



Getting Started with Email Login Setup



Getting Started with Email Login Setup

Contents

| | |
|---|----|
| Getting Started with Email Login Setup | 1 |
| Logging into TaxCalc | 2 |
| Admin Centre > Users | 5 |
| Notifications | 6 |
| Setting up Email Login for a User | 7 |
| Resending an Email Login Setup Invitation | 8 |
| Account Activation as an Invited User | 9 |
| Inviting New TaxCalc Users | 10 |



Getting Started with Email Login Setup

TaxCalc's Email Login Setup allows you to use a unique email address to login and access TaxCalc, making your login credentials more secure.

Starting from the Summer 2025 release, we'll begin a gradual rollout of these changes. Over time, users will be invited to use Email Login Setup. We'll provide more information as we go, and you can always check the [Email Login Setup - Collateral](#) Knowledge Base for the latest updates on the rollout plan.

Until then, please continue logging in as usual.

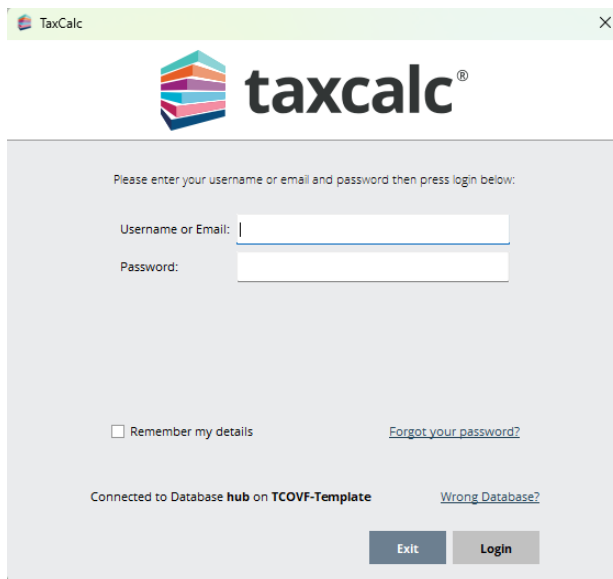
This guide will show you how to:

- Login to TaxCalc with your unique email address as an Admin user.
- Invite other users to complete the Email Login Setup.
- Login to TaxCalc for the first time with your new credentials.



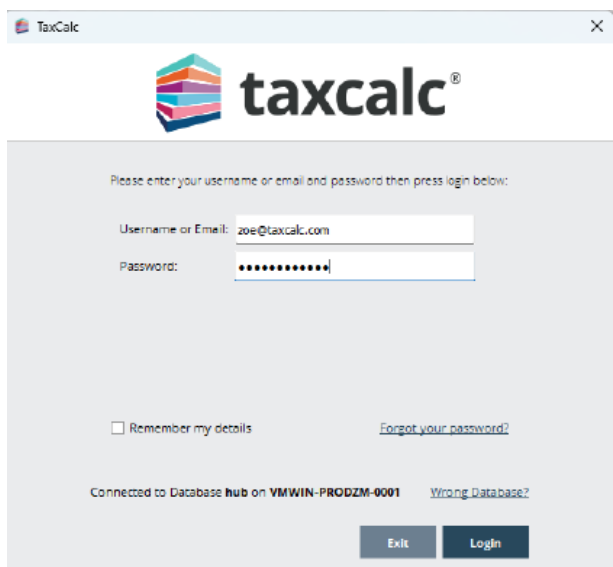
Logging into TaxCalc

As a TaxCalc customer if you have been invited to use Email Login Setup, when you first login to TaxCalc a dialog is displayed asking you to enter your Username or Email.



The screenshot shows a window titled "TaxCalc" with a close button (X). Inside the window is the TaxCalc logo, which consists of a colorful 3D cube icon followed by the text "taxcalc®". Below the logo, there is a message: "Please enter your username or email and password then press login below:". There are two input fields: "Username or Email:" and "Password:". Below the "Username or Email:" field, there is a checkbox labeled "Remember my details" and a link labeled "Forgot your password?". Below the "Password:" field, there is a link labeled "Wrong Database?". At the bottom of the dialog, there is a status bar that says "Connected to Database hub on TCOVF-Template" and a link labeled "Wrong Database?". There are two buttons at the bottom: "Exit" and "Login".

