



Getting Started with Communications Centre



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Contents

Introduction	2
Communications Summary	4
Setting up Outgoing Email (SMTP) Firm Details	4
Adding Users to Shared Emails	7
Setting up Outgoing Email (SMTP) User Details	8
Sending an Email	10
Making the Most of Communications Centre	13
Setting up Email Templates	13
Creating Mail Merge Templates	16
Creating Categories	16
Applying Email Templates	17
Creating Mailing Lists	18
Automating Emails	20
Communications Activity	24
Sending Messages within the Client Record or Work Item	25



Introduction

TaxCalc's Communications Centre allows you to create letters or emails for outgoing communications with clients of your practice within TaxCalc. You can also automate and schedule emails for key events as well as:

- Create and manage mailing lists
- Create message templates for email or mail merge letters
- Create messages with optional client/user information
- Send emails to clients using a preconfigured mailing list, or by manually selecting the clients' email addresses
- Schedule and automate messages
- View sent message activity
- View pending message activity

In order to use the email function within Communications Centre you will first need to set up your SMTP details within Admin Centre.

Licencing

Customers who have purchased additional user licences can 'Manage Users' by selecting **Help ► View Licence Information**, choose **Communications Centre** under **Select a product** and click **Manage Licence**.

For more information on Communications Centre, please see [KB3199 Communications Centre: Collateral](#) and visit our [website](#).

This guide will show you how to:

- Review the Communications Centre Summary information
- Set up the SMTP settings for Firms and Users
- Send emails
- Create and apply templates and assign them to categories
- Create mailing lists
- Activate and schedule emails
- Review message activity in Communications Centre and Practice Manager



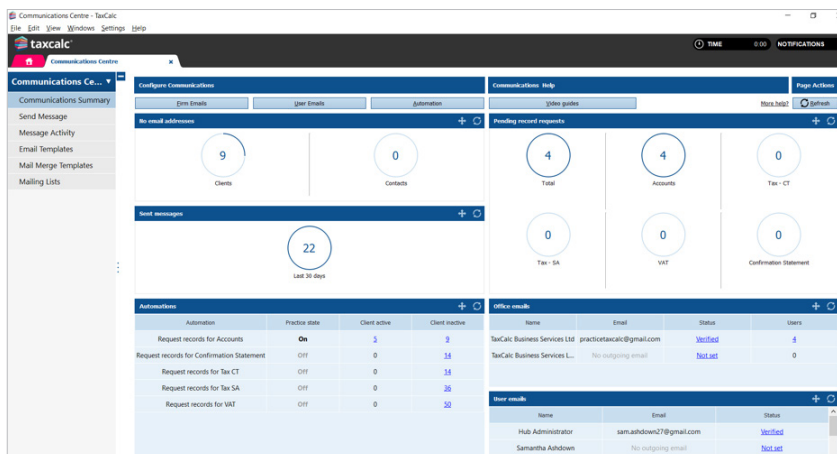
Communications Summary

Communications Summary shows you key information to help set up and monitor your email communications activity. You can view which clients and contacts don't have an email address, your firm and user email settings, the number of messages sent, any pending record requests and your automation settings.

With just a click you can also drill down into the summary data, providing you with the detailed information.

Using the buttons along the top, you can view our video guides as well as quickly and easily navigate to the following setup screens within Admin Centre:

- **Firm Emails**
- **User Emails**
- **Automation**



Setting up Outgoing Email (SMTP) Firm Details

For TaxCalc to successfully send emails from Communications Centre you'll need to set up access to one or more email accounts using SMTP details. Your IT team should be able to provide you with any information you may need in setting this up.

You can set up details for any shared practice email addresses for each office under **Firm Details**.

You can also configure an email account per user so that members of your practice can email clients directly from their own email accounts.

1. Click **Firm Emails** from the **Communications Summary** screen to open **Firm Details** within **Admin Centre**.
2. Select an Office and click **Edit Office**. Then from the left-hand menu select **Outgoing Email Settings**.



3. From the **Outgoing Email Settings** screen click **Add** to open the **Add SMTP details** dialog.

Add SMTP details

Email provider:

SMTP server:

Email:

Encryption type:

SMTP port:

SMTP port is usually either 587 or 465

From name:

Username:

usually the same as your email address

Email password:

Verification:

Send a passcode to your email address and enter it here

By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our terms of service and privacy policy.

4. Here you'll need to choose your **Email provider** from the dropdown list:

- **Gmail**
- **Office 365**
- **Outlook**
- **Other**

Please note: Some email providers will require you to turn off the secure app setting. For example, when using a Gmail account, you will need to go to the Account Settings ► Security and enable Less secure app access. Please see [KB3193 - Why can't I verify the SMTP Outgoing Email setting? for more details.](#)

5. The **SMTP server** details should be automatically populated once the email provider is selected, but if using 'Other', you can manually enter them, for example, smtp-mail.outlook.com.

6. Enter the email address you wish to use for the **Email**.

7. Select the **Encryption type**:


- **TLS/SSL**
- **STARTTLS**

8. Enter the **SMTP port**, this is usually either **587** or **465**. If it is neither of these, then you will need to contact your IT team who will be able to provide you with this information.



9. In the **From name** field, enter the name you would like the email to be from.
10. Then enter the **Username**, which is often the same as the email address and **Email password**, which is the password for accessing this email account. If you do not know the password, your IT team will be able to provide you with this information.
11. Once all the details have been entered, click **Email passcode** to send a passcode to the specified email address which will verify that the setup details are working.

Please note: By clicking Email passcode you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our [terms of service](#) and [privacy policy](#).

 Add SMTP details
✕

Add SMTP details

Email provider:

SMTP server:

Email:

Encryption type:

SMTP port:
SMTP port is usually either 587 or 465

From name:

Username:
usually the same as your email address

Email password:

Verification:
Send a passcode to your email address and enter it here

By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our [terms of service](#) and [privacy policy](#).

12. Once you've received the passcode, enter the 6 digit code and click **Verify**.

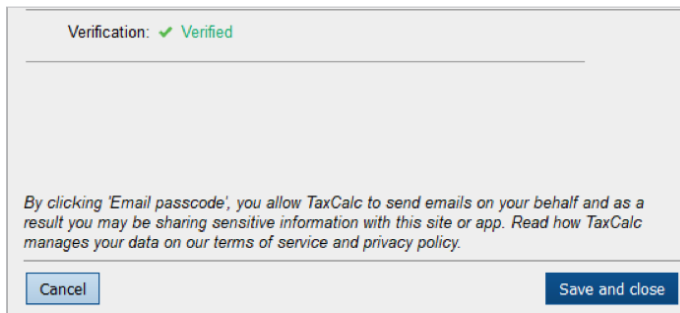
Verification:

Problems receiving your code? [Send passcode again](#)

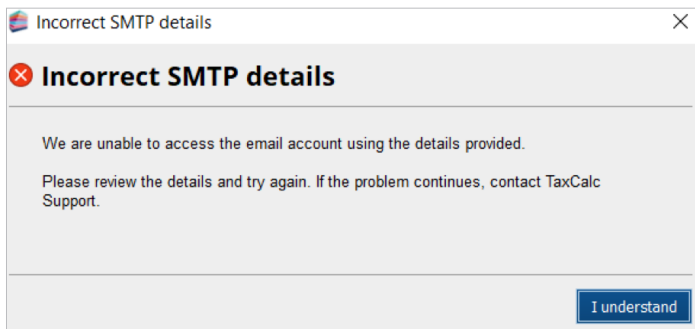
By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our [terms of service](#) and [privacy policy](#).

