

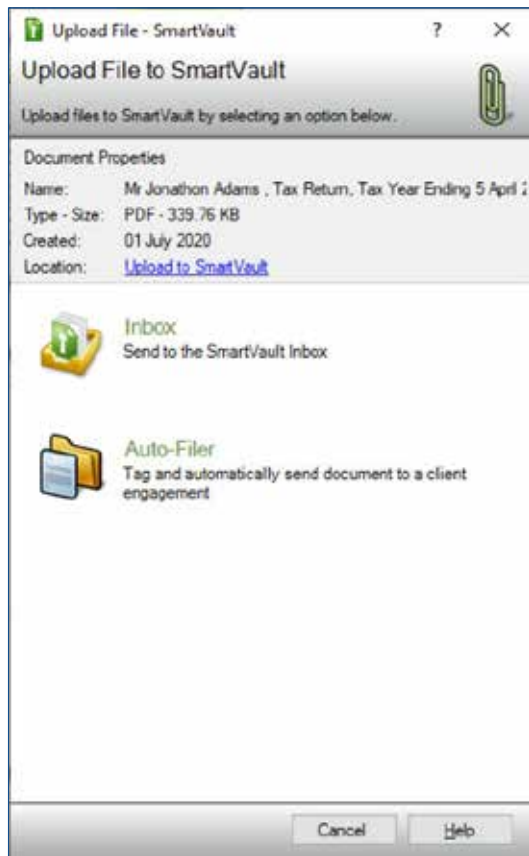
Getting Started with TaxCalc Document Manager

Powered by SmartVault



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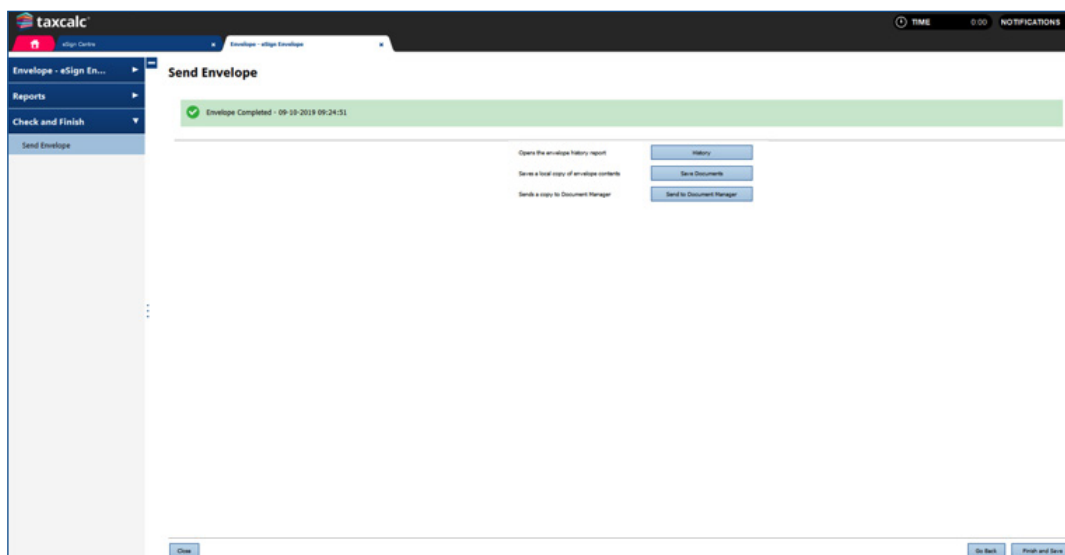