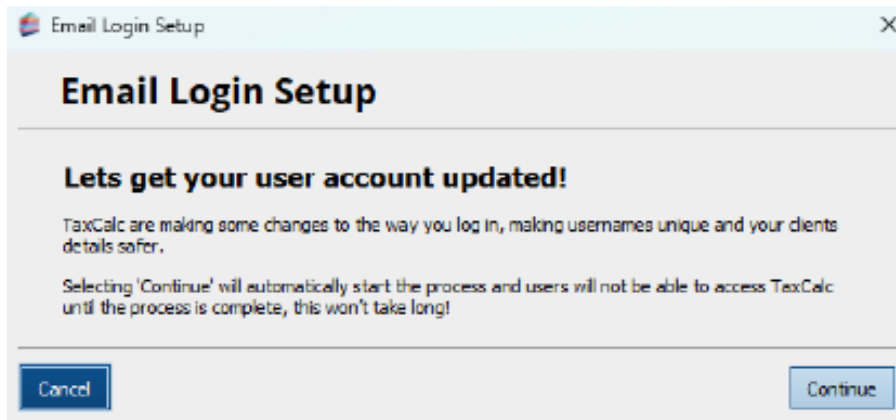
1. Enter your **Email** address (this is the account which you use to login to the TaxCalc website).
2. Then enter your **Password** and click **Login** to start the Email Login Setup process.



This screenshot shows the same TaxCalc login dialog box as the previous one, but with the input fields filled. The "Username or Email:" field contains the text "zoe@taxcalc.com". The "Password:" field contains a series of dots, indicating that the password is masked. The rest of the dialog, including the logo, message, checkboxes, links, status bar, and buttons, remains the same as in the previous screenshot.

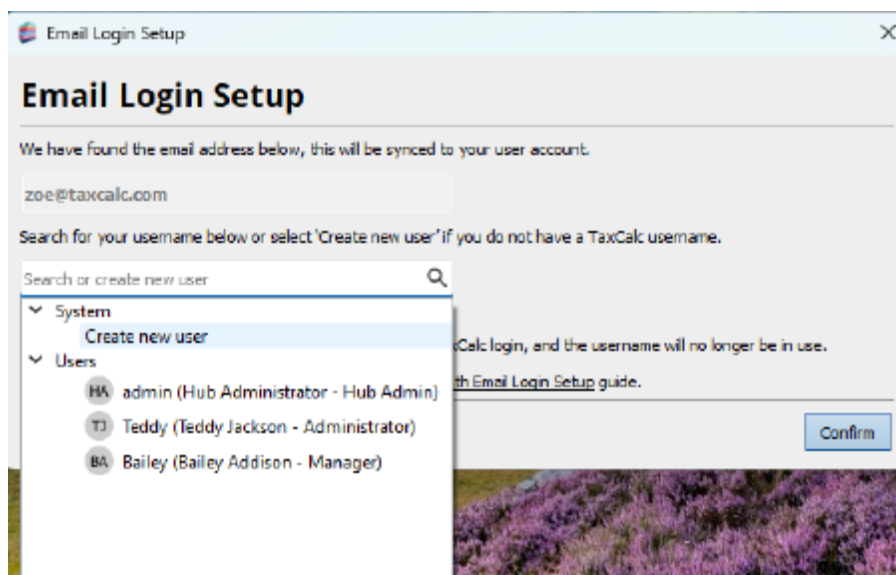


3. The **Email Login Setup** dialog is displayed. Click **Continue** to start setting up your user account.



The email address you have entered to login will be used to sync to a user account.