13. You'll then see confirmation that the setup information has been verified.





14. If the information you've entered is invalid, a message is displayed advising that the SMTP details are incorrect. Please see [KB3211 - Why do I get an Incorrect SMTP Details message? for more information.](#)



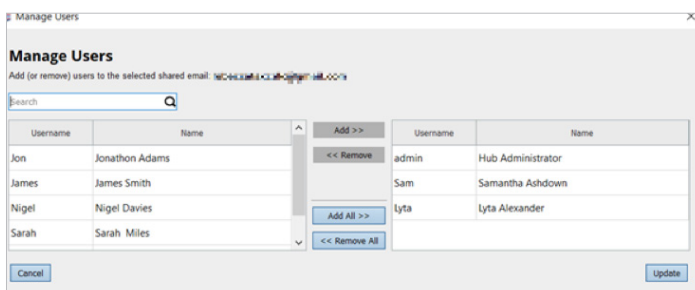
15. Once all details are correct and verified successfully, click **Save and close**.

16. You will now be able to see this email account within the **From** field in **Send Message**.

Adding Users to Shared Emails

Once the email account has been created you can easily manage the users that can access shared emails.

1. From **Outgoing Email Settings**, click **Manage Users** to open the **Manage Users** dialog.
2. Here you can select the users you wish to have access to this email account by highlighting the individual username and clicking **Add**, or if you want all users to be included, click **Add All**.



3. Alternatively, you can select **Remove** or **Remove All** to remove users from the email account.

4 Once you have selected all the required users, click **Update** to save your changes.



Setting up Outgoing Email (SMTP) User Details

Within Users you can add individual email addresses to ensure emails are sent from the specific users email addresses where required.

1. Click **User Emails** from **Communications Summary** to open the **Users** screen within **Admin Centre**.

2. Select the **User**, click **Edit User**, then from the left-hand menu select **Outgoing Email Settings**.

3. From the **Outgoing Email Settings** screen click **Add** to open the **Add SMTP details** dialog.

4. Here you'll need to choose your **Email provider** from the dropdown list:

- **Gmail**
- **Office 365**
- **Outlook**
- **Other**

Please note: Some email providers will require you to turn off the secure app setting. For example, when using a Gmail account, you will need to go to the Account Settings ► Security and enable Less secure app access. Please see [KB3193 - Why can't I verify the SMTP Outgoing Email setting?](#) for more details.

5. The SMTP server details should be automatically populated, but if not, you can manually enter them, for example, smtp-mail.outlook.com.

6. Enter the user's **Email** address.

7. Select the **Encryption type**:

- **TLS/SSL**
- **STARTTLS**

8 Enter the **SMTP port**, this is usually either **587** or **465**. If it is neither of these, then you will need to contact your IT team who will be able to provide you with this information.

9. In the **From name** field, enter the name you would like the email to be from.

10. Then enter the **Username**, which is often the same as the email address and **Email password**, which is usually the users email login password.

11. Once all the details have been entered, click **Email passcode** to send a passcode to the specified email address which will verify that the setup details are working.

Please note: By clicking **Email passcode** you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our [terms of service](#) and [privacy policy](#).



Add SMTP details
✕

Add SMTP details

Email provider: Outlook ▼

SMTP server:

Email:

Encryption type: STARTTLS ▼

SMTP port:
SMTP port is usually either 587 or 465

From name:

Username:
usually the same as your email address

Email password:

Verification: Email passcode
Send a passcode to your email address and enter it here

By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our terms of service and privacy policy.

Cancel
Save and close

12. Once you've received the passcode, enter the 6 digit code and click **Verify**.

Verification: Verify

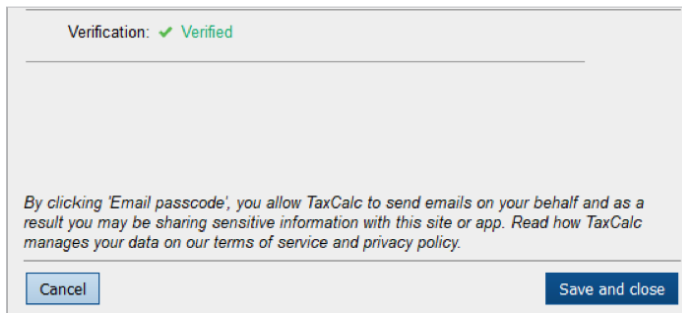
Problems receiving your code? [Send passcode again](#)

By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our terms of service and privacy policy.

Cancel
Save and close

13. You'll then see confirmation that the setup information has been verified.





14. Click **Save and close**.

15. You will now be able to see this email account within the From field in **Send Message**.

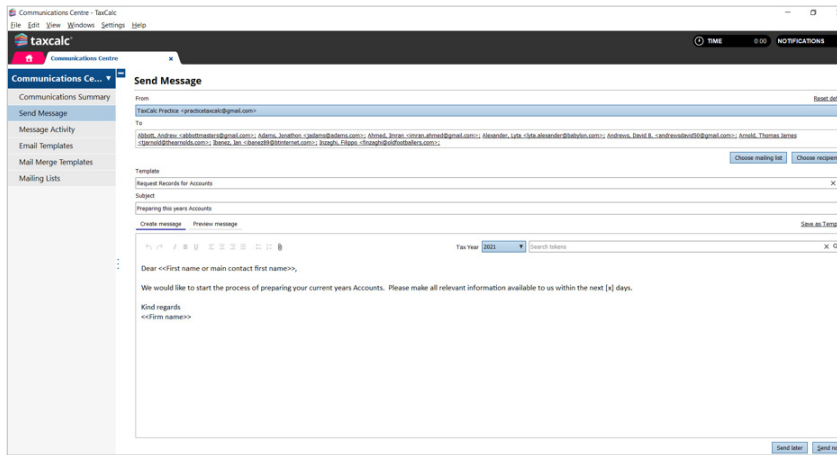
Sending an Email

Once you have completed the Outgoing email setup using SMTP configuration, you can then use the Send Message option in Communications centre to create email messages to send to your clients.

Here we will explain a few more of the options available to you.

1. Within **Communications Centre**, select **Send Message**.
2. Click **From** and select the required account who the email is from.
3. In the **To** field you can either select the recipients' email addresses by clicking the **Choose Recipients** button or selecting **Choose mailing list**. These options will ensure any email activity is recorded in the client's communication activity. You can also manually enter the email addresses, however, doing this will not link the email activity to the client's communication activity.
4. Enter the message **Subject**.
5. From the **Create Message** tab, type the email message content.
6. If required use the options from the **Token** dropdown list to automatically populate specific client information. For example, selecting the Tax Year token picks up the values from the correct tax return.
7. You can also choose to use any of the formatting options to personalise your email further, and add any attachments.

