Getting started with Document Manager

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Getting Started

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.

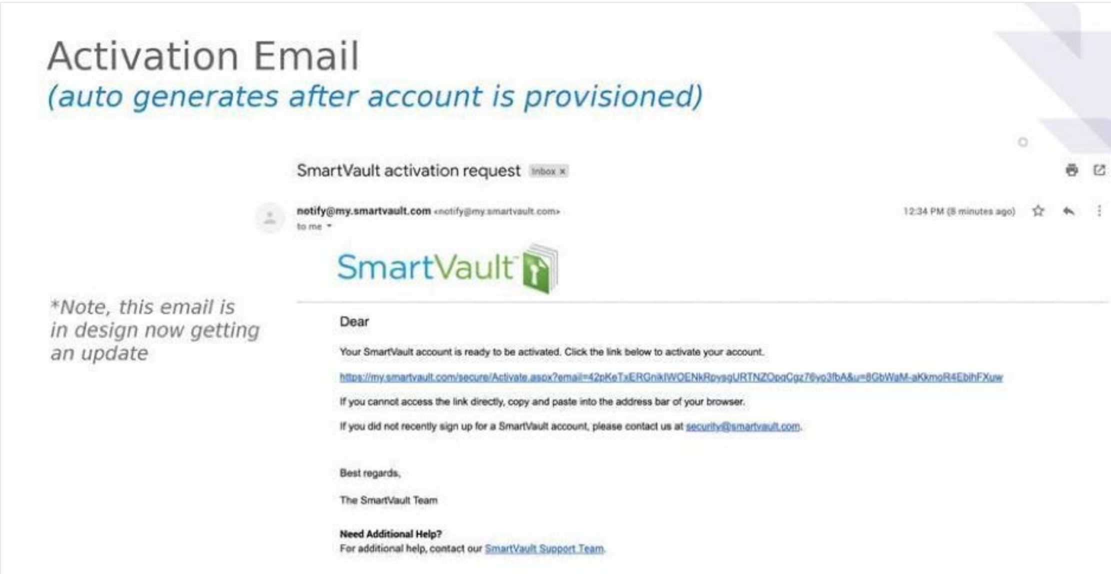
This guide will show you how to:

- 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.
- Authorise your Document Manager account.
- Open Document Manager.
- Enabling and disabling clients for Document Manager.
- 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 sent from notify@my.smartvault.com. Once activated, you'll be ready to go!



Activation Email
(auto generates after account is provisioned)

**Note, this email is in design now getting an update*

SmartVault activation request Inbox ×

notify@my.smartvault.com <notify@my.smartvault.com> 12:34 PM (8 minutes ago)
to me

SmartVault

Dear

Your SmartVault account is ready to be activated. Click the link below to activate your account.

https://my.smartvault.com/secure/Activate.aspx?email=42pKeTxERGnklWOENkRpysgURTNZOpqCgz76yo3fbA&u=8GbWaM-aKkmoR4EbihFXuw

If you cannot access the link directly, copy and paste into the address bar of your browser.

If you did not recently sign up for a SmartVault account, please contact us at security@smartvault.com.

Best regards,

The SmartVault Team

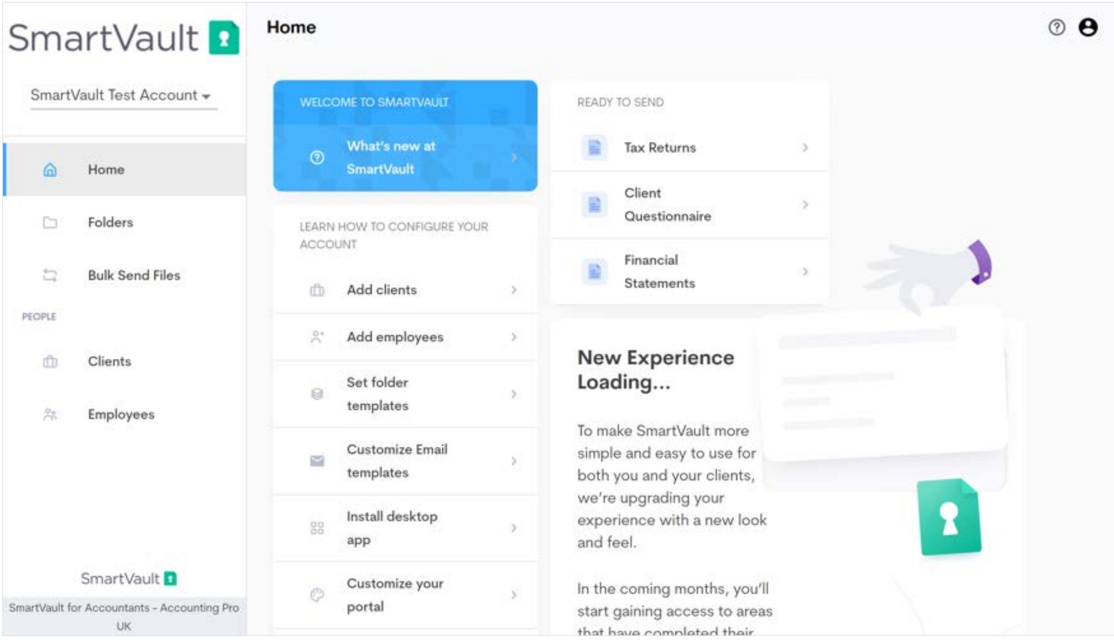
Need Additional Help?
For additional help, contact our SmartVault Support Team.

