Getting started with eSign Centre

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Getting started with eSign Centre

TaxCalc eSign Centre dramatically reduces the time spent obtaining client approval for tax returns, VAT returns, sets of accounts and any other documents. Simply send over an electronic copy of the documents for the client to check, then once signed, you'll be notified immediately. You can then complete your workflow and submit the documents straightaway, then store them to your Document Management system.

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, please visit taxcalc.com/esign.

For a complete solution for managing your client documents, why not use eSign Centre alongside TaxCalc's Document Manager powered by SmartVault, for an efficient way of signing, sharing and storing your documents.

For more information on Document Manager, please visit taxcalc.com/docManager.

This guide will show you how to:

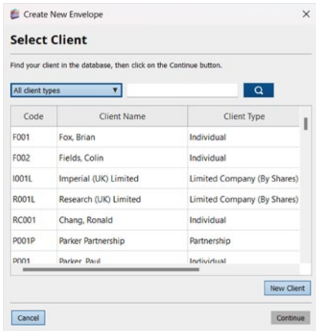
- Create and set up a new envelope.
- Manage your recipients.
- Set up the signing order.
- Apply email templates.
- Attach documents to the envelope.
- Preview the documents and apply signature and date fields.
- Review the Check & Finish® validations.
- Send envelopes to Document Manager.

Step 1

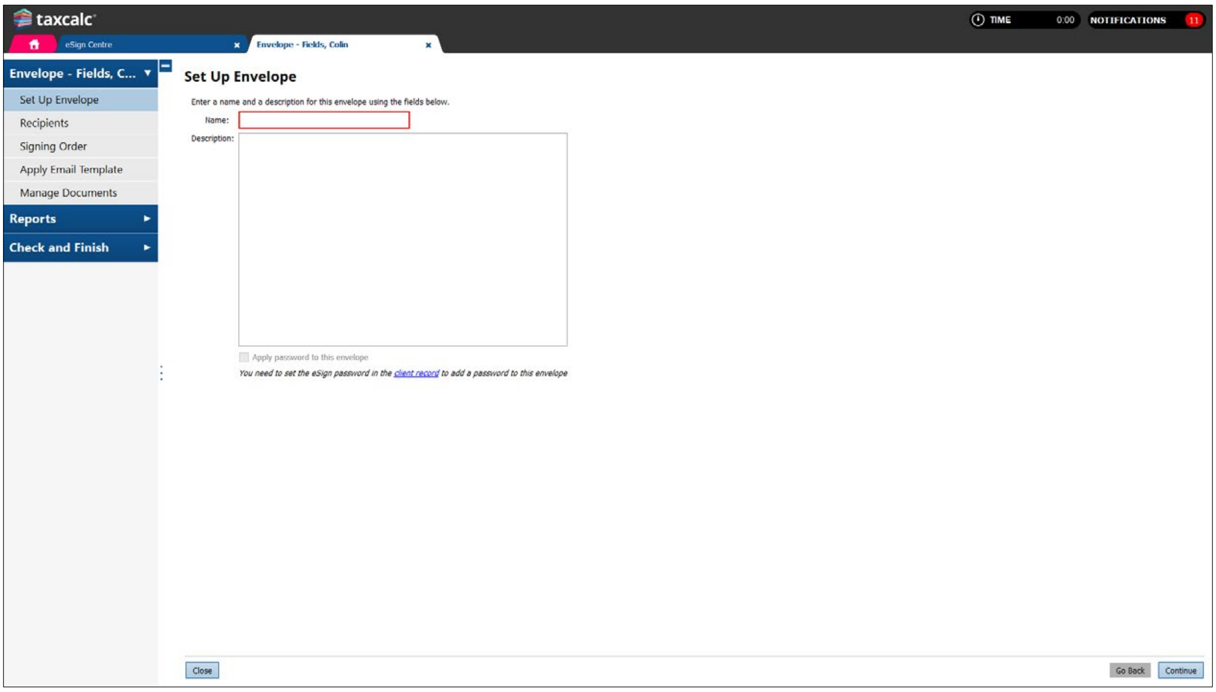
Creating an envelope

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!

