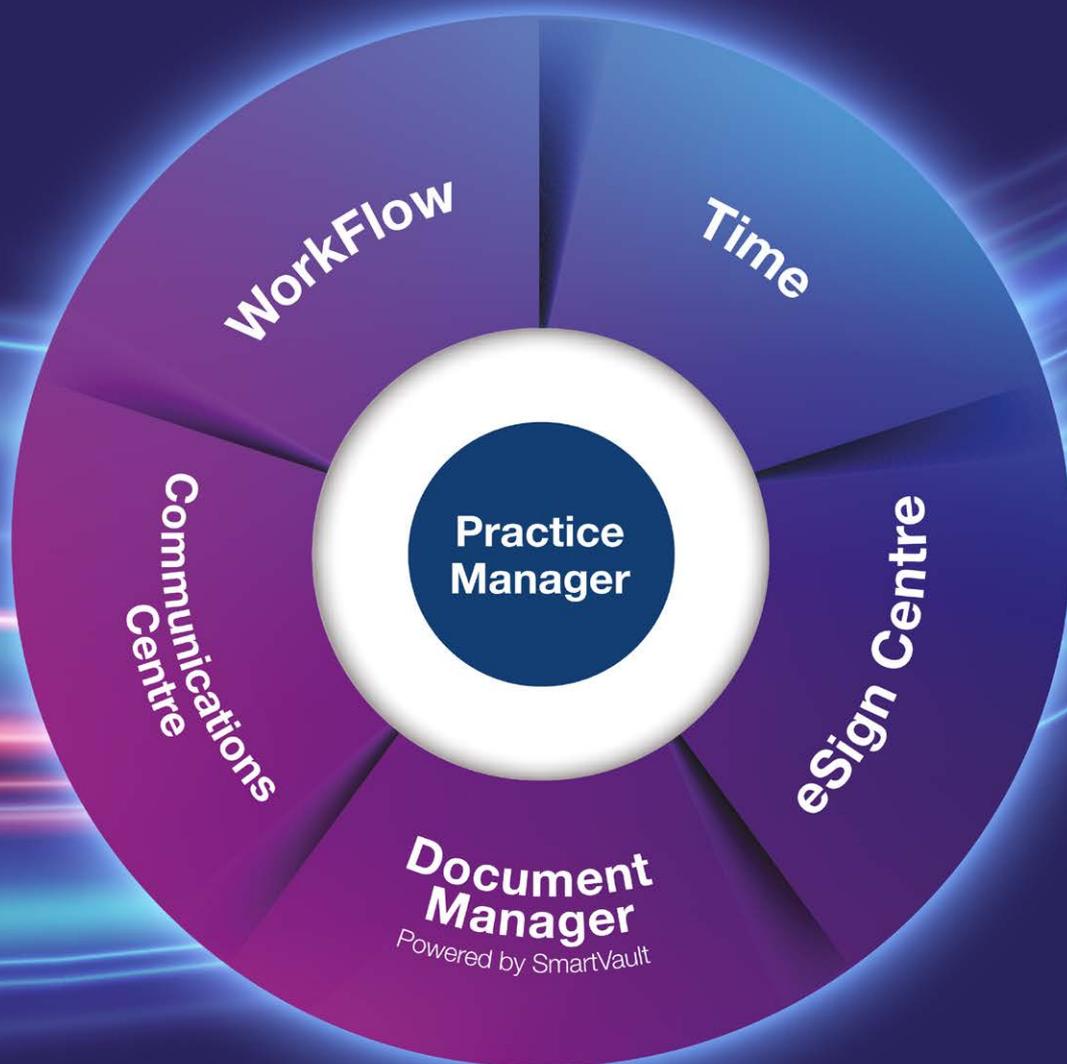




Getting started with TaxCalc's practice management



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TaxCalc's practice management solution

WorkFlow

- Automated workflows
- Deadline management
- Customisable job templates
- Automated task completion
- Internal and external deadline tracking
- Configurable dashboards

Time

- Create time logs and timesheets
- Auto time tracker
- Interactive visualisation of timesheets
- Timesheet reviewer process
- WIP Overview and outstanding WIP
- Time Analysis
- Work value and cost calculations



Communications Centre

- Create and manage mailing lists
- Create email message templates
- Pre-populate messages with client information
- Schedule and automate message creation
- View message activity

Document Manager

- powered by SmartVault
- Automated workflows
 - Deadline management
 - Customisable job templates
 - Automated task completion
 - Internal and external deadline tracking
 - Configurable dashboards

eSign Centre

- Digital signing
- Multiple documents per envelope
- Multiple signers
- Remind clients for signature
- Control centre overview



Getting started with TaxCalc's practice management solution

TaxCalc's practice management solution works as the administrative powerhouse of your practice. Synchronising with all products across the TaxCalc suite, it allows you to take even more control of how your practice runs, creating greater productivity and efficiency than ever before.

With **TaxCalc WorkFlow** you can have complete visibility of all work as it progresses through your practice, giving you instant access to comprehensive client information, advanced workflows and deadline management of statutory and non-statutory tasks.

TaxCalc Time, our new time logging tool, lets you track hours across job functions, making it easy to assess, analyse and approve time spent on both billable and non-billable activities, maximising chargeable time and allowing for more accurate billing.

Automate your document workflow with **TaxCalc Document Manager powered by SmartVault**, which enables you to securely store and share all your firm and client documents remotely using one centralised cloud-based solution.

The digital age of document signing is here! **TaxCalc eSign Centre** makes sending signed documents easy, minimising the time spent obtaining client approval for tax returns, VAT returns and sets of accounts.

Create, send and track all your standardised and personalised outbound client emails with **TaxCalc Communications Centre** Fully automating client record requests and reminders utilising information held within the TaxCalc database.

Let TaxCalc's practice management solution give you the tools to be more organised and more effective in everything you do.



Getting started with WorkFlow

WorkFlow is the enhanced integrated practice management solution everyone's been waiting for. With TaxCalc's Practice Manager working together with WorkFlow, you can be in even more control of how your practice works by creating, customising and co-ordinating all of your Jobs and Tasks in just a few simple steps. Whether you're a new or existing TaxCalc user, it's easy.

Step 1 Set Licence and user permissions for Jobs and Tasks

To get started, your Administrator is automatically assigned a WorkFlow licence. You'll need to assign a licence to each user that requires access to WorkFlow.

Licence Information

Select a product:
WorkFlow
Licence period: 10/07/2023 – 10/07/2024

Features enabled:

Type	Licences allowed	Licences used
WorkFlow	12 users	1

Manage User Licences:

Licence type: WorkFlow

User	Licence
admin	Remove licence

[Manage Licence](#)

Please use the Bulk Update tool in [Work Management](#) to reassign users that are currently assigned to jobs

[Activate Upgrade](#) [Buy More Licences](#) [Close](#)



