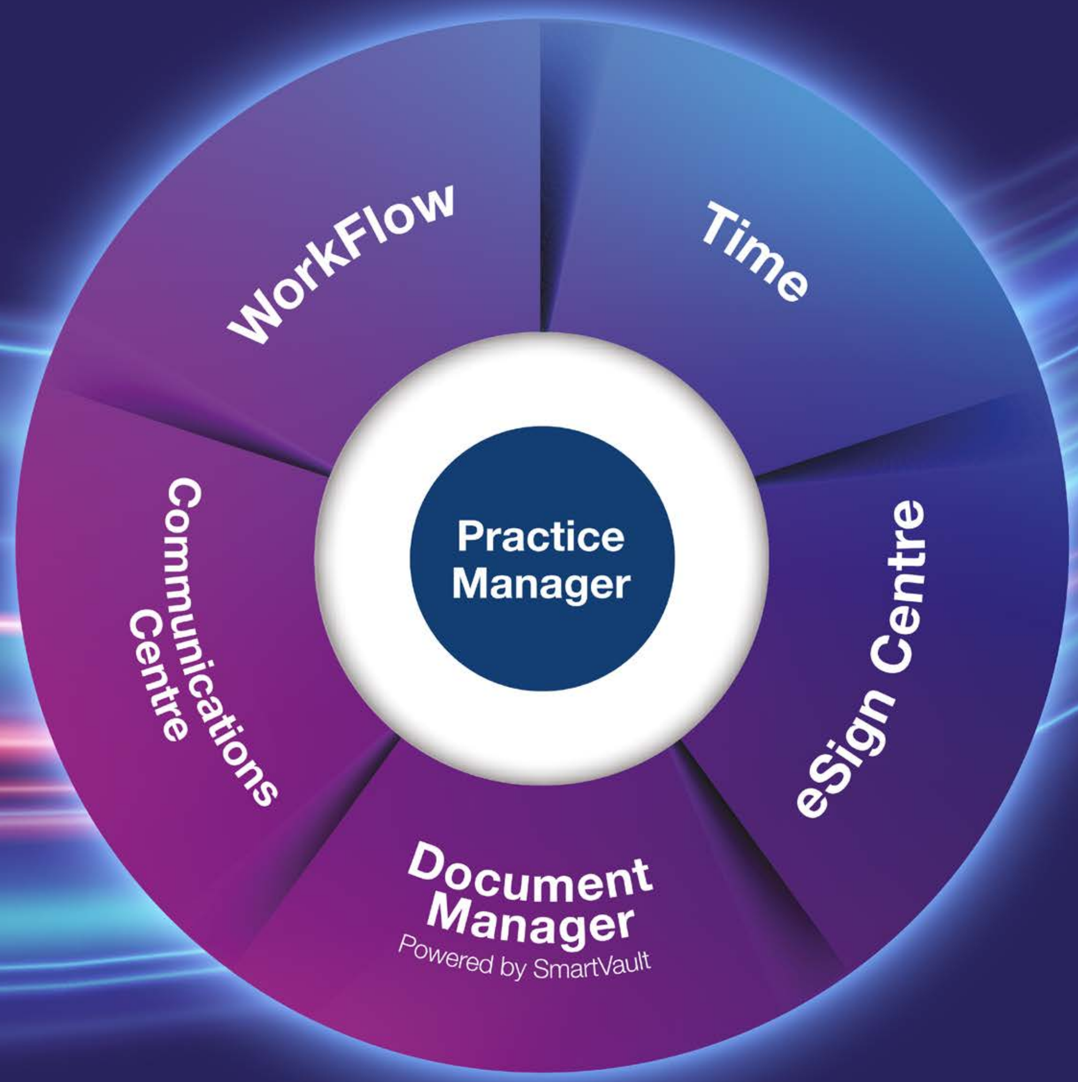
taxcalc®

Getting started with TaxCalc's practice management



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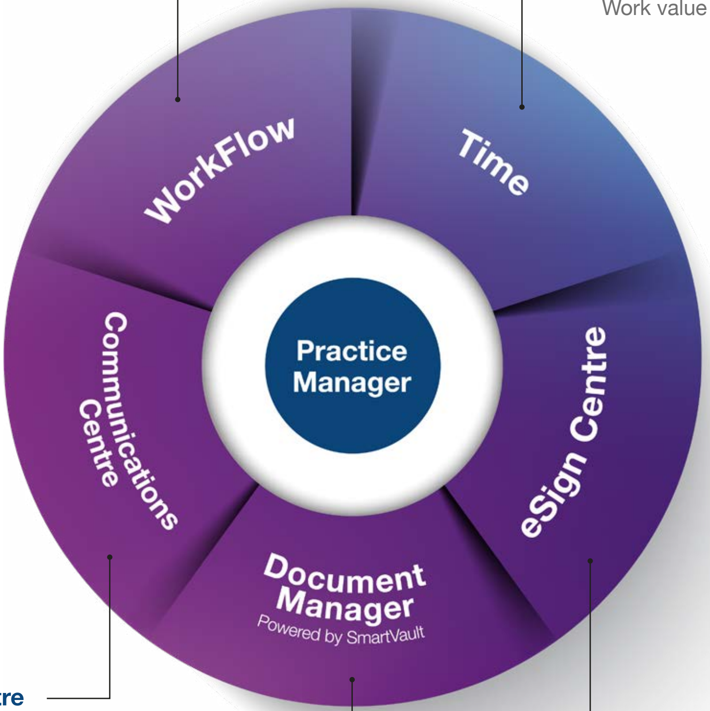

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Getting started with TaxCalc's practice management solution

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.

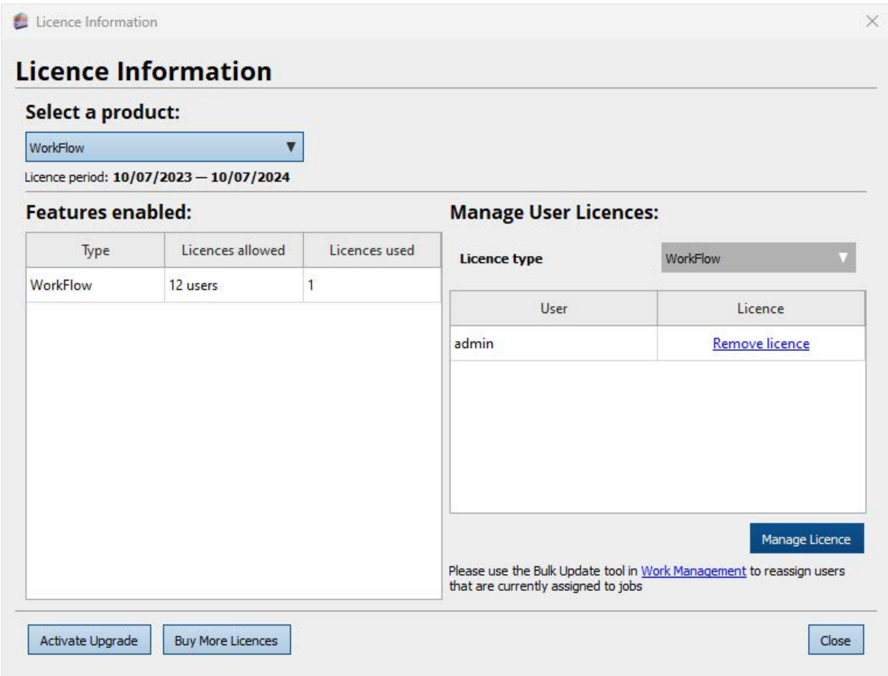
Let TaxCalc's practice management solution give you the tools to be more organised and more effective in everything you do.

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.

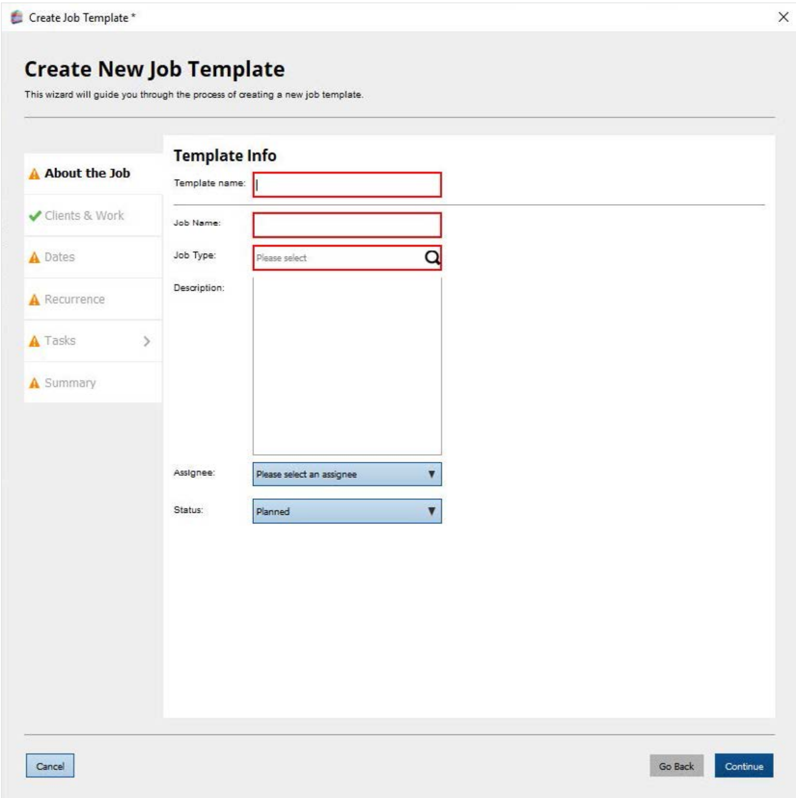
Step 1
Set Licence and user permissions for Jobs and Tasks

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.