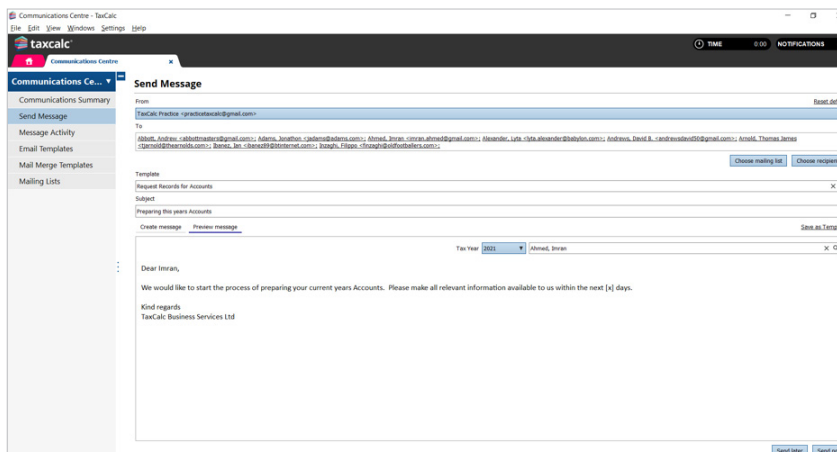




8. Select the **Preview Message** tab to ensure you are satisfied with your email message content if using tokens.

9. To ensure tokens have been populated for each recipient, select the client from the **Search recipients** dropdown box.

10. To preview another recipients message, click the 'x' to remove the current recipient and select another client from the list.



11. If so, click **Send now** to send the email to the selected recipients.

12. Alternatively, select **Send later** where you can save the message to send on a particular date. These emails will be saved as scheduled message types in the Pending queue in Message Activity.

13. You can also select **Save as template**, to save the email content to use over and over again as detailed above.

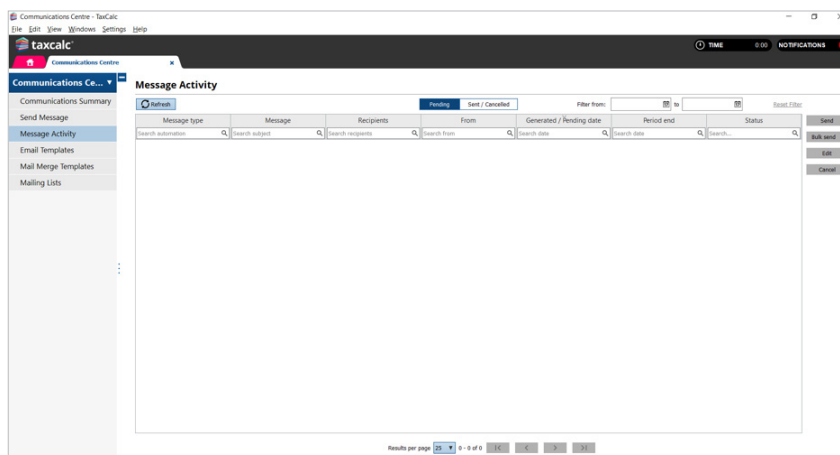
Please note: Save as template will not save the recipients or SMTP details, only the message content.



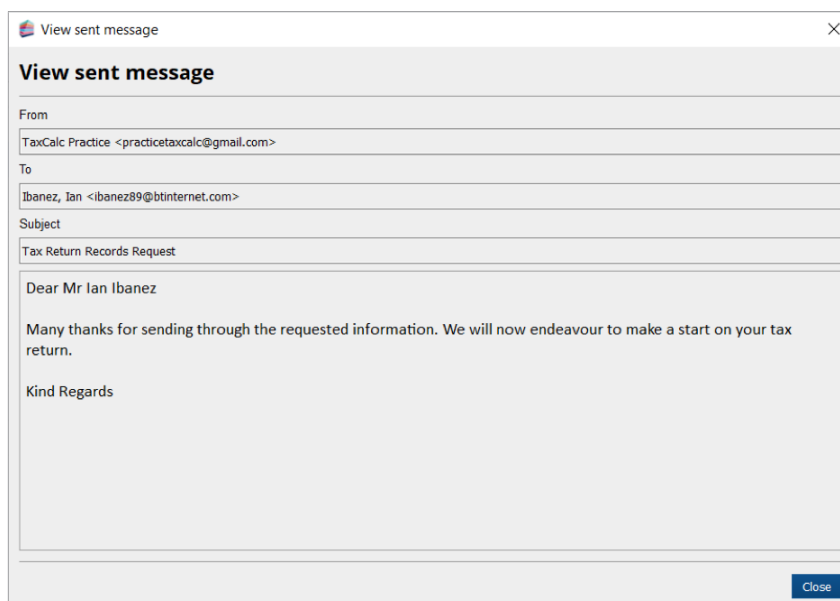
Reviewing Message Activity

Message Activity gives you the ability to view the correspondence you have sent to clients from within Communications Centre. You can see the messages sent out to clients, who they were sent to, when they were sent and who in the practice sent them.

1. To view the message details, select **Message Activity** in **Communications Centre**.



2. Ensure the **Sent / Cancelled** option is selected.
3. Select the **Message** to open the **View sent message** dialog.
4. Here you can see the following details, including the name of any documents attached:



5. Click **Close** to return to the **Message Activity** screen.
6. To see your Pending emails, click the **Pending** option.
7. From here you can choose to **Send, Bulk send, Edit** or **Cancel** your pending emails.



Making the Most of Communications Centre

There are a number of time saving features within Communications Centre that you can easily use with minimal set up to make your day to day communications more efficient.

- **Templates**
- **Mailing Lists**
- **Automation**
- **Communications Activity**

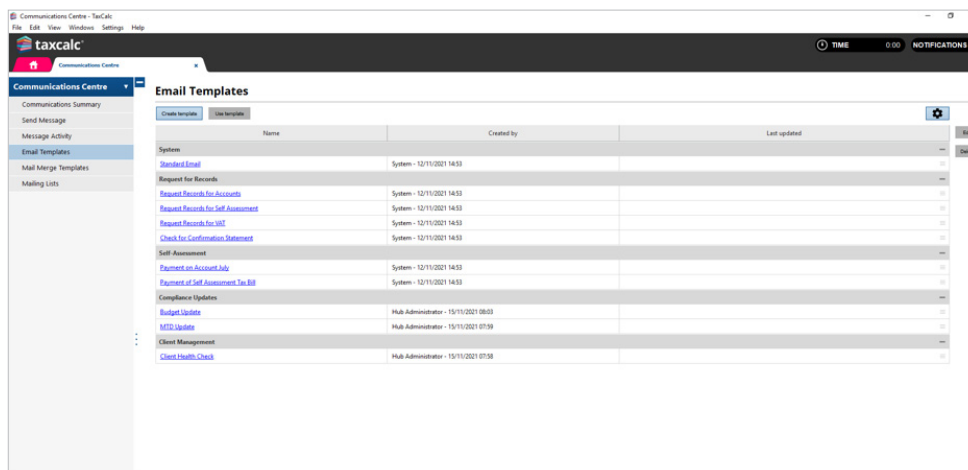
Setting up Email Templates

Email Templates allows you to create customised content to send out to your clients. You may also want to send the same email message out in bulk. Having templates ready to hand means you can quickly and easily send emails out without having to write them every time and allows you to add that personal touch.