Step 2 Create a Job Template

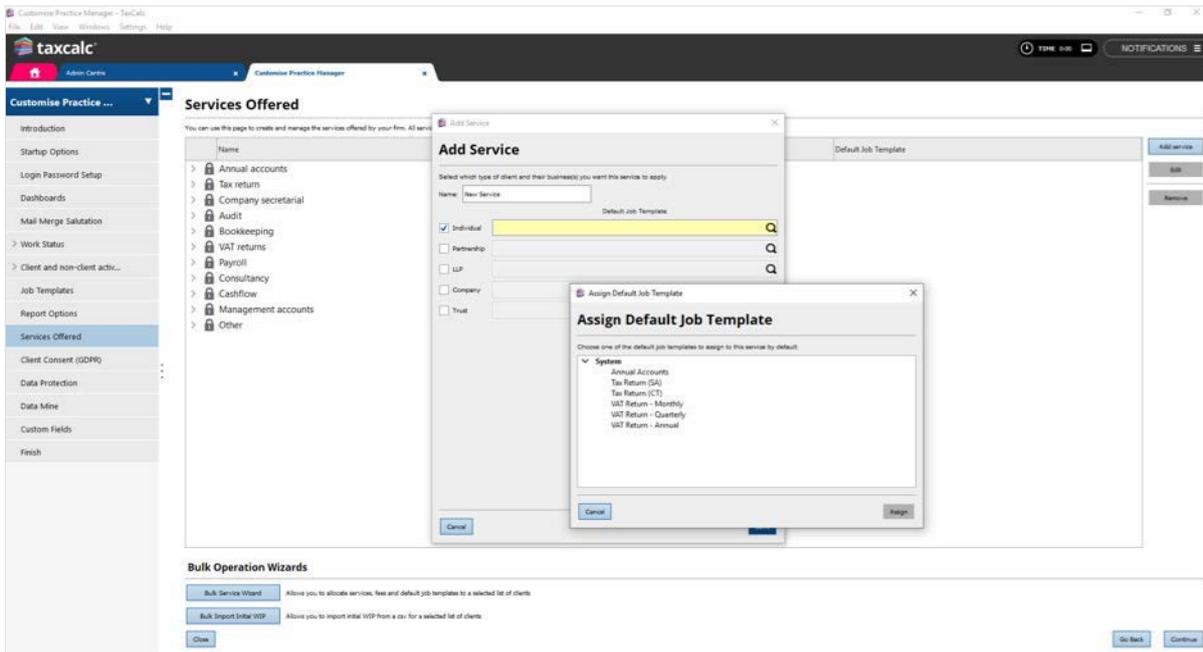
We're here to make your life easier, which is why you can now create one single Job Template with multiple Tasks to automate services offered by your practice, such as Tax Returns, to use time and time again. For more detail on creating Job Templates see [Knowledgebase Article 2978](#).

The screenshot shows a web application window titled "Create Job Template" with a close button (X) in the top right corner. The main heading is "Create New Job Template" with a sub-note: "This wizard will guide you through the process of creating a new job template." On the left, a sidebar contains a list of steps: "About the Job" (with a warning icon), "Clients & Work" (with a checkmark icon), "Dates" (with a warning icon), "Recurrence" (with a warning icon), "Tasks" (with a right arrow icon), and "Summary" (with a warning icon). The "Template Info" section is active and contains the following fields: "Template name:" (text input), "Job Name:" (text input), "Job Type:" (dropdown menu with "Please select" and a search icon), "Description:" (text area), "Assignee:" (dropdown menu with "Please select an assignee"), and "Status:" (dropdown menu with "Planned"). At the bottom, there are three buttons: "Cancel", "Go Back", and "Continue".



Step 3 Set up services offered

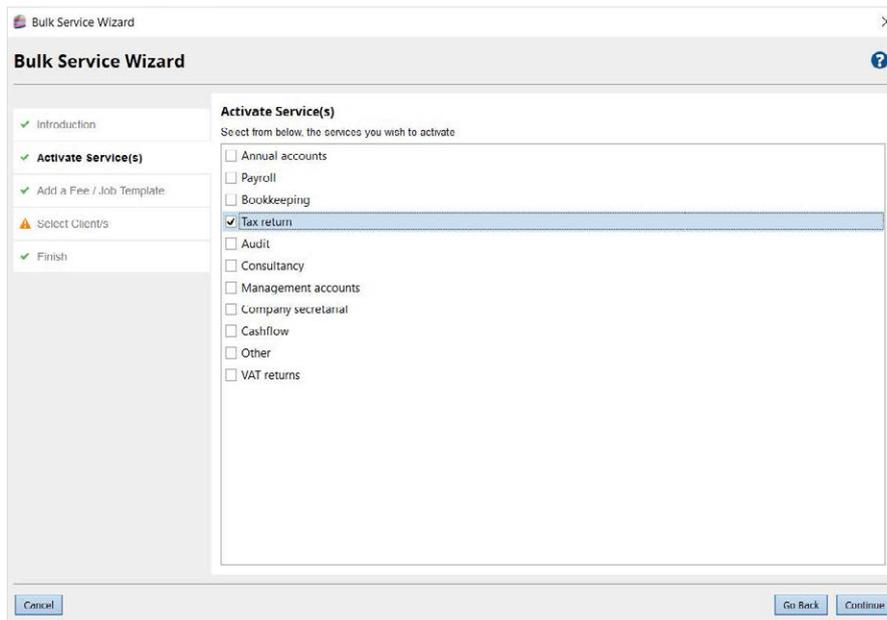
Once you have created your Job Template you can assign them to each service for your specific types of clients and their businesses.



Step 4

Bulk activating services for clients

You can allocate services, fees and Job Templates for your clients. Instead of you painstakingly allocating each one individually, we've made things easier by adding a Bulk Service Wizard option where you can allocate all services (with corresponding Job Templates) and fees to multiple clients all in one place.



The screenshot shows a window titled "Bulk Service Wizard" with a close button (X) in the top right corner. The window has a sidebar on the left with a progress indicator for the following steps: Introduction, **Activate service(s)**, Add a Fee / Job Template, Select Client/s, and Finish. The main area is titled "Activate Service(s)" and contains the instruction "Select from below, the services you wish to activate." Below this is a list of services with checkboxes:

- Annual accounts
- Payroll
- Bookkeeping
- Tax return
- Audit
- Consultancy
- Management accounts
- Company secretarial
- Cashflow
- Other
- VAT returns

At the bottom of the window, there are three buttons: "Cancel" on the left, and "Go Back" and "Continue" on the right.

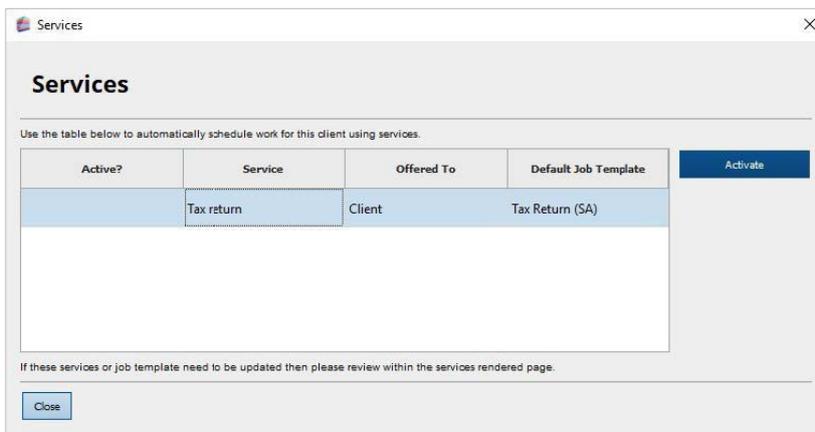


Step 5

Activating a Job or Task for a client

Once your services have been setup and allocated to your clients, you can manage the associated Jobs and Tasks within Practice Manager. From here you'll be able to see what Jobs and Tasks are active and activate any new ones.

If you are already using Tasks in Practice Manager to manage your work don't worry. Follow this guide to create your Job Templates, allocate to your Services and activate your Jobs, and when you are ready, simply de-activate your existing Tasks. For more information see [Knowledgebase Article 2981](#).



Services

Services

Use the table below to automatically schedule work for this client using services.

