

Getting Started with TaxCalc Document Manager

Powered by SmartVault



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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 [website](#).

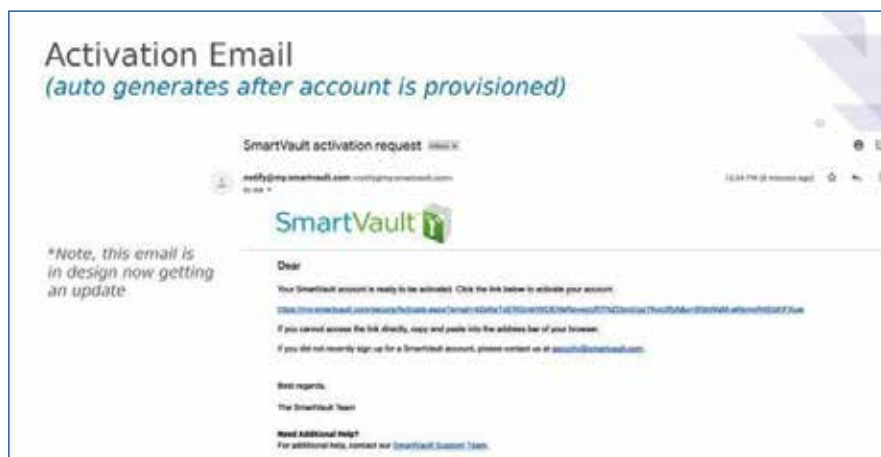
This guide will show you how to:

- **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!



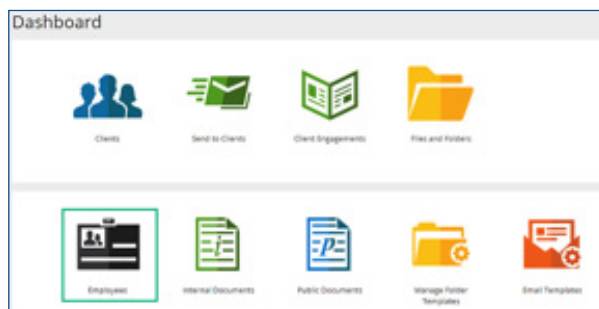
If you do not receive the email please check your junk mail folder. If you still haven't received the

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 [here](#) 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.

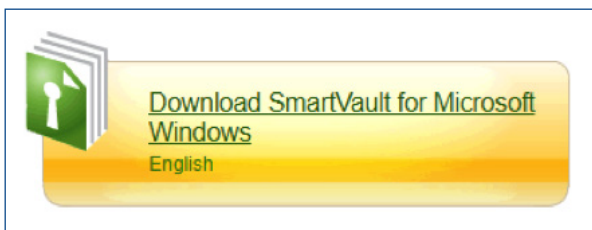
For more information about SmartVault onboarding and training please contact support@smartvault.com or call 01223 735906 and press 1 for support.

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

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



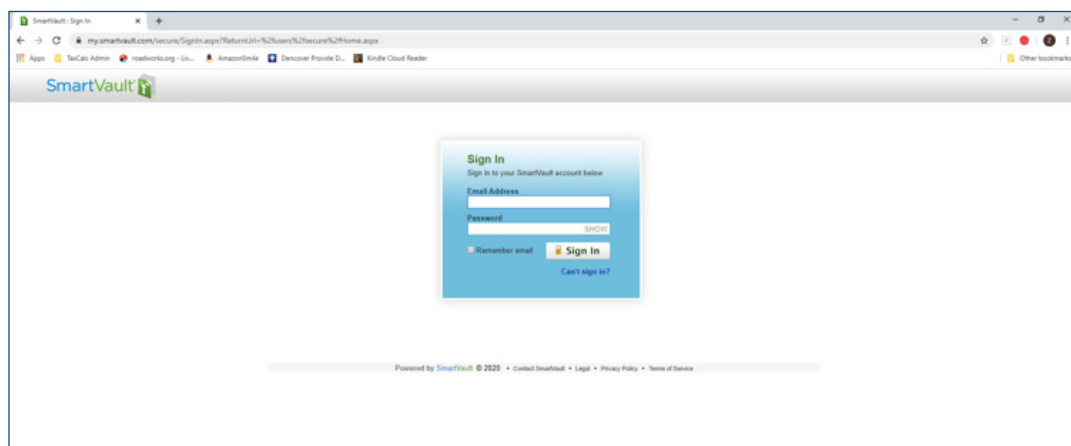
Click [here](#) for more information on how to install the desktop client for Windows.

