



# 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](https://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](https://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.

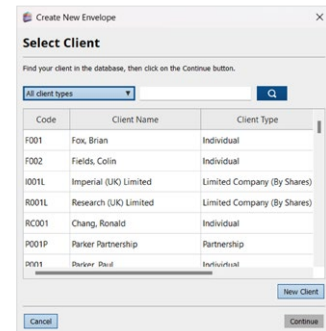


## Step 1

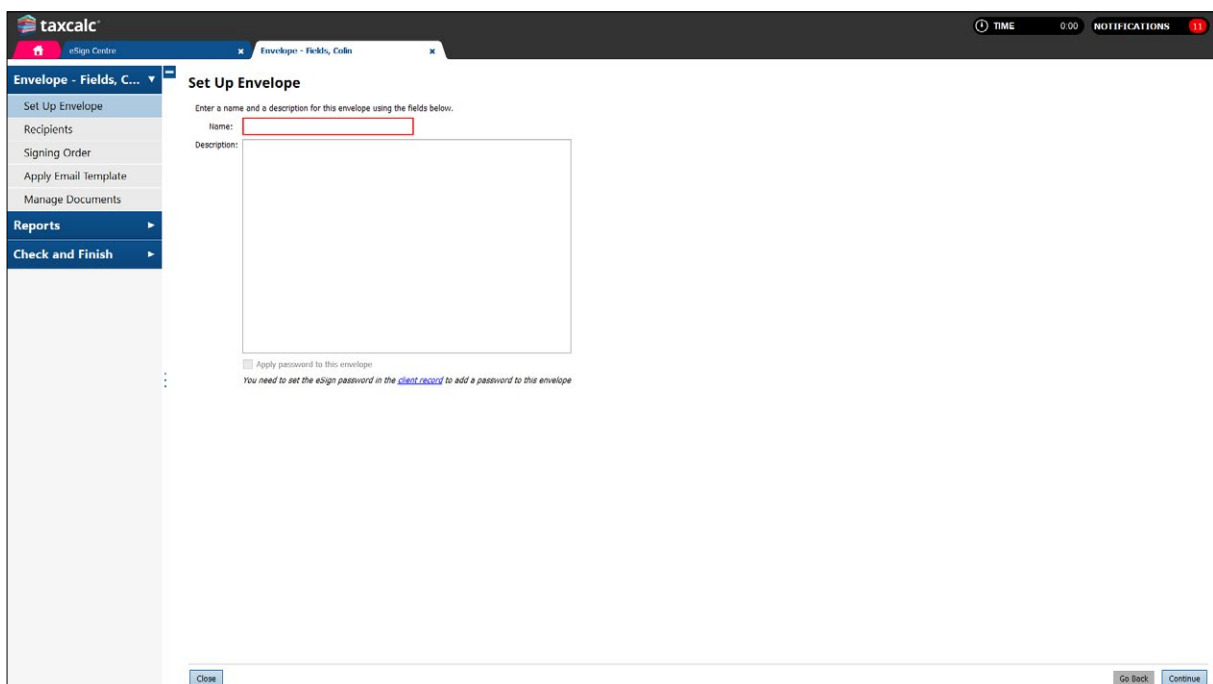
# Creating an envelope

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**.

**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:  Hours:

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

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

**Add Users**

Search Users:

	Username	Name
<input type="checkbox"/>	admin	Hub Administrator
<input type="checkbox"/>	Darren	Darren Bellamy
<input type="checkbox"/>	Katherine	Katherine Davidson
<input type="checkbox"/>	Jay	Jay Green

Cancel Add User



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 .

**Relationship Manager**

Use this wizard to create or amend any relationship for this client.  
Any relationships that are adjusted on this screen will be saved in the client record.

Create Relationship | Open Client/Contact

Related To	Date of Commencement	Date of Cessation	Default Contact
<b>Is a director of</b>			
Churchlane Plc	01/01/2000		
Crystal Limited	01/01/2000		

Show all available relationship headings

Buttons: Edit Relationship, Edit Nature of Control, Set As Main Contact, Delete Relationship, Add to Envelope, Finish

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

**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: **Do not send reminder** | Hours: **Hours**

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.

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.

The screenshot displays the 'taxcalc' eSign Centre interface. The main window is titled 'Envelope - Fields, Colin' and shows the 'Signing Order' configuration screen. The left sidebar contains navigation options: 'Set Up Envelope', 'Recipients', 'Signing Order' (selected), 'Apply Email Template', 'Manage Documents', 'Reports', and 'Check and Finish'. The main content area is titled 'Signing Order' and includes the following text: '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
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At the bottom of the screen, there are buttons for 'Close', 'Go Back', and 'Continue'.