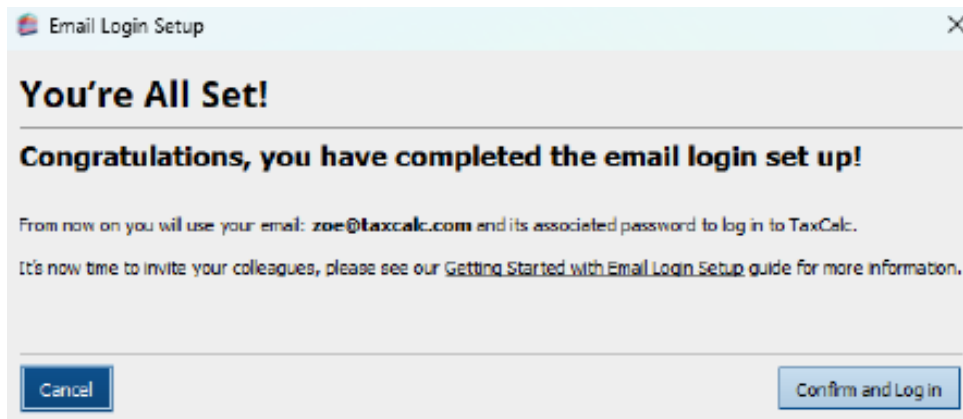
4. Either search for your username or select **Create new user** if you are not yet setup as a user in TaxCalc.
5. Once complete, click **Confirm**.



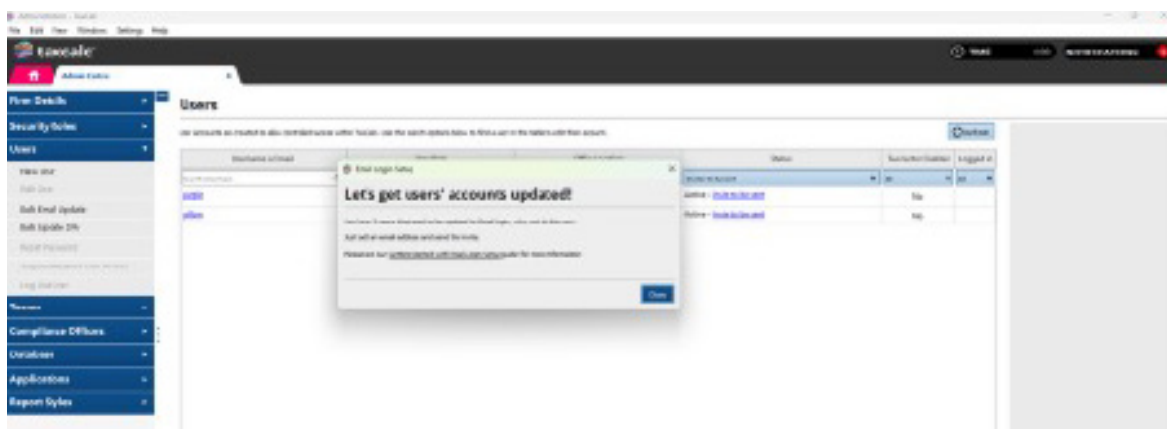
6. Now you're all set up, click **Confirm and Log in**.

Please note: You will not need to complete the above steps again; simply log in with your email address and password going forward.





You are automatically taken to **Admin Centre > Users**. The Email Login Setup dialog is displayed which informs you of the number of users that need to be updated to Email Login.



7. Click **Close**, you can choose to update the user immediately, or at a later stage.

From the Users screen you can also see whether each user is logging in with a username or an email address and whether they have been invited to set up their Email Login.

To ensure all users are logging into TaxCalc with unique credentials you will need to enter their email address to send them invitations so that they can set up their additional details.



Admin Centre > Users

Within **Admin Centre > Users**, only Admin users will be able to see whether each user is logging in with a username or an email address and whether they have been invited to set up their Email Login.

The Username or Email column shows whether the user is logging in with a username or an email address. For security purposes, all users should login with a unique email address.

The Status column shows whether a user has been sent an invite to setup their email login, if they have already been set up, or if the request is pending.