Active?	Service	Offered To	Default Job Template
	Tax return	Client	Tax Return (SA)

Activate

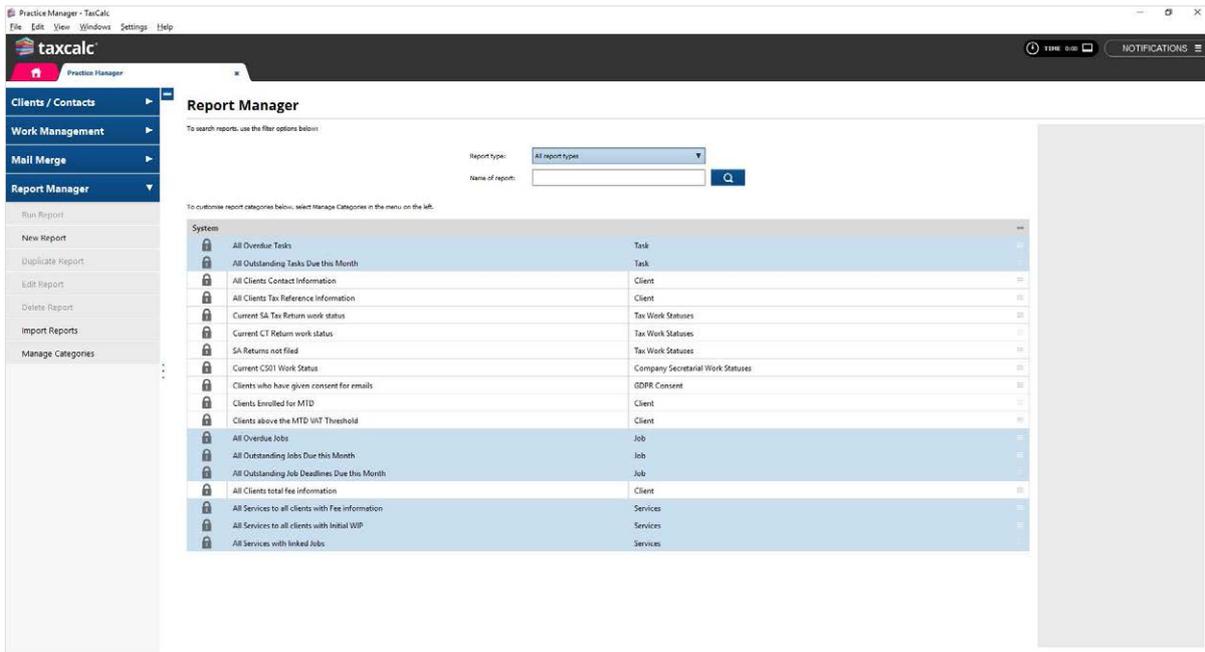
If these services or job template need to be updated then please review within the services rendered page.

Close



Step 6 Running Job or Task reports

You can report on Jobs and Tasks to determine any overdue or outstanding Jobs or Tasks as well as any services with linked Jobs. You can also customise and create new reports for your Jobs and Tasks.

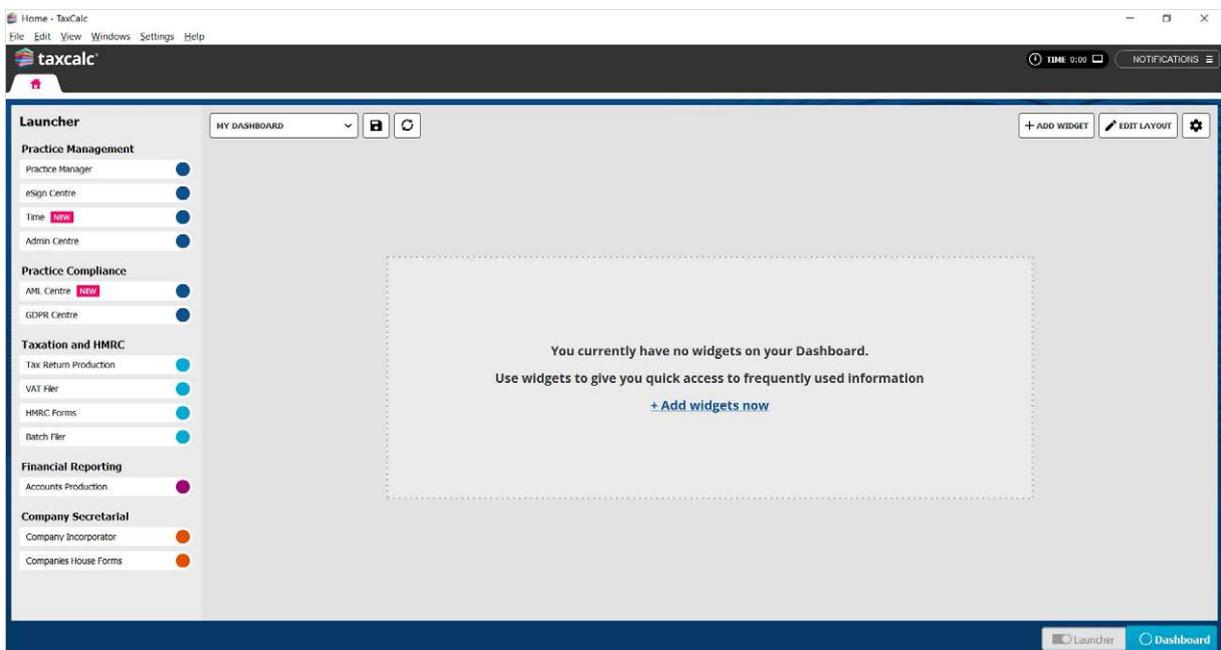


Step 7

Using Job and Task widgets on the Dashboard

Dashboard is a collection of widgets that can be added, removed and grouped to enable fast navigation to relevant information. It's designed to show data in a simplified structure, enabling greater efficiency for our WorkFlow users.

You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task types and statuses.



Check out our [Getting started with WorkFlow guide](#) for more detailed information.



Getting started with Time

Get the big picture as well as the minute detail of all time spent in your practice. TaxCalc's new time-logging, automatic tracking and reporting tool delivers the information you need to assess chargeable and non-chargeable time and keep tabs on productivity in your practice.

Track chargeable and non-chargeable activity and generate reports to gain visibility of client profitability and staff performance. All your timerelated tasks are made easy with TaxCalc Time.

Now you can actually see the value your people provide to your practice and clients. Working in harmony with every product in the TaxCalc suite, Time lets you track hours across job functions, making it easy to assess, analyse and approve time spent, both on billable and non-billable activities.

Step 1 Set Licence and user permissions for Time

To get started, your Administrator is automatically assigned a Time licence. You'll need to assign a licence to each user that requires access to Time.

Licence Information

Select a product:
Time

Licence period: 27/06/2019 — 27/06/2020

Features enabled:

Type	Licences allowed	Licences used
Time	2 users	1

Manage User Licences:

Licence type: Time

User	Licence
admin	Remove licence

Buttons: Activate Upgrade, Buy More Licences, Manage Licence, Close



Step 2 Configure default working hours and charge out rates

By default, users are expected to follow the firm working hours. Within TaxCalc you can set your own firm wide and user specific working hours. If you provide any services to clients on a Chargeout rate (user) basis, you can set the users charge out rate to calculate fees as a default.