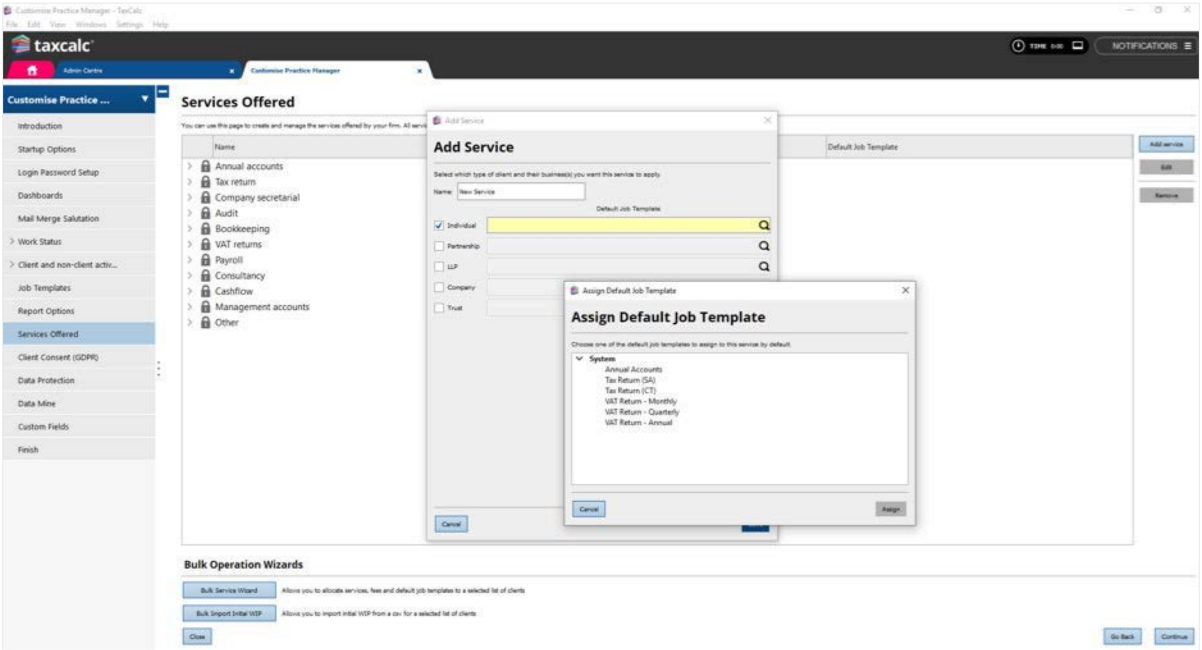
Step 2
Create a Job Template

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.



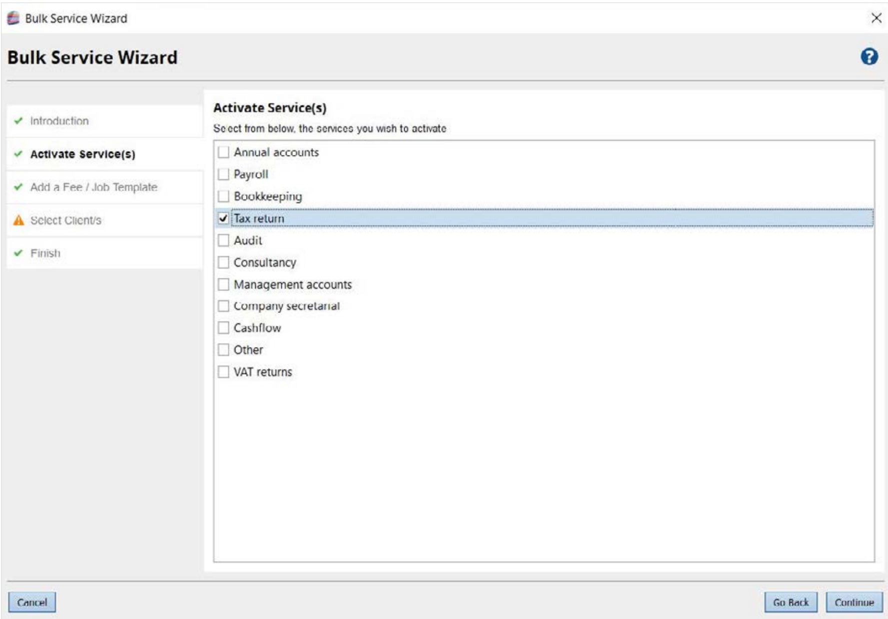
Step 3
Set up services offered

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

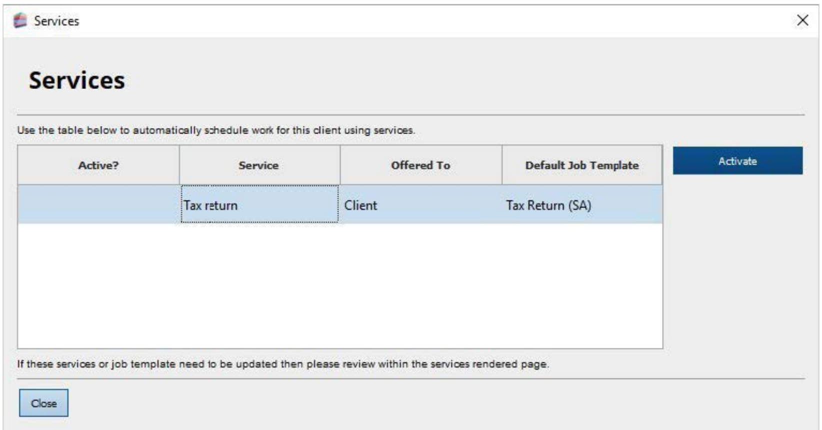
You can allocate services, fees and Job Templates for your clients. Instead of you painstakingly allocating each one individually, we've made things easier by adding a Bulk Service Wizard option where you can allocate all services (with corresponding Job Templates) and fees to multiple clients all in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



Step 5
Activating a Job or Task for a client

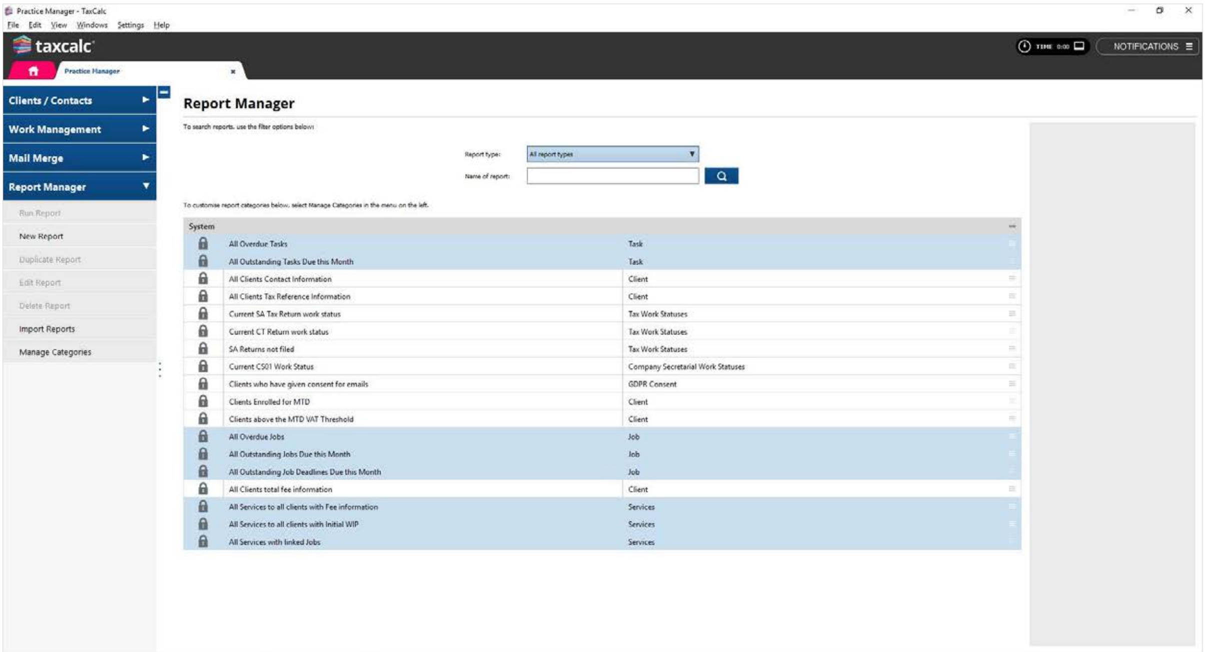
Once your services have been setup and allocated to your clients, you can manage the associated Jobs and Tasks within Practice Manager. From here you'll be able to see what Jobs and Tasks are active and activate any new ones.

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.