7. Select one of the following options:

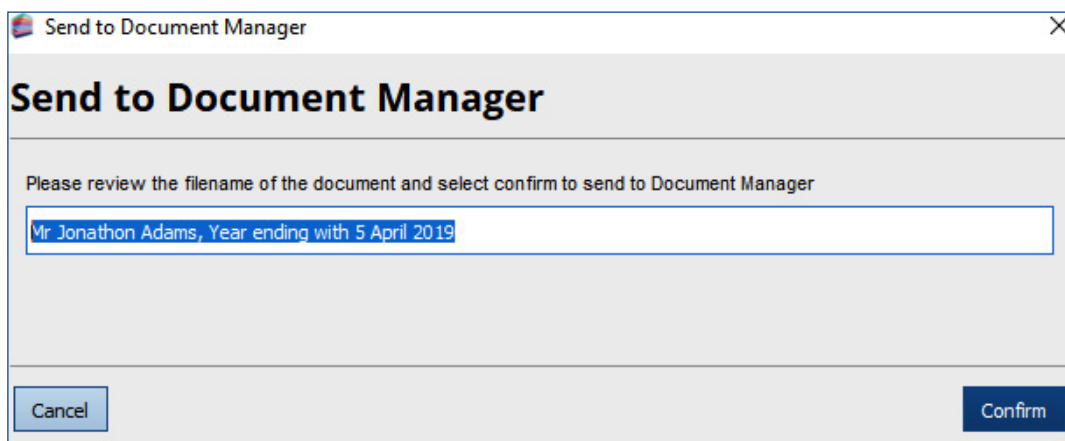
- **Inbox** - to send the file to the Document Manager inbox.
- **Auto-Filer** - to tag and automatically send the file to the appropriate Document Manager folder.

8. The **Upload Document** dialog is displayed.

4. Click **Check and Finish** then select Send to **Document Manager**.

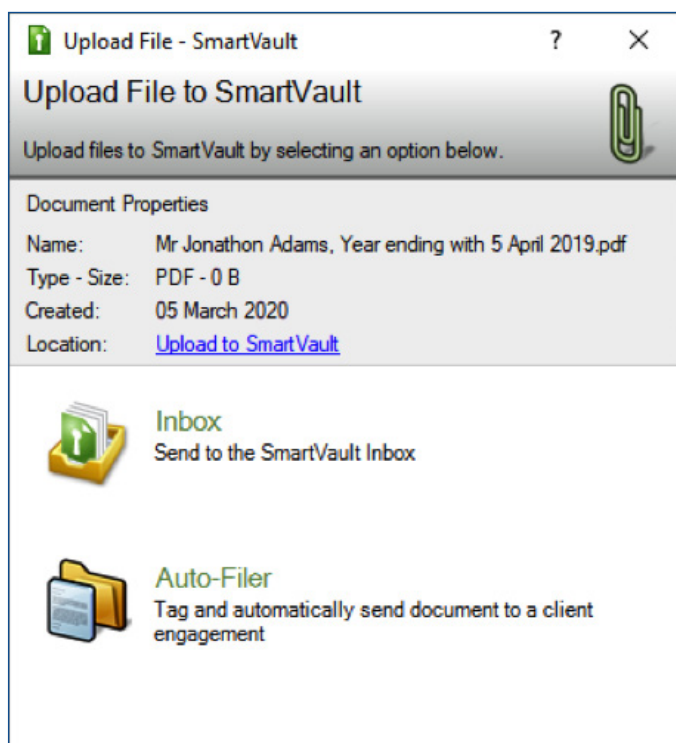


5. The **Send to Document Manager** dialog is displayed where you can change the name of the document if required.



6. Click **Confirm** to open the **Upload File to SmartVault dialog** and choose one of the following options:

- **Inbox** – to send the file to the SmartVault Inbox
- **Auto-Filer** – to tag and automatically send the file to the appropriate SmartVault folder



7. Click **Upload** and a message confirming '**Upload complete**' is displayed.

Step 8 – Support

For any queries please visit the [SmartVault Support](#) website or contact [SmartVault Support](#) and select **I have a SmartVault account** for Live Chat and Email Support.

Alternatively, you can call SmartVault Support on 01223 735906 where lines are open Monday – Friday, 9am – 3am.