You can create and manage templates for emails and mail merge correspondence or use TaxCalc's default templates, as well as create multiple categories to group your template types.

Creating an Email Template:

1. Within **Communications Centre**, select **Email Templates**.

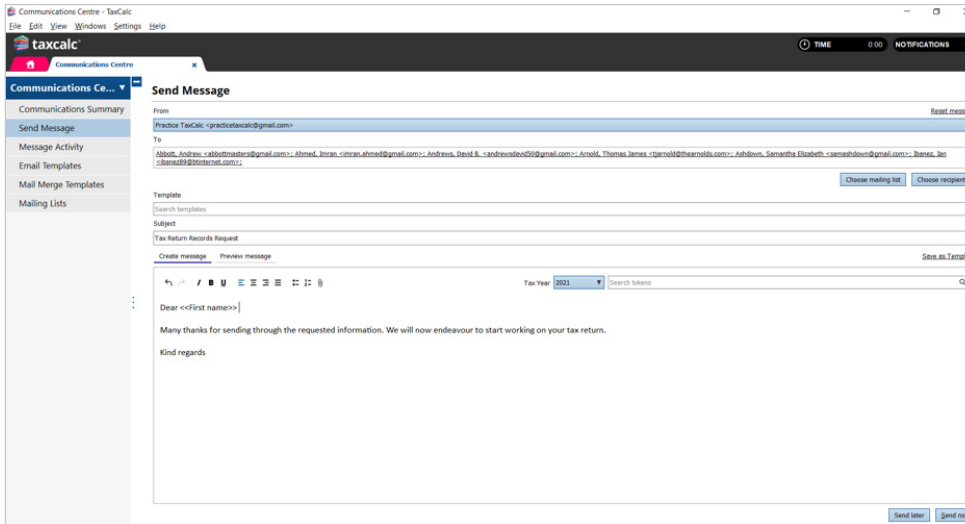


2. Click **Create Template** to open the **Create Message Template** dialog.

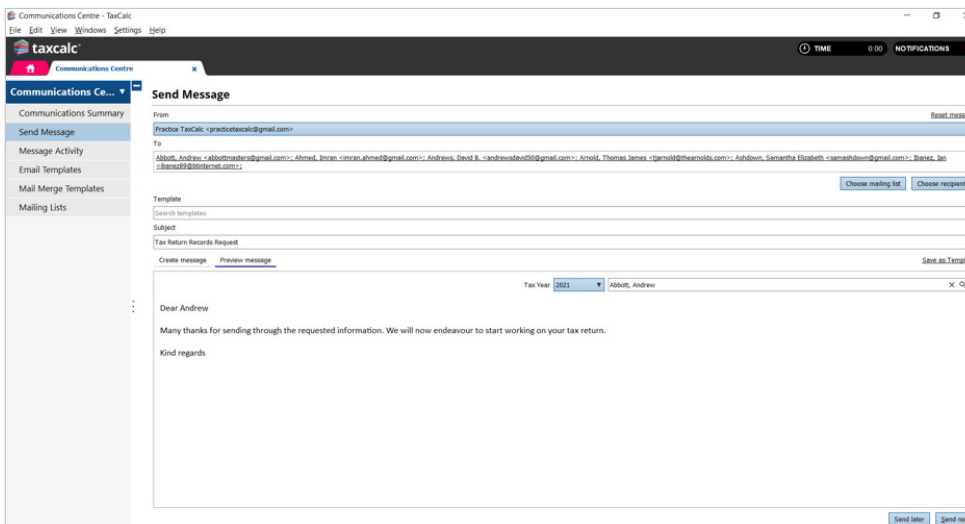


3. Enter the Template **Name** as well as the message **Subject**.
4. Now type the content of your message.
5. From the **Token Name** dropdown list you can select dynamic data fields. These fields pull the requested information from the TaxCalc database to automatically fill in the required data. For example, selecting <<Total Tax Current Year>> will automatically enter the client's total tax for the current year calculated within Tax Return Production. The same for <<Client Name>> will automatically add the client's name that has been specified in the client record within Practice Manager.
6. Once done, click **Create**.
7. You also have the option to create an email message directly from the email template tab by selecting **Use template**.
8. Within **Communications Centre**, select **Send Message**.
9. Enter the message content.
10. From the **Token Name** dropdown list select the required tokens you want automatically populated within the email.

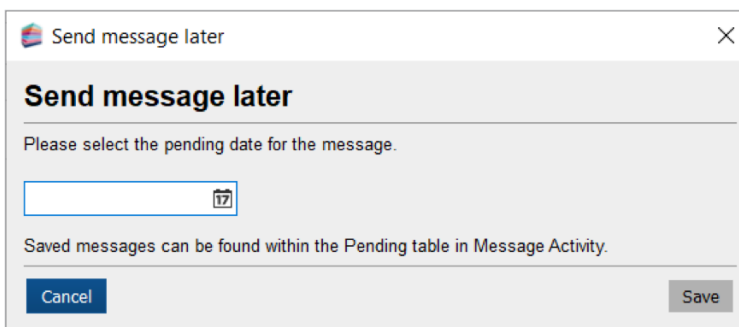




11. Once the message is complete, select the **Preview message** tab to see how your message will look once sent.



12. You can then choose to clear the message content by selecting **Reset message**, or you can click **Send now** or **Send later**. Selecting **Send later** displays the **Send message later** dialog.



13. From here you can select the date in which the email is to be sent.

14. The message is then saved within the **Pending** table in **Message Activity**.



15. Click **Save**.
16. Alternatively, instead of selecting **Send later** or **Send now**, you can click **Save as template** to display **the Save Template** dialog, where you can enter the template **Name** and assign it to a **Category**.