Step 6
Running Job or Task reports

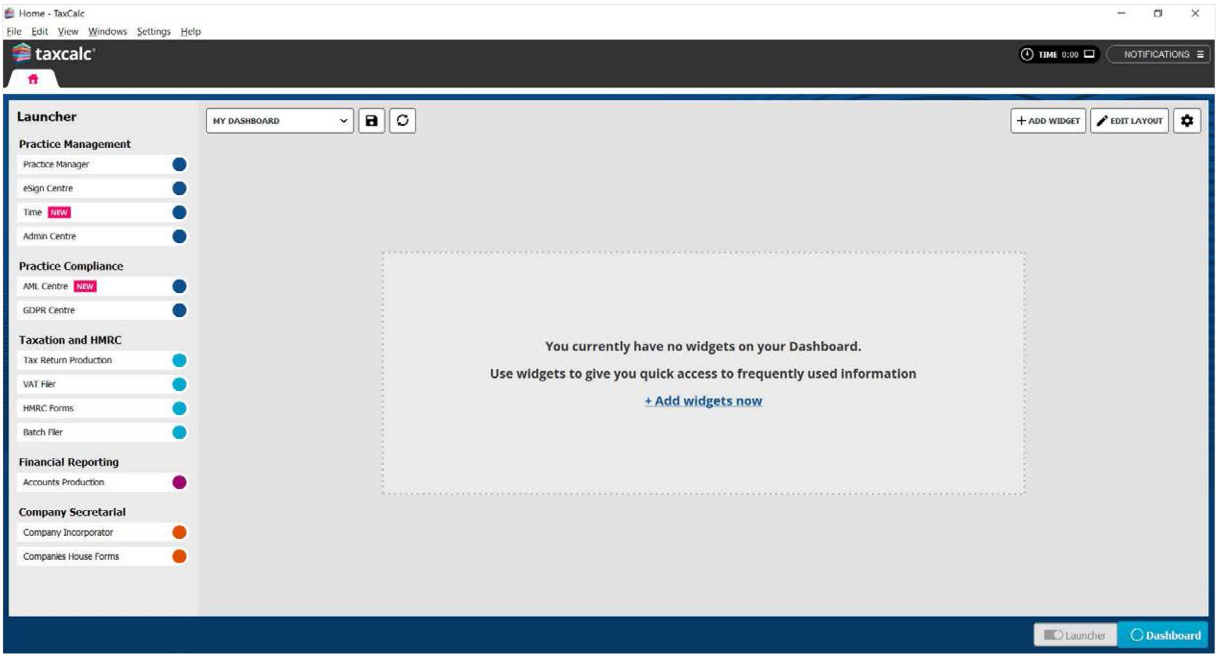
You can report on Jobs and Tasks to determine any overdue or outstanding Jobs or Tasks as well as any services with linked Jobs. You can also customise and create new reports for your Jobs and Tasks.



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

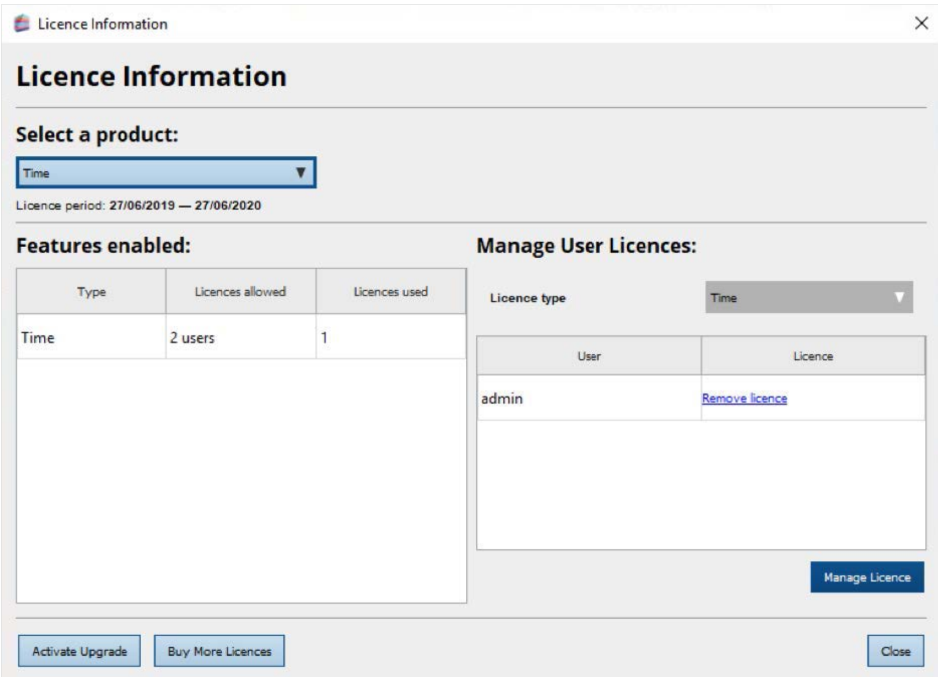
Get the big picture as well as the minute detail of all time spent in your practice. TaxCalc's new time-logging, automatic tracking and reporting tool delivers the information you need to assess chargeable and non-chargeable time and keep tabs on productivity in your practice.

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.

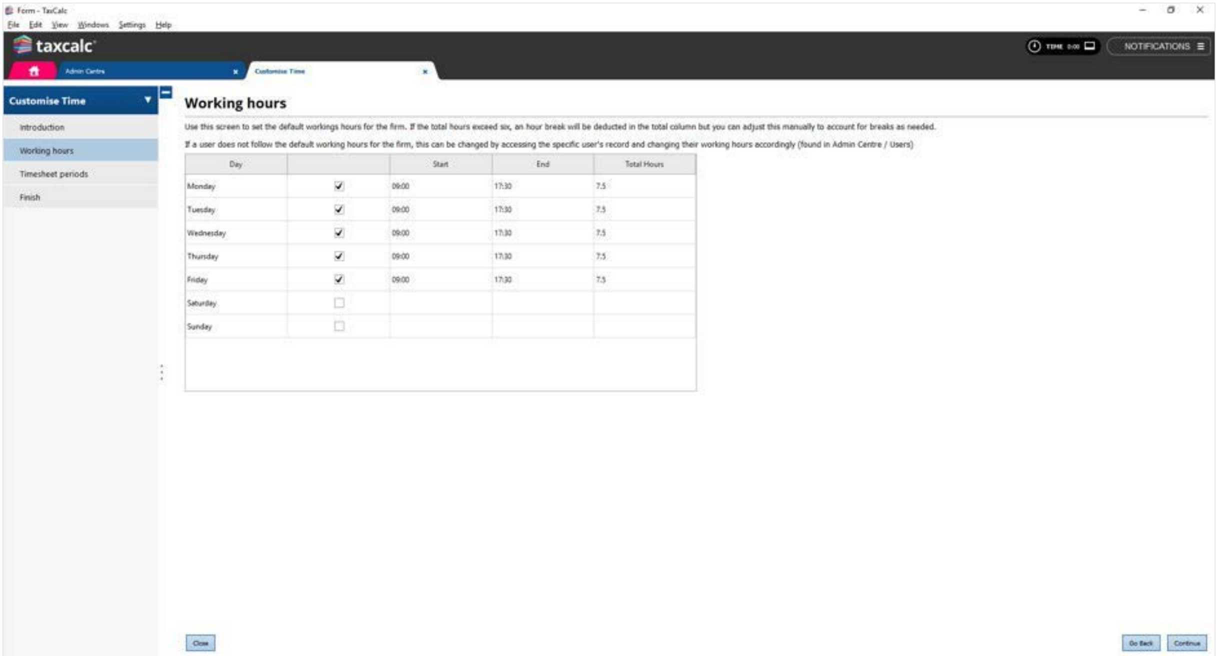
Step 1
Set Licence and user permissions for Time

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.



Step 2
Configure default working hours and charge out rates

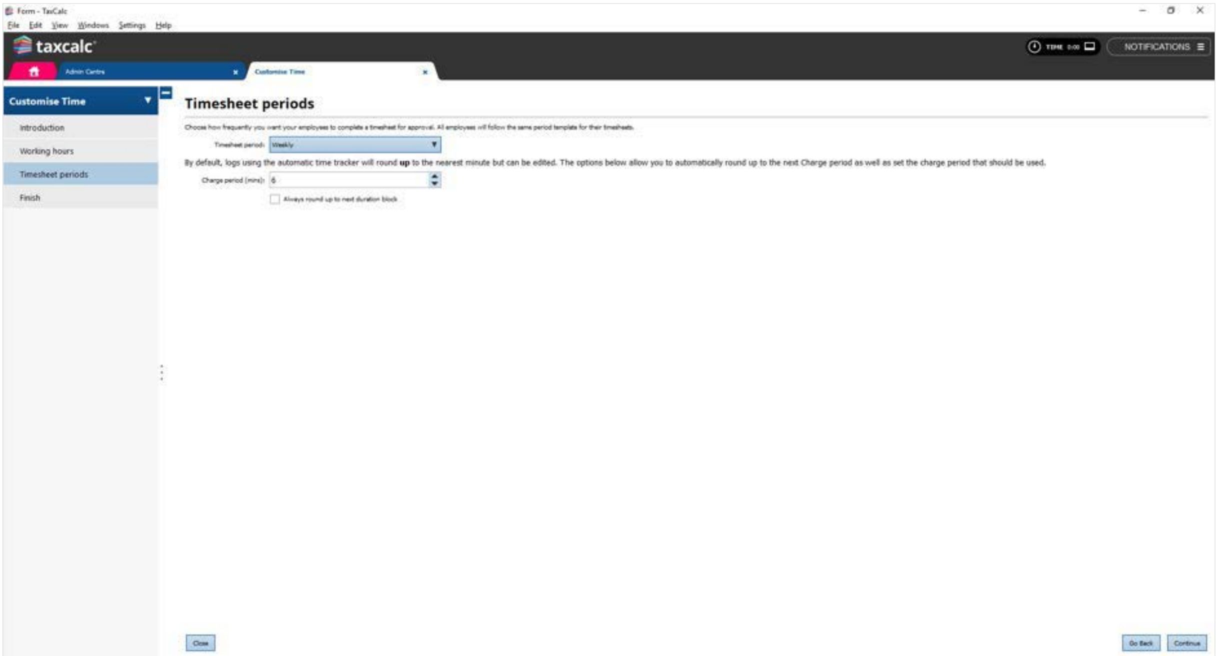
By default, users are expected to follow the firm working hours. Within TaxCalc you can set your own firm wide and user specific working hours. If you provide any services to clients on a Chargeout rate (user) basis, you can set the users charge out rate to calculate fees as a default.



