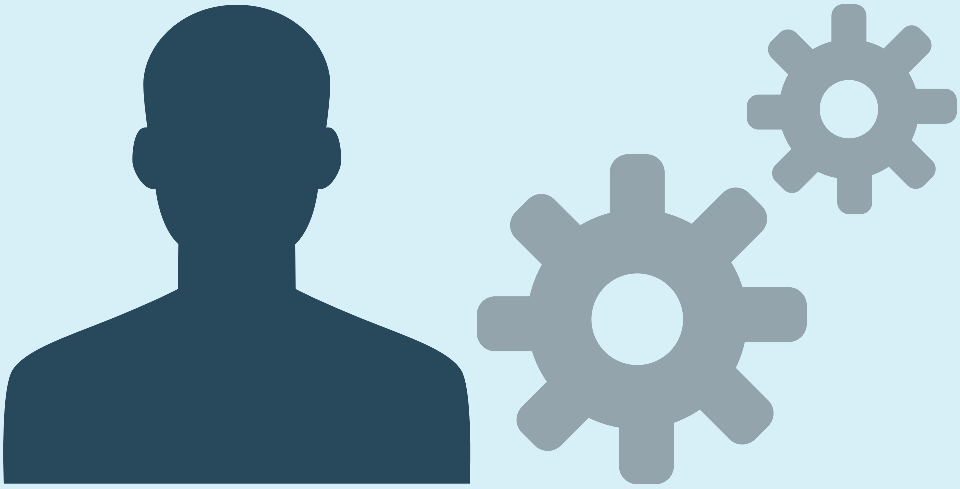


THE SimpleStep® GUIDE TO

CUSTOMISING YOUR CLIENT HUB AREA

taxcalc®

The main Client Hub area is very flexible, allowing you to choose the information you see at a glance. Rather than displaying a simple client list, with client codes and names you can display items such as the tax return status, UTR's and/or details of when the latest return was saved.

As part of our ongoing improvement programme, we have introduced new customisation features to tailor the Client Hub screen to your liking and put the information you need at your fingertips.

This guide will show you how to:

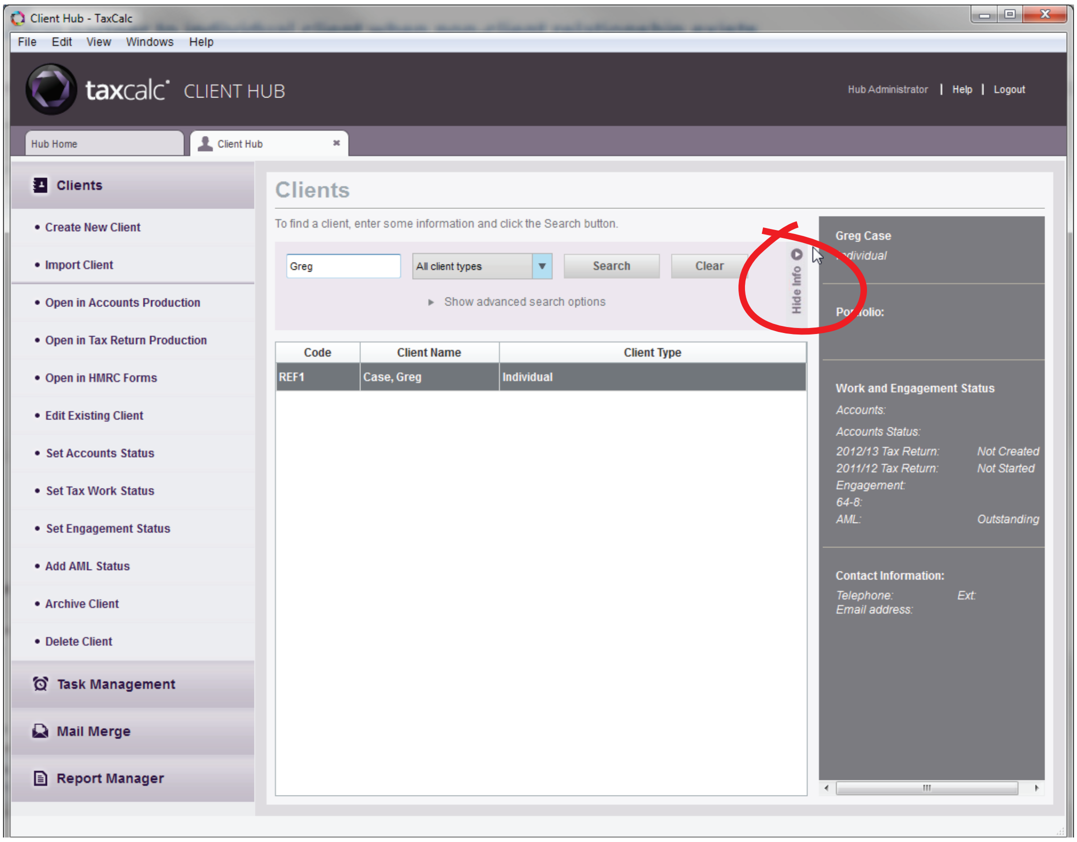
- Hide the right-hand information panel, to give you more room for your client list.
- Add or remove columns in the table, to give you the displayed information that you prefer.
- Resize the columns and change their order to suit your tastes.
- Display tax status dashboard to see the practices current workload, great to use towards the end of January!

