INTUIT

Document Management System
An Intuit ProLine™ Solution

Getting Started Guide

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Step 1: Install DMS

NOTE FOR NEW USERS: You will be presented with a Setup Wizard that walks you through the steps on pages 2-4. If you choose not to follow the wizard, and want to perform the Setup manually later on, pages 2-4 will show you all the necessary steps.

1 In the Installation Wizard, follow the wizard prompts.

2 After starting DMS, click **Create a Database**.

**3** Choose a location for your database, and then click **OK**.

NOTE: You must install DMS to a local computer. If you would like to share data with others in your firm, choose a network location for your database.

TIP: You can set user rights for other users in your firm in DMS Options. On the **Tools** menu, click **Options**, and then click the **User Rights** tab.
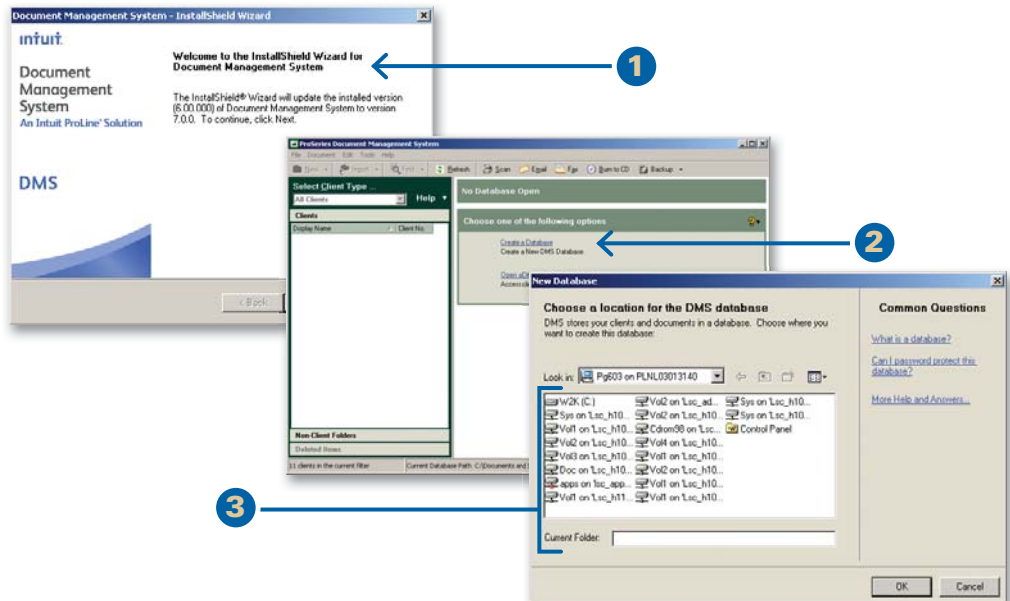
Step 2: Set Up a Folder Template

1 On the **Tools** menu, click **Options**.

2 Click the **Folder Templates** tab.

3 Choose whether to apply changes to all of your client folders or just new client folders.

4 Click a folder in the list and then use the **Add**, **Rename**, or **Delete** buttons to create folders for your template.

   NOTE: To expedite setting up folder templates for the new tax year, select the folders you want. Then, use the right-click menu to copy and paste them into the new tax year folder.