Working hours

Use this screen to set the default workings hours for the firm. If the total hours exceed six, an hour break will be deducted in the total column but you can adjust this manually to account for breaks as needed.
 If a user does not follow the default working hours for the firm, this can be changed by accessing the specific user's record and changing their working hours accordingly (found in Admin Centre / Users)

Day		Start	End	Total Hours
Monday	<input checked="" type="checkbox"/>	09:00	17:30	7.5
Tuesday	<input checked="" type="checkbox"/>	09:00	17:30	7.5
Wednesday	<input checked="" type="checkbox"/>	09:00	17:30	7.5
Thursday	<input checked="" type="checkbox"/>	09:00	17:30	7.5
Friday	<input checked="" type="checkbox"/>	09:00	17:30	7.5
Saturday	<input type="checkbox"/>			
Sunday	<input type="checkbox"/>			

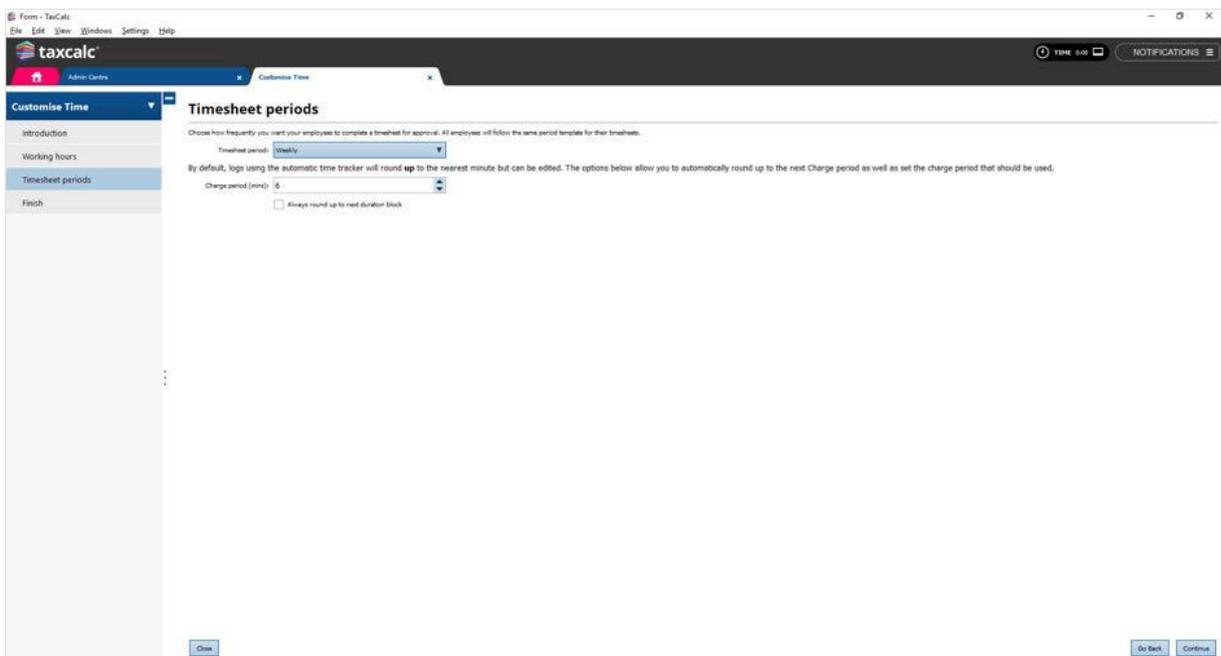


Step 3

Timesheet periods

Choose how frequently you want your employees to complete a timesheet for approval in Timesheet Periods. You can set this to weekly or monthly, it's entirely up to you.

From here you can decide the number of minutes to round up time logged by the automatic Timetracker. By default, the automatic Timetracker will round up to the nearest minute, but you can change this to suit the requirements of your practice



The screenshot shows a web browser window with the TaxCalc application. The main content area is titled "Timesheet periods" and contains the following text and controls:

Choose how frequently you want your employees to complete a timesheet for approval. All employees will follow the same period template for their timesheets.

Timesheet period: **Weekly** (dropdown menu)

By default, logs using the automatic time tracker will round up to the nearest minute but can be edited. The options below allow you to automatically round up to the next Charge period as well as set the charge period that should be used.

Charge period (mins): **5** (dropdown menu)

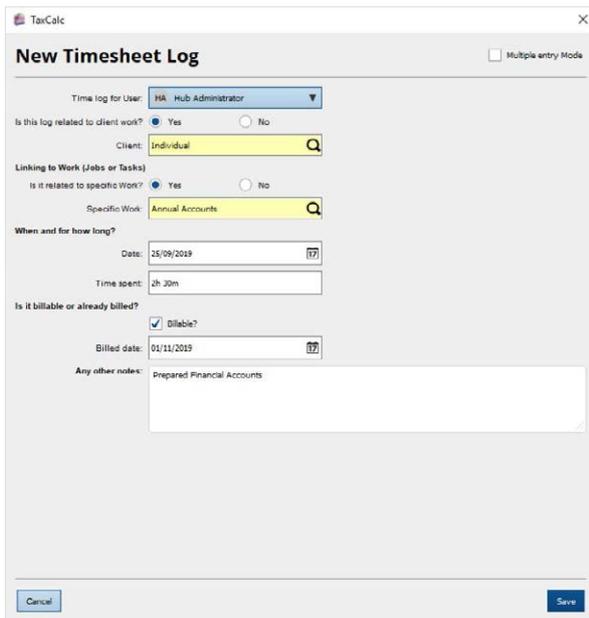
Always round up to next duration block

At the bottom of the screen, there are "Close", "Go Back", and "Continue" buttons.



Step 4 Log time

Use Time Logs in the Time module to log time against your clients. You can enter time against individual clients one by one, or multiple clients all in one go. Link Jobs to the time you're logging so that you can see exactly what you've been working on for each client.

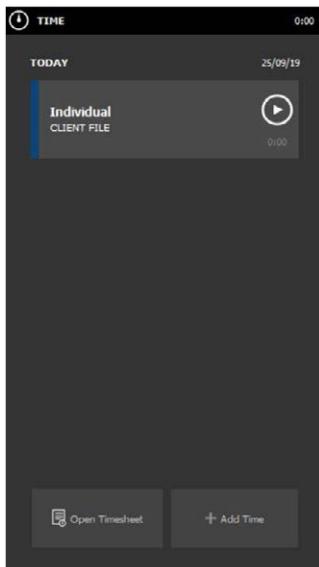


The screenshot shows a web form titled "New Timesheet Log" with a "Multiple entry Mode" checkbox. The form fields are as follows:

- Time log for User:** A dropdown menu showing "HA Hub Administrator".
- Is this log related to client work?:** Radio buttons for "Yes" (selected) and "No".
- Client:** A search field containing "Individual".
- Linking to Work (Jobs or Tasks):** Radio buttons for "Yes" (selected) and "No".
- Specific Work:** A search field containing "Annual Accounts".
- When and for how long?:**
 - Date:** A date picker showing "25/09/2019".
 - Time spent:** A text input field showing "2h 30m".
- Is it billable or already billed?:** A checkbox for "Billable?" which is checked.
- Billed date:** A date picker showing "01/11/2019".
- Any other notes:** A text area containing "Prepared Financial Accounts".

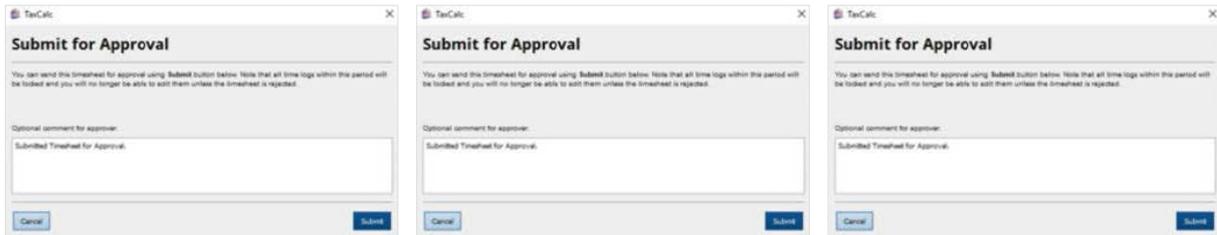
At the bottom of the form are "Cancel" and "Save" buttons.

If you're working on a specific client or work item, look out for the red flashing prompt of the automatic Timetracker. Simply click the start button from the automatic Timetracker to start recording the time you're spending on the client.