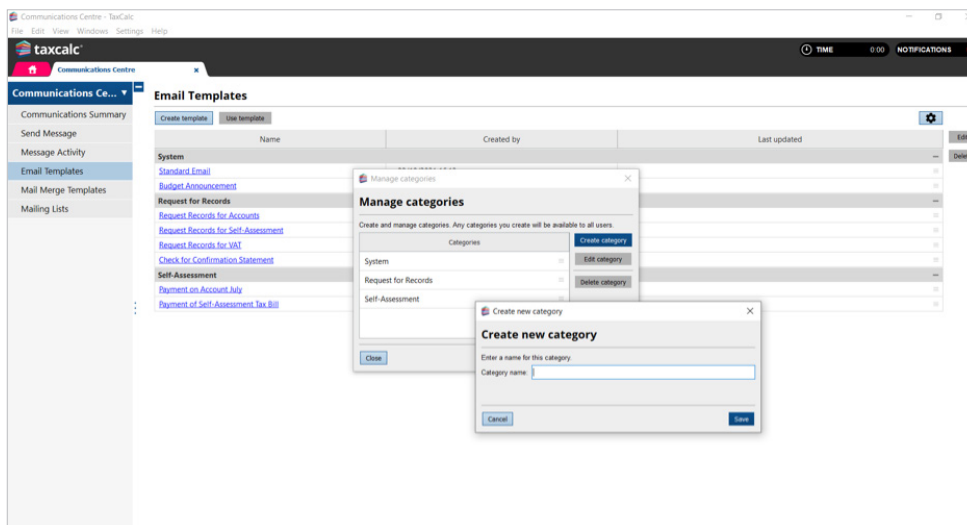
Creating Mail Merge Templates

With Mail Merge you can contact any or all of your clients with a few simple clicks. You can also create a client questionnaire to get the information you need to handle their returns.

[See KB2180 – How do I use Mail Merge?](#)

Creating Categories

1. Open **Communications Centre** and select **Email Templates** from the left-hand menu.
2. From the **Cog** menu select **Manage Categories** to open the **Manage Categories** dialog.
3. Click **Create Category** to open the **Create New Category** dialog.
4. Enter the **Category Name** and click **Save**.



5. You can drag and drop the templates into the appropriate categories if required.

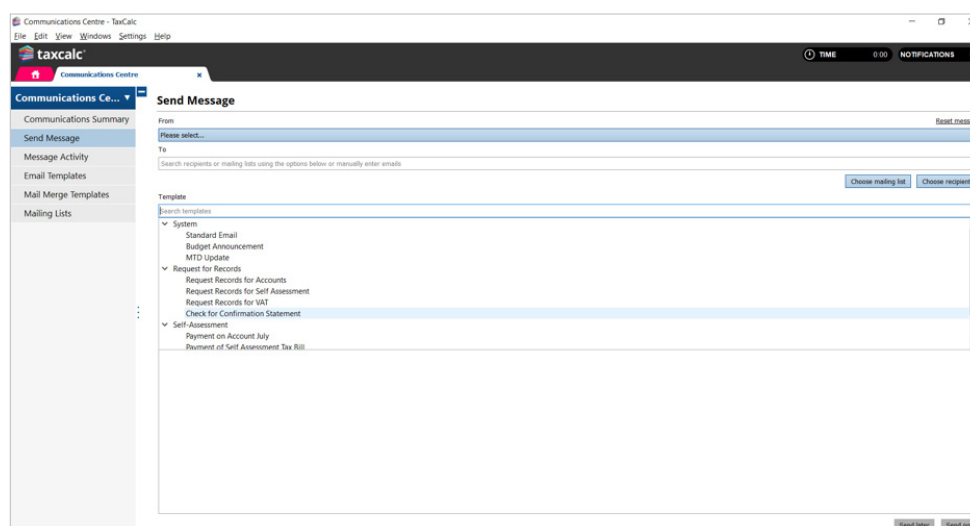


Applying Email Templates

Once you have created your email template or where using a default template, you can easily apply it to any outgoing email within:

- Send Messages in Communications Centre
- Send client message within the client record in Practice Manager
- Send client message within the work module
- Send client message within the Email templates
- Send client message within the Mailing lists

1. Either in **Communications Centre** select **Send Message** from the left-hand menu, or select **Send Client Message** within the client record in Practice Manager.
2. Select who the message is **From** and **To**.
3. The **Template** dropdown provides you with the list of available email templates. Select the required template.



4. The content from the template is then populated and can be edited if required.
5. Once the message is complete, select **Preview message** then **Send now** or **send later** once you're happy with the content.



Creating Mailing Lists

Rather than repeatedly having to select multiple clients for every communication, TaxCalc allows you to create a mailing list which you can use time and time again. You can review any existing mailing lists and make amendments where required, and create any new mailing lists.

1. In **Communications Centre**, select **Mailing Lists** from the left-hand menu.
2. Click **Create mailing list** to open the **Mailing List** dialog.
3. Alternatively, you can select the **Choose mailing list** option from the **Send Message** screen and select **Create mailing list**.

Mailing List

Create, edit and manage all your mailing lists

Mailing List Information

Please enter the following information about the mailing list

Name:

Description:

Choose Recipients

Please select recipients you would like to add to your mailing list

All Specific Advanced client selection (Data Mine)

Clients

Selected

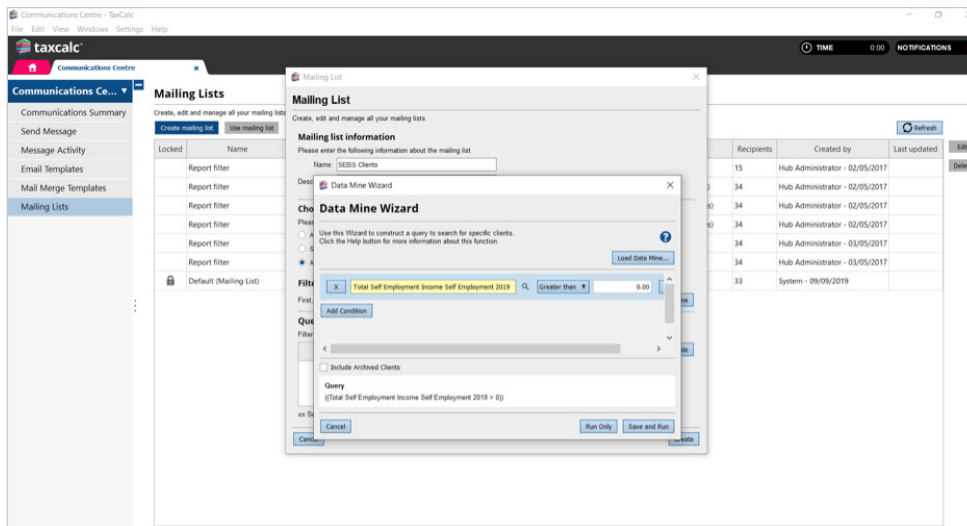
This report will be based on all of your 6 current clients and contacts.

4. From the **Mailing List Information** section, enter the **Name** and **Description** of your mailing list.
5. Now you can select the recipients you want to include in the **Choose Recipients** section:

- **All**
- **Specific**
- **Advanced client selection (Data Mine)**

6. Click **Specific** to add certain clients to the mailing list.





For more information, see the [Advanced Search Data Mining](#) topic and the [Data Mining Examples](#) topic in the TaxCalc application help. You can also find more details on other useful mailing lists in [KB3208 - Examples of Mailing Lists that can be created.](#)

- Click **Create** to complete your mailing list which you can then use in **Communications Centre ► Send Message**.
- You can also select the mailing list from the **Mailing List** option and selecting **Use Mailing List** to a send message to the selected clients.