Step 3
Timesheet periods

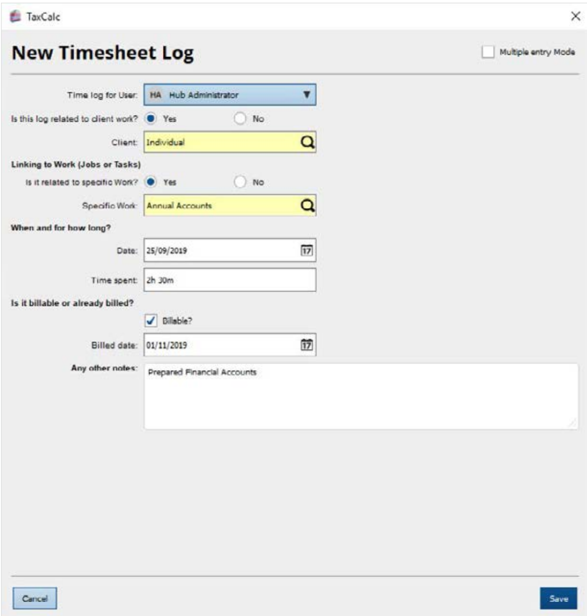
Choose how frequently you want your employees to complete a timesheet for approval in Timesheet Periods. You can set this to weekly or monthly, it's entirely up to you.

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

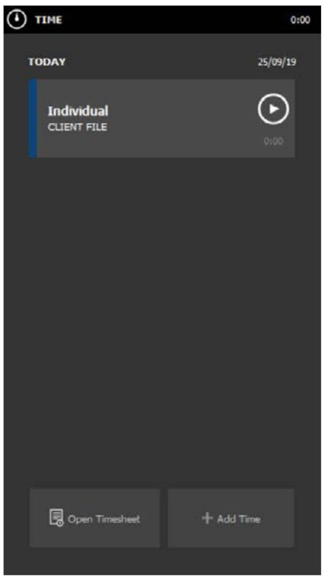


Step 4
Log time

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.

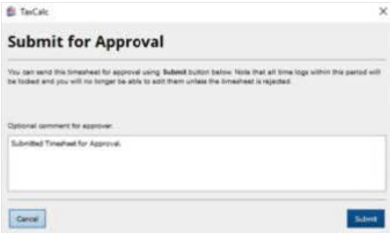


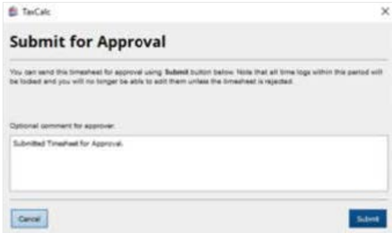
If you're working on a specific client or work item, look out for the red flashing prompt of the automatic Timetracker. Simply click the start button from the automatic Timetracker to start recording the time you're spending on the client.



Step 5
Submit, approve and reject timesheets

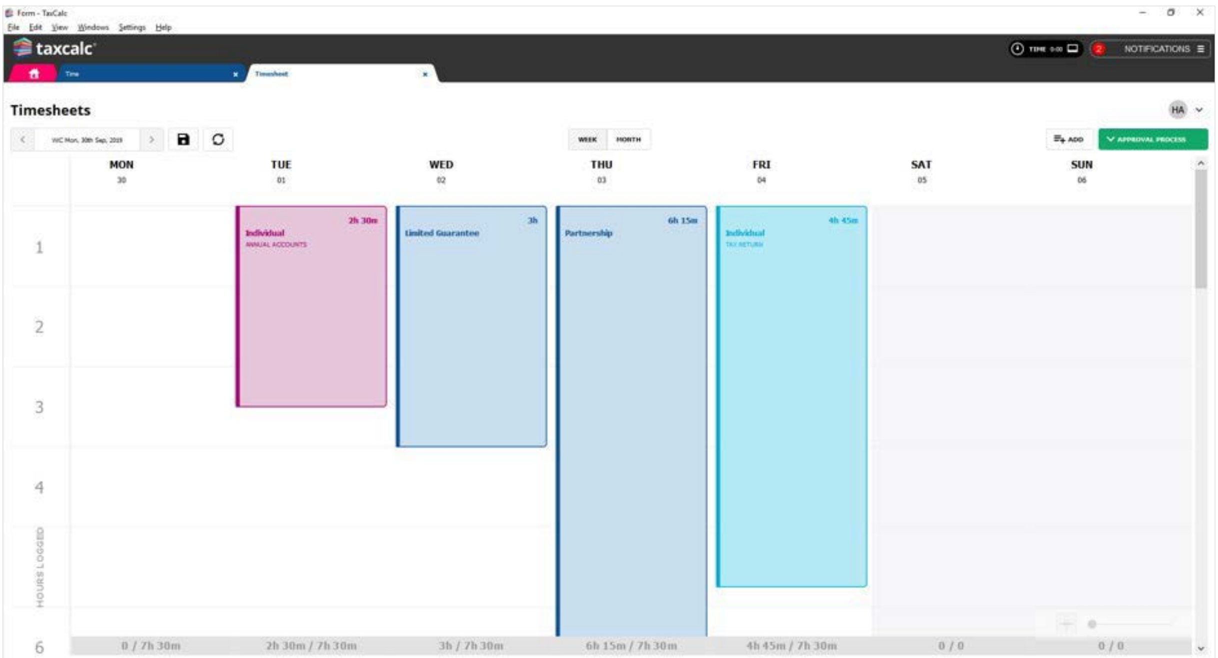
Once you have entered your time logs they can be submitted for approval. Depending on your permissions you will then be able to either approve or reject the time submitted.





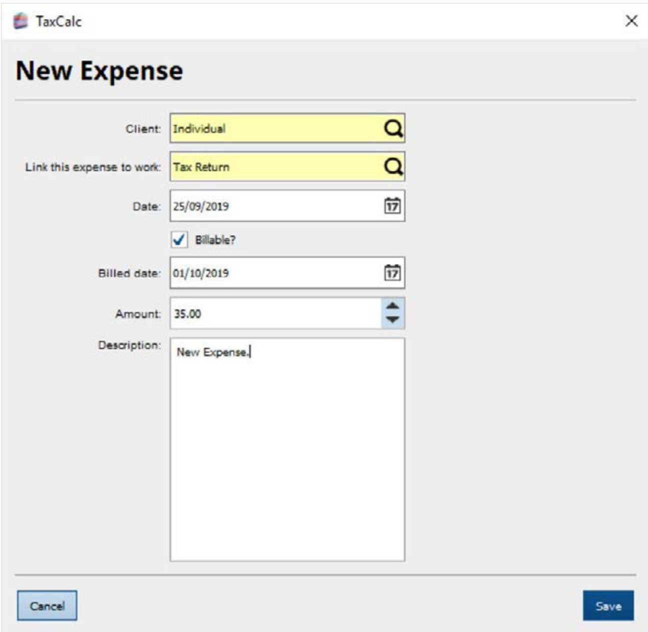
Step 6
View timesheets in calendar mode

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

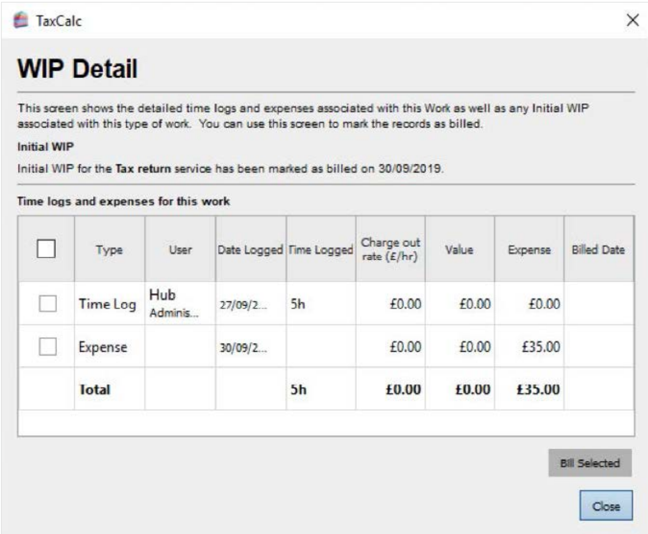
Ad Hoc Expenses allows you to view and manage your general client expenses.
From here you can add, edit and delete expenses where required.



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.

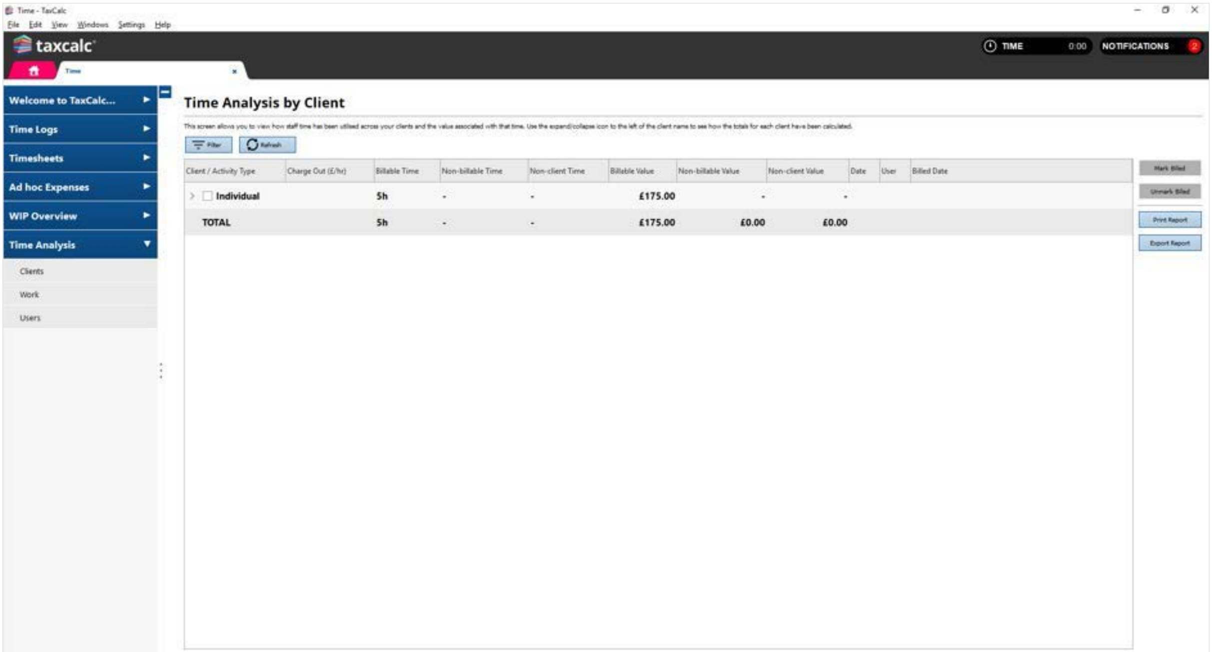
You can also export the WIP data to MS Excel where you can then use this information to raise invoices and billing for your clients.



