# 2006 ProSeries DMS®
# Getting Started Guide

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# Step 1: Install DMS



**1** In the Installation Wizard, follow the wizard prompts.

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

**3** Choose a location for your database.

**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.

## What is the folder template?

You can create a template that includes the folders you want DMS to create for client folders.
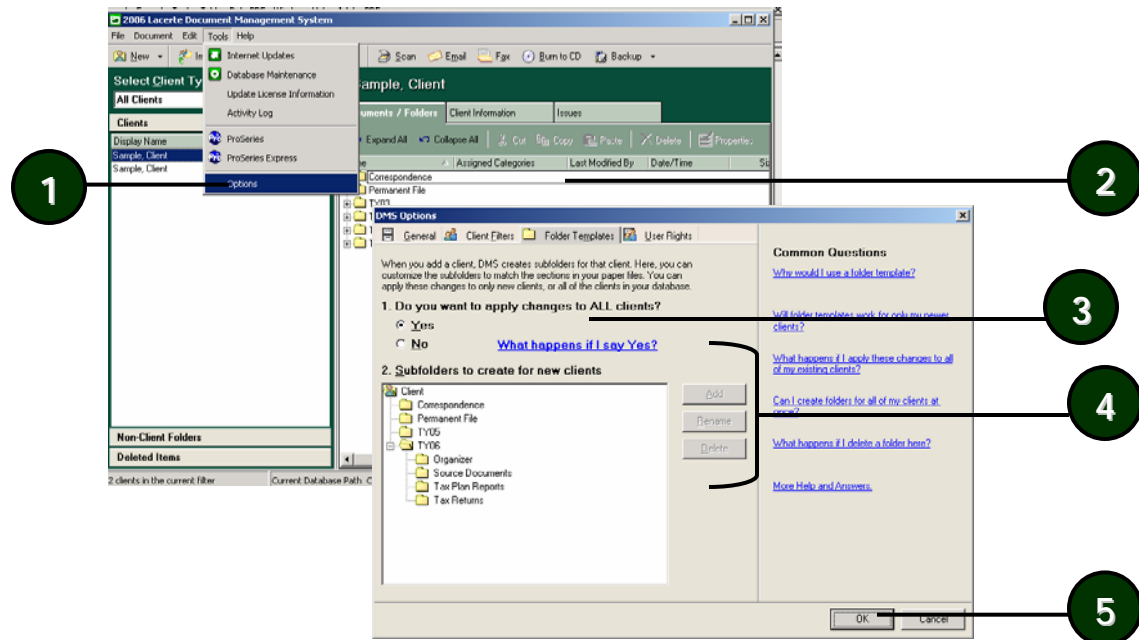
## Can I add other folders to the template later?

You can change your folder template at any time and apply changes to new or current client folders. To make changes for current client folders too, answer **Yes** to the question **Do you want to apply changes to All clients?**
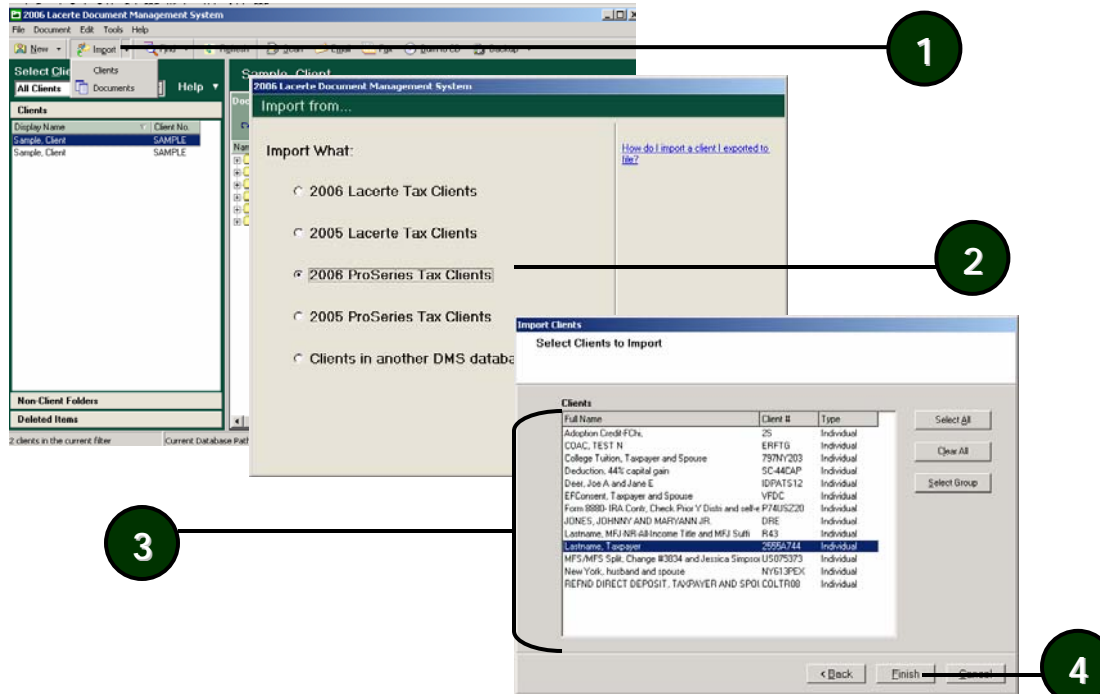
## Can I add sub-folders to just one folder at a time?

