Getting started with eSign



Contents

Getting Started with eSign Centre

Getting Started with eSign Centre	3
Step 1 – Creating an Envelope	4
Step 2 – Selecting your Recipients	6
Step 3 – Setting up the Signing Order	8
Step 4 – Applying Email Templates	9
Step 5 – Attaching Documents to an Envelope	10
Step 6 – Previewing the Documents	12
Step 8 – Check and Finish	13
Step 7 – Sending Envelopes to Document Manager	14

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 where you can then complete your workflow and submit the documents straightaway to the relevant body, 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 our website.

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 our website.

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 and 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.

Line has a line of the second									
🗐 taxcalc'		v.						© 🕶	ста натачалани 🏮
aliga Contra	eSign Cer	ntre							
From has findings									
Eport Monitore	-		9	and be		-			
					1 I I I I I I I I I I I I I I I I I I I				
ten right transmis	E Contribució	- days		×					
Name of Street and Address	Select Ci	lent							
tanta farman	-				Taxata.	Name -	fields.	fair has	Listening int
Date (name)	Server 2		9		THE ADDRESS	Ginantit	/988		
	-	dank from	Allow Taxes	-	Hule Adversariation	Organist	100g		
	autor.	have been serviced	Interior	- 11	Hall Adventidate	Settin Cent	1536	04/01/000	
	11.958	The strength of the second strength	Interface	- 51	Hall Advantation	Conserved	10,003	14/16/07	
14	CORNEL	(and) and the latter	(mini langing						
	10ets	(And Section Sector	instantorpes						
	allowed a	States, Scotters	NAME OF						
	Jacob	string how							
	ADD	Manager Age Taylor	himi .						
	attention of the local division of the local	Annual Province Series		*					
	[368]			[head]					
	X1-1-1-1-1								

- **3.** Select the client you're creating a new envelope for and click **Continue.**
- 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.



In the Period Action of	INTERNAL INTERN			
The Same Sec. Sec. Sec. Sec. Sec. Sec. Sec. Sec	The See See See See See See See See See S		0	DIO NOTIFICATIONS
Ale See 2460 1988 1920 1920 (MATO 2000 1957 (MATO 2000)	The See New See See See See See See See See See S			- there has
Ale See 2400 1000 1000 1000 1000 1000 1000 1000	No. Sol Nor. Sol Lail Tennels Sol 24502			
Ale See See See See See See See See See S	No.500 No.500 Lai fermin for 2450			
Arrise Percival ad Annah Sat 2010 1026 1020 an Alfa 2020 1020 Percival 2020	No. Sol No. Sol Led Tenside Sol 24502			
Ar Sac	No.500 No.500 Leit Reseits Set 2010			
Ter See New Lead Research And 24103 10205 1005 10	No See Nor See Lad Research See 24202			
Jelia tua tua tua tua tua telia	2486 1086 1026 SHIL-200 1689 SHIL-200	Also Sea	Telebell	and Records Lord
tos Nos anticolo Nos evidence	NAR NCAS SHITLCOOD NERS PHILODAY	36968		
100a #450000 107a #450000	NOo will/2000 Mara will/2000	1005		
istra enticidar	itina exitation	100	000000	
		1620	84452507	

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.

being part and other halos						- 8
Tavrale.	-				(i) 1 44	and entertained
	14					
nelige Adams. I	Recipients	10				
er ig brenge	failure and provided to choose the descent	unts, harpants the last a vehicles with no baladar b	tipl, and will resolve a rate of the anaster	ere te analise o organis		
Carpe Inter	and the second second second	Gentland	fastering -	her .	Also 1	Lines.
and loter locales	Millanaffan Allania	ADAUET	Own	jalars@alars.com	lan.	1 100.00
trap (. Advanced
						and the second
nd and finish •						
	Auto Reminder Options					
	They are please if pix multiple to adverse	study and a variable to be spreek spara pady or a	right minima			
	The default settings can be inclusioned as	the follow (Series and pre-scatching for all arrestigates to	in fermion security at the evening	a Teat Speet cantil		
	Anna Israel Income and					
	and the second second second	and the				
	Notice the property of a state of	a de la casa e casa i casa e a span.				
	1000					Printed and
	1.000					Carlant, Cons

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

Add	dusers		
Sear	ch users		٩
	Usemane	Name	^
7	admin	Hub Administrator	
	sem	Sementhe Ashdown	
	Jon	Jonathon Adams	
	lyta	Lyta Alexander	
1-1	100	Incode Decision Porch	×

- 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.
- 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.

Use this recent to previe or emend any re-			
	radionimip for this plant.		
Any relationships that are adjusted on the	somet will be seved in the diert record		
Noisteal To	Bate of Commencement	Date of Constitute	Defail Circles
In the sprane of			
Sult	63/06/2008		-

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

fou can choose if you	would like to automatically	send a reminder	to the current eigning party on a regular occurrence.
The default softings o	on be customiced in the Ad	min Centre and p	ore populated for all envelopes. Auto Reminders cannot be set after an envel
Remarder Options:	Do nat send remarker		
			Marcoll 1

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 Manage Relationships which opens the Relationship Manager dialog where you can create or amend 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.





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.
- 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.

ingen Adame (A)	Signing Order	t and combers admit is the series	us and he index is what they we want	e he disaberti la sproj.		
genti .	Phere is north that one again, the	a musique will not be said in the ne	I spec will be province spine too had	and the speed		
-	Signers					
ry mouth hamples		(ment)		. (mail		(BAR)
nap formation	Mr. Innamore Adams		Instan Alams Billions			(Martin)
- AP	THE ARTIGUEUR					
	Watchers Frankrist words over 1 to					
		- Series		ber -		

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.

B termentiprinter faite	÷	
Taxcalc	And a second sec	
Commine adiga (a	Email Templates	
Sector Constant	The second	territor.
	B → Recented → Aprileties base	
	Sergins From:	
	Name of Names and Art of the	
	-	

- Select Apply Email Template in eSign Centre and from the dropdown list select the template you'd like to use.
- You can also amend the text to be included in the email being sent to the signers in the Email Content section.







9

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.

- 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.**
- 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 <u>KB3069 - Can I upload MS Word documents to</u> <u>an eSign envelope?</u>



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

Step 6 – Previewing the Documents

Step 7 – Check and Finish

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.

its the Mittig May his			- 2- (
taxcalc'			O THE IN ADDRESS
and the second s	fundasi bilan kadas		
Mr lonat	hon Adams, Year ending with S	April 2019	
an a forming and a forming and form and	non Adama, twe ending with a	<section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>	Here has been and an an and an an and an
			State No
1000			and and a second

Check and 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.

DTIFICATIONS	2
Hub Administrator 🔅 -	
Update available	Show details
eSign Document Status	tide details
An eSign document has changed status.	
Dismiss	View Document

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.

send.

Three of the second	A contract of the second se	Association Association
lantar tar	C sed faatge	_
	tempolest management (a management (a management))	
	Annie is beine and a second se	
	18	(see) (see

1. Select Check and 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

4. Click Send Envelope.

5. The envelope is then sent to the first recipient for signing.

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.

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

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

For more information on Document Manager, please visit our <u>website</u>.