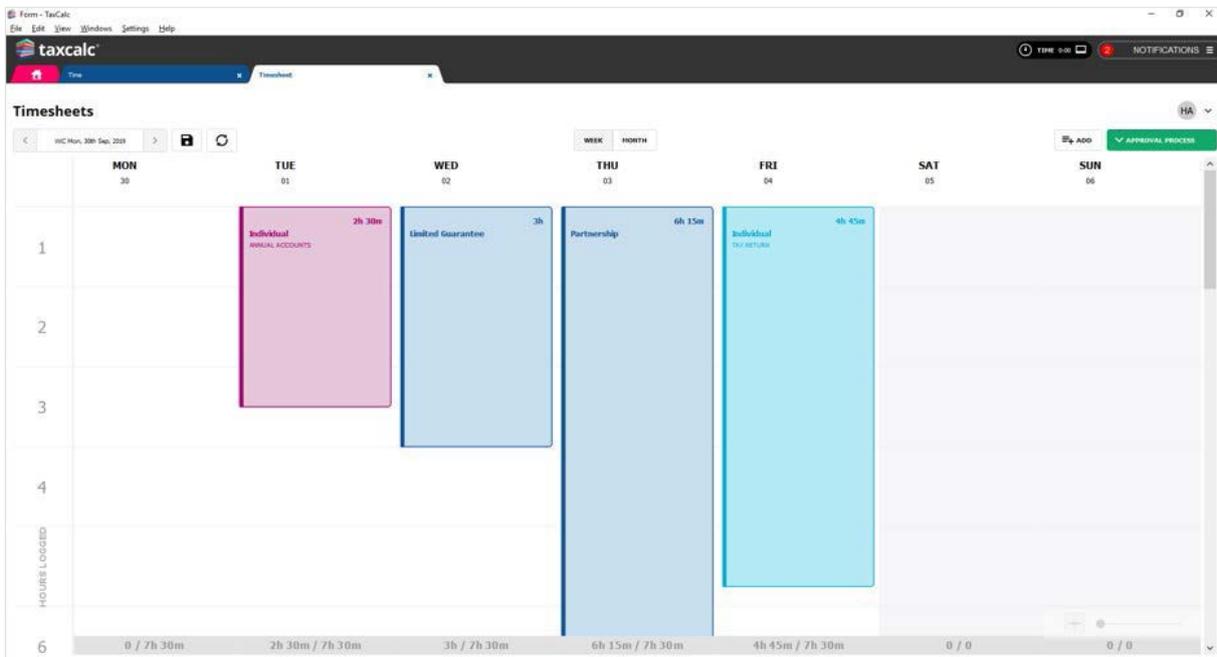
Step 5 Submit, approve and reject timesheets

Once you have entered your time logs they can be submitted for approval. Depending on your permissions you will then be able to either approve or reject the time submitted.



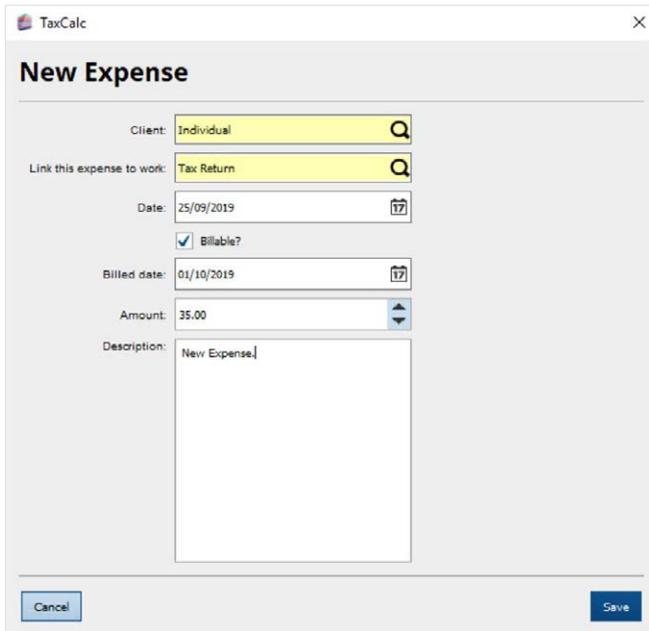
Step 6 View timesheets in calendar mode

Managing timesheets in the calendar view enables you to manipulate the entries and make any necessary changes all in one place.



Step 7 Create ad hoc expenses

Ad Hoc Expenses allows you to view and manage your general client expenses. From here you can add, edit and delete expenses where required.



The screenshot shows a 'New Expense' form window titled 'TaxCalc'. The form contains the following fields and controls:

- Client:** A dropdown menu with 'Individual' selected and a search icon.
- Link this expense to work:** A dropdown menu with 'Tax Return' selected and a search icon.
- Date:** A date input field with '25/09/2019' and a calendar icon.
- Billable?:** A checked checkbox.
- Billed date:** A date input field with '01/10/2019' and a calendar icon.
- Amount:** A numeric input field with '35.00' and a spinner control.
- Description:** A text area containing 'New Expense'.

At the bottom of the form, there are two buttons: 'Cancel' on the left and 'Save' on the right.



Step 8

Report on Time, WIP Overview

From the WIP Overview screen, you can see any imported Initial WIP, what clients you have logged time against, how much you expect to bill each client per service (either as a fixed fee or a charge out rate) and whether the client has been billed for the services offered. If you have added any expenses to the client, these are included here too.

You can also export the WIP data to MS Excel where you can then use this information to raise invoices and billing for your clients.

TaxCalc
×

WIP Detail

This screen shows the detailed time logs and expenses associated with this Work as well as any Initial WIP associated with this type of work. You can use this screen to mark the records as billed.

Initial WIP
Initial WIP for the **Tax return** service has been marked as billed on 30/09/2019.

Time logs and expenses for this work

<input type="checkbox"/>	Type	User	Date Logged	Time Logged	Charge out rate (£/hr)	Value	Expense	Billed Date
<input type="checkbox"/>	Time Log	Hub Adminis...	27/09/2...	5h	£0.00	£0.00	£0.00	
<input type="checkbox"/>	Expense		30/09/2...		£0.00	£0.00	£35.00	
	Total			5h	£0.00	£0.00	£35.00	

Bill Selected
Close



Step 9 Time Analysis

Time Analysis allows you to view client related time logs and mark them as billed or unbilled. You also have the option to mark items as billed in bulk.

You can select to view the time logs by Clients, Work or Users. The displayed time logs default to the user logged in. To view other users time logs, set the relevant permissions in the Admin Centre, then select the appropriate user (or users) from within the filters panel.

The screenshot displays the 'Time Analysis by Client' page in the TaxCalc application. The page features a sidebar on the left with navigation options: 'Welcome to TaxCalc...', 'Time Logs', 'Timesheets', 'Ad hoc Expenses', 'WIP Overview', and 'Time Analysis'. The 'Time Analysis' section is expanded, showing sub-options for 'Clients', 'Work', and 'Users'. The main content area is titled 'Time Analysis by Client' and includes a table with the following data:

Client / Activity Type	Charge Out (£/hr)	Billable Time	Non-billable Time	Non-client Time	Billable Value	Non-billable Value	Non-client Value	Date	User	Billed Date
> <input type="checkbox"/> Individual		5h	-	-	£175.00	-	-			
TOTAL		5h	-	-	£175.00	£0.00	£0.00			

On the right side of the table, there are buttons for 'Mark Billed', 'Unmark Billed', 'Print Report', and 'Export Report'. The top of the interface shows the 'taxcalc' logo, a 'TIME 0:00' indicator, and a 'NOTIFICATIONS' icon.