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

# Step 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**, and **Delete** buttons to create folders for your template.

**5** Click **OK** to save your changes.

# 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**.

## What transfers when I import a client?

DMS transfers client information and creates a new client folder in DMS. DMS does not import the tax return or any other documents.

## What other clients can I transfer to DMS?

You can also export from the Lacerte Tax program and Lacerte Tax Planner and import client folders from a different DMS database. (See Step 2.)

## Why can't I find my clients?

DMS uses Tax IDs to match transferred clients. If clients have the same SSN, DMS saves them in the same client folder (i.e., MFS/MFJ).

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 TY06/Tax Returns folders.

**TIP:**
Use ProSeries Options to set the default DMS folder. In step 6, click the **Settings** button.

# 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**.

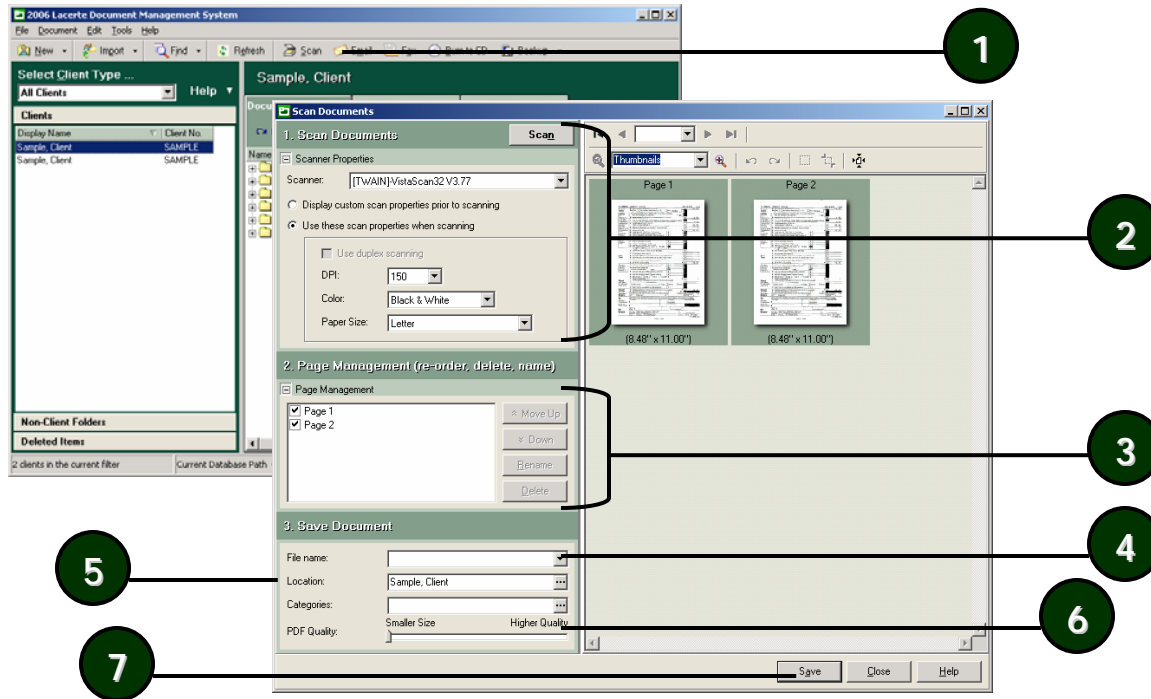**4** Select the **Send PDF of tax return** check box, and click **OK**.