STEP 1

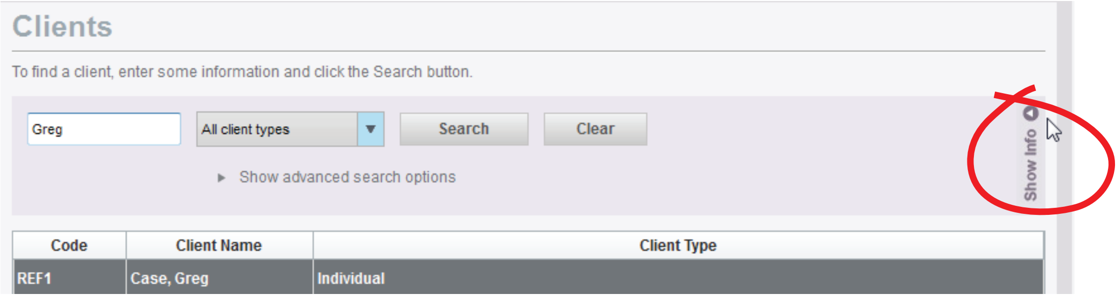
Hiding the Information Panel

First, access the Client Hub.

In the top-right there is now a Hide Info option. Clicking Hide Info will remove the entire right-hand information panel. This gives the central table more column space.



You can bring the right-hand information panel back again at any point by clicking on Show Info in the top-right of this screen.



STEP 2 Adding and Removing Columns

The default Client Hub list displays the Client Code, Client Name and Client Type columns. However, you may also add the following columns:

- **Client UTR**
- **Postcode**

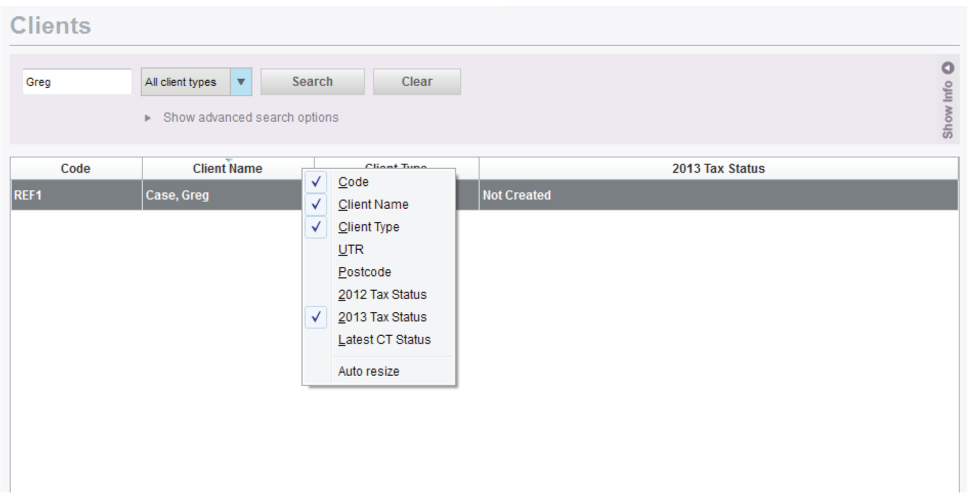
  The postcode of the main client address
- **2013/2012 Tax Status**

  The current status of the 2013/2012 tax return. This could be 'Not Created' or 'In progress' or 'Filed Online' but allows you to easily see the tax status of your Self Assessment clients.
- **Latest CT Status**

  This will show you the tax return status of the latest corporation tax return for any company clients. It will also show you the period end date so you can determine the latest return for a client.
- **2012/2013/CT600 Last saved date**

  This will show the date and time the tax return was last saved.