1. From the **TaxCalc** home screen select **eSign Centre**.
2. Select **Create New Envelope** to display the **Select Client** dialog.



3. Select the client you're creating a new envelope for and click **Continue**.
4. The **Set Up Envelope** screen is displayed where you can enter a **Name** and a **Description** for your envelope.
5. If you have setup an eSign envelope password from the client record in Practice Manager you can also select whether you would like to **Apply password from client record**. Selecting this option will ensure any eSign envelopes sent will require a password.
6. Click **Continue**.

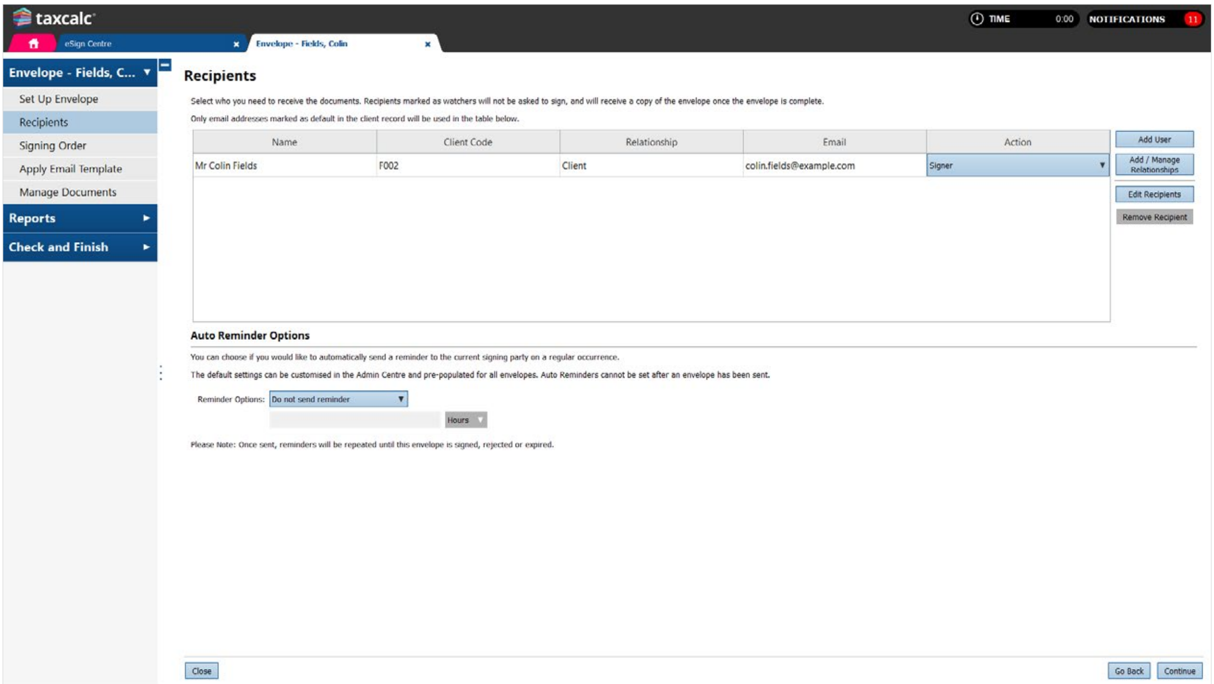


Step 2

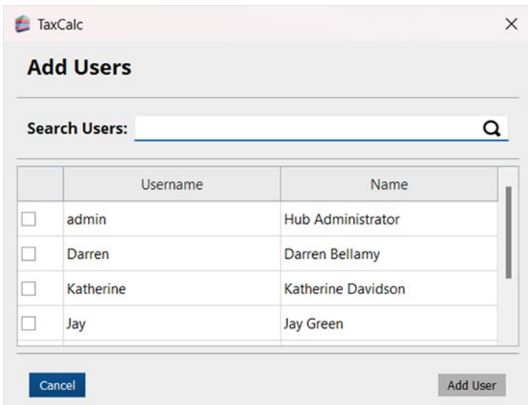
Selecting your recipients

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.