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 where you can schedule your free 1-hour group webinar 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.

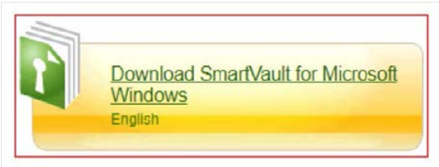
For more information about SmartVault onboarding and training please contact support@smartvault.com or call 01223 735906 and press 2 for Customer Success.

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.



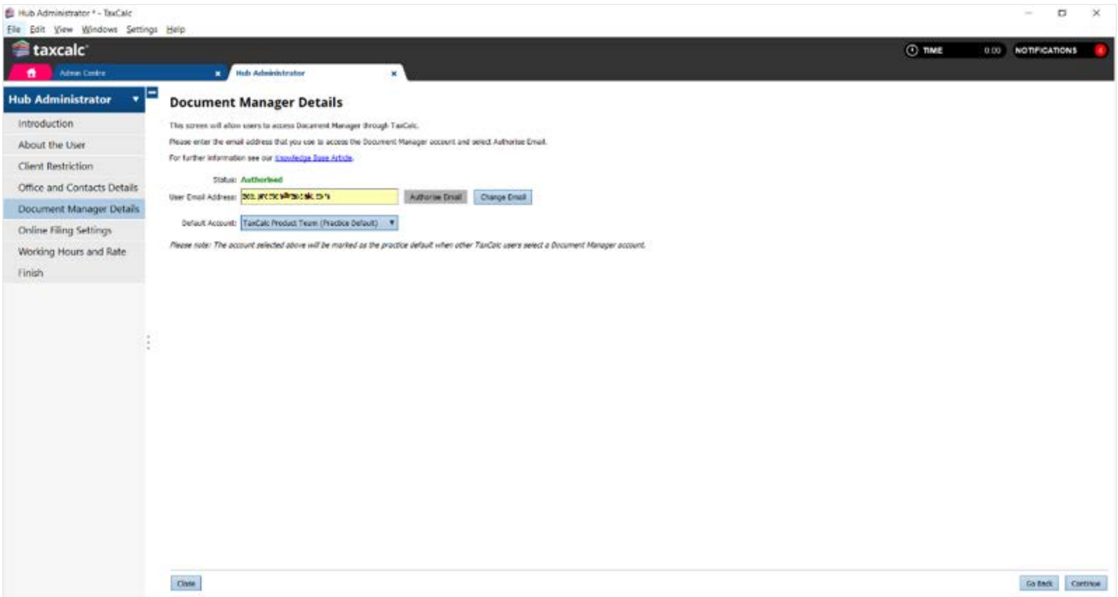
Click here for more information on how to install the desktop client for Windows.

Step 5

Authorising your Document Manager Account

Document Manager Details allows you to enter your credentials for sending documents to document manager. This way you'll automatically log into Document Manager without having to re-enter your details each time.

1. From the TaxCalc homescreen, select **Admin Centre**.
2. Select **Users > New/Edit User > Document Manager Details**.
3. Enter the **User Email Address** and click **Authorise Email** to display the Document Manager Authorisation dialog. Please see [KB3107] – Authorising TaxCalc to Connect to SmartVault for more details.
4. Alternatively, click **Change Email** to enter a different email address.
5. Select the Document Manager account to be used from the **Default Account** dropdown list.
6. Click **Finish** and **Finish and Save** to save the updates.

