undone. Billing and Read Only staff can't delete documents.
- The signature column shows whether a document has been requested, viewed, signed, declined or has expired. Use **Request Signature** from the **+ New** menu.

Folders. On a client's Documents tab, each tax year's documents are grouped by folder, with a count on each group. Documents not filed yet sit under **No folder**, and empty built-in folders hide behind **Show empty folders**. When you upload or use **Move to folder**, you choose from that document's own tax year's folders, or pick **+ Create new folder**. You can move several documents at once only if they're from the same tax year.

Folders for all clients. A folder you create is normally for that one client and tax year. Owners and admins also see **Also add this folder for all clients** in the **Create Folder** window. Tick it and the folder is added to every client's folders, for every tax year, including existing clients. It appears the next time that client's folders are opened, for example in the upload or **Move to folder** window, so it may not show on another client straight away. Only new top-level folders can be added this way, and names that are already standard folders can't be used. The same window lists the folders added for all clients. **Stop adding** stops a folder being added to clients from then on; folders already created, and the documents in them, stay where they are.

Firm Files holds templates, forms and internal documents shared across the firm. Clients never see them.

Communications

Tab	Use it to	Plan
Client Conversations	Send secure messages to clients, add internal notes, turn a message into a task	All
Team Chat	Chat with colleagues inside TPP	Professional, Firm
Email Inbox / Email Accounts	Connect a firm mailbox and handle client email in TPP	Professional, Firm
Fax	Send and receive faxes	All

TPP sends staff invitations from your connected firm mailbox. Invitations go out on every plan, even after your trial ends. Connecting a mailbox, though, needs the Professional or Firm plan or an active trial, so firms staying on Essential should connect one during the trial. If a send fails, TPP shows the specific reason, and **Communications** → **Email Accounts** shows the account's status and last error (section 9).

Use @mentions in chat and notes to notify a colleague through their bell.

Email Inbox

- The inbox shows all mail in your connected mailboxes, including messages TPP couldn't match to a client. Those show an **Unmatched** pill.
- Open an unmatched email and click **Assign to Client**, pick the client, then **Assign**. Matched emails show the client and a **View Client** button.
- While the inbox is open, TPP checks for new mail every 10 seconds and shows a notice when something arrives. To check right away, open **Communications** → **Email Accounts** and click **Sync now** next to the mailbox.

6. Firm management

Firm Management (avatar menu or sidebar) is where Owners and Admins run the firm.

Its tabs are Staff, Branding, Services, State Tax Agencies, Roles & Permissions, Security, Subscription, Workflow Templates, Organizer Templates, Engagement Templates, Integrations and Data Rights.

Staff and seats

1. On the **Staff** tab, click **Invite staff**.
2. Enter first name, last name, email, phone (optional) and roles. The Owner role can't be granted by invitation.
3. Click **Send Invitation**. TPP emails the invitation from your firm's connected mailbox (section 5). Resend, cancel or re-invite from the same list.

Staff show as Active, Invited, Inactive or Invitation Cancelled. **Deactivating** someone removes their access immediately. You can't deactivate yourself, change your own roles or deactivate the firm's only Owner.

Only Active staff count toward seats. Pending invitations don't. If you go over your plan's seats, you're never blocked: each extra seat is billed at \$5 per user per month.

Plans and pricing

Plan	Monthly	Annual	Staff included	Adds
Essential	\$15	\$150	1	Clients, returns, documents, client portal, tasks, communications, calendar, basic reports and signatures
Professional	\$39	\$390	5	Team Chat, Audit Management, Time & Billing, Tax Planning, Tax Organizers, workflow templates, email center, integrations, advanced reports
Firm	\$59	\$590	10	Roles & Permissions, advanced audit logs, firm-wide analytics, advanced security and automation, custom domain, white-label included

All plans include unlimited clients. Firms of 25+ users can ask for custom Enterprise pricing.