1. Select the recipient from the list.
2. Select the recipient action, **Signer**, **Watcher** or **Do Not Send**.



3. To add a TaxCalc user as a recipient, click **Add User** and select the user you'd like to assign to this envelope.



4. Recipients marked as Watchers will not be asked to sign the document, but will receive a copy of the signed document once the envelope is complete.

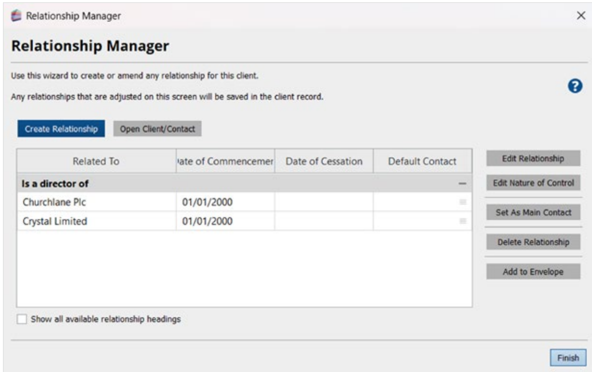
5. Ensure each recipient has a valid email address. Only email addresses marked as default in the client record are used.

6. If no email address is available for a relationship, click **Edit Recipient**. From here you can add or remove email addresses, set a default email address and select the required actions for all recipients.

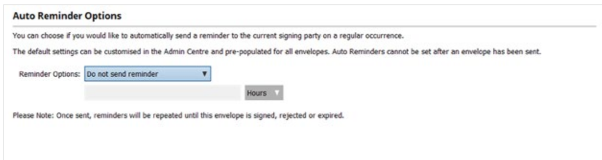
7. Click **Save and Close** once you've made all your changes.

8. To add an email address for a TaxCalc user, you will need to go to **Admin Centre > Users > Edit User > Office and Contacts Details**.

9. You can also select to **Add/Manage Relationships** which opens the **Relationship Manager** dialog where you can create, amend or add any relationship for the client. From here you can set a main contact and manage the nature of control. Any changes are also reflected in Practice Manager .



10. You may want to send automatic reminders to the signing party. You can do this by selecting your **Reminder Options**.