Automating Emails

Automated Message Settings allows you to automate the process of requesting records for clients which automatically generates a message. These messages can either be sent individually or in bulk.

Please note: Before activating the automated message, you will need to make sure the client has a usual year end set as well as a default email address within the client record in Practice Manager.

You will also need to have setup your email accounts with verified SMTP configuration in Admin Centre and selected an email template in Communications Centre.

To set up Automation:

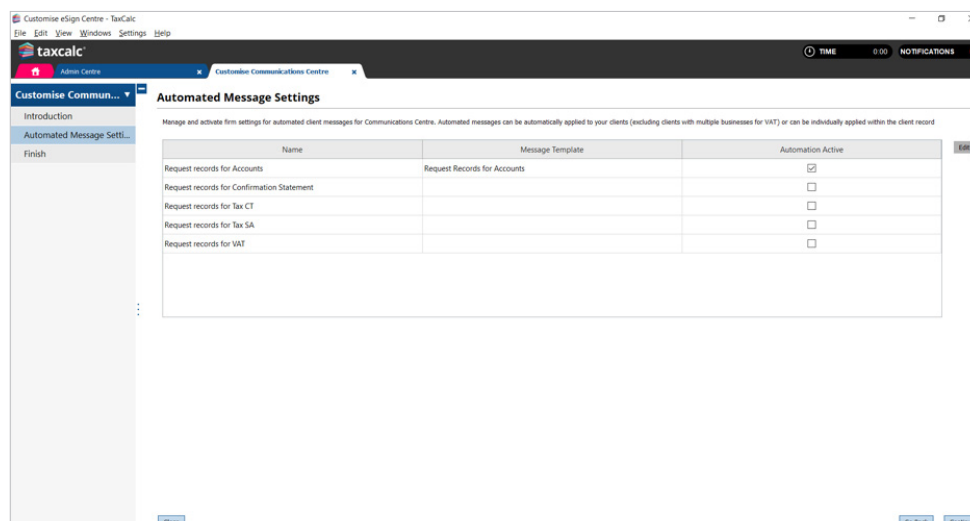
- Click **Automation** from **Communications Summary** to display the **Automated Message Settings** screen in **Admin Centre**.
- Tick **Automation Active** for the relevant automation request:

- **Request records for Accounts**
- **Request records for Confirmation Statement**
- **Request records for Tax CT**
- **Request records for Tax SA**
- **Request records for VAT**



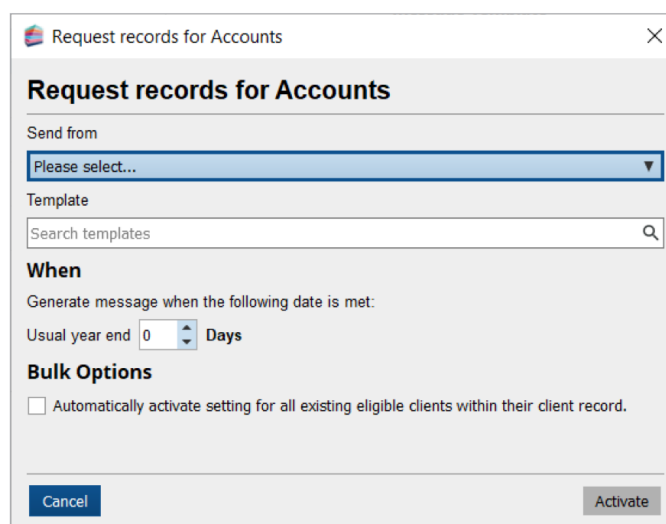
To use these automations, ensure the following dates have been set up within the client record:

- **Request records for Accounts** – client's usual year end
- **Request records for Confirmation Statement** – client's confirmation statement
- **Request records for Tax CT** – client's usual year end
- **Request records for Tax SA** – the current tax year
- **Request records for VAT** – client's VAT period end



The **Request records** dialog is displayed.

3. Select **Send From** and choose the appropriate email account the message is to be sent from.
4. Apply the required **Template**.
5. Optionally, add the appropriate number of days to ensure the message is generated based on the specific automation setting.



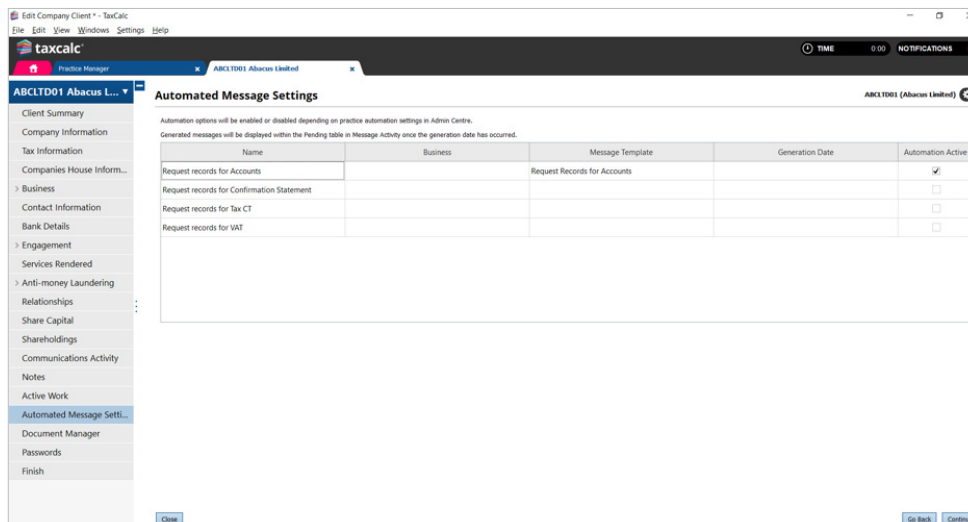
6. Select **Automatically activate setting for all existing eligible clients within their client record** to activate the record request for all relevant clients.



Please note: You must ensure the clients have the specific client value for calculations available within the client record to turn automation on. For example, Usual Year-End for requesting records for Accounts or Tax CT.

7. If you wish to apply the setting to a specific client rather than all eligible clients, you can set this manually by opening the client record in Practice Manager.

8. Select **Activate**.



Once the set number of days have lapsed, the message is automatically generated and sent to the Pending queue within Communications Centre.