Trial and upgrades

- The 30-day trial unlocks everything. Reminder emails arrive at 15, 7, 3 and 1 days left.
- To upgrade, open **Subscription** and pick a plan, or click any locked feature and choose **Upgrade to unlock**. Review the prorated amount due today, then click **Confirm Upgrade**. Changes take effect immediately.
- **Buying during the trial doesn't cost you trial days**. Your paid plan starts right away, but the first charge waits until your trial would have ended. (If fewer than 2 days of your trial are left, the first charge

comes about 2 days after you buy.) The Subscription tab then shows **Next billing date** and **Trial credit applied**.

- Use **Manage Billing** to update your payment method or cancel. A cancellation ends at the close of the current billing period.
- Only an Owner or Admin can start billing.

If a trial ends, a payment fails past the grace period, or the account is suspended or cancelled, most pages show "Your trial has ended". **Nothing is deleted**. Choose a plan from **View Subscription Plans** to restore access.

Other settings

- **Branding** (Owner or Admin): firm name, colors, logo, website and portal name.
 - Logos can be PNG, JPG, SVG or WebP, up to 10 MB, in any shape. TPP sizes them automatically and never stretches or crops them.
 - Enter your website as yourfirm.com; TPP adds https:// for you.
 - **Save Draft** keeps your changes without making them live. Publish when you're ready.
 - **White-Label** branding, which removes TPP's name from your client portal, comes with the Firm plan. Click **Upgrade** next to it to move to Firm.
- **Security**: set the firm's MFA policy and run an access review (section 9).
- **Templates**: reusable workflows, organizers and engagement letters.

Integrations

Open **Firm Management** → **Integrations** → **Open Integrations Hub** (Professional and Firm plans). Any staff member can see what's connected; only Owners and Admins can connect, disconnect or sync.

Integration	Where to connect	What it does today
Gmail, Microsoft Outlook email	Communications → Email Accounts	Send and receive client email in TPP
Google Calendar, Microsoft Outlook Calendar	Calendar → Connect a calendar	Shows your calendar events in TPP
QuickBooks Online, Xero, Zoho Books	Integrations Hub, or a Tax Planning engagement's Financial Data tab	Pulls a client's Profit & Loss and Balance Sheet into Tax Planning
Dropbox	Integrations Hub	Links your Dropbox account. Browsing or attaching Dropbox files from TPP isn't available yet
SignNow	Integrations Hub	Stores your SignNow connection only. Use TPP's built-in signature requests to collect signatures
PayPal	Integrations Hub	Coming soon for client payments. Connecting it today doesn't change how clients pay

7. The client portal

This section is for clients. The portal is branded with your tax firm's name and logo. It shows only your own information.

Sign in

Your tax firm invites you by email, with the subject "You're invited to the {firm name} Client Portal". You may also get a link when your firm sends you a tax organizer.

1. Open the link and click **Create My Account**.
2. Create your account with the same email address the invitation was sent to, and choose a password.
3. You land in your portal (or on your organizer). Next time, just sign in.

Invitation links expire after 7 days. If yours has expired or doesn't work, ask your firm to send a new one. If you see "We couldn't find your client account", you signed in with a different email: click **Sign out and try another email** and use the one your firm has on file.

To download this guide at any time, click **User guide (PDF)** at the top of the portal.

If you work with more than one tax firm

You can use one account with every tax firm that invites you, as long as each one uses the same email address.

- **Switching firms:** the top of the portal shows **Switch to:** followed by the names of your other firms. Click a name to open that firm's portal. Each portal shows only what that firm has shared with you.
- **A new firm invites you while you're signed in:** opening the link shows "You're signed in as" your email. Click **Continue to my portal** to add the new firm to your account.
- **The invitation went to a different email:** sign out, then open the link again and use the email address the invitation was sent to.

Your dashboard

The top of the page shows your return type, tax year and current status, plus a progress tracker. Below it are five tabs:

Tab	What you can do
Overview	See your progress, upcoming appointments (Confirm Appointment) and your engagement details
Documents	View your documents by year and Upload Document (PDF, JPG, PNG, DOCX or XLSX, up to 15 MB)
Tasks	See what your preparer needs from you and click Mark Done
Messages	Message your preparer securely

Tab	What you can do
Payments	See invoices and your balance due, and pay

Use **Message My Tax Firm** to send a question about your return, an appointment or anything else.