5 Click **OK** to save your changes.
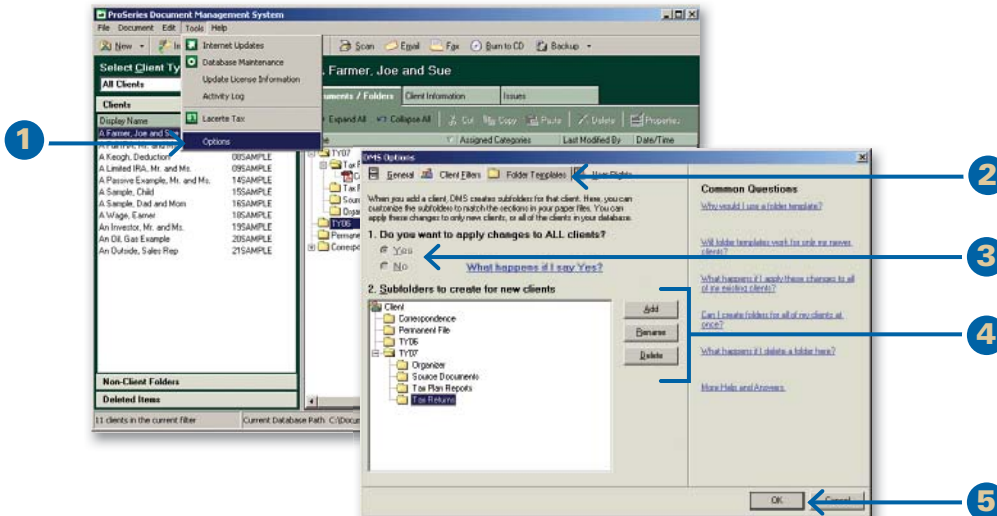
What is the folder template?

You can create a template that includes the folders you want DMS to create for client folders.

Can I add other folders to the template later?

You can change your folder template at any time and apply changes to new or current client folders. To make changes to current client folders as well, select **Yes** to the question **Do you want to apply changes to All clients?**

Can I add sub-folders to just one folder at a time?

Yes. Right-click the folder in the Documents/Folders list and click **New Subfolder**.

Step 3: Import Clients from ProSeries

1 Click **Import** on the toolbar, and then click **Clients**.

2 Select which ProSeries tax clients to import, and click **Next**.

3 Select the clients you want to import.

4 Click **Finish**.

TIP: To add a new client folder, on the **File** menu, point to **New**, and then click **Client**.
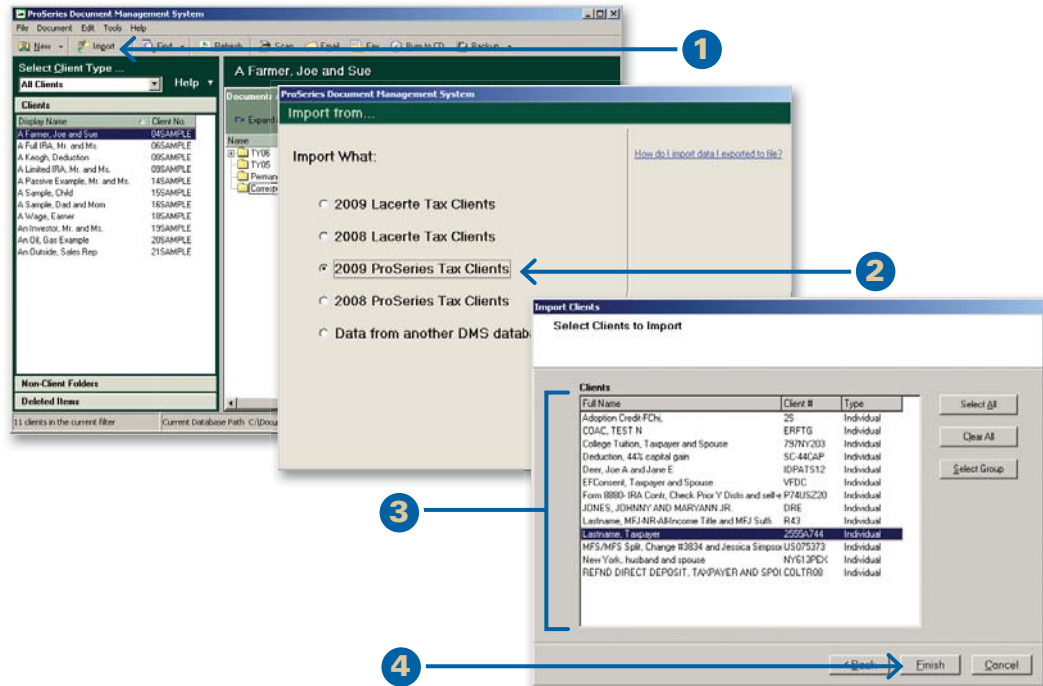
Step 4: Getting Files into DMS - Print a Tax Return

1 In the ProSeries Tax program, select the client(s) in the Client list.

2 On the **File** menu, click **Send to DMS**.

3 Select **Export selected clients to DMS**.

4 Select the **Send PDF of tax return** check box, and click **OK**.

5 Select the **DMS** check box. To change the DMS folder or other settings, click the **Printer, PDF, and DMS Setup** button.

6 Select the check boxes next to the copy types you want to send to DMS.

7 Click **Print**.

TIP: To set the default DMS folder, use the ProSeries Print Options feature on the File menu. Click the **Printer, PDF, and DMS Setup** option to specify the folder.