**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**.

# Step 4: Getting Files into DMS: Scan a Document



1 Click **Scan** on the toolbar.

2 Verify the **Scanner**, any scanner settings, and 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**.

Are there other
ways to add
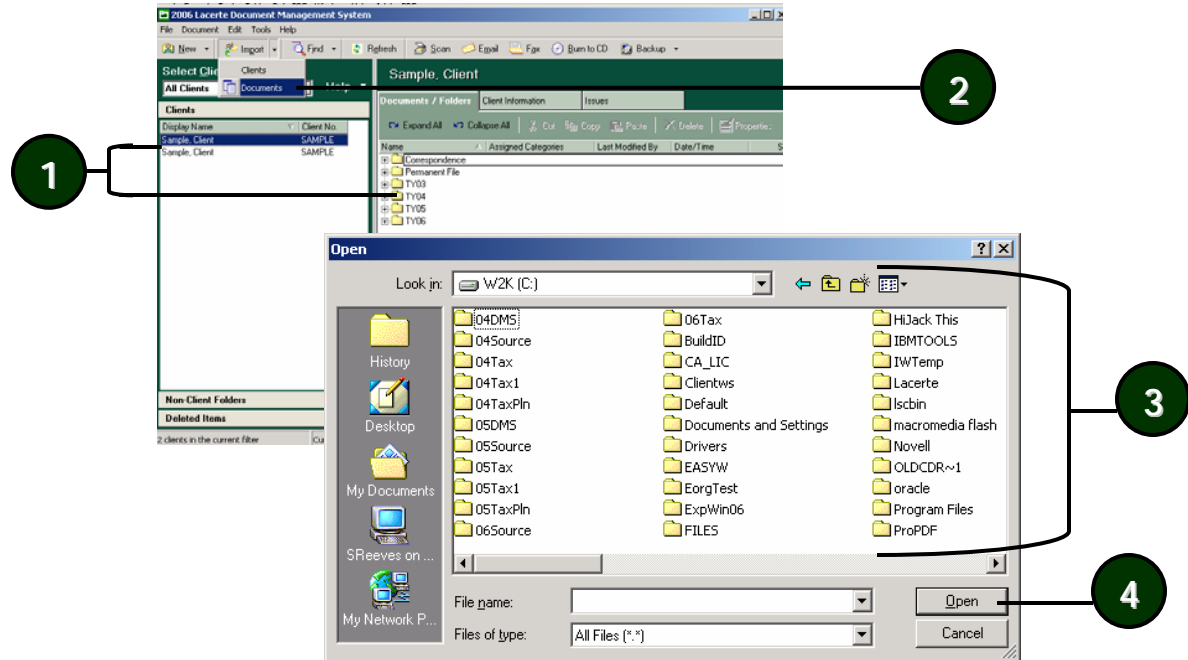documents to
DMS?

You can also add
documents to DMS by:
- Dragging and
  dropping a
  document or
  folder into a DMS
  folder.
- From Microsoft
  Windows Explorer,
  right-click a doc-
  ument, point to
  **Send To**, and then
  click **DMS**.