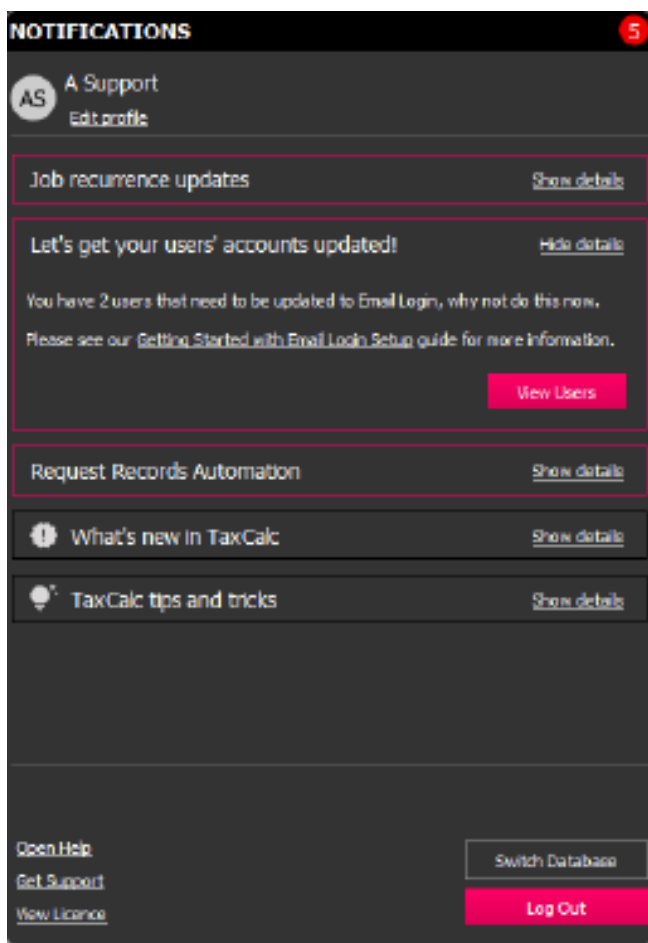
Status:

- **Active** – an existing TaxCalc user has already been set up to use Email Login
- **Active – Invite to be sent** – an existing TaxCalc user is active and available to be sent an email to setup their Email Login
- **Active - (Invite Pending) Resend | Cancel** – an existing TaxCalc user's activation email is pending, select to resend or cancel invitation
- **Active – (Invite Cancelled) Resend** – an existing TaxCalc user's invite to setup their Email Login has been cancelled, select to resend invitation
- **Invite Expired Resend** – a new TaxCalc user's activation email has expired, select to resend invitation
- **Suspended** – the TaxCalc user has been suspended, therefore no email login setup is required. The user must be restored to add an email.



Notifications

As an Admin user, TaxCalc Notifications allows you to see how many users still need to be setup for Email Login. For users that have the permissions, you can select **Show Details** which tells you how many users need to be updated. Click the option **View Users** which will take you to **Admin Centre > Users** which provides you with a filtered view of the users that need to be updated.



Setting up Email Login for a User

1. To invite a user to use the email login, click **Invite to be sent**:

| Username or Email | User Role | Office Location | Status | Two-Factor Enabled | Logged in |
|--|----------------------------------|----------------------------------|--|----------------------------------|----------------------------------|
| <input type="text" value="Search username"/> | <input type="text" value="All"/> | <input type="text" value="All"/> | <input type="text" value="Invite to be sent"/> | <input type="text" value="All"/> | <input type="text" value="All"/> |
| jordan | Administrator | Main Office | Active invite to be sent | No | |
| jordan | Administrator | Main Office | Active invite to be sent | No | |

2. This will then display the **Email Login Setup** dialog.

Email Login Setup

Email Login Setup

You've chosen to set up Email Login for **marcus**.
Please enter the user's email address below.

When you click 'Send invitation', they'll receive an email with a link to activate their account. From there, they can set up their login and create a password. Please note that the link will expire after 7 days.

CancelSend invitation


3. Enter the user's unique email address that they will use when logging into TaxCalc and select **Send invitation**.

If the email address is already in use the following warning is displayed:

Email Login Setup

Email Login Setup

You've chosen to set up Email Login for **marcus**.
Please enter the user's email address below.