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.



Getting started with Document Manager

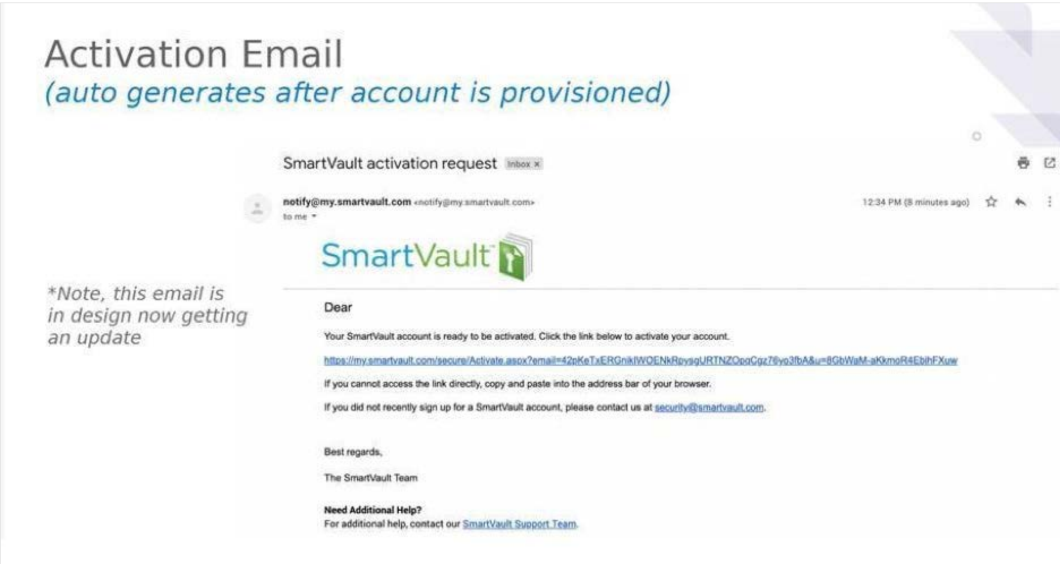
Powered by SmartVault

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.

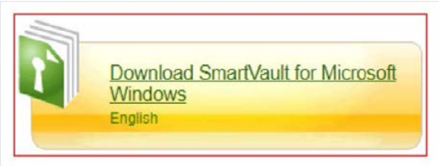
You'll also be given a link to the SmartVault Live Training Hub, where you can schedule your free 1 hour training session, after which you will be emailed links to helpful knowledgebase articles and furthermore, a 30-minute follow-up call with your dedicated Customer Success Manager to answer any additional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

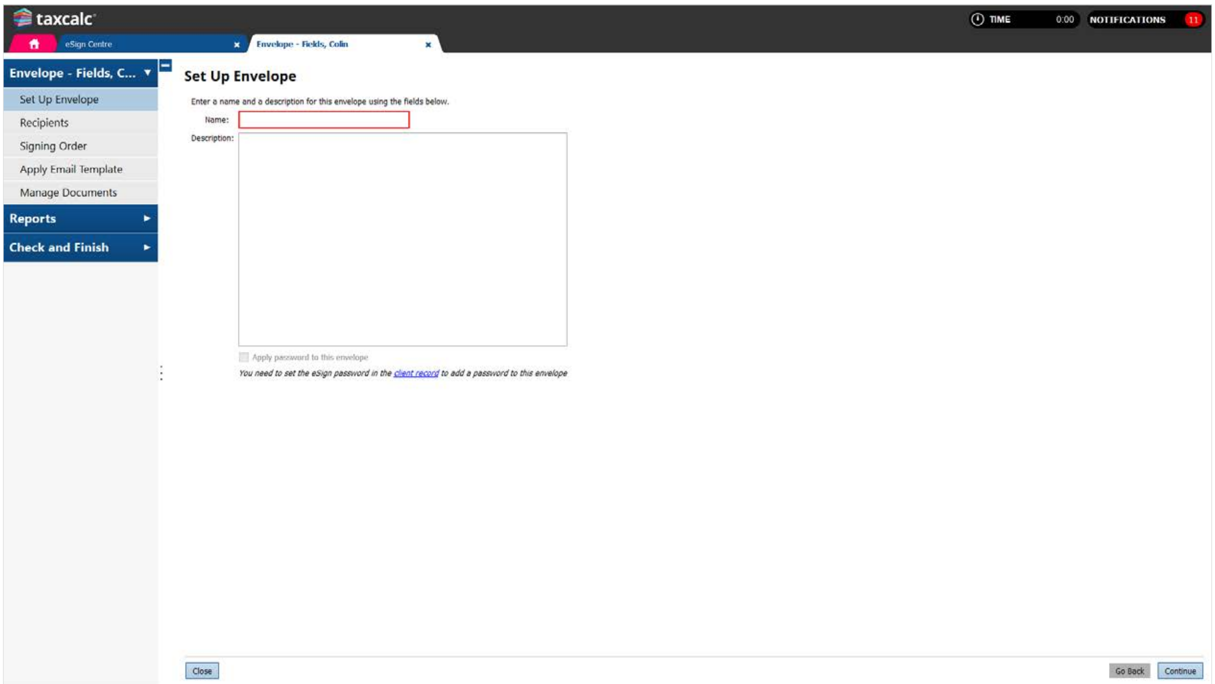
TaxCalc eSign Centre dramatically reduces the time spent obtaining client approval for tax returns, VAT returns and sets of accounts. Simply send over an electronic copy of the document, ask the client to check and sign – you'll be notified immediately and you can submit the document straightaway.

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].

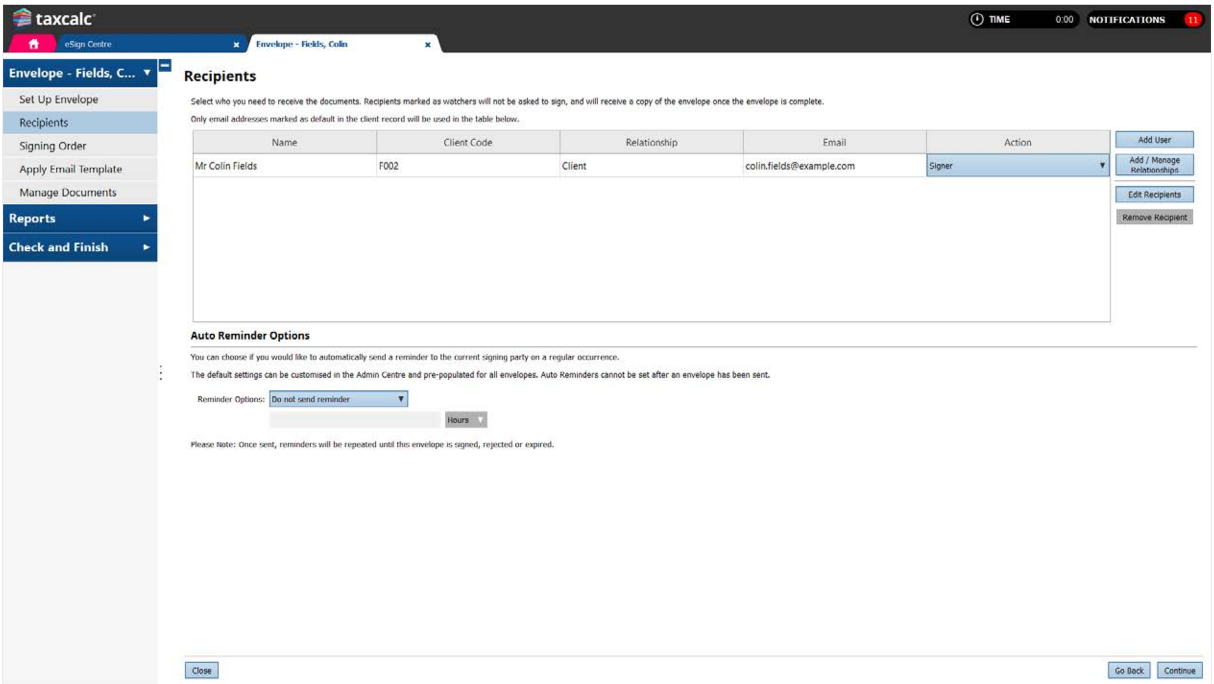
Step 1
Creating an envelope

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!