**TIP:**
You can also
import complete
folders into DMS.
Just drag the
folder from your
Desktop and drop
it into DMS.

# Step 4: Getting Files into DMS: Import Files



**1** Choose the client or non-client folder and 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**.

# Step 4: Getting Files into DMS: Print Files
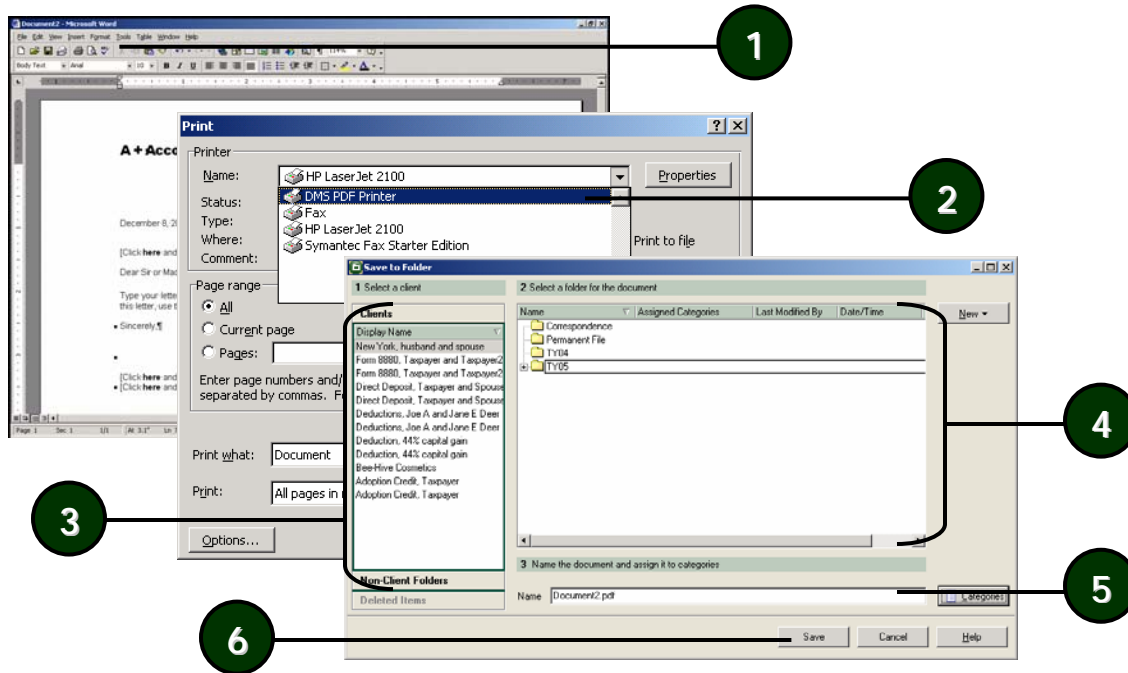


1 Open the document in the related program and click **Print** on the appropriate menu.

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 **Save**.

## 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.
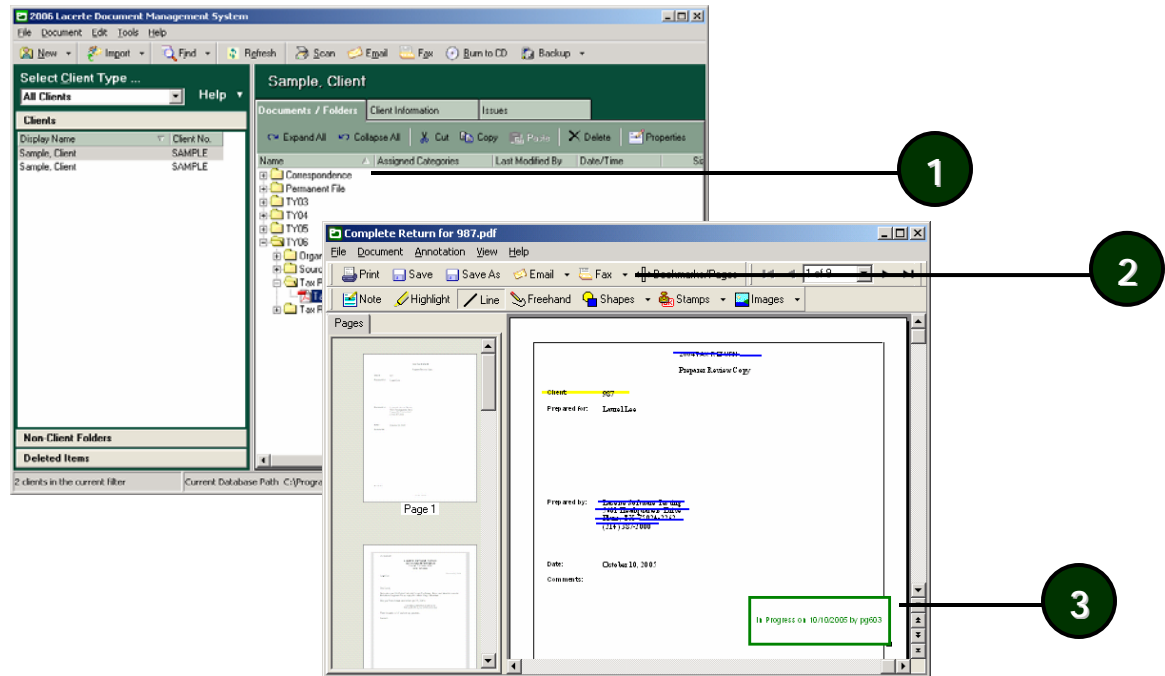- Lines.
- Date Stamps.
- Image Stamps.
- Shapes.