Can I print a group of returns to DMS?

You can select multiple clients in the Client list before printing to DMS, just like you would print a group of tax returns to the printer.

Where does DMS save the return?

DMS saves the tax return in the related client folder, in the TY09/ Tax Returns folders.
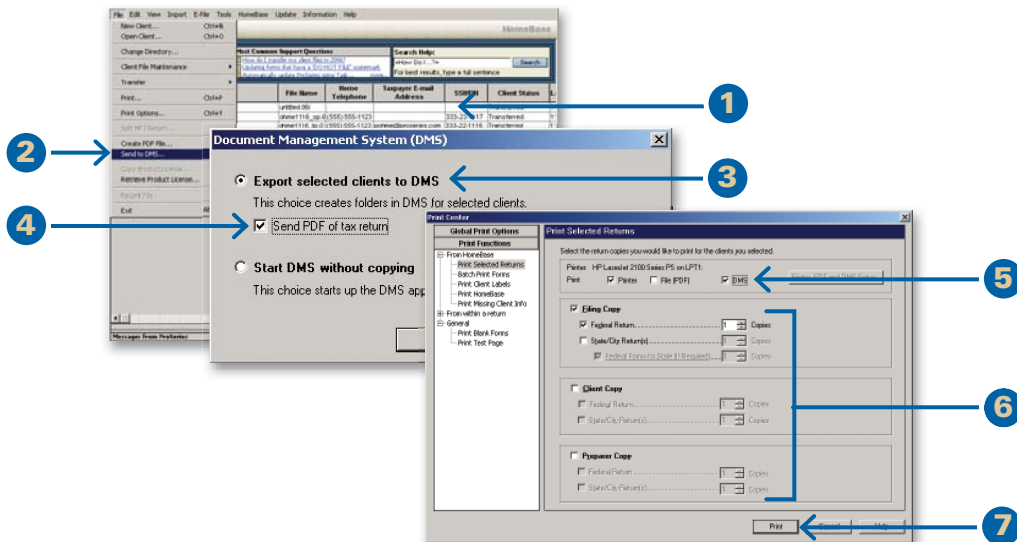
Scanner Tips

Confused by what scanner to buy? We recommend:

- **TWAIN**, **WIA** compliant scanners like a **Fujitsu** scanner
- Auto Document Feeders (ADF) to scan multiple documents at once
- Fast scanning speed to scan quickly

See the ProSeries Web site under DMS for more information.

Why can't DMS find my scanner?

Verify:

- The scanner is TWAIN or WIA compliant.
- The scanner is plugged in and turned on.
- All scanner drivers are installed.

Scanning Tips

- Higher resolutions (DPI) have larger file sizes. You can lower resolution for scanning in the **Scanner Properties** section.
- We recommend using 150 DPI to scan documents.