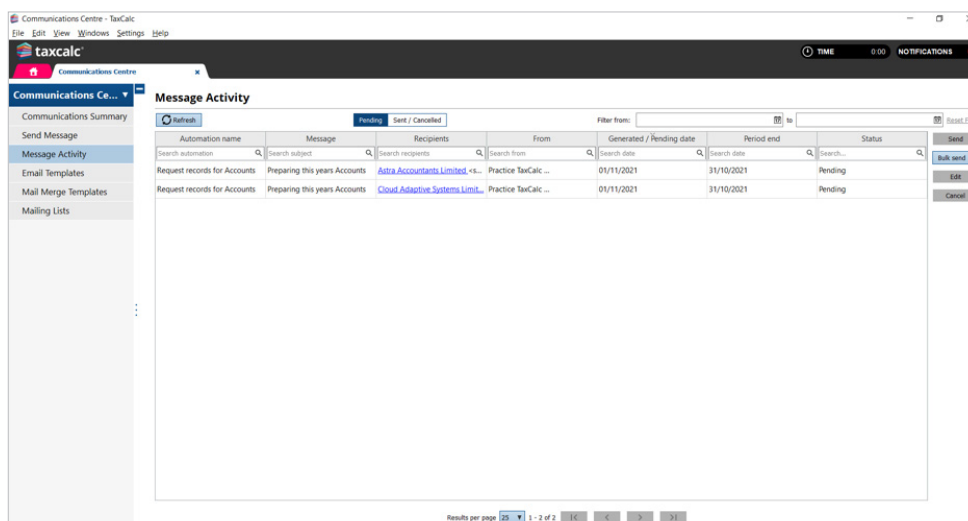
9. Select **Communications Centre**.

10. Select **Message Activity** from the left-hand menu.

11. Click **Pending** where you will see a list of emails you can select and review before sending.

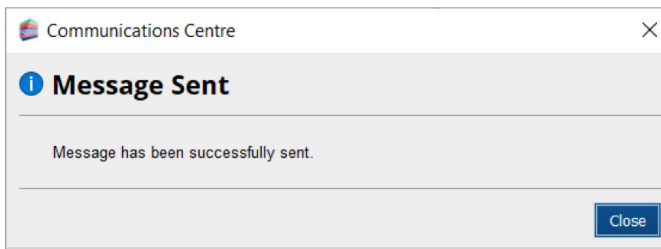
12. Highlight the relevant message.

13. Now select to **Send, Bulk send, Edit** or **Cancel** the pending message.



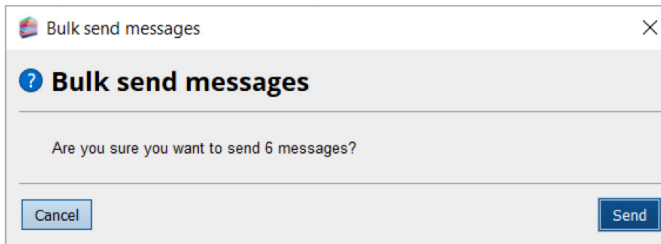
14. Once a single email has been sent successfully, the following message is displayed:



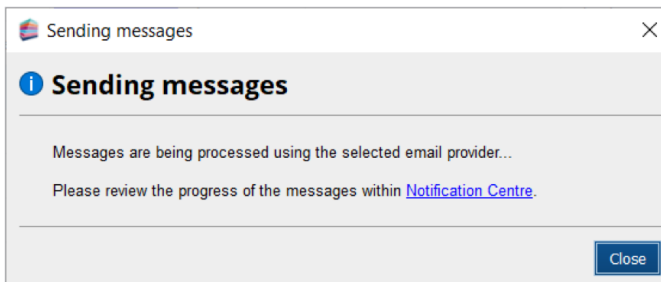


15. If you select **Bulk send**, you have the option to send **All messages**, or just those on the **Current page**.

16. Then click **Send** to the **Bulk send messages** dialog.

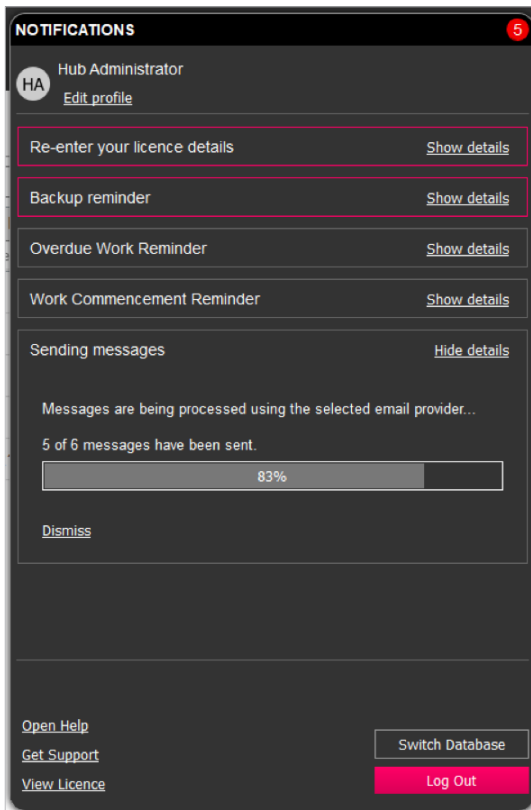


17. The following message is displayed:



18. Click **Notification Centre** to see the progress of the messages being sent.





Communications Activity

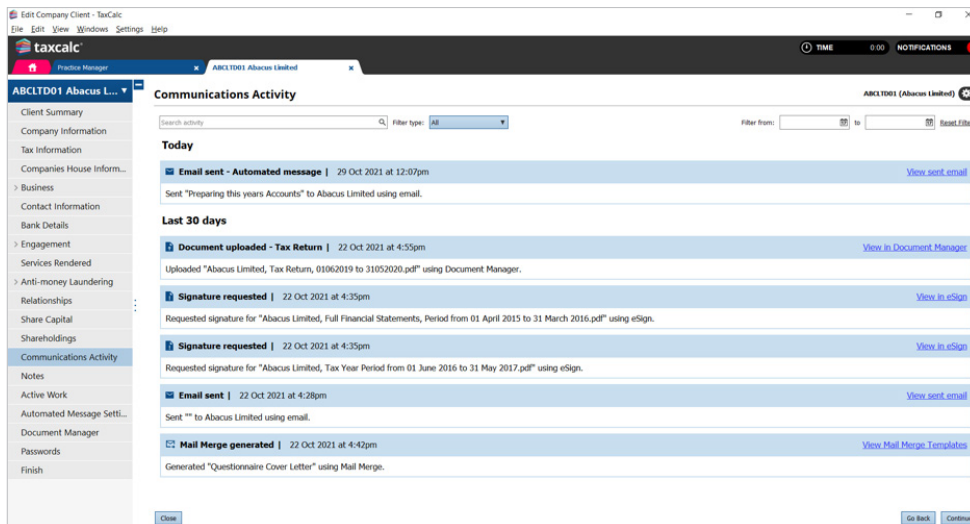
Within a client's record, Communications Activity gives you the ability to view the correspondence you have sent to clients. You can see the messages sent out to clients, who they were sent to, when they were sent and who in the practice sent them.

This is particularly important for Practices to be able to maintain a record of communications with each client so that any member of the team can deal with a query from any client should they need to.

Both electronic signing, document management and mail merge generated events can also be reviewed from this one central location so that you don't need to look through various sources to find something.

1. Within **Practice Manager**, select **Clients/Contacts**. Select a client and double click to open the **Client Record**.
2. Select **Communications Activity** from the left-hand menu.