Getting started with Document Manager

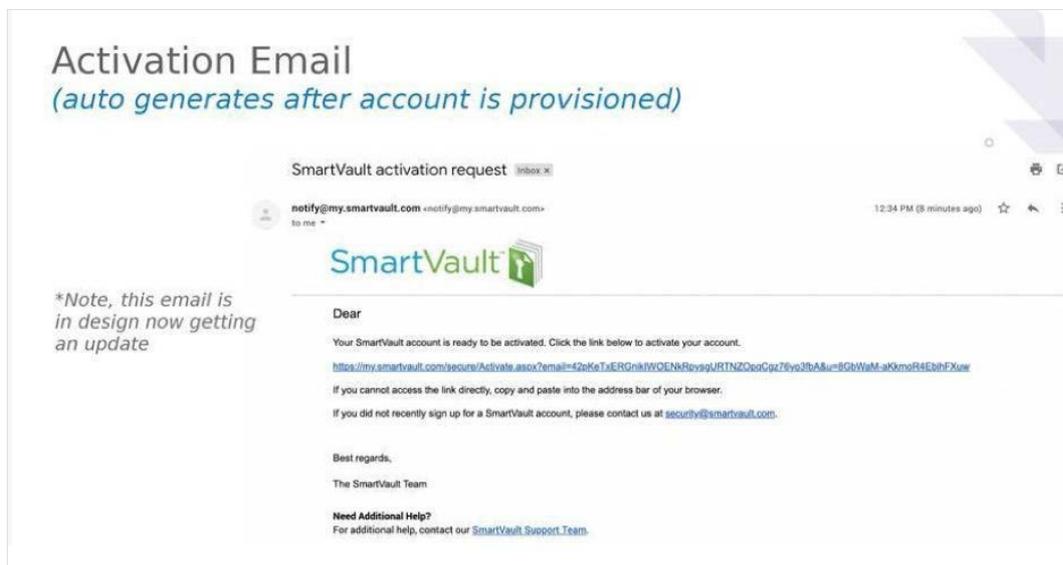
Powered by SmartVault

Document Manager is an integral part of TaxCalc's practice management toolkit.

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

Step 1 Activating your Account

You will receive an email from SmartVault within one to two business days inviting you to activate your Document Manager account. Once activated, you'll be ready to go!



If you don't 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've activated your account and logged in to Document Manager, you'll be automatically directed to the SmartVault home screen. From here, you'll 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'll 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 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 inviting you 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

Uploading a Document

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

Step 6

Electronic Approval via eSign Centre

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

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 a TaxCalc eSign Centre licence to use this functionality.

Take a look at our [Getting started with Document Manager guide](#) for more information.



Getting started with eSign Centre

TaxCalc eSign Centre dramatically reduces the time spent obtaining client approval for tax returns, VAT returns and sets of accounts. Simply send over an electronic copy of the document, ask the client to check and sign – you’ll be notified immediately and you can submit the document straightaway.

Using our tried and trusted SimpleStep workflow, preparing documents for electronic sign-off couldn’t be easier. Clients can sign on any device - smartphone, tablet, laptop and desktop – from anywhere at any time.

For more information on eSign Centre, see [Knowledgebase Article 2875](#).

Step 1 Creating an envelope

To get started you’ll need to make sure you have created the clients in Practice Manager and your required document is ready to be sent for approval. For example, your client’s tax return or engagement letter. Once these have been setup, you’re ready to go!

The screenshot shows the TaxCalc eSign Centre interface. The top navigation bar includes the TaxCalc logo, a home icon, and tabs for 'eSign Centre' and 'Envelope - Fields, Colln'. On the right, there are 'TIME 0:00' and 'NOTIFICATIONS 13' indicators. A left-hand sidebar menu contains the following items: 'Envelope - Fields, C...' (selected), 'Set Up Envelope', 'Recipients', 'Signing Order', 'Apply Email Template', 'Manage Documents', 'Reports', and 'Check and Finish'. The main content area is titled 'Set Up Envelope' and contains the instruction: 'Enter a name and a description for this envelope using the fields below.' Below this, there is a 'Name:' text input field and a larger 'Description:' text area. At the bottom of the main area, there is a checkbox labeled 'Apply password to this envelope' and a note: 'You need to set the eSign password in the client record to add a password to this envelope'. At the bottom of the interface, there are 'Close', 'Go Back', and 'Continue' buttons.



Step 2 Selecting your recipients

From the Recipients screen you can see the related parties listed in the relationships section from Practice Manager. You can select who is going to receive the documents in this envelope and add any TaxCalc users you may want to include within the signing process. This is particularly useful for accountants sending their client's set of accounts.

Recipients

Select who you need to receive the documents. Recipients marked as watchers will not be asked to sign, and will receive a copy of the envelope once the envelope is complete.
Only email addresses marked as default in the client record will be used in the table below.

Name	Client Code	Relationship	Email	Action
Mr Colin Fields	F002	Client	colin.fields@example.com	Signer

Auto Reminder Options

You can choose if you would like to automatically send a reminder to the current signing party on a regular occurrence.
The default settings can be customised in the Admin Centre and pre-populated for all envelopes. Auto Reminders cannot be set after an envelope has been sent.

Reminder Options:

Please Note: Once sent, reminders will be repeated until this envelope is signed, rejected or expired.



Step 3 Setting up the signing order

If you have added more than one recipient, you can decide in what order the document is signed by each individual. Once the document has been successfully signed, it is then sent on to the next signer and so on and so forth.

taxcalc eSign Centre

Envelope - Fields, C... | **Signing Order**

Displayed below are all of the signers and watchers added to this envelope and the order in which they will receive the documents for signing.
If there is more than one signer, the envelope will not be sent to the next signer until the previous signer has successfully signed.

Signers

Name	Email	
Mr Colin Fields	colin.fields@example.com	Move Up Move Down

Watchers

All watchers will receive the contents of the envelope once all signers have responded.

Name	Email
------	-------

Close | Go Back | Continue



Step 4 Applying email templates

For the personalised touch, you can compose a customised email or use the eSign Centre default to send to the document signers.

The screenshot shows the 'taxcalc' eSign Centre interface. The top navigation bar includes 'eSign Centre', 'Envelope - Fields, Calls', 'Admin Centre', and 'Customise eSign Centre'. The left sidebar lists 'Introduction', 'Envelope Credentials', 'Reminder Options', 'Email Templates' (selected), 'Envelope Options', and 'Finish'. The main content area is titled 'Email Templates' and contains a table of templates. Below the table is a 'Template Preview' section with input fields for 'Template Name' and 'Template Body'. A note at the bottom states: 'Please note: These templates can be seen by all users.' Buttons for 'Close', 'Go Back', and 'Continue' are located at the bottom of the page.

Locked	Is default	Template Name	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	eSign Centre Default	Add New Template Edit Template Delete Template

Template Preview

Template Name :

Template Body :

Please note: These templates can be seen by all users.

[Close](#) [Go Back](#) [Continue](#)



Step 5 Attaching documents to an envelope

Once you have created your envelope, selected the recipients and applied the required email template, you're now ready to attach the documents to your envelope.

The screenshot shows the taxcalc eSign Centre interface. The main area is titled 'Manage Documents' and contains instructions: 'You can add documents from the client or their relationships and upload any supporting documents. Documents will keep the settings they were created with, including any summaries, attachments and watermarks. Invalid characters in document names will be removed. Please note: Uploaded documents must adhere to the eSign Acceptable Use Policy in Section 15.15 of the EULA.' A modal window titled 'Add TaxCalc Documents' is open, showing a table of documents to be added to the envelope. The table has columns for Name and Type, and lists two items under 'Tax Return Production'.

	Name	Type
Tax Return Production		
<input type="checkbox"/>	Mr Colin Fields, Tax Year Ending on 5 April...	SA100
<input type="checkbox"/>	Mr Colin Fields, Tax Year Ending on 5 April...	SA100



Step 6 Previewing the documents

The preview option lets you add the signature and date fields onto the document for each signer. You can decide where each field needs to go and how many times. This is particularly handy if your client needs to sign in more than one place.

The screenshot displays the taxcalc eSign Centre interface. The main window shows a document titled "Mr Colin Fields, Tax Year Ending on 5 April 2022". The document content includes:

HM Revenue & Customs
Tax Return for the year ended 5 April 2022.
 This is a copy of the information that will be transmitted to the HM Revenue & Customs once authorised by you. The copy includes all completed supplementary pages & attachments. Before transmitting the return (or amendment) information to HM Revenue & Customs using the Self Assessment Online Service, your tax adviser must provide you with a copy of your tax return (or amended tax return) information for you to declare that the information is correct and complete to the best of your knowledge and belief and approve submission to HM Revenue & Customs. If you give false information or conceal any part of your income or chargeable gains you may be liable to financial penalties. It is recommended that you retain a copy of the Tax Return (or amended tax return information) transmitted to HMRC.