Sign documents

- **Signature requests:** a banner shows how many documents are waiting. Click **Review & Sign**, give consent to sign electronically, then click **Complete Signing**. To decline, give a reason, such as a needed correction.
- **Engagement letters:** review the services included and not included. Tick each acknowledgment, type your full name and click **Sign Engagement**. It then waits for your preparer's countersignature.

When a document needs more than one signer, people sign in a set order. If you see "It isn't your turn to sign yet", an earlier signer still needs to finish. You'll be able to sign once they do.

Complete a tax organizer

An organizer is a questionnaire about your tax year. Your answers save automatically, so you can stop and come back. Add dependents, check off the Document Checklist, then click **Submit & Sign**. Your organizer then goes to your tax professional for review.

Uploading documents in an organizer. When you answer Yes to a question like "Did you receive a W-2?", you can attach the matching documents right there:

- Click the upload button to choose files, or drag and drop them. You can add up to 20 files per question.
- Each file can be up to 15 MB: PDF, an image (such as JPG or PNG), Word, Excel, CSV or plain text.
- Each file shows its own status. If one fails, click **Retry** for that file; the others aren't affected. Click **Remove** to take a file off, or **Add more files** to add another.
- If you change an answer from Yes to No, the files you already uploaded are kept.

Privacy & My Data

Click your name at the top of the portal to open your settings. There you can **Download my data (JSON)** or **Request data deletion** (section 8).

For firms: preview the portal

Owners and Admins can see exactly what a client sees, without signing in as them.

1. In the Staff Console header, click your portal name (the pill next to your firm name).
2. On **Preview the Client Portal**, search for and pick a client.
3. Browse their Overview, Documents, Tasks, Messages and Payments tabs.

The preview is read-only: buttons such as Review & Sign, Upload and Pay are greyed out. Internal documents and notes stay hidden, just as in the real portal. Click **Choose another client** to switch, or **Open**

client record to go back to the client. Each preview is recorded in the audit log.

8. Support, privacy and data rights

Firm staff contact TPP from inside the app. Anyone can reach TPP from the public contact page. Staff and clients can download their data or ask for it to be deleted.

Get help

Who	Where	What happens
Firm staff	Avatar menu → Contact TPP Support	Enter a subject and message. You get a reference number, and TPP replies to your account email
Clients	Message My Tax Firm in the portal	Goes to your tax firm, not to TPP
Anyone	Contact page on the website	Enter name, email, subject and message. You get a reference number and a reply by email. Or write to hello@taxpracticeportal.com

In-app support reaches TPP directly, not your firm's own support contact (that's the header help icon). Messages can be up to 10,000 characters. You can send up to 5 requests per email address per hour.

Download your data

Open **Privacy & My Data** (staff: avatar menu; clients: click your name) and click **Download my data (JSON)**.

- **Staff** get their profile and up to 500 of their own activity-log entries.
- **Clients** get their contact and client details, a list of their documents (names and dates, not the files) and their messages.

Request deletion

On the same page, click **Request data deletion** and add an optional reason. Deletion isn't instant. Your firm's Owner or Admin reviews the request and follows up. You can **Cancel my request** while it's pending.

For Owners and Admins: handling requests

1. Open **Firm Management** → **Data Rights**. Requests list the type, name, email and date requested.
2. Review each request. Nothing is deleted automatically.
3. Complete it with the usual tools: **Delete Permanently** on the Staff tab, or delete from the client's page.

The Privacy Policy is at </privacy>. Privacy questions go to legal@taxpracticeportal.com.

9. Security and troubleshooting

Every firm's data is kept separate. Access follows each person's role, and each client sees only their own portal.

The **Security & Trust Center** (/security) lists which protections are live and which are in development.

Set up multi-factor authentication

- **For yourself:** avatar menu → **Security**. Add an authenticator app and backup codes. The page shows your level as "Multi-factor enabled" or "Password only".
- **For the firm** (Owner or Admin): **Firm Management** → **Security**. Choose one policy:
 - **Optional:** staff may turn on MFA; nothing is enforced.
 - **Required — any second factor:** authenticator app, backup codes or SMS.
 - **Required — phishing-resistant only:** hardware security key, re-checked for sensitive actions.

