# Getting Started with TaxCalc Document Manager

**Powered by SmartVault** 



#### Contents

Getting Started with TaxCalc Document Manager powered by SmartVault	3
Step 1 – Activating your Account	4
Step 2 – Adding Additional Users	4
Step 3 – Onboarding and Training	5
Step 4 – Installing Connected Desktop Step	5
5 – Launching Document Manager Step	6
6 – Uploading a Document	7
Step 7 – Electronic Approval via eSign Centre	10
Step 8 – Support	12

#### Getting Started with TaxCalc Document Manager powered by SmartVault

TaxCalc Document Manager is powered by SmartVault as an integral part of TaxCalc's Practice Management toolkit that supports our strategy to provide choice and control over the products a practice needs to run efficiently.

With Document Manager and TaxCalc eSign Centre you can have the best of both worlds for online secure document management and electronic approval.

A complete solution for managing client documents, Document Manager gives peace of mind from onboarding a new client to maintaining tax returns or accounts, that all documents are stored and shared securely all in one place.

For more information on Document Manager, please visit our <u>website</u>.

This guide will show you how to:

- Activate your account
- Add additional users
- Access onboarding materials and your
  1-hour free training session
- Install the SmartVault connected desktop for your Windows application
- Upload a document from TaxCalc
- Use electronic approval via eSign Centre
- · Log any support queries

#### Step 1 – Activating your Account

You will receive an email from SmartVault within 1-2 business days inviting you to activate your

Document Manager account. Once activated, you'll be ready to go!

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If you do not receive the email please check your junk mail folder. If you still haven't received the

activation email please contact TaxCalc Support on 0345 5190 882

### Step 2 – Adding Additional Users

You can add additional users to your Document Manager account if required. When you add a new employee, an email invitation is sent to the employee that allows them to join Document Manager.



Click <u>here</u> for more information on how to add an employee to your account.

## Step 3 – Onboarding and Training

Once you have activated your account and logged in to Document Manager, you will automatically be directed to the SmartVault home screen. From here you will receive a welcome email with a handy link to the SmartVault Getting Started Guides which include comprehensive tutorials and videos to get you up and running as quickly as possible.

You will also be given a link to the SmartVault Live Training Hub, where you can schedule your free 1-hour training session, after which you will be emailed links to helpful knowledgebase articles and furthermore, a 30 minute follow up to call with your dedicated Customer Success Manager to answer any additional questions you may have.

For more information about SmartVault onboarding and training please contact <u>support@smartvault</u>. com or call 01223 735906 and press 1 for support.

You will receive ongoing account management where you will be invited to any upcoming webinars and informed of any useful features. You will also receive a health check before your renewal date to ensure you're getting the best out of Document Manager.

## Step 4 – Installing Connected Desktop

Install the SmartVault connected desktop client for your Windows application, which provides a fully integrated connection between your computer and



Click <u>here</u> for more information on how to install the desktop client for Windows.

the SmartVault Portal where you'll perform all of your document management.

#### **Step 5 – Launching Document Manager**

1. From the TaxCalc homescreen, select

#### **Document Manager**.

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2. The Document Manager SmartVault launcher is displayed.

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- 3. Enter your **Email Address** and **Password** and click **Sign In** to view the Dashboard.
- 4. From here you can manage all your documents.

#### Step 6 – Uploading a Document

Once you've had your training and you're all setup, you can easily upload your TaxCalc documents to Document Manager for secure online documentation storage and file sharing.

#### 1. Login to the SmartVault Connected Desktop.

Email		×
Password	Remember email	1
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2.Within the appropriate TaxCalc module, generate the required files, for example, Accounts, Tax Return, Company Secretarial, etc.

3.Select **Send to Document Manager** from the TaxCalc modules **Check and Finish** menu. The **Send to Document Manager** dialog is displayed.

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Name Mr Jonathon Adams , Tax Return		_

4. Select the documents to be uploaded.

5. If required, amend the Name of the document.

6. Click Send.

The Upload File to SmartVault dialog is displayed.



- 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.

Upload De	ocument - SmartVault		– 🗆 X
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lame Description	Astra Accountants Limited, Tax Return,	, 01042018 to 31032019.pdf	
Refresh		Upload	Cancel Help

 Click Upload to upload the document and create the relevant client folders in Document Manager.

There are other methods to upload documents to Document Manager, for more information please see **KB3095 - How can I send documents to Document Manager?** 

#### Step 7 – Electronic Approval via eSign Centre

When you need formal approval from your client, simply use TaxCalc eSign Centre to pack your documents into an eSign envelope and send for signature. Once the signing process is complete, upload your signed document to Document Manager.

**Please note**: You will need an eSign Centre licence to use this functionality.

- 1. Ensure you are logged in to the SmartVault Connected Desktop.
- 2. Login to TaxCalc and launch eSign Centre.
- 3. Select the eSign Envelope and click Open Envelope.

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#### 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.

📁 Send to Document Manager	×
Send to Document Manager	
Please review the filename of the document and select confirm to send to Document Manager	
Mr Jonathon Adams, Year ending with 5 April 2019	
Cancel	Confirm

- 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



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

### **Step 8 – Support**

For any queries please visit the <u>SmartVault Support</u> website or contact <u>SmartVault Support</u> 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.