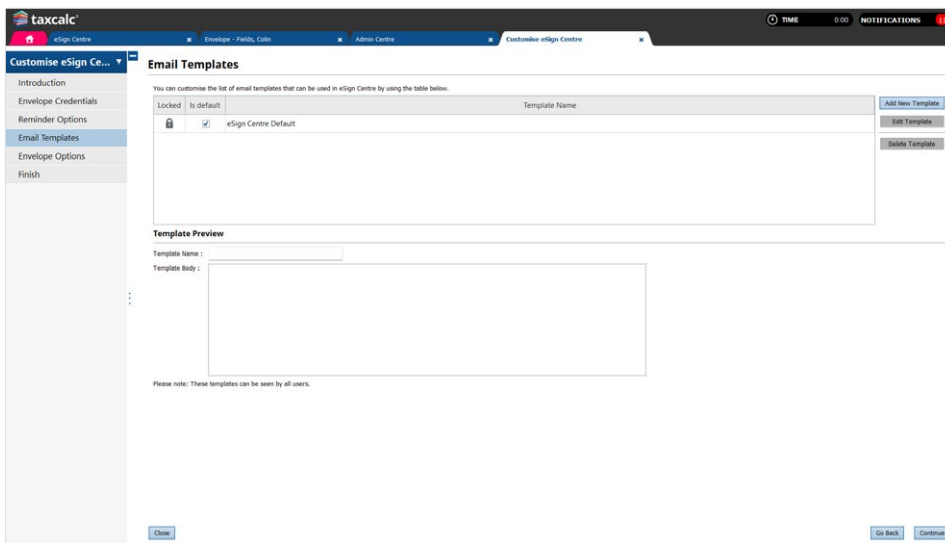


## Step 4

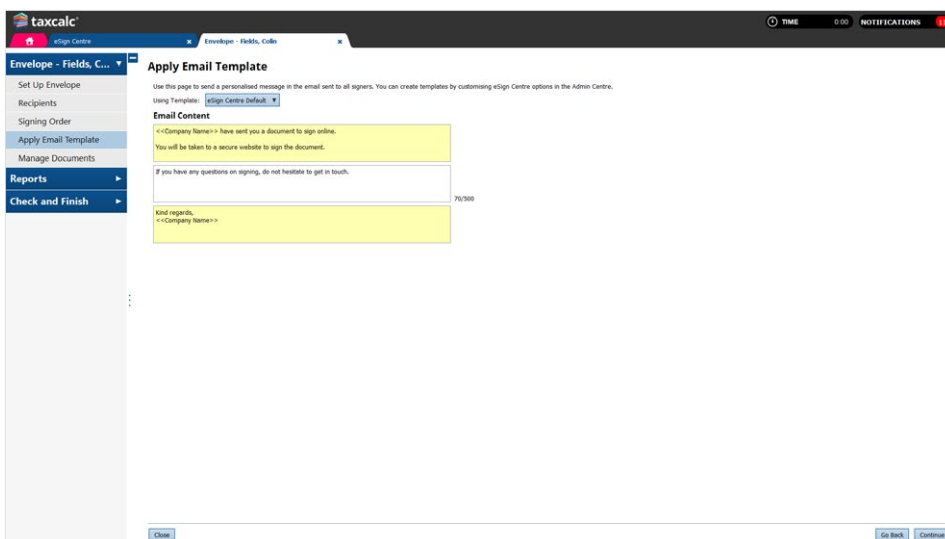
# Applying email templates

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

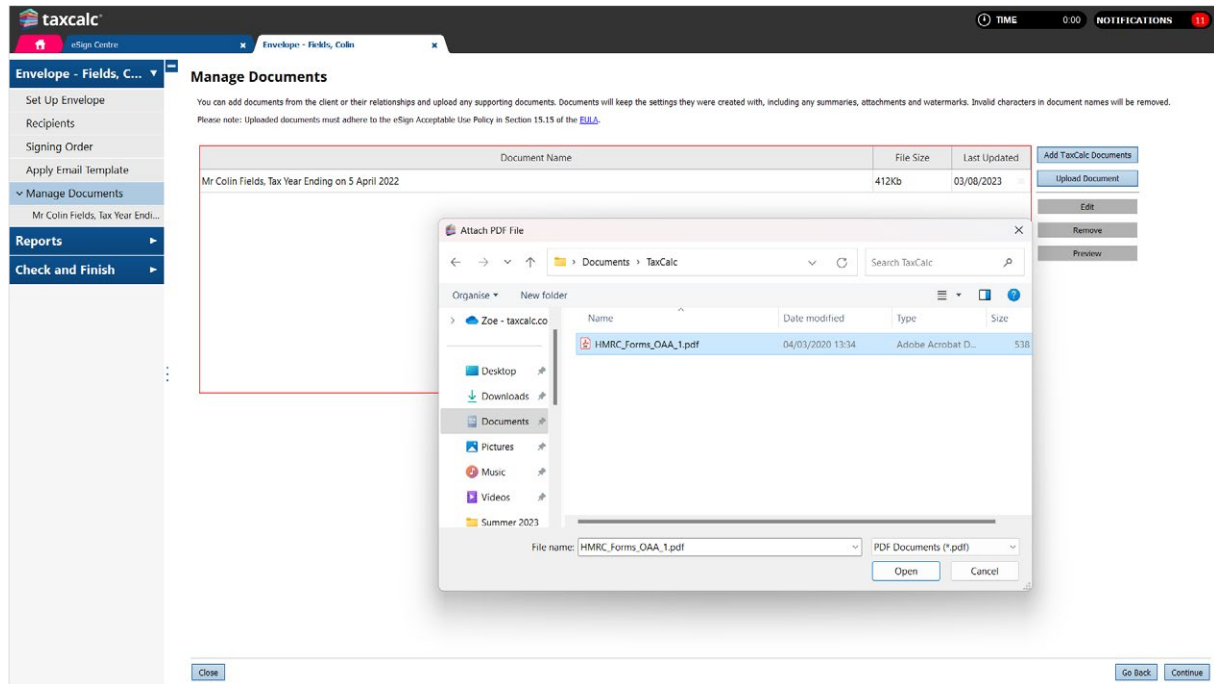
You can attach multiple client and relationship documents created in TaxCalc as well as any external PDF supporting documents all in one envelope.

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**.

The screenshot displays the TaxCalc web interface. The main area is titled 'Manage Documents' and contains a table with columns for 'Document Name', 'File Size', and 'Last Updated'. A modal dialog box titled 'Add TaxCalc Documents' is open, showing filters for 'All Document Types', 'Fields, Colin (Client)', and 'All periods'. Below the filters is a table with columns 'Name' and 'Type'. The table lists two documents under the 'Tax Return Production' type: 'Mr Colin Fields, Tax Year Ending on 5 April... SA100'. The dialog box has 'Cancel' and 'Add Documents' buttons at the bottom. The background interface includes a sidebar with navigation options like 'Set Up Envelope', 'Recipients', and 'Manage Documents', and a top navigation bar with 'taxcalc' logo and user information.



- To include any externally saved documents to your envelope, select Upload Document.
- Select the PDF file to be uploaded and click Open to include it in your envelope.
- 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?](#)



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