Step 5 – Launching Document Manager

1. From the TaxCalc homescreen, select **Document Manager**.



2. The Document Manager SmartVault launcher is displayed.

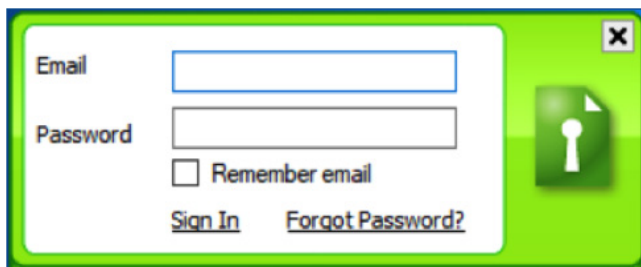


3. Enter your **Email Address** and **Password** and click **Sign In** to view the Dashboard.
4. From here you can manage all your documents.

Step 6 – Uploading a Document

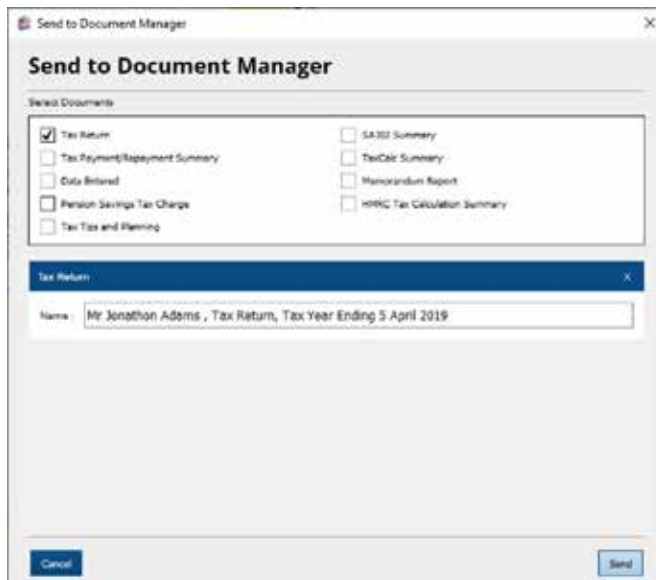
Once you've had your training and you're all setup, you can easily upload your TaxCalc documents to Document Manager for secure online documentation storage and file sharing.

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

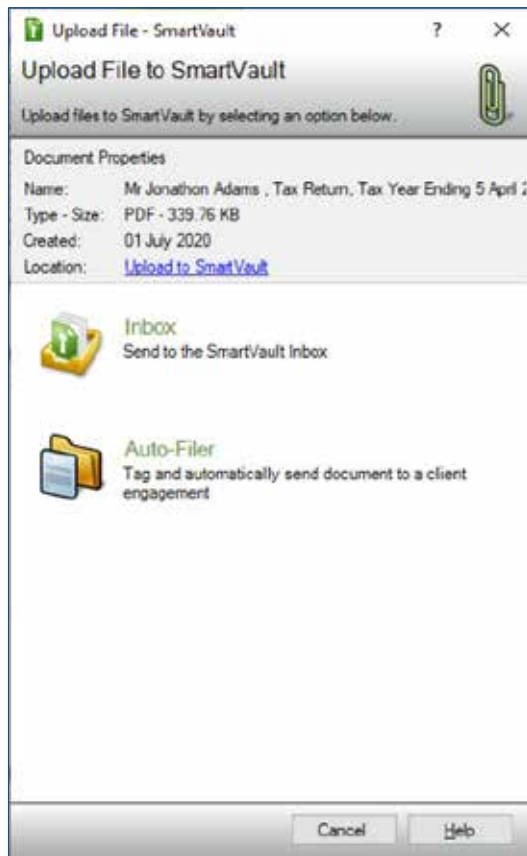
A login dialog box with a green border. It contains two input fields for 'Email' and 'Password'. Below the password field is a checkbox labeled 'Remember email'. At the bottom are two links: 'Sign In' and 'Forgot Password?'. On the right side, there is a green key icon and a close button (X).