The HM Revenue & Customs Return number assigned to your tax return information is: **MRZVEMHESUJLWVJ500CKMHA5R137**
 This number appears on each page of this copy, which is consecutively numbered from 1 to 14.
 The following blocks comprise the information to be sent electronically.

Name	LTR	N1 Number	Agent Reference
Mr Colin Fields	888908889	NA 12 13 14 A	F002

Where your Tax Return (or amended Tax Return) contains a claim for a repayment and you require the repayment to be sent to your bank, building society or other nominee, the relevant question within the return (or amended return) must be completed.

Your signature confirms you have authorised HM Revenue & Customs to make any repayment arising from this return to the nominee as detailed above.

Signature _____ Date / /

The interface also features a sidebar on the left with options like "Set Up Envelope", "Recipients", "Signing Order", "Apply Email Template", "Manage Documents", "Reports", and "Check and Finish". A "Previewing fields" panel on the right allows adding fields to the document, with options for "Mr Colin Fields", "Signature", and "Date".



Step 7

Check & Finish®

Check & Finish® validates the entries you have made and ensures all data is correct. If there are any errors or warnings, click on the links to make the necessary changes.

You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task types and statuses.

The screenshot displays the 'Send Envelope' screen in the TaxCalc eSign Centre. The page title is 'Send Envelope' and the breadcrumb is 'Envelope - Fields, Colin'. A green confirmation message states: 'Based on your entries the data appears to be correct.' Below this, the 'Envelope Details' section provides the following information:

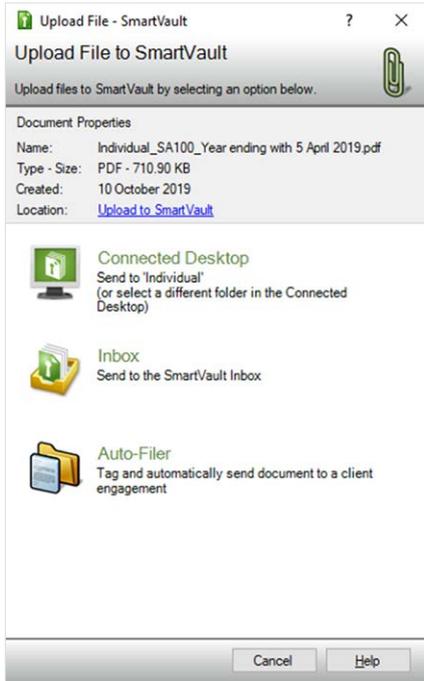
- Documents Attached:** Mr Colin Fields, Tax Year Ending on 5 April 2022, HMRC_Forms_GAA_1.pdf.pdf
- Signers:** Mr Colin Fields, colin.fields@example.com
- Watchers:**

A note indicates: 'Emails will be sent in the order listed above and watchers will receive an email after all documents have been signed.' The 'Actions' section contains a 'Send Envelope' button to start the signing process. At the bottom, there are 'Close', 'Go Back', and 'Finish and Save' buttons.



Step 8 Sending envelopes to Document Manager

Complement eSign Centre with TaxCalc Document Manager powered by SmartVault, to store and manage your signed documents safely and securely.



Getting started with Communications Centre

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.

For more information on Communications Centre, please see [Knowledgebase Article 3199](#) and visit our website.

The screenshot displays the TaxCalc Communications Centre interface. The top navigation bar includes 'taxcalc', 'TIME 0:00', and 'NOTIFICATIONS 2'. The main content area is divided into several sections:

- Configure Communications:** Includes 'From Emails', 'User Emails', and 'Automation' tabs. A 'No email addresses' indicator shows 8 Clients and 0 Contacts.
- Communications Summary:** A sidebar menu with options like 'Send Message', 'Message Activity', 'Email Templates', 'Mail Merge Templates', and 'Mailing Lists'.
- Emails:** A section with four circular gauges: 'Sent Messages (Last 30 days)' (12), 'Total Scheduled Messages' (20), 'Total Pending Requests' (8), and 'Total Pending Reminders' (2).
- Client request record automation:** A table with columns for Automation, Practice, Requests on, Requests off, Reminders on, and Reminders off.

Automation	Practice	Requests on	Requests off	Reminders on	Reminders off
Request records for Accounts	On	4	4	4	0
Request records for Confirmation Statement	On	4	4	4	0
Request records for Tax CT	On	4	4	4	0
Request records for Tax SA	On	21	4	21	0
Request records for VAT	On	5	28	5	0
- Pending record requests and reminders:** A section with six circular gauges: 'Total' (10), 'Accounts' (6), 'Tax - CT' (4), 'Tax - SA' (0), 'VAT' (0), and 'Confirmation Statement' (0).
- Office emails:** A table with columns for Name, Email, Status, Signature, and Users.

Name	Email	Status	Signature	Users
TaxCalc Business ...	No outgoing email	Not set	Not set	0
TaxCalc Business ...	No outgoing email	Not set	Not set	0
- User emails:** A table with columns for Name, Email, Status, Signature, and Users.

Name	Email	Status	Signature	Users
Hub Administrator	practicetaxcalc@gmail.com	Verified	Not set	Not set
Samantha Ashdown	No outgoing email	Not set	Not set	Not set
Sarah Miles	No outgoing email	Not set	Not set	Not set

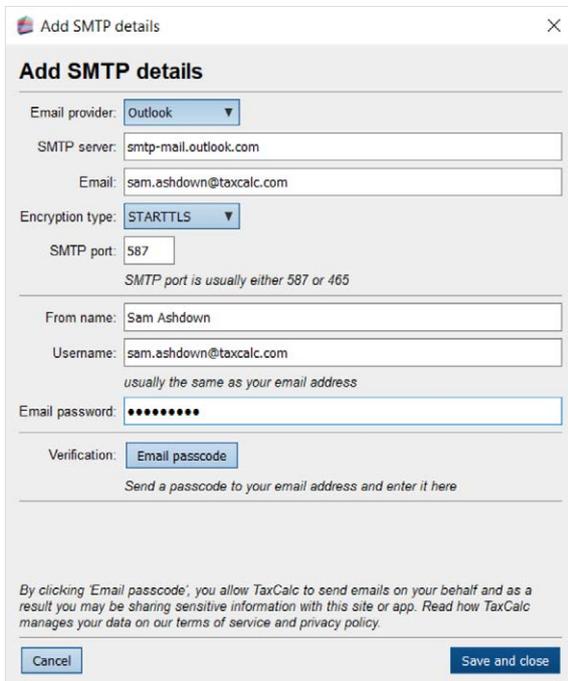


Step 1

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.

A dialog box titled "Add SMTP details" with a close button (X) in the top right corner. The form contains the following fields and options:

- Email provider:** A dropdown menu with "Outlook" selected.
- SMTP server:** A text input field containing "smtp-mail.outlook.com".
- Email:** A text input field containing "sam.ashdown@taxcalc.com".
- Encryption type:** A dropdown menu with "STARTTLS" selected.
- SMTP port:** A text input field containing "587". Below it, a note reads "SMTP port is usually either 587 or 465".
- From name:** A text input field containing "Sam Ashdown".
- Username:** A text input field containing "sam.ashdown@taxcalc.com". Below it, a note reads "usually the same as your email address".
- Email password:** A text input field filled with ten black dots.
- Verification:** A button labeled "Email passcode". Below it, a note reads "Send a passcode to your email address and enter it here".