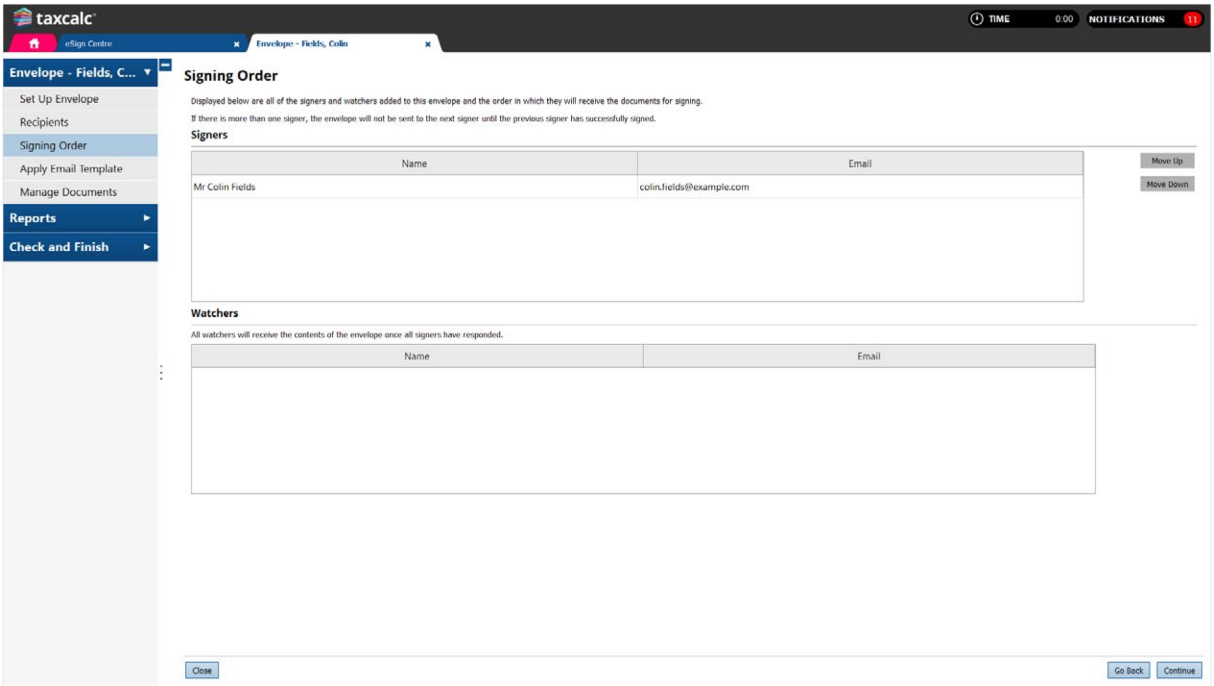


Step 3

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.

1. Select the Signer from the list.
2. Click either Move Up or Move Down to amend the order in which the document is sent to each signer.
3. If you have any Watchers, these are listed here and will be sent the envelope once all signers have responded.

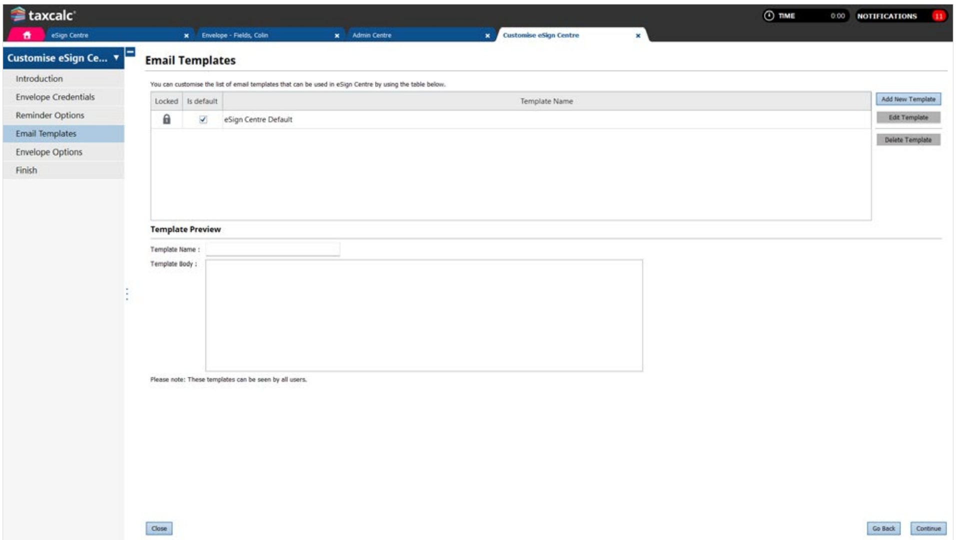


Step 4

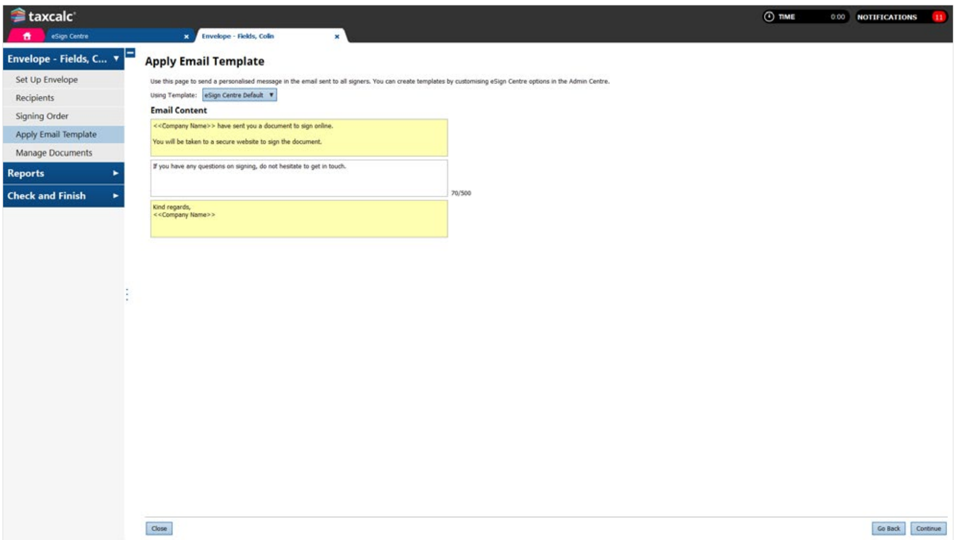
Applying email templates

For the personalised touch, you can compose a customised email or use the eSign Centre Default to send to the document signers. If you want, you can even create your own email template in *Admin Centre* > *Customise eSign Centre* > *Email Templates*.