You can apply the policy to specific roles only. When you raise it from Optional, existing staff get a grace period (14 days by default). After that, anyone not enrolled is sent to the Security page until they set up MFA.

Review who has access

Owners and Admins can produce an access review: a report of every staff member's roles, client access and MFA status, plus each connected integration.

1. Open **Firm Management** → **Security** and click **Open access review**.
2. Click **Generate report** (or **Regenerate report** for a fresh one).
3. Use **Download staff CSV** or **Download integrations CSV** to keep a copy.

Run it regularly, and whenever someone changes roles or leaves. Each report is recorded in the audit log.

Good practice

- Give each person the least access they need. Use Read Only for auditors and temporary staff.
- Mark working papers **Internal Only**.
- Deactivate departing staff on their last day. Access ends immediately.
- Check the activity history on client records if something looks wrong.

Troubleshooting

Problem	Fix
A menu item has a lock icon	Your plan doesn't include it. Click it to see the upgrade options
"Your trial has ended" on every page	Choose a plan under Subscription. Your data is still there

Problem	Fix
"Your subscription payment needs attention"	Update your payment method in Manage Billing
"Connect an email account under Communications to send invitations"	Connect a firm mailbox in Communications → Email Accounts, then invite again. On Essential after the trial, upgrade first or keep a mailbox connected from the trial
Client invitation shows "Invitation not sent", an organizer or engagement email wasn't sent, or Communication History shows "Failed"	Usually no mailbox is connected. Connect one, then click Retry invitation, Retry Send or Resend
"Something went wrong"	The error has been reported automatically. Click Try again . If it keeps happening, email hello@taxpracticeportal.com with the reference code shown
"Page not found"	The link is wrong or the page has moved. Click Go home and navigate from there
"File is too large"	Uploads are limited to 15 MB. Split or compress the file
"Please upload a logo file smaller than 10 MB" or another logo error	Use a PNG, JPG, SVG or WebP under 10 MB. If an SVG is refused, export a plain SVG or use a PNG
Client says they can't sign in	Check the client's Portal Access status and the email on file. Resend the invitation if it's pending or expired
Client sees "This invitation has expired", "This invitation link isn't valid" or "This invitation was cancelled"	Click Resend invitation on the client's profile. Only the newest link works
Client sees "We couldn't find your client account"	They signed in with a different email. They should sign out and use the address on file, or you can correct it
"This client does not yet have Client Portal access"	Turn on portal access before sending an organizer
"Documents from different tax years cannot be moved together"	Select documents from one tax year at a time
"It isn't your turn to sign yet"	An earlier signer must finish first
"Only a firm Owner or Administrator can delete a client"	Ask an Owner or Admin to delete it
"Only your firm's Owner or an Administrator can manage integrations"	Ask an Owner or Admin to connect or disconnect it
"You can't change your own roles"	Ask another Owner or Admin

Problem	Fix
"Too many requests" or "Too many attempts"	Wait a few minutes (invitations) or an hour (support) and try again
Can't see a client	Preparers and Reviewers see only assigned clients. Ask an Admin to assign you

Email sending problems

When an invitation or email can't be sent from a connected Gmail account, TPP now says why.

Message	What to do
"Your Gmail connection needs to be reauthorized" or "...is missing required access"	Reconnect the account in Communications → Email Accounts
"...does not have permission to send messages through TPP"	Reconnect Gmail and grant the sending permission when Google asks
"Google denied TPP permission to send from this Gmail account"	Reconnect the account, or ask your administrator
"Your Google Workspace administrator has restricted this application"	Ask your Google Workspace administrator to allow TPP
"Google has temporarily limited email sending from this account"	Google's sending limit was reached. Try again later
"...due to a temporary email provider error"	Try again in a few minutes

An account that needs reconnecting shows that status in Email Accounts. Reconnecting uses the Email Accounts tab, which needs the Professional or Firm plan or an active trial.

FAQ

Is there a limit on clients?

No. Every plan includes unlimited clients.

Can I change plans later?

Yes. Upgrades and downgrades take effect immediately and are prorated.

What happens to my data if the trial ends?

Nothing is deleted. Access returns as soon as you choose a plan.

Is there a mobile app?

A mobile app is coming soon. The client portal already works in a mobile browser.