1 Click **Scan** on the toolbar.

2 Verify the **Scanner** and any scanner settings. Then, click **Scan**.

3 Select the pages you want to save.

4 Type a name for the document in the **File Name** box.

5 Verify where you want to save the document in the **Location** box, or click □ to browse.

6 If you would like, add categories to the document in **Categories** or change the **PDF Quality**.

7 Click **Save**.
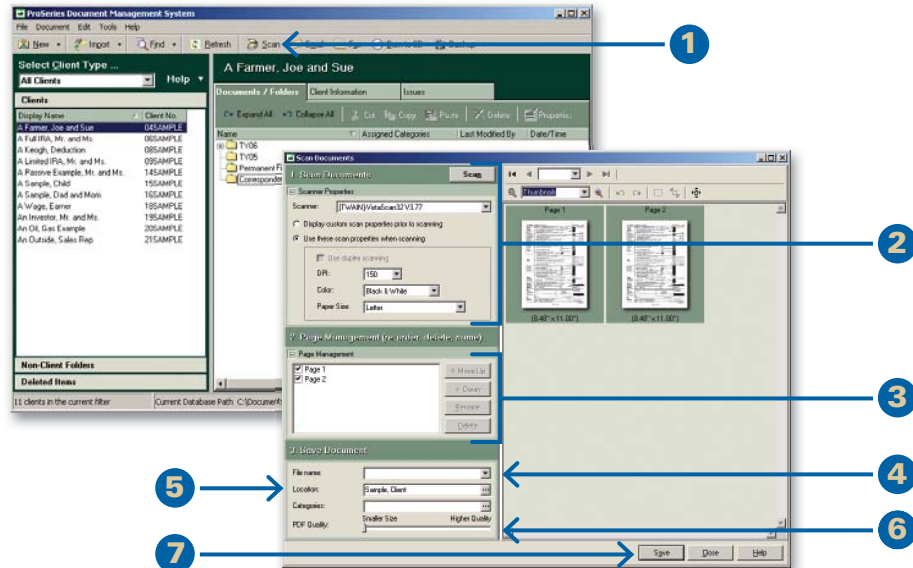
Step 4: Getting Files into DMS - Import Files

1 Choose the client folder or non-client folder and a subfolder where you want to add the document.

2 Click **Import** on the toolbar, and then click **Documents**.

3 Browse to and select the document you want to import.

4 Click **Open**.

TIP: You can also import complete folders into DMS. Just drag the folder from your Desktop and drop it into DMS.
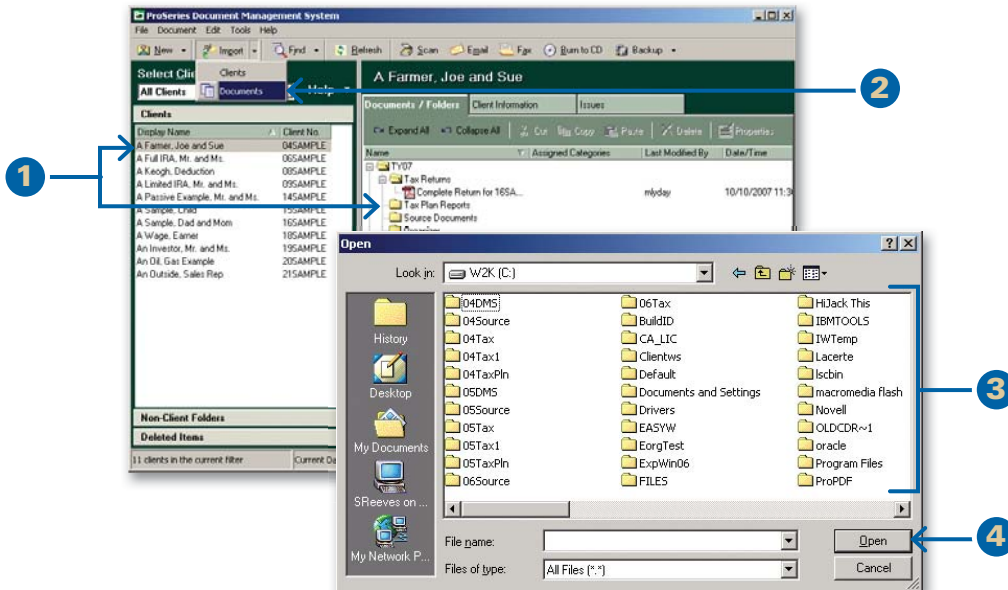
Why would I print to DMS?

Print to DMS from an external program to create an archive copy of a document. This archived copy is saved as a PDF file, and reflects just how the document was at the particular time it was printed.

What programs can I use to print to DMS?

You can print to DMS from most Windows programs, including Microsoft Office products.

What is the Save to DMS toolbar?

You can use the **Save to DMS** toolbar in Microsoft Office applications and save any documents in the Microsoft Office applications directly into DMS with one click.