Envelope - New Envelope - TaxCalc

taxcalc

Envelope - Adams, Jonathon

Envelope - New Env...

Set Up Envelope

Recipients

Signing Order

Apply Email Template

Manage Documents

Mr Jonathon Adams, Year en...

HMRC\_Forms\_ADAMS.pdf

Reports

Check and Finish

Mr Jonathon Adams, Year ending with 5 April 2019

HM Revenue & Customs

Tax Return for the year ended 5 April 2019.

This is a copy of the information that will be transmitted to the HM Revenue & Customs once authorised by you. This copy includes all completed supplementary pages & attachments. Before transmitting the return (or amended/retained) information to HM Revenue & Customs using the Self Assessment Online Service, you as adviser must provide you with a copy of your tax return (or amended/retained) information for you to declare that the information is correct and complete to the best of your knowledge and belief and agrees submitted 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 document number assigned to your tax return information is: RR4LJCJBYUSTC34RW7HEANGLK4DDGER4

The number appears on each page of this copy, which is consecutively numbered from 1 to 10. The following details summarise the information to be sent electronically.

Name	UTR	NI Number	Agent Reference
Mr Jonathon Adams	1000000000	JG 43 21 77 G	000001

I understand that when I submit TaxCalc Business Conditions List Report I have approved this copy they will be authorised to submit my return (or amended return information) using the Self Assessment Online Service.