 This email address is already registered for a TaxCalc account. Only unique, unregistered email addresses can be sent an invitation.

When you click 'Send invitation', they'll receive an email with a link to activate their account. From there, they can set up their login and create a password. Please note that the link will expire after 7 days.

CancelSend invitation

Once the email invitation has been sent, the user status is changed to **Active (invite Pending)** [Resend](#) | [Cancel](#).

The invited user will receive an email asking them to activate their account.

The activation link within the invitation will be valid for 7 days, after which the link will expire.

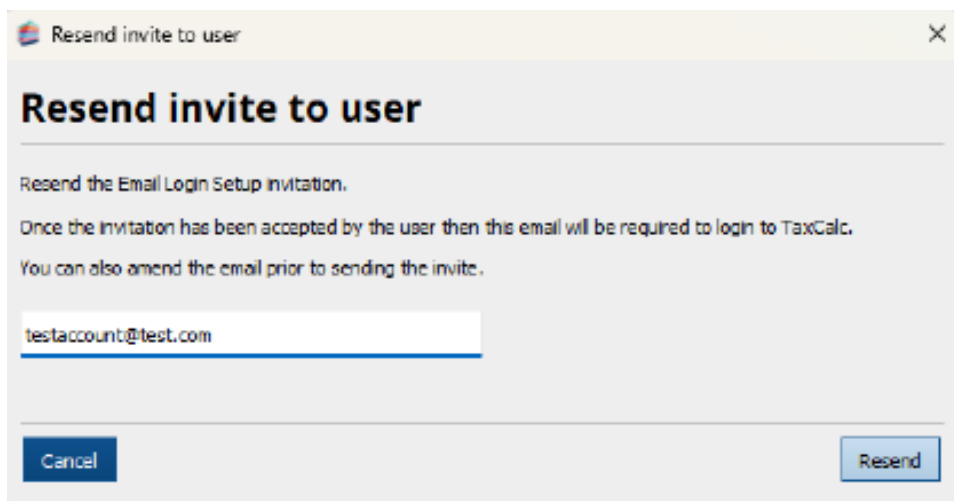
A new activation link can be sent at any time, whereby the previous link will be automatically cancelled/expired.



Resending an Email Login Setup Invitation

1. If you need to resend the Email Login Setup invitation, from **Admin Centre > Users** click **Resend**.
2. Enter the users unique **email address**.

Please note: You can use a different email address to the original email address if required. However, only one email address per user can be used per account.



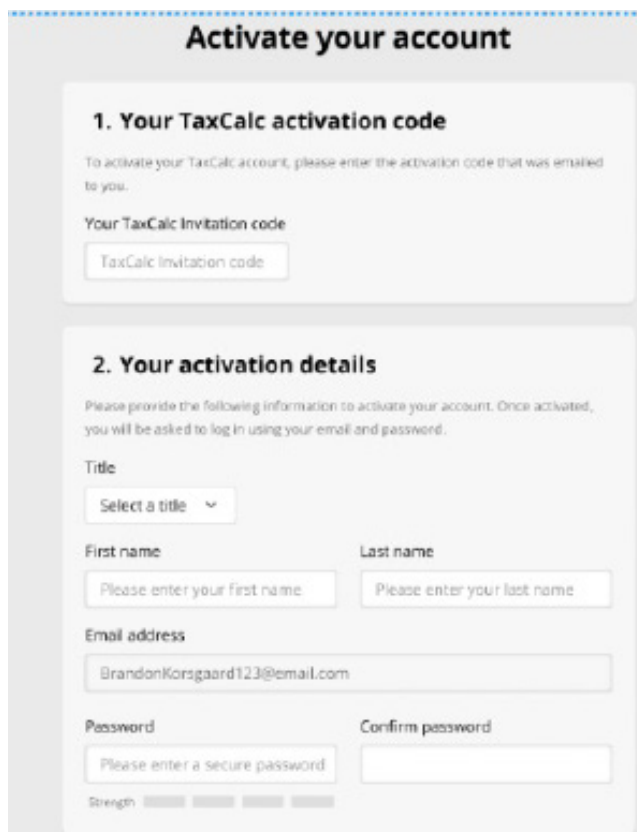
The screenshot shows a dialog box titled "Resend invite to user" with a close button (X) in the top right corner. The main heading inside the dialog is "Resend invite to user". Below the heading, there is instructional text: "Resend the Email Login Setup invitation.", "Once the invitation has been accepted by the user then this email will be required to login to TaxCalc.", and "You can also amend the email prior to sending the invite.". A text input field contains the email address "testaccount@test.com". At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Resend" on the right.