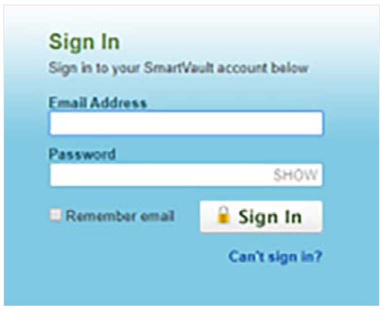


Step 6

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 7

Enabling and Disabling Clients for Document Manager

TaxCalc allows you to establish a link between the client record in TaxCalc and the client record in Document Manager, therefore, you only need to create the client once. You can also enable the link between existing clients in TaxCalc with existing clients in Document Manager to ensure you don't have duplicate records. If the client no longer needs to be linked you can choose to disable it.

Enabling Existing Clients for Document Manager:

1. Within the client record select **Document Manager** from the left-hand menu.
2. Click **Enable Client for Document Manager**.
   The Enable Client for Document Manager dialog is displayed.
3. Select **Choose client from list**.
4. Highlight the client you'd like to enable or enter the client name in the search bar.
5. Click **Enable Client**.

Enabling New Clients for Document Manager:

1. Within the client record select **Document Manager** from the left-hand menu.
2. Click **Enable Client for Document Manager**.
   The **Enable Client for Document Manager** dialog is displayed.
3. Select **Create new client**.
4. Click **Email** to include the email address for the client held in the TaxCalc Client Information page in the client record.
5. Ensure the client details are correct and click **Create client**.

Disabling Clients for Document Manager:

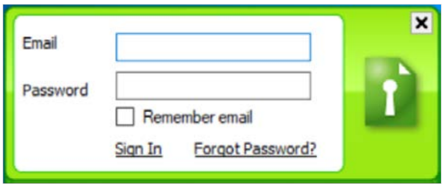
1. Within the client record select **Document Manager** from the left-hand menu.
2. Click **Disable Client** for **Document Manager**.
3. The following message is displayed, **'Disable client? Are you sure you want to disable client for Document Manager?'**
4. Click **Disable client** to disable to the link between the TaxCalc client record and the Document Manager client record.

Step 8

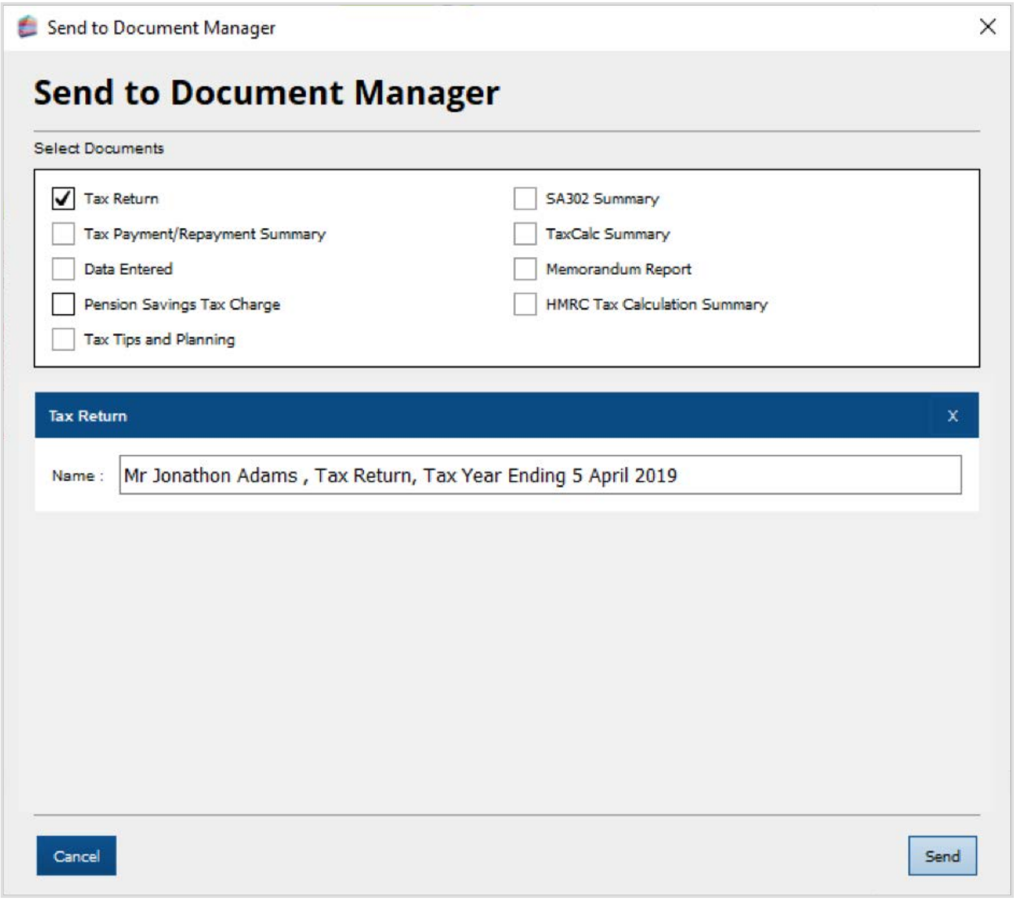
Uploading a Document

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.