1. Select Apply Email Template in eSign Centre and from the dropdown list select the template you'd like to use.



2. You can also amend the text to be included in the email being sent to the signers in the Email Content section.



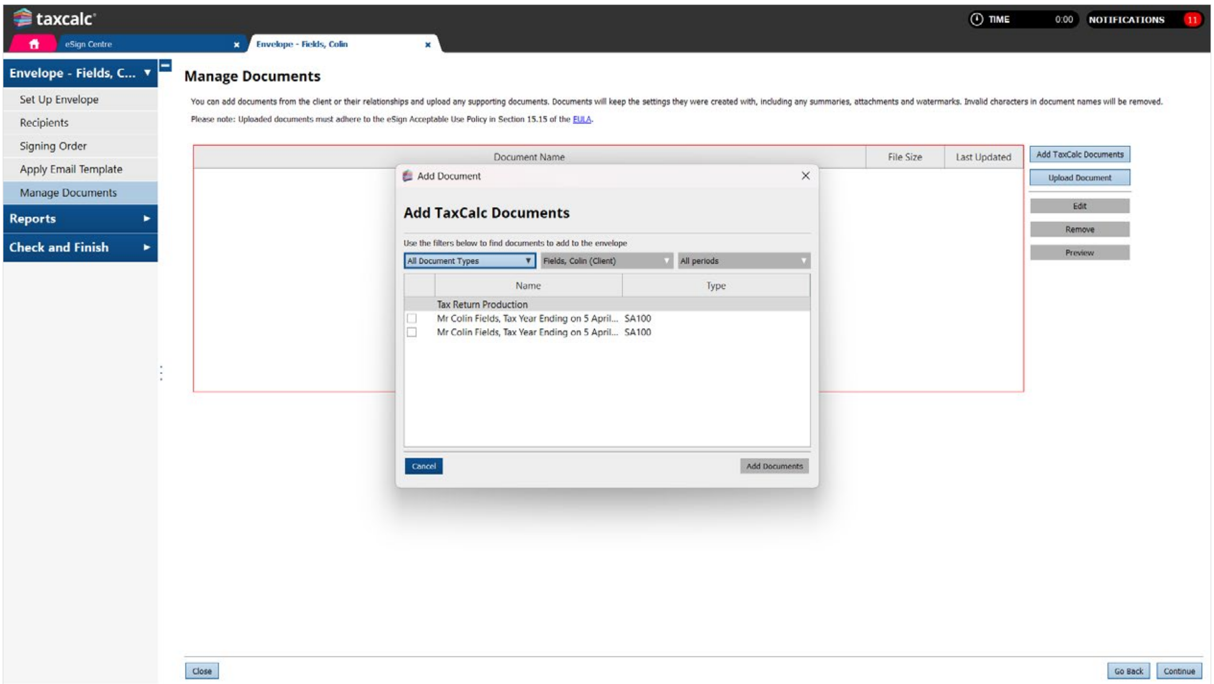
Step 5

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!

You can attach multiple client and relationship documents created in TaxCalc as well as any external PDF supporting documents all in one envelope.