1 Open the document in the related program and click **Print** on the appropriate menu.

2 In the **Printer** list, click **DMS PDF Printer,** and then click **OK**.

3 Select the client or non-client folder where you want to save the document.

4 Select the subfolder where you want to save the document.

5 Type a name for the file.

6 Click **OK**.
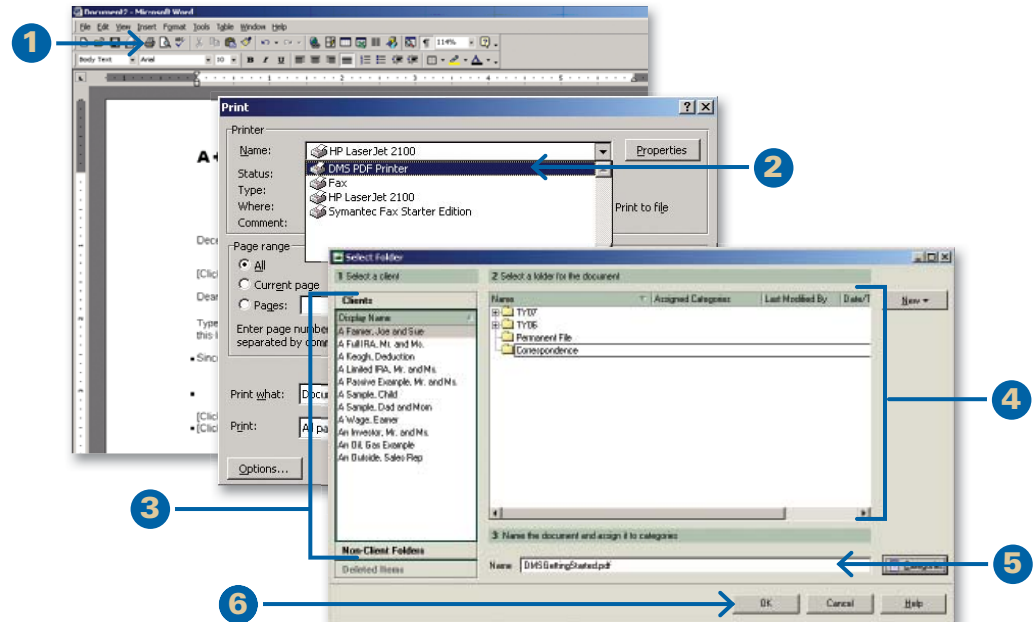
Step 5: Annotate PDF Documents in DMS

1 Double-click the PDF document in the Documents/Folders list.

2 Choose an annotation from the toolbar.

3 Click and drag or click on the document where you want to add the annotation.

TIP: You can add, remove, and rotate pages in a PDF file. Find the page in the Pages list, and right-click.
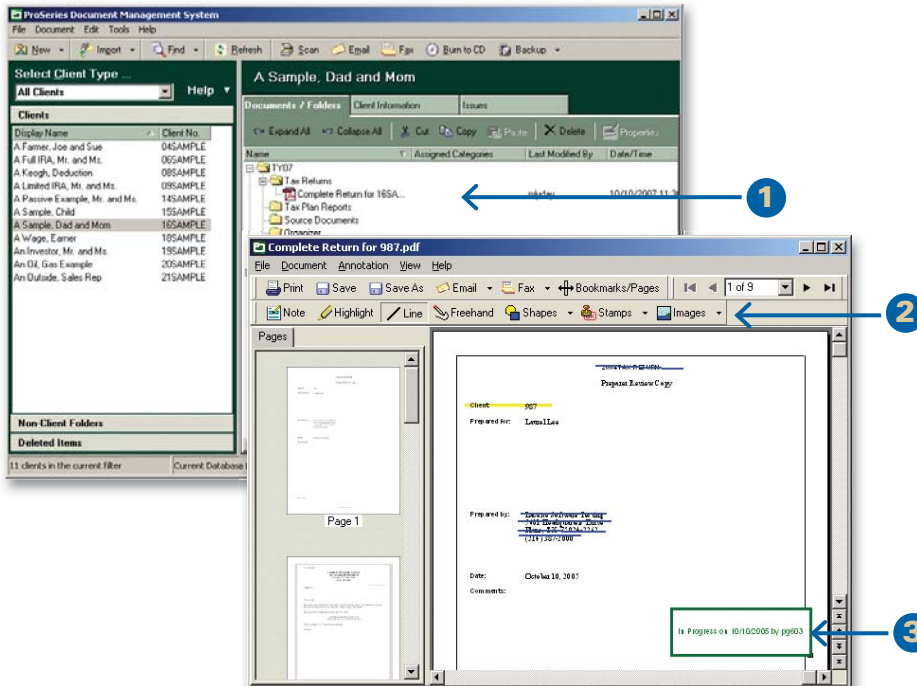
What documents can I annotate?

You can annotate any PDF documents that are stored in DMS.

What annotations can I use?

You can add:

- Notes
- Highlighting
- Lines
- Image Stamps
- Shapes
- Stamps (with Dates & User Names)

What about when I e-mail or fax a document?

You can choose to include annotations when you email or fax a document.

To include annotations with an attachment, select the check box in the Annotations column in the Attachments list.