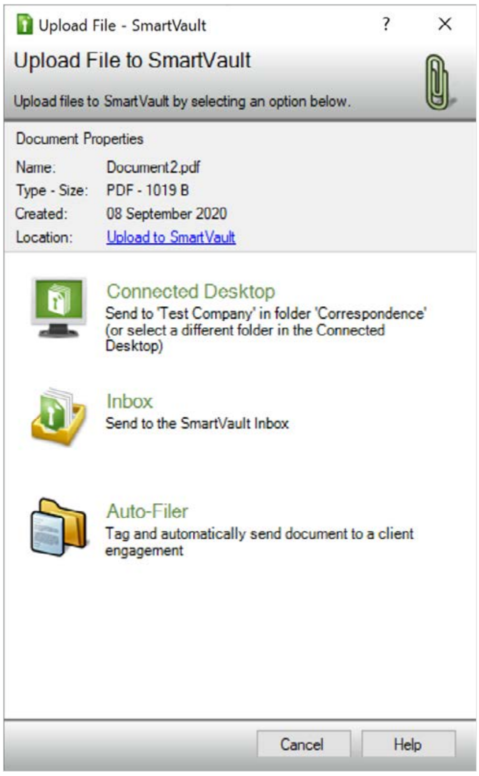
1. Login to the **SmartVault Connected Desktop**.



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.



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.Select the documents to be uploaded.



7. Select one of the following options:

- **Connected Desktop** – this is the simplest method for filing. From here you can select the client and folder you want to send the document to.
- **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.

The client details as well as the folder the document will be sent to are displayed. Alternatively, you can select a different client and folder if required. Selecting the Connected Desktop option automatically sends the document to the folder on the cloud.

There are other methods to upload documents to Document Manager, for more information please see KB3095 – How can I send documents to Document Manager?Select the documents to be uploaded.

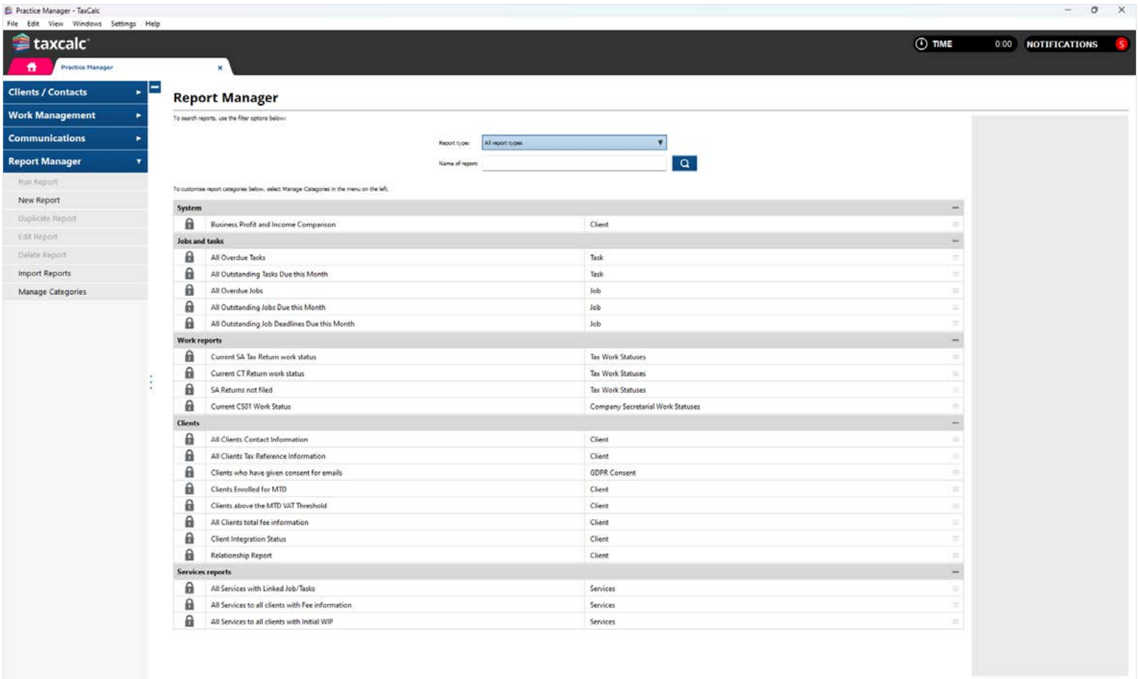
Step 9

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**.

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