3. From here you can see all communications that have been sent to the client. This includes:

- Emails sent via Communications Centre (including any attachments to the emails)
- eSign signature requests and signed documents
- Documents uploaded to Document Manager - these communications are only available in the Communications Activity screen if you have manually selected to do so when uploading a document to Document Manager.
- Mail Merges generated – these communications are only available in the Communications Activity screen if you have manually selected to do so when running a mail merge.

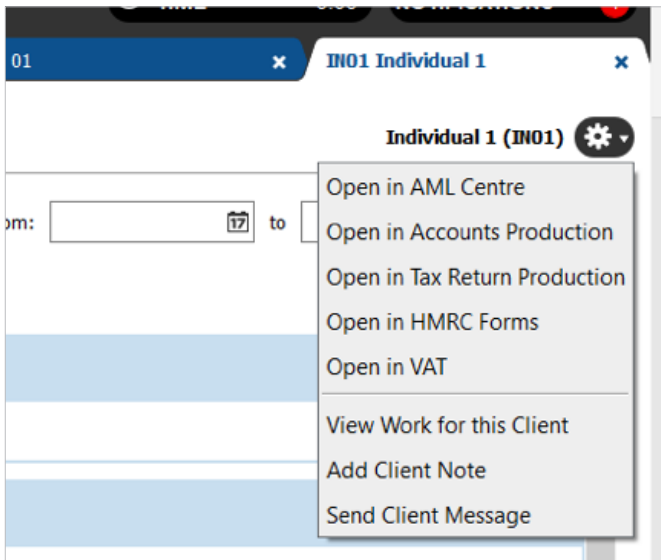
To quickly and easily locate the required information, the communication activity screen groups the communications by Today, 30 days, 12 months and Older. You can also filter the information by date and activity type.

Sending Messages within the Client Record or Work Item

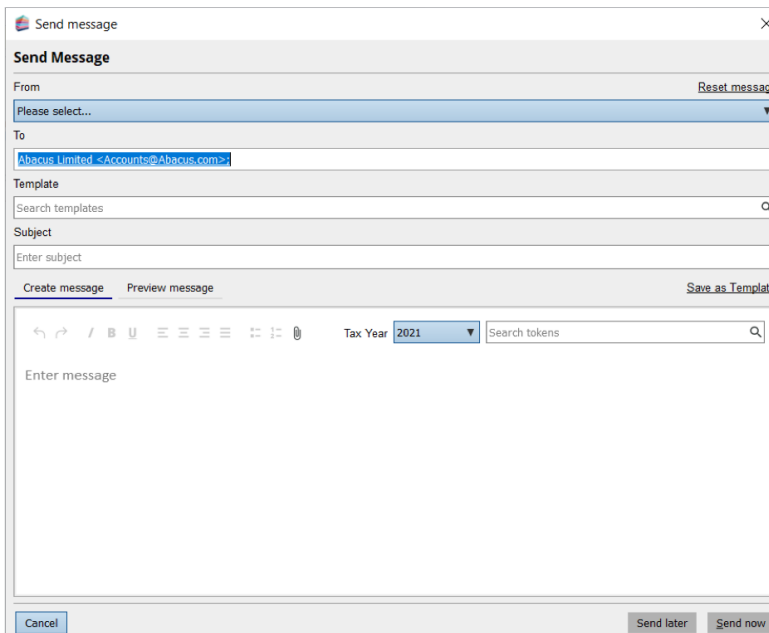
You also have the option to send messages directly from the client record within Practice Manager and within the client's work module.

1. From **Practice Manager**, select the **client**.
2. Click **Edit Client/Contact** to open the client record.
3. From the **Cog** menu on the top right-hand side select **Send Client Message**.





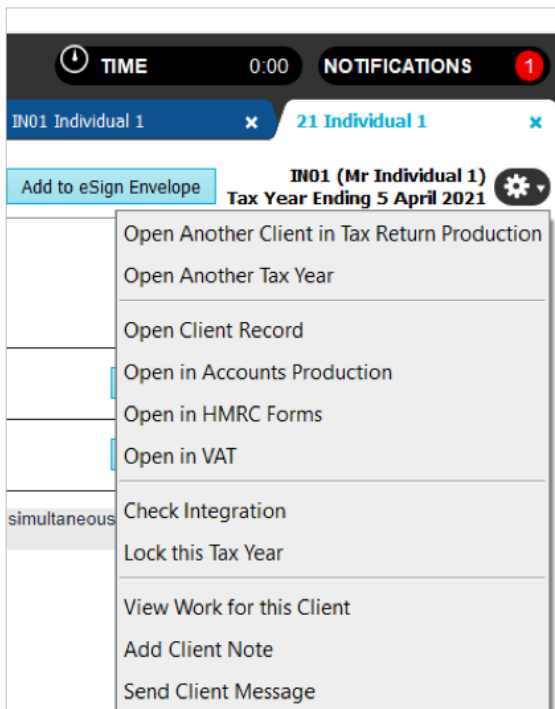
4. The **Send Message** dialog is then displayed where you can create the email content for the client:



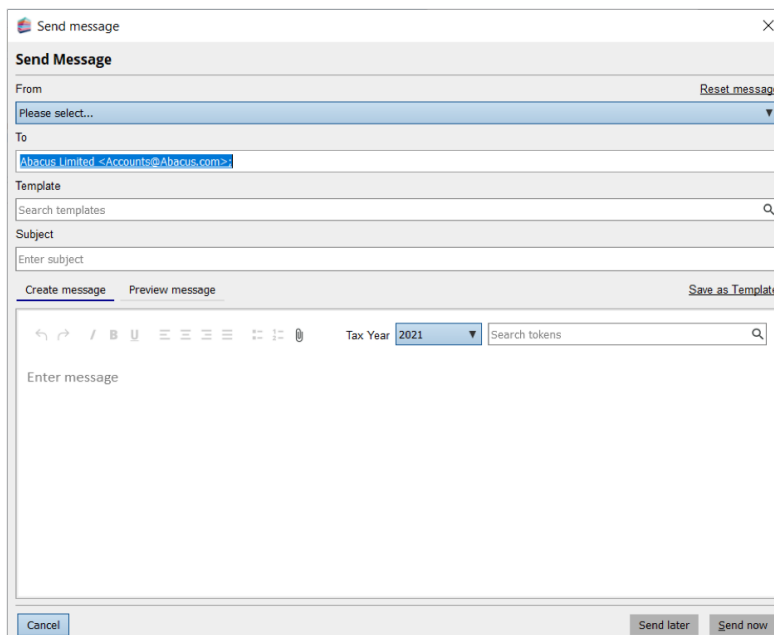
Sending a Message from the Client's Work:

1. Alternatively, from within the appropriate TaxCalc module, for example, Tax Return Production, select the **Cog** menu on the top right-hand side select **Send Client Message**.





2. The **Send Message** dialog is then displayed where you can create the email content for the client:



Thank you for reading this guide. You can find more information and answers to common questions within our Knowledge Base. Please see [Knowledgebase Article Communications Centre: Collateral](#)

You can also find further details within the in-app help within TaxCalc, **Help ► Contents ► Introduction to TaxCalc Communications Centre.**