To attach specific pages instead of the whole document, click the All Pages link next to the document in the Attachments list.

Step 6: Sending Files Out of DMS - E-Mail

1 Select the file you want to email from the Documents/Folders list, and then click **Email** on the toolbar.

2 Add additional documents to the message and confirm the email address.
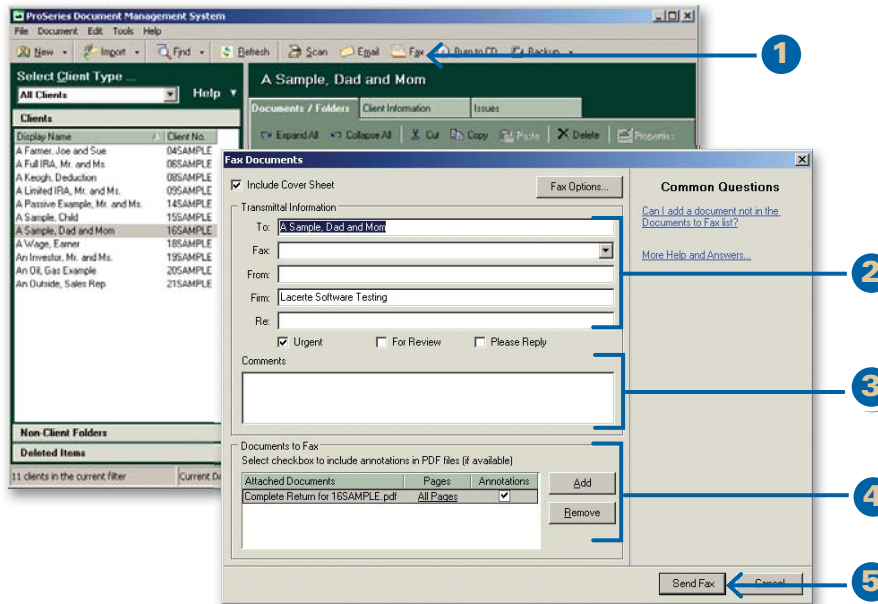
3 Click **Create Email**.

   TIPS: If there are multiple email addresses for this client, click the arrow next to E-Mail Address to select from a list of available email addresses.

   You can password protect the PDF file you send by selecting the **Password Protect...** check box.
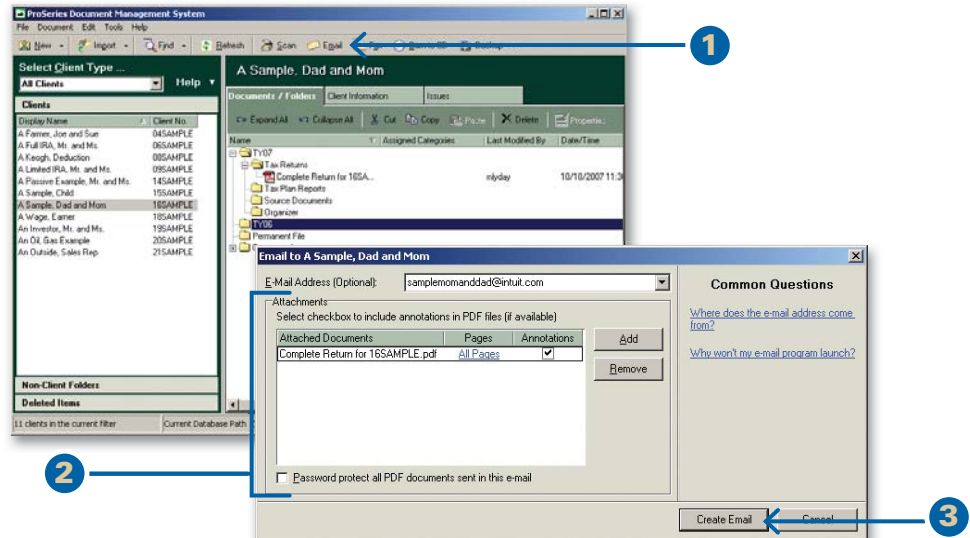
Step 6: Sending Files Out of DMS - Fax

1 Select the file you want to fax from the Documents/Folders list, and then click **Fax** on the toolbar.

2 Verify the fax number and the To and From information.

3 Add any comments to the message.

4 Verify or add documents to the message.

5 Click **Send Fax**.