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.

A dialog box titled 'Send to Document Manager'. It has a 'Select Documents' section with a list of checkboxes: 'Tax Return' (checked), 'Tax Payments/Repayment Summary', 'Data Entered', 'Pension Savings Tax Charge', 'Tax Tax and Planning', 'SA302 Summary', 'TaxCalc Summary', 'Memorandum Report', and 'HMRC Tax Calculation Summary'. Below this is a 'Tax Return' section with a 'Name' field containing 'Mr Jonathon Adams , Tax Return, Tax Year Ending 5 April 2019'. At the bottom are 'Cancel' and 'Send' buttons.

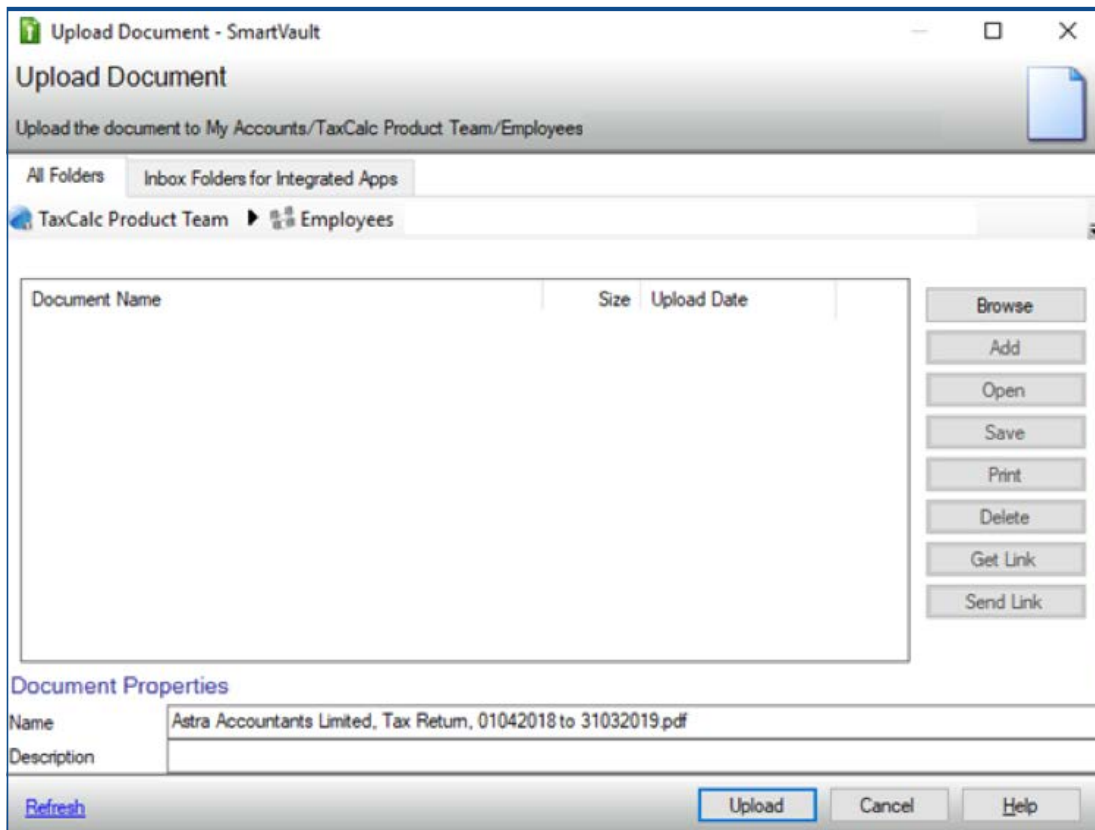
4. Select the documents to be uploaded.
 5. If required, amend the **Name** of the document.
 6. Click **Send**.
- The **Upload File to SmartVault** dialog is displayed.