Account Activation as an Invited User

All invited users will receive an email asking them to activate their account.

1. Click on the link within the email to open the TaxCalc website.



The screenshot shows a web form titled "Activate your account" with a blue dashed border. It is divided into two main sections:

- 1. Your TaxCalc activation code**
Text: "To activate your TaxCalc account, please enter the activation code that was emailed to you."
Label: "Your TaxCalc Invitation code"
Input field: "TaxCalc invitation code"
- 2. Your activation details**
Text: "Please provide the following information to activate your account. Once activated, you will be asked to log in using your email and password."
Fields:
 - Title: "Select a title" (dropdown menu)
 - First name: "Please enter your first name" (text box)
 - Last name: "Please enter your last name" (text box)
 - Email address: "BrandonKorsgaard123@email.com" (text box)
 - Password: "Please enter a secure password" (text box)
 - Confirm password: (empty text box)
 - Strength: Four colored bars (red, orange, yellow, green) indicating password strength.

2. Enter the **TaxCalc Invitation Code**, which will be in the invitation email, and the activation details.
3. Once this information is complete the account will be activated.
4. Then when the user next logs in to TaxCalc they will be asked to login using their email and password.

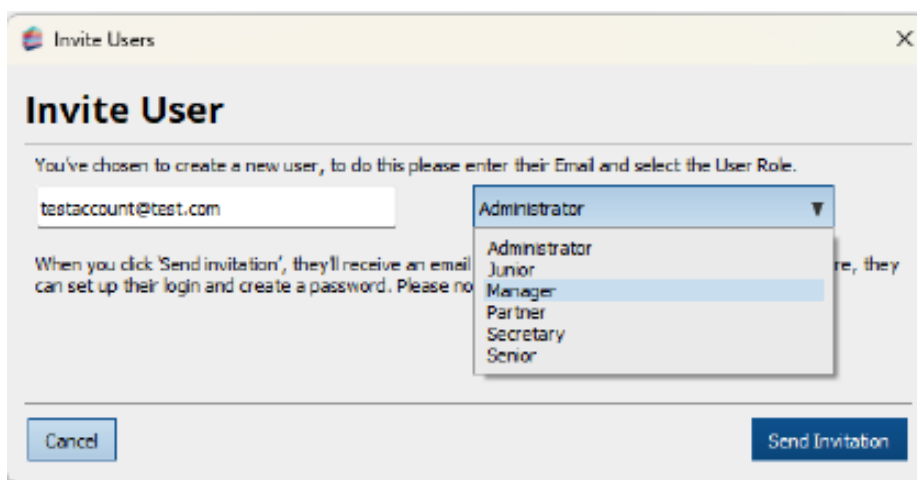
Please note: For information on resetting a user's password, please see [KB3423 - Resetting your Password for Email Login Setup Users](#).



Inviting New TaxCalc Users

Users with administrative permissions to create and manage other users can select New User to send an invitation for setting up email login credentials.

1. Within **Admin Centre** click **New User** from the left-hand menu to display the **Invite User** dialog:



Invite User

You've chosen to create a new user, to do this please enter their Email and select the User Role.

testaccount@test.com

When you click 'Send invitation', they'll receive an email can set up their login and create a password. Please no... re, they

Administrator
Junior
Manager
Partner
Secretary
Senior

Cancel Send Invitation

2. Enter the users **Email** that they will use to login to TaxCalc and select their **User Role** from the dropdown list.

The invited user will receive an email asking them to activate their account. Please refer to the above section **Account Activation as an Invited User**.