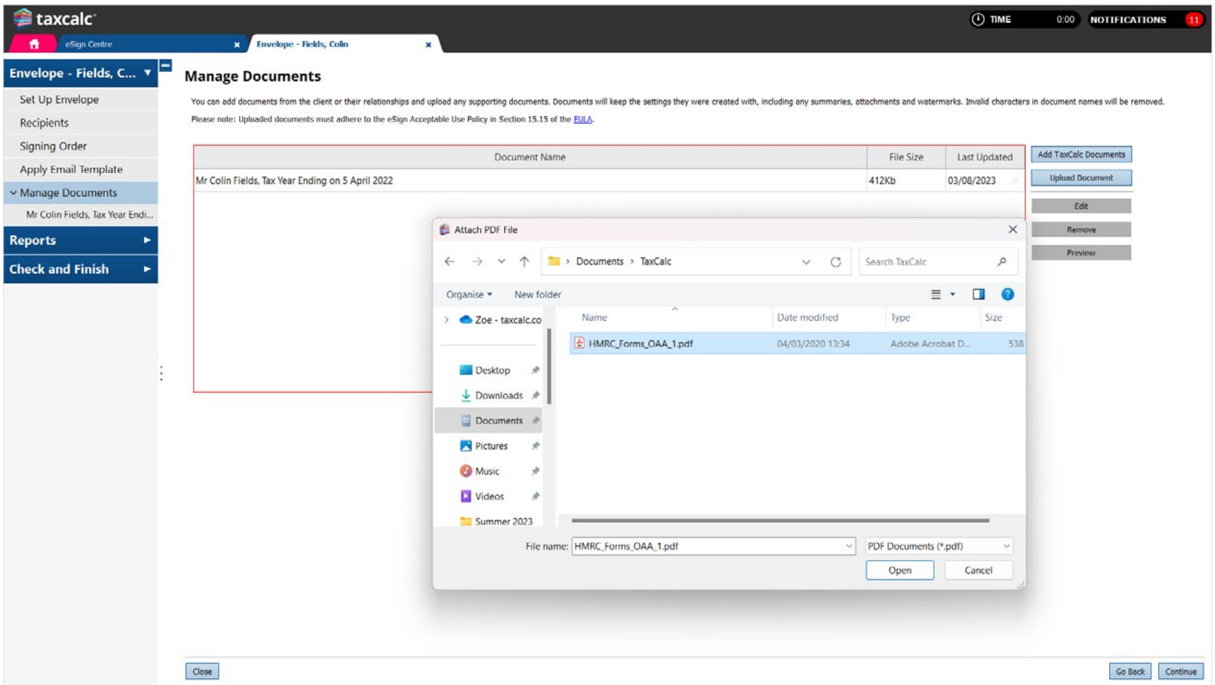
1. Select **Manage Documents** and click **Add TaxCalc Documents** to display the **Add TaxCalc Documents** dialog where you can select the document you would like to attach.
2. Select the **Document Type**, for example, **Tax Return Production**.
3. Select the **Client/Relationship** and the **Period**.
4. Select the required documents from the list and click **Add documents**.



5. To include any externally saved documents to your envelope, select Upload Document.

6. Select the PDF file to be uploaded and click Open to include it in your envelope.

7. To attach an MS Word document, you will need to ensure it has been converted to PDF format. For details on how to do this please see [KB3069 - Can I upload MS Word documents to an eSign envelope?]