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

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

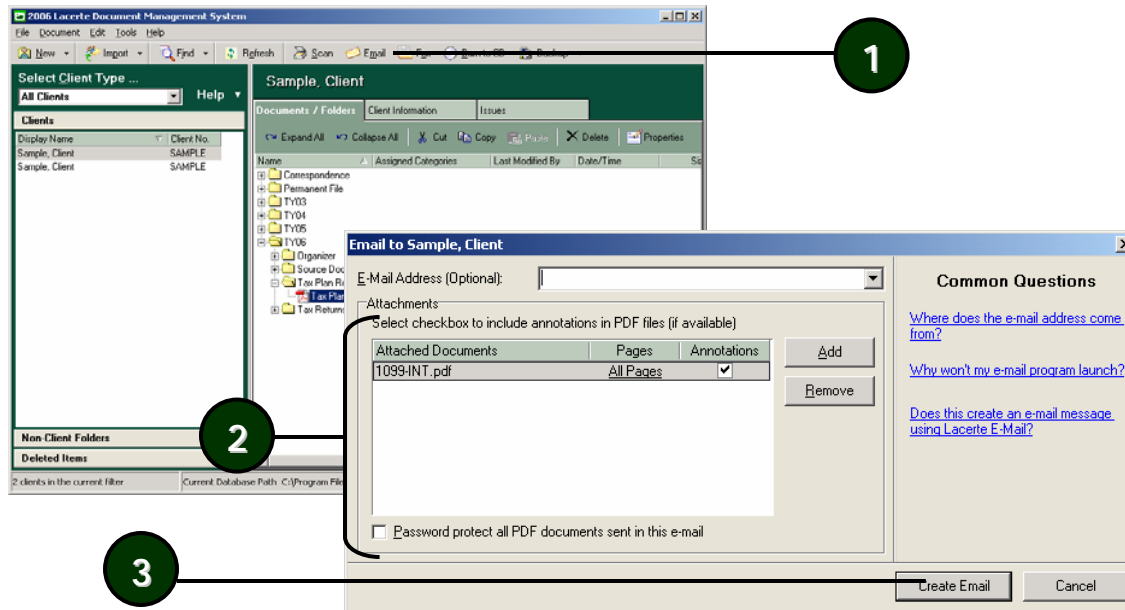# Step 5: Annotate PDF Documents in DMS



**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.

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

**1** Click **Email** on the toolbar.

**2** Add documents to the message.

**3** Click **Create Email**.

**TIPS:**
You can choose the client's address once the e-mail message is created.

You can password protect the PDF file you send by selecting the **Password Protect** check box.

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To fax documents using DMS, you will need:

- A fax modem connected to your computer,
- and a phone line.

**NOTE:**
To include annotations with attachments, select the check boxes in the **Annotations** column in the **Attachments** list.

# Step 6: Sending Files Out of DMS: Fax



**1** 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**.