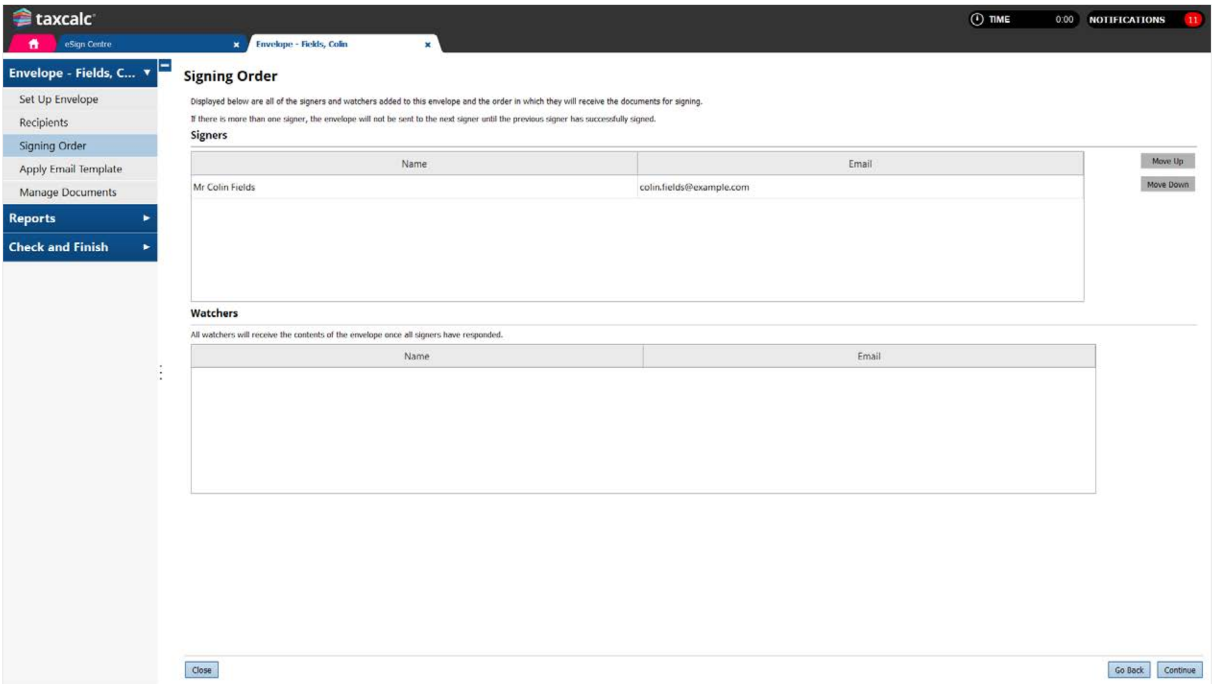
Step 2
Selecting your recipients

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.



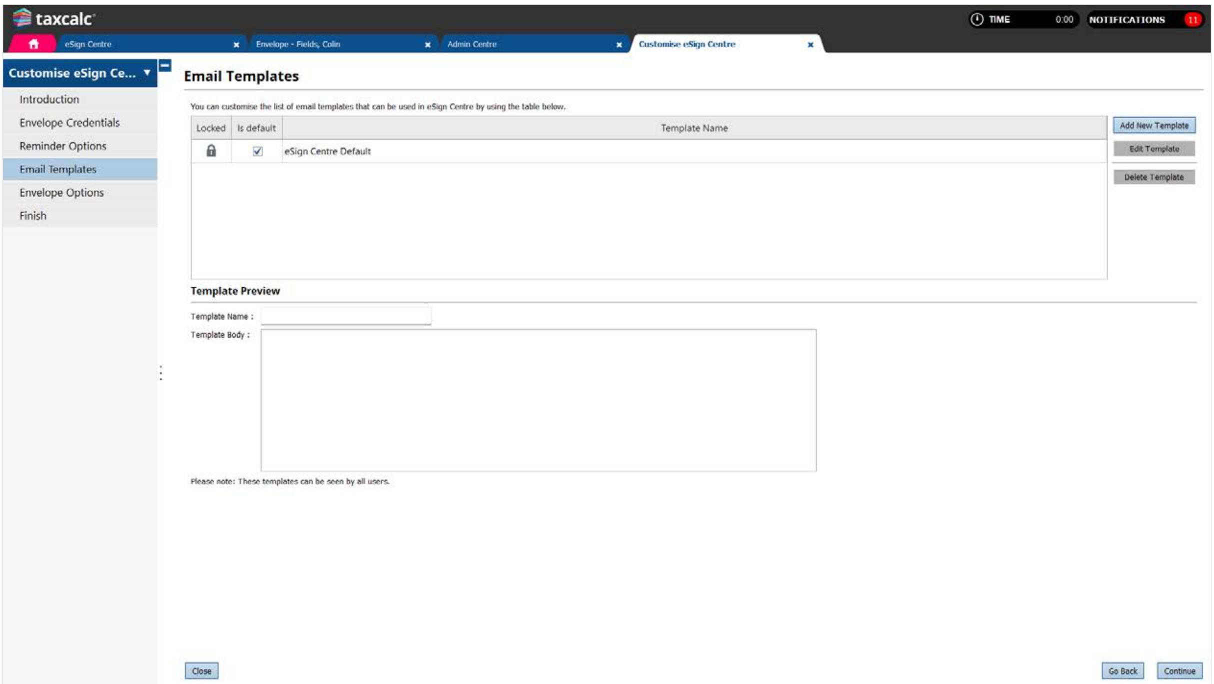
Step 3
Setting up the signing order

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.



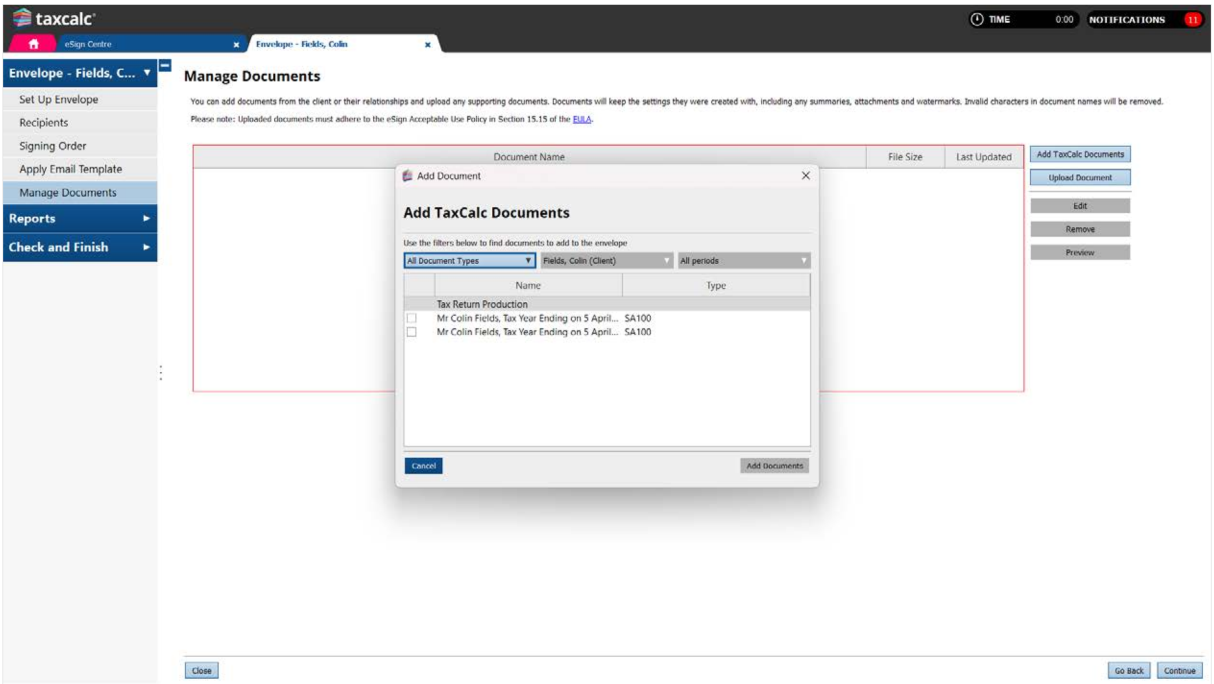
Step 4
Applying email templates

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



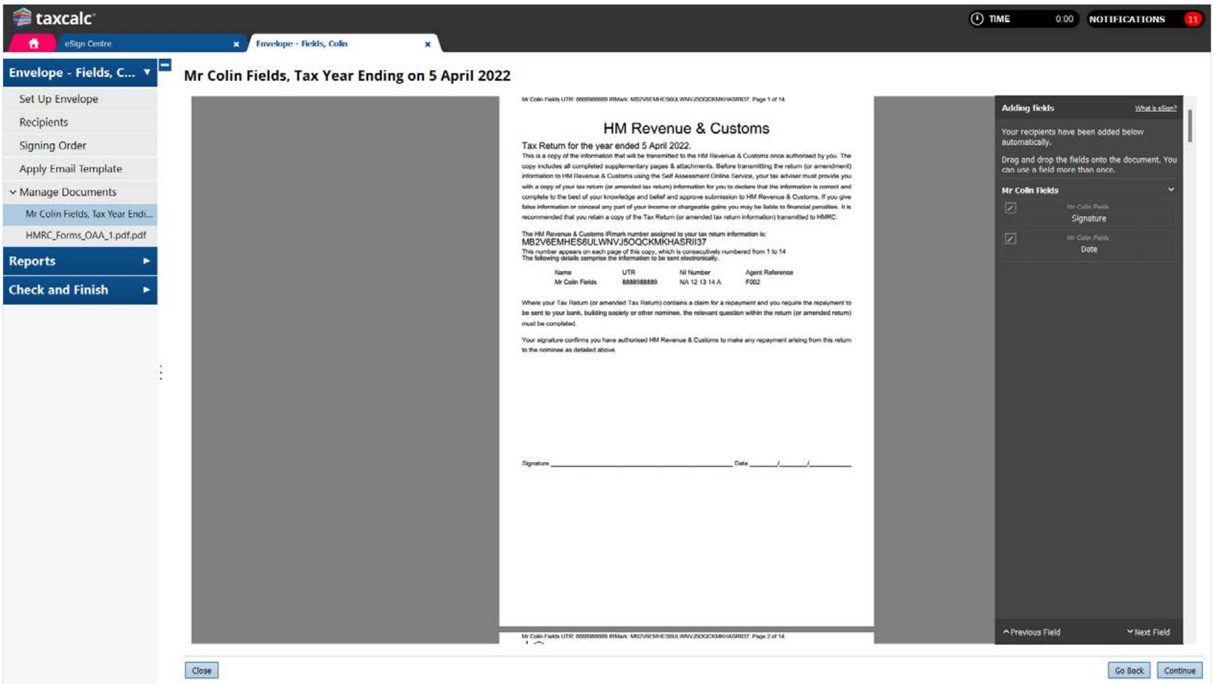
Step 5
Attaching documents to an envelope

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.