Where your Tax Return (or amended Tax Return) contains a claim for a repayment and you require this repayment to be sent to your bank, building society or other receiver, 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 in the name as detailed above.

Mr Jonathon Adams Signature

Mr Jonathon Adams Date

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Close

Adding fields

Your recipients have been added below automatically. Drag and drop the fields onto the document. You can use a field more than once.

Mr Jonathon Adams

Mr Jonathon Adams Signature

Mr Jonathon Adams Date

Hub Administrator

Previous Field

Next Field

Go Back Continue



## Step 7

# Check & Finish<sup>®</sup>

**Check & Finish<sup>®</sup> 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.

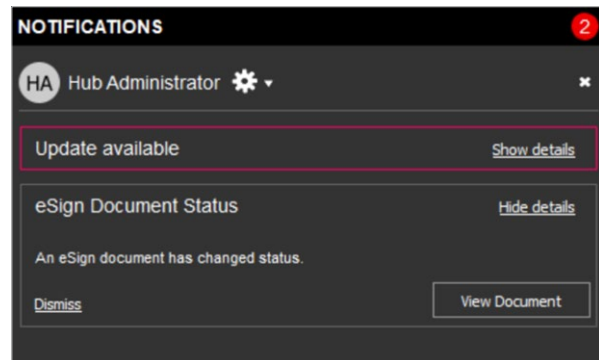
1. Select **Check & Finish<sup>®</sup>** to validate the data you entered.
2. If there are any errors or warnings, click the links to be taken to the appropriate entry for correction.
3. If the data is correct, the envelope is ready to send.
4. Click **Send Envelope**.
5. The envelope is then sent to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

The screenshot shows the 'taxcalc' interface. The top navigation bar includes 'eSign Centre' and 'Envelope - Fields, Colin'. The left sidebar has 'Envelope - Fields, C...', 'Reports', 'Check and Finish', and 'Send Envelope'. The main content area is titled 'Send Envelope' and contains a green success message: 'Based on your entries the data appears to be correct.' Below this, the 'Envelope Details' section lists 'Documents Attached: Mr Colin Fields, Tax Year Ending on 5 April 2022 HMRC\_Form\_OAA\_1.pdf', 'Signers: Mr Colin Fields colin.fields@example.com', and 'Watchers:'. A note states: 'Note: Emails will be sent in the order listed above and watchers will receive an email after all documents have been signed.' The 'Actions' section has a 'Send Envelope' button. At the bottom, there are 'Close', 'Go Back', and 'Finish and Save' buttons.



- 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.

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



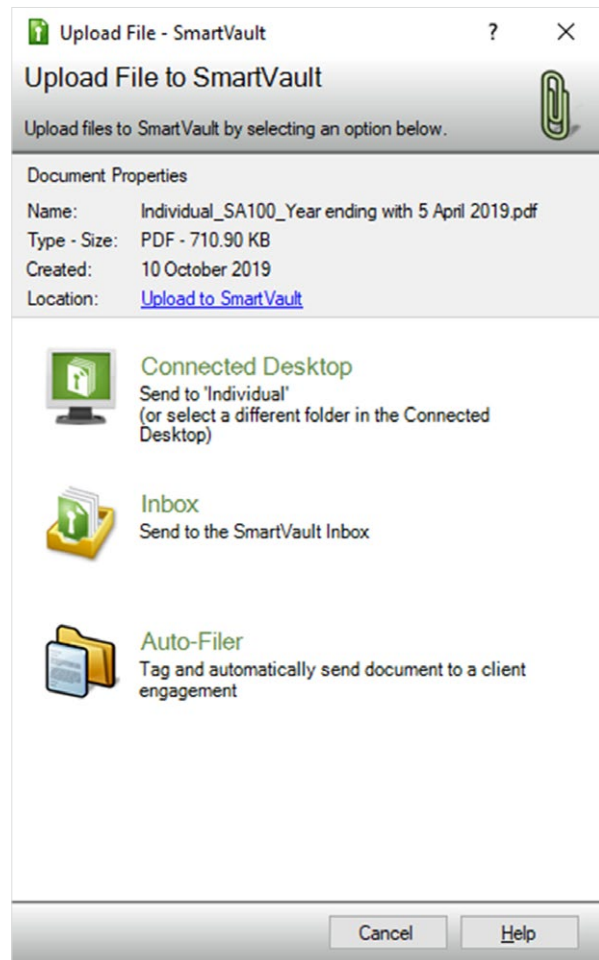
## Step 8

# 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](http://taxcalc.com/docManager).