8. Once the document appears in the list, ensure it's highlighted before clicking **Preview**.

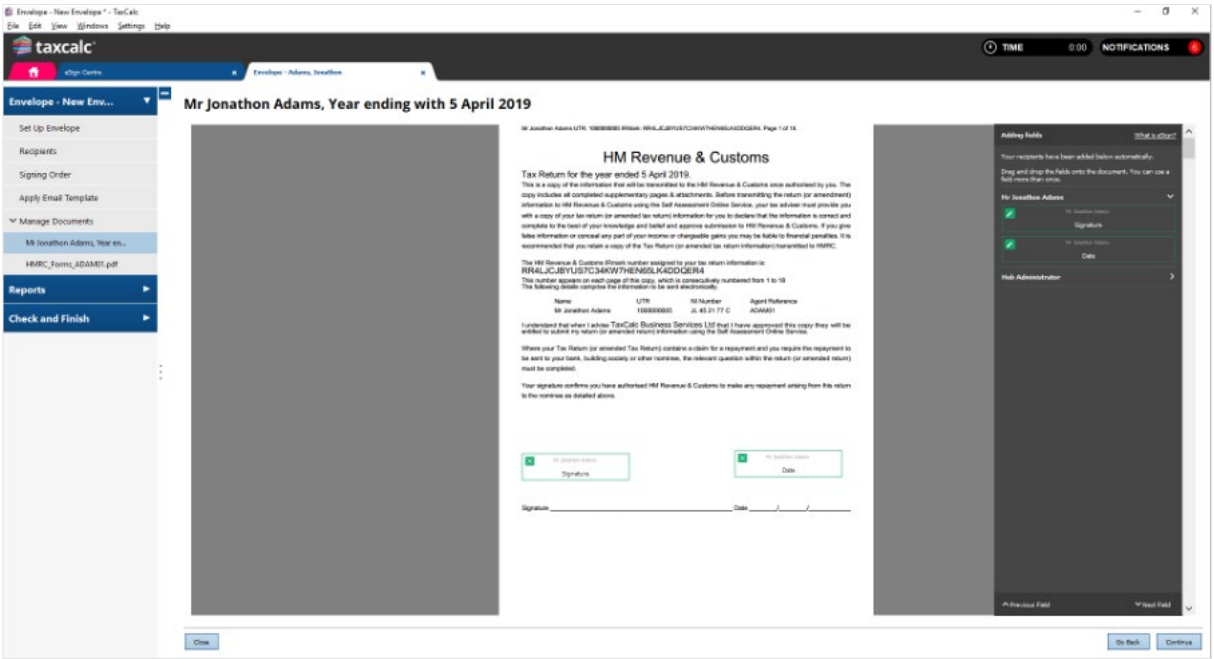
9. Should you need to update the order of the documents, simply drag and drop them into the correct place.

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.

1. From **Manage Documents** select the document in the list and click **Preview**.
2. On the right-hand side the recipients are listed ready for you to add to the document.
3. Drag and drop the signature and date fields onto the document for each signer and click **Continue**.



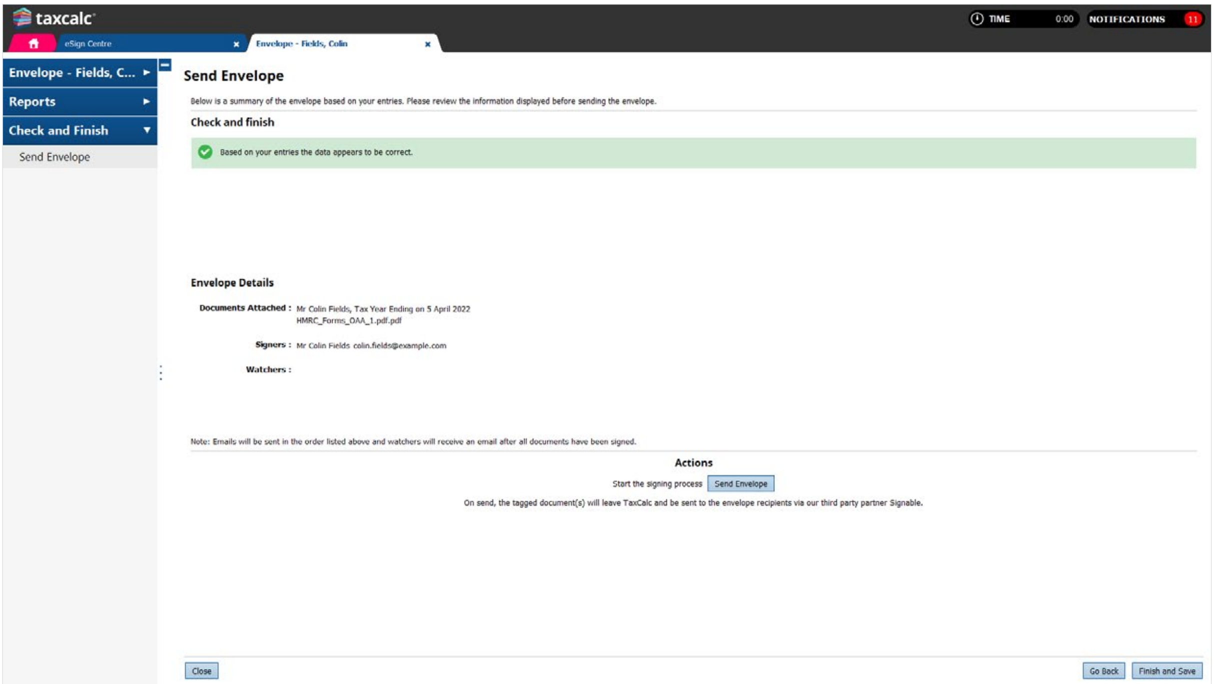
Step 7

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.