Step 6
Previewing the documents

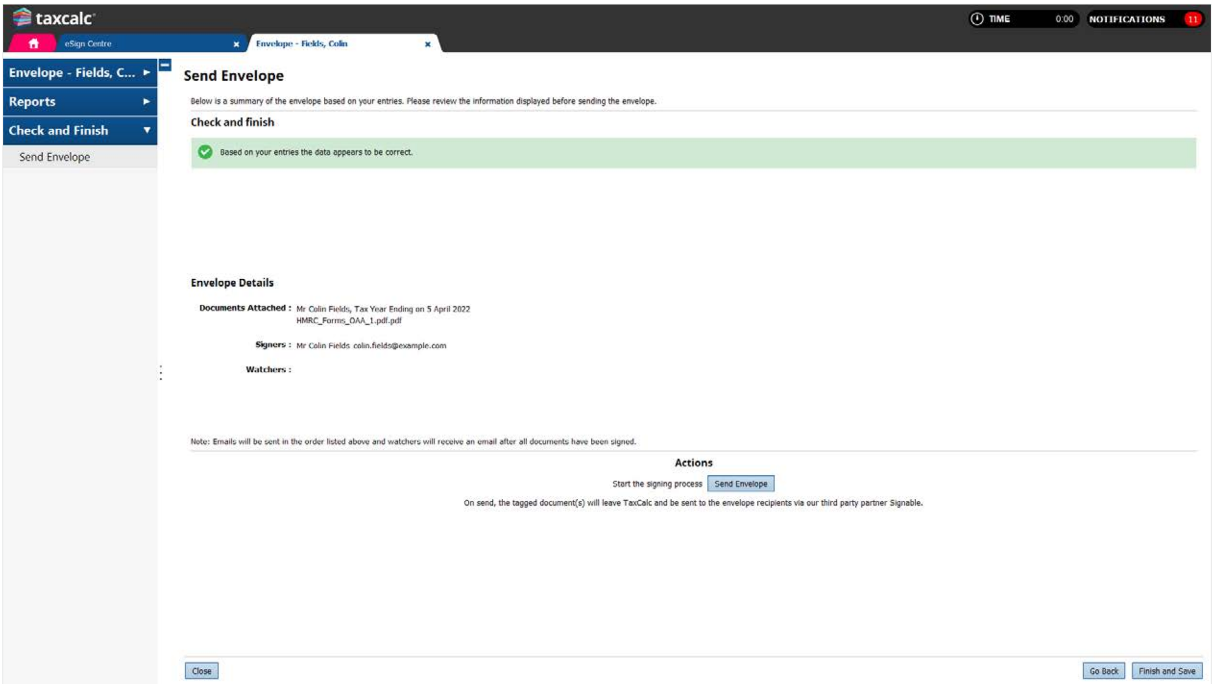
The preview option lets you add the signature and date fields onto the document for each signer. You can decide where each field needs to go and how many times. This is particularly handy if your client needs to sign in more than one place.



Step 7
Check & Finish®

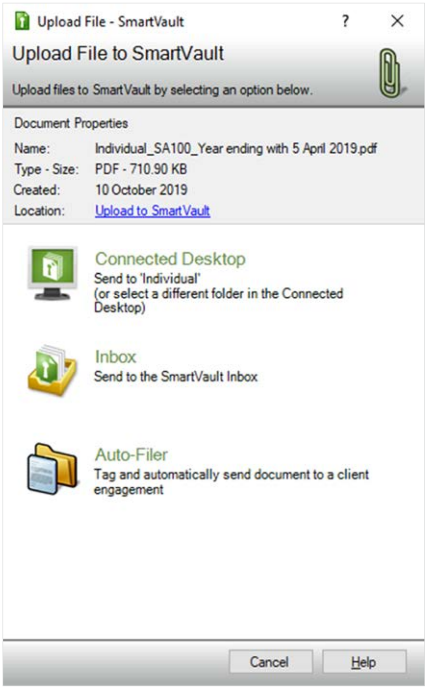
Check & Finish® validates the entries you have made and ensures all data is correct.
If there are any errors or warnings, click on the links to make the necessary changes.

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.



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.



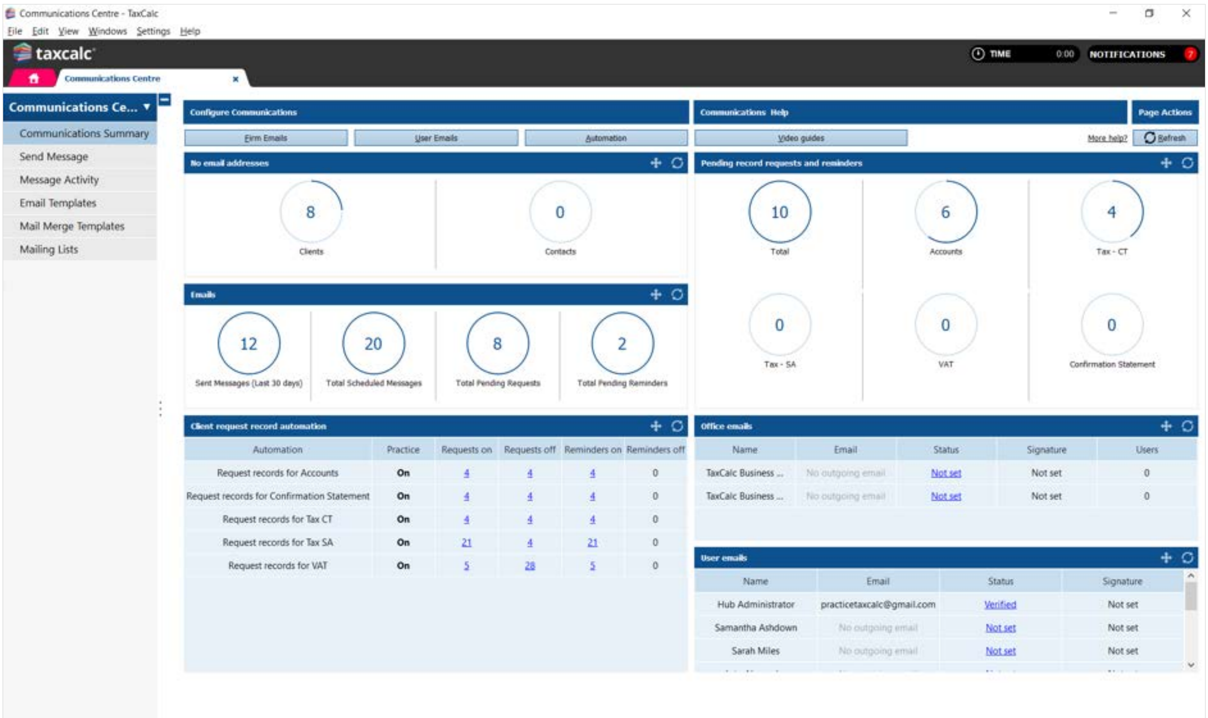
Getting started with Communications Centre

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.

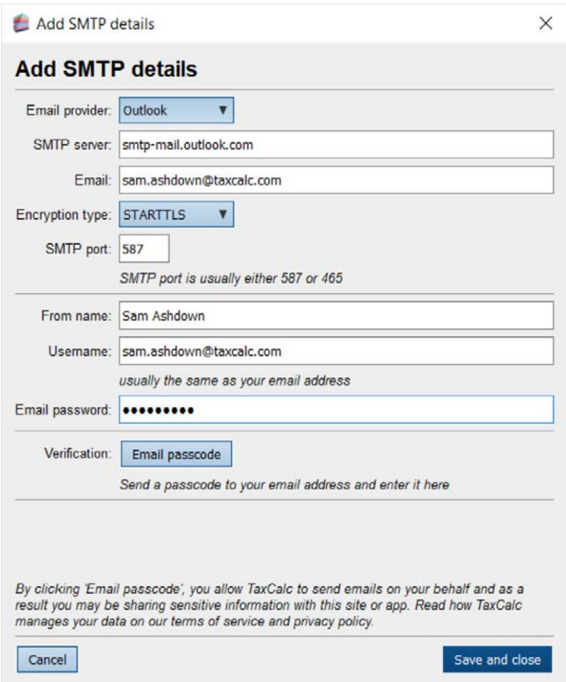
For more information on Communications Centre, please see [Knowledgebase Article 3199] and visit our website.



Step 1
Setting up outgoing email (SMTP) firm details

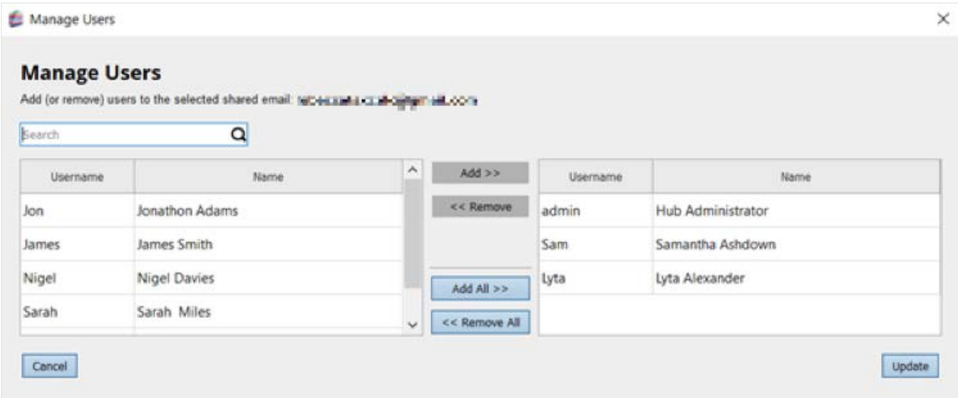
For TaxCalc to successfully send emails from Communications Centre you'll need to set up access to one or more email accounts using SMTP details. Your IT team should be able to provide you with any information you may need in setting this up.

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.