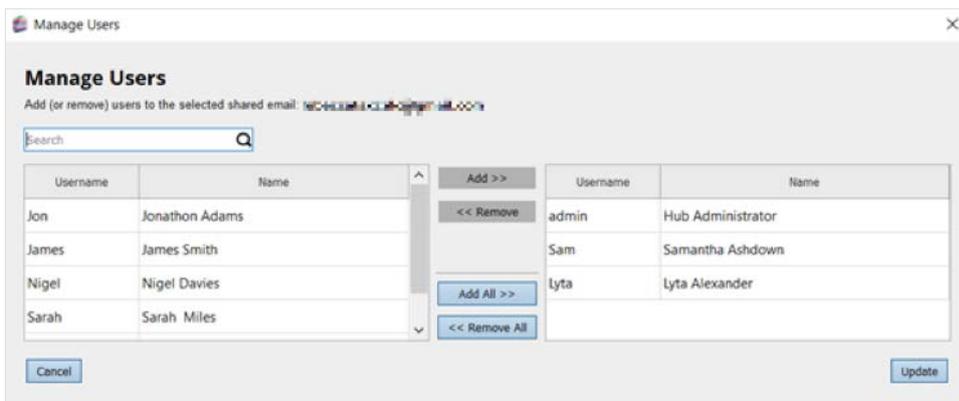
At the bottom of the dialog, there is a disclaimer: "By clicking 'Email passcode', you allow TaxCalc to send emails on your behalf and as a result you may be sharing sensitive information with this site or app. Read how TaxCalc manages your data on our terms of service and privacy policy." Below the disclaimer are two buttons: "Cancel" on the left and "Save and close" on the right.



Step 2

Adding users to shared emails

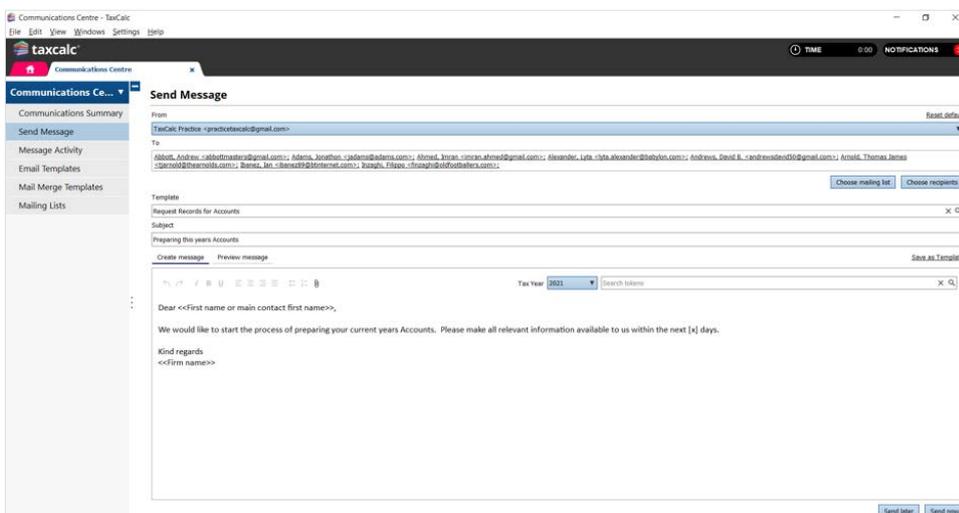
Once the email account has been created you can easily manage the users that can access shared emails. Within Users you can add individual email addresses to ensure emails are sent from the specific users email addresses where required.



Step 3

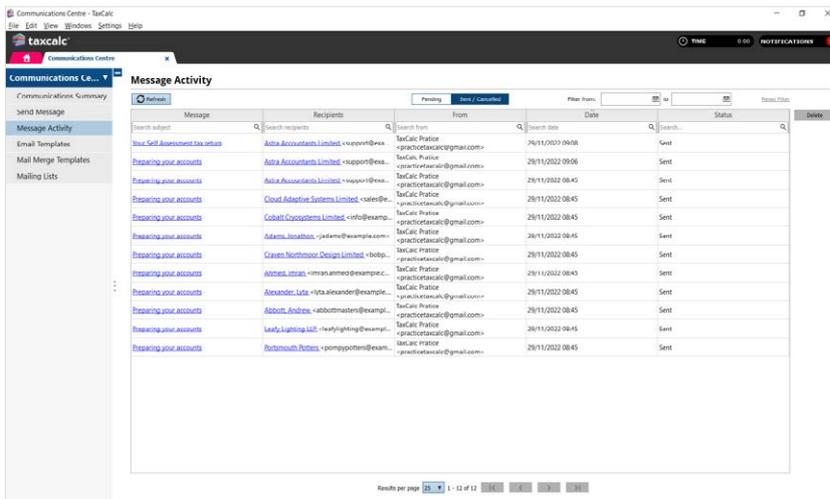
Sending an email

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.



Step 4 Reviewing message activity

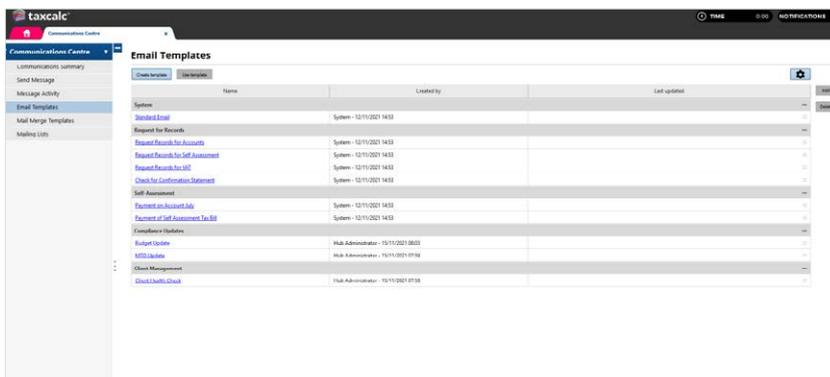
Message Activity gives you the ability to view the correspondence you have sent to clients from within Communications Centre. You can see the messages sent out to clients, who they were sent to, when they were sent and who in the practice sent them.



Step 5 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.



Step 6 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.

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.



Step 7 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.

taxcalc
TIME 0:00 NOTIFICATIONS

Automated Message Settings

Manage and activate firm settings for automated client messages for Communications Centre. Automated messages can be automatically applied to your clients (excluding clients with multiple businesses for VAT) or can be individually applied within the client record. For further information see our [Knowledge Base Article](#).

Automation	Request Template	Reminder Template	Requests	Reminders	Edit
Request records for Accounts	Request Records for Accounts	Request Records for Accounts Reminder	<input checked="" type="checkbox"/>	Yes	
Request records for Confirmation Statement	Check for Confirmation Statement	Check for Confirmation Statement Reminder	<input checked="" type="checkbox"/>	Yes	
Request records for Tax CT	Request Records for Self Assessment	Request Records Self Assessment Reminder	<input checked="" type="checkbox"/>	Yes	
Request records for Tax SA	Request Records Self Assessment Reminder	Request Records Self Assessment Reminder	<input checked="" type="checkbox"/>	Yes	
Request records for VAT	Request Records for VAT	Request Records VAT Reminder	<input checked="" type="checkbox"/>	Yes	



Andrew + WorkFlow = no compliance deadlines missed

Now you can track clients' due dates and make sure all jobs and tasks are completed in line with their statutory deadlines.

But that's not all. Not by a long way.

As part of our advanced Practice Management solution, WorkFlow integrates with the TaxCalc ecosystem, allowing you to automate workflow, gain complete visibility of all tasks and take total control of your practice.

The result: increased productivity and efficiency. And for a price that's highly affordable.

Isn't it time you reinvented your practice?

Practice Manager

Included as standard

taxcalc.com/practicemanager

WorkFlow

From £60 per user per annum*

taxcalc.com/WorkFlow

Time

From £24 per user per annum*

taxcalc.com/time

* Prices exclude VAT