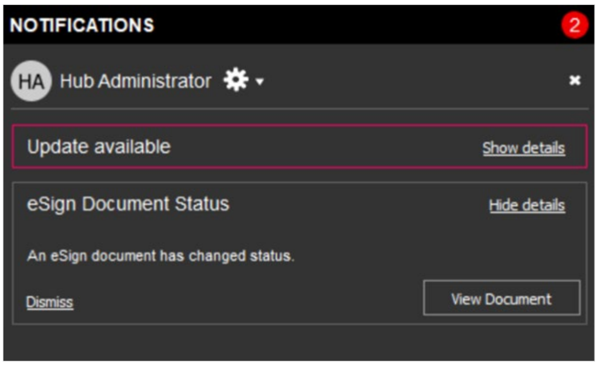
You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task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

1. Select **Check & Finish®** to validate the data you entered.
2. If there are any errors or warnings, click the links to be taken to the appropriate entry for correction.
3. If the data is correct, the envelope is ready to send.
4. Click **Send Envelope**.
5. The envelope is then sent to the first recipient for signing.



6. The **Status** of the envelope is updated on the eSign Centre homescreen as it goes through each stage, keeping you up-to-date at all times.

7. Once the signing process is complete, TaxCalc will display a notification, making tracking of your documents and envelopes simple!



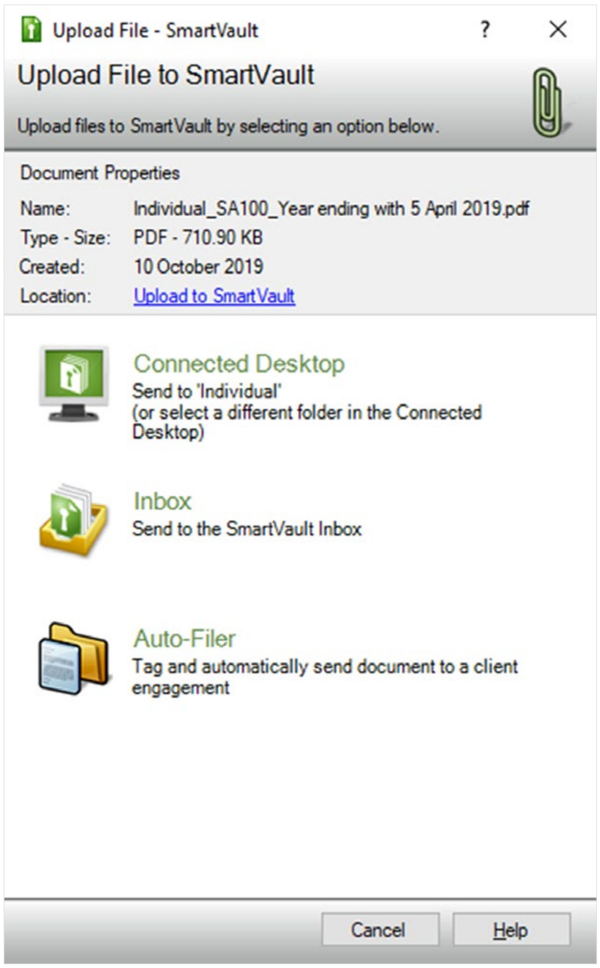
Step 8

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.

You can automatically send any signed documents at the click of a button!

1. Ensuring you're logged into Document Manager, click Send to Document Manager.
   The Send to Document Manager dialog is displayed.
2. Edit the file name if required, then click Confirm.
   A dialog is displayed where you can select to upload your files to Document Manager.



3. Select 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.

4. The Upload Document dialog is displayed where you can select to Upload the documents.

Please see the KB3014 - Getting Started with TaxCalc Document Manager powered by SmartVault guide for more information.

For more information on Document Manager, please visit taxcalc.com/docManager.

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