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.



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

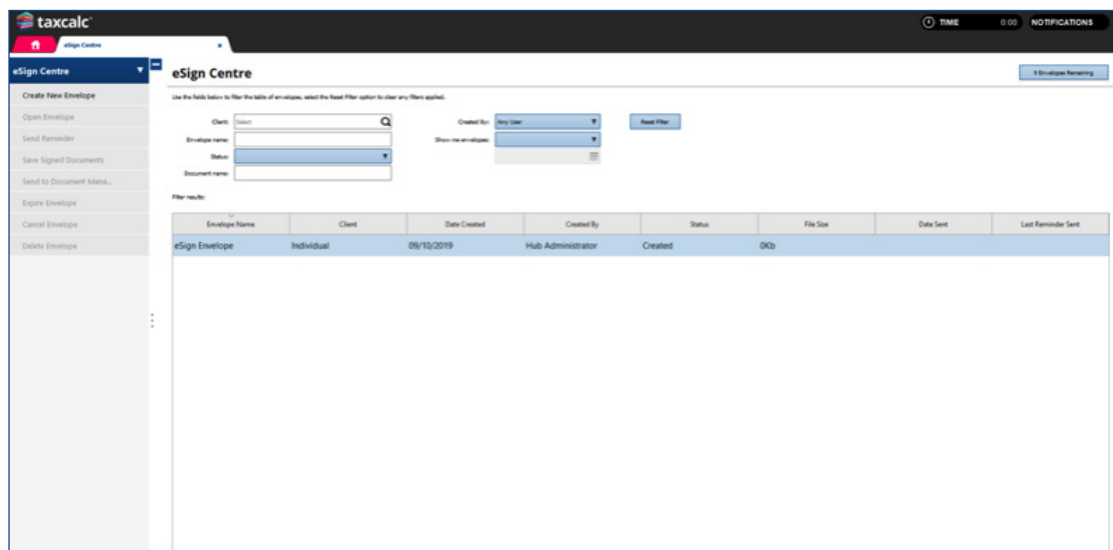
There are other methods to upload documents to Document Manager, for more information please see [KB3095 - How can I send documents to Document Manager?](#)

Step 7 – Electronic Approval via eSign Centre

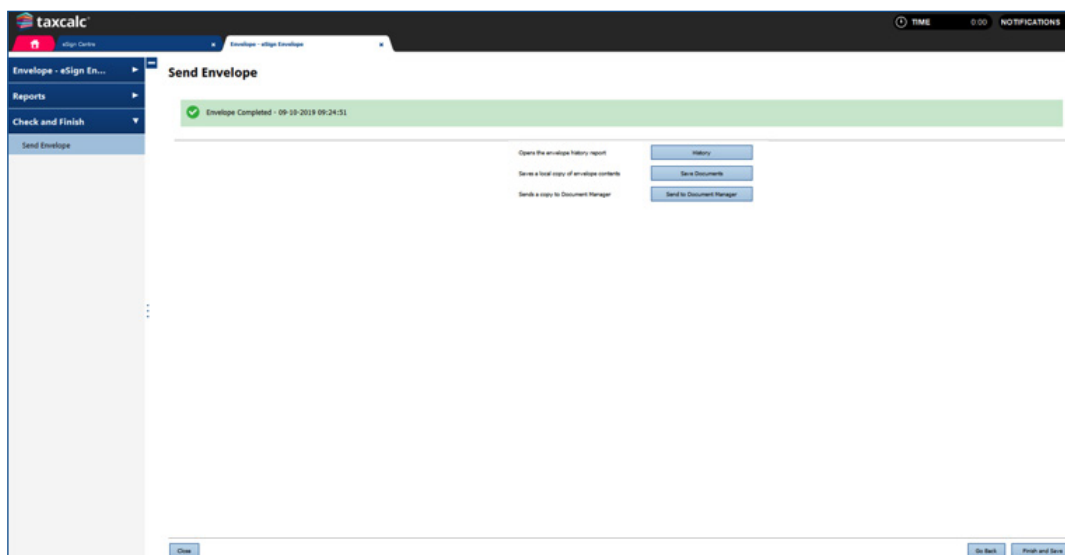
When you need formal approval from your client, simply use TaxCalc eSign Centre to pack your documents into an eSign envelope and send for signature. Once the signing process is complete, upload your signed document to Document Manager.