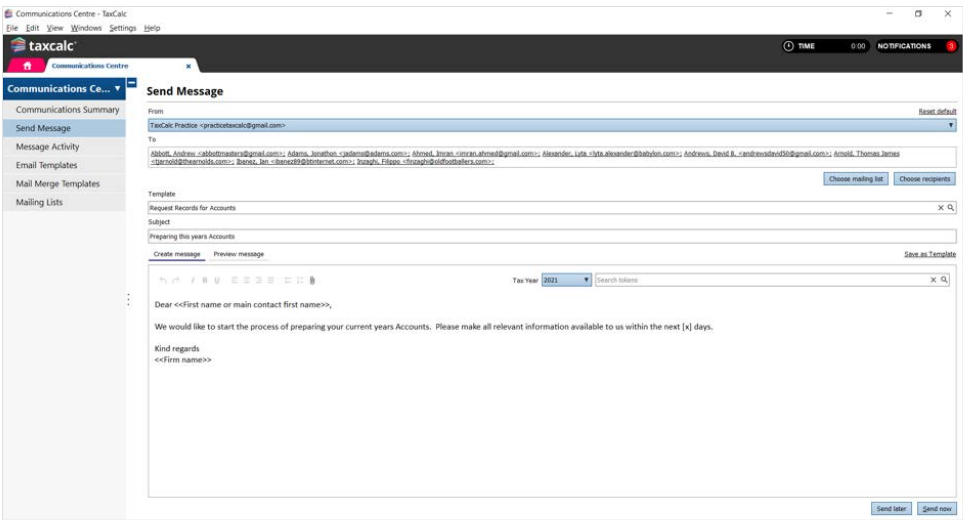
Step 2
Adding users to shared emails

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.



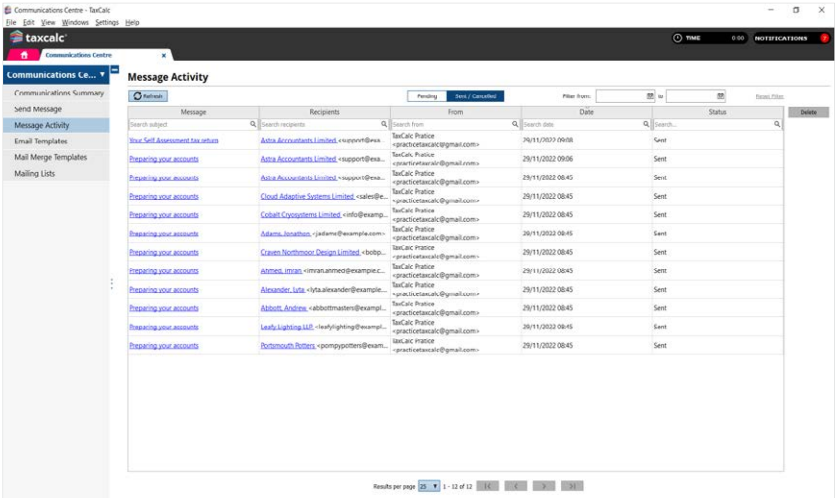
Step 3
Sending an email

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

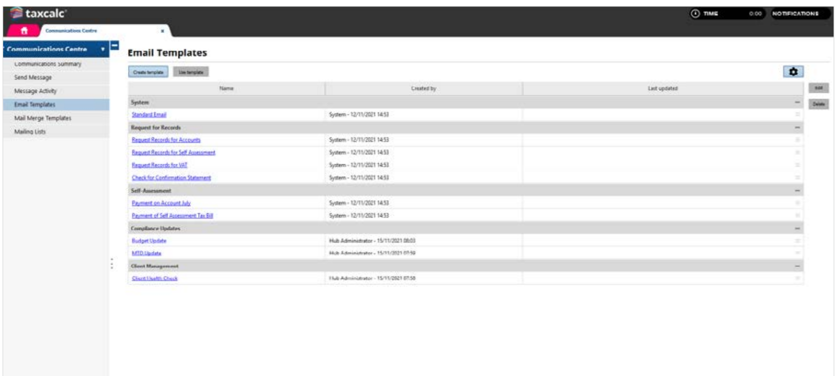
Message Activity gives you the ability to view the correspondence you have sent to clients from within Communications Centre. You can see the messages sent out to clients, who they were sent to, when they were sent and who in the practice sent them.



Step 5
Setting up email templates

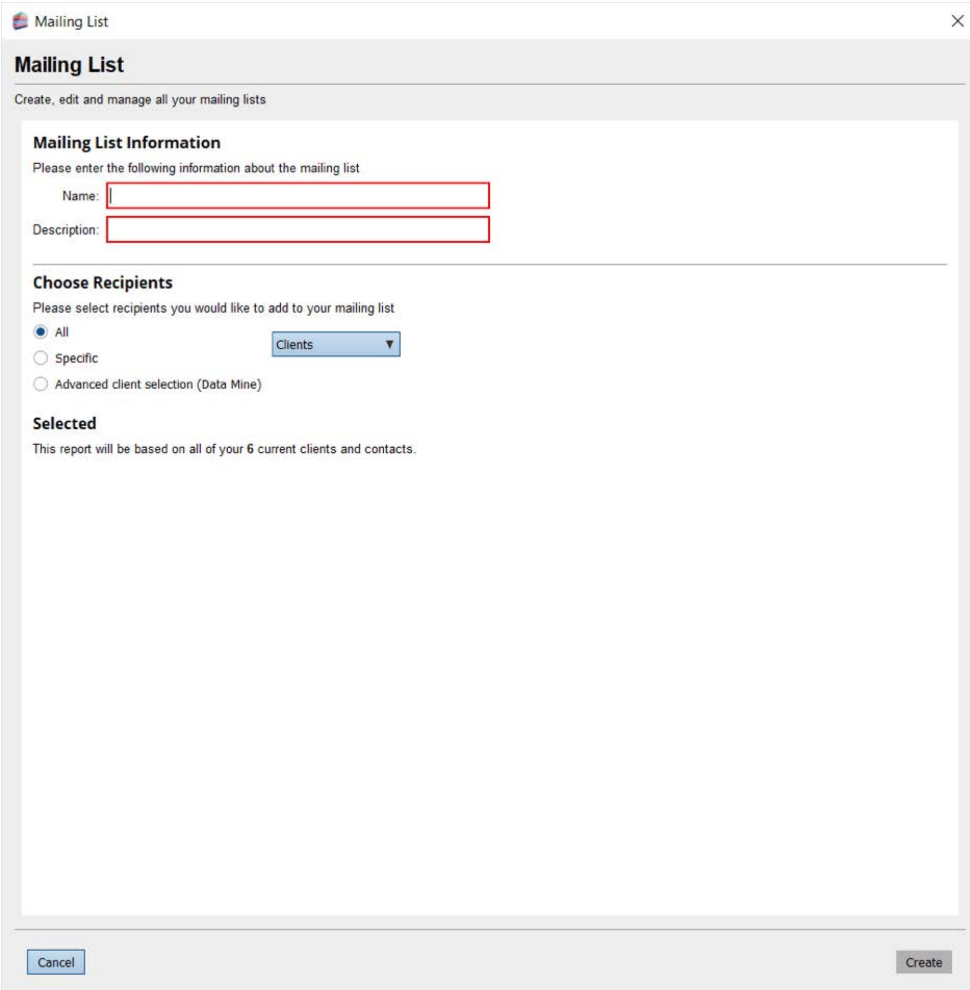
Email Templates allows you to create customised content to send out to your clients. You may also want to send the same email message out in bulk. Having templates ready to hand means you can quickly and easily send emails out without having to write them every time and allows you to add that personal 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.

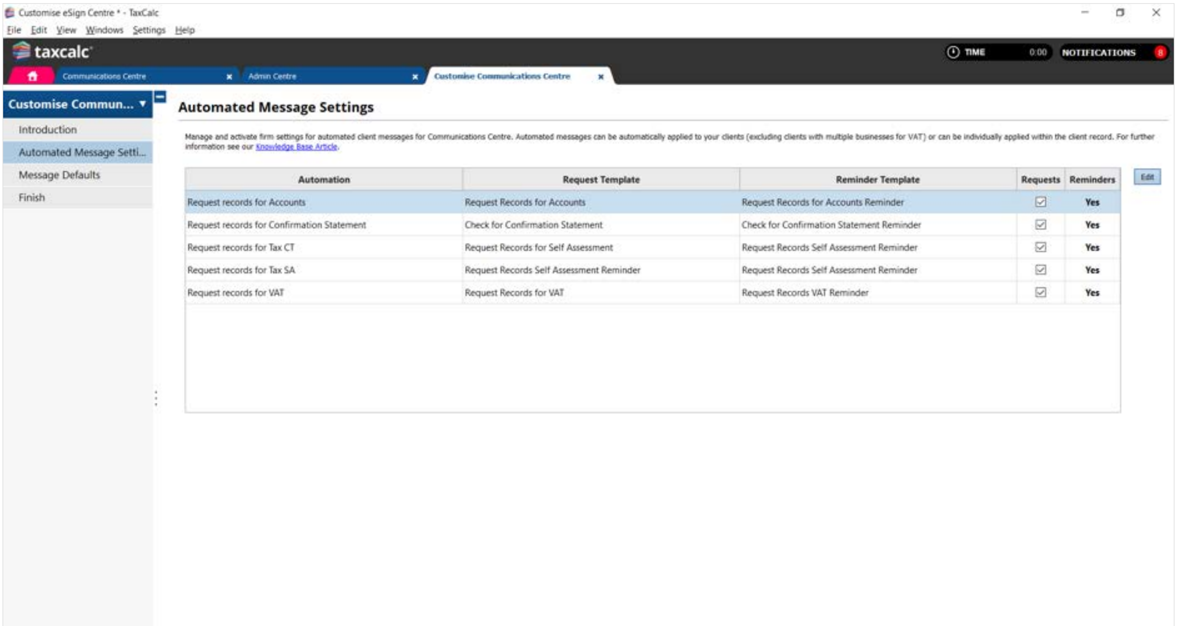


Step 7
Automating emails

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.



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