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

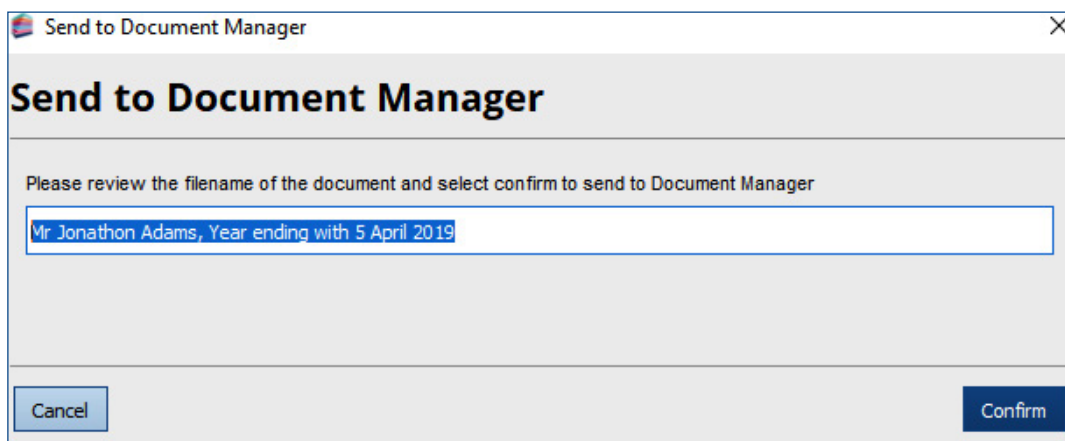
1. Ensure you are logged in to the **SmartVault Connected Desktop**.
2. Login to TaxCalc and launch **eSign Centre**.
3. Select the **eSign Envelope** and click **Open Envelope**.



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

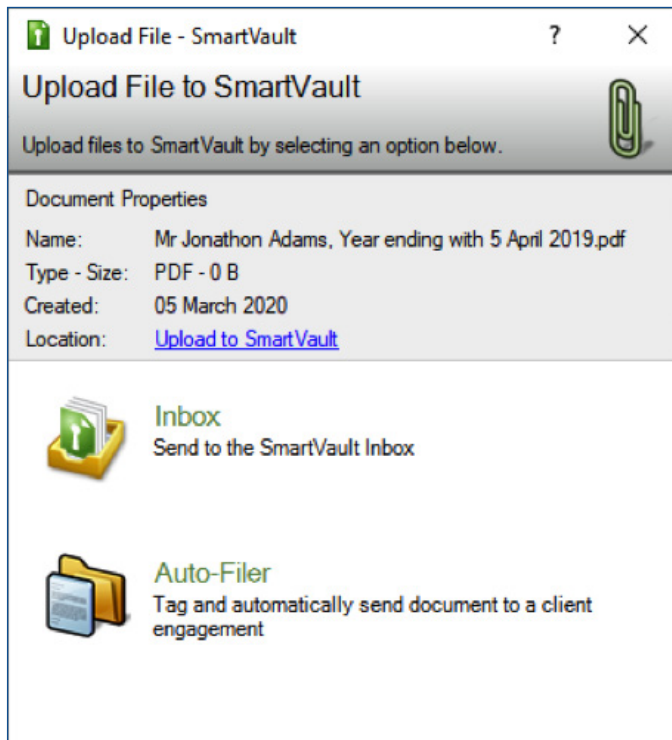


5. The **Send to Document Manager** dialog is displayed where you can change the name of the document if required.



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.