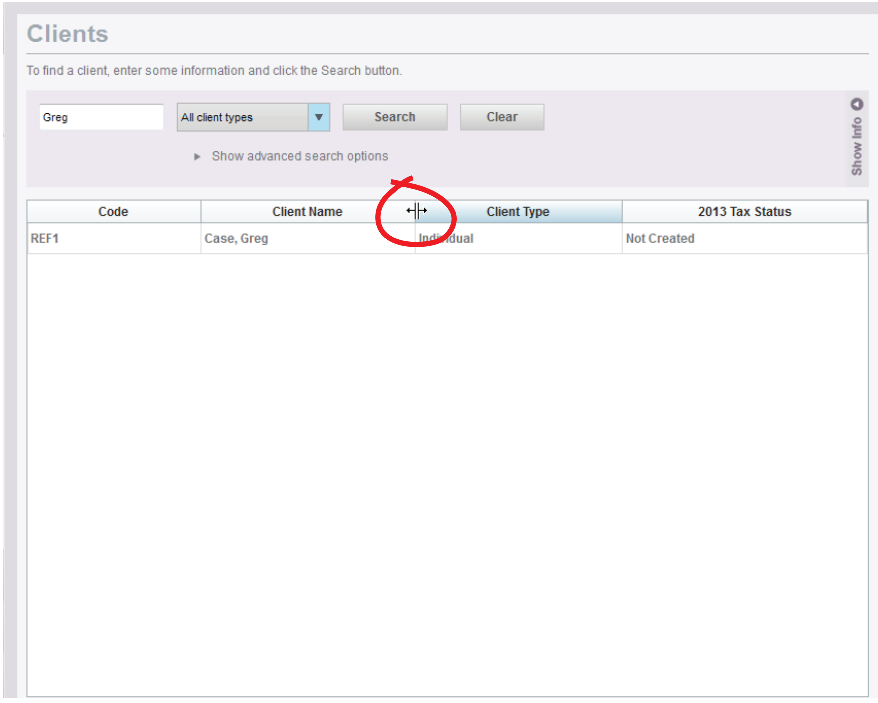
You can easily show or hide these columns (and the default columns) by right-clicking on any of the column headings and then clicking on the relevant column name. Alternatively you select and order the columns by selecting View from the top menu bar followed by Customise your Client List.



STEP 3

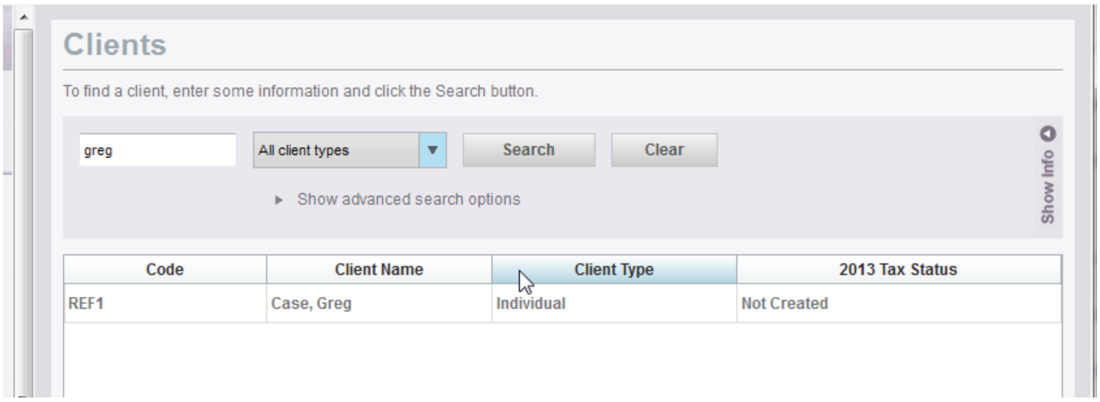
Moving and Resizing Columns

To resize a column just move your cursor over the column heading dividing lines and the icon will change from an arrow to a divider. Now click and drag to increase or decrease the column width.

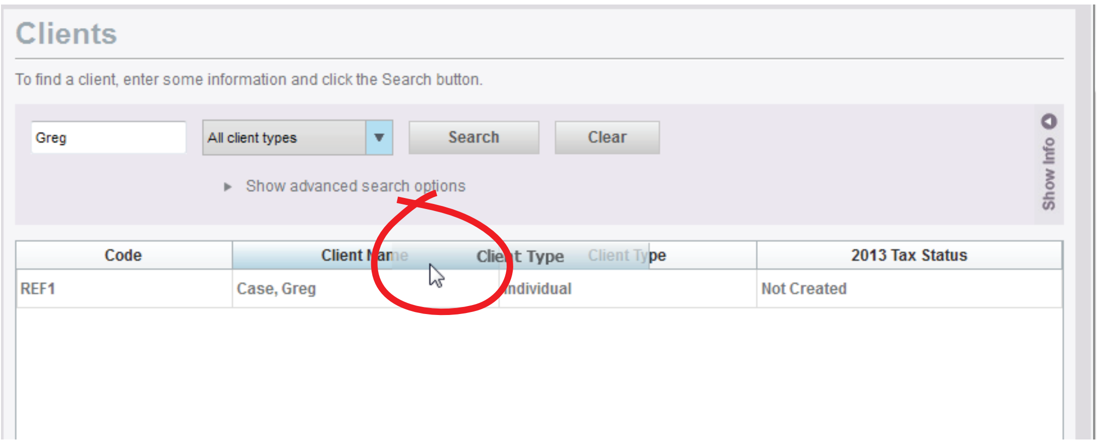


If you want to re-arrange the column order you can do so easily. Just left click and hold on any column heading – now drag and drop it to your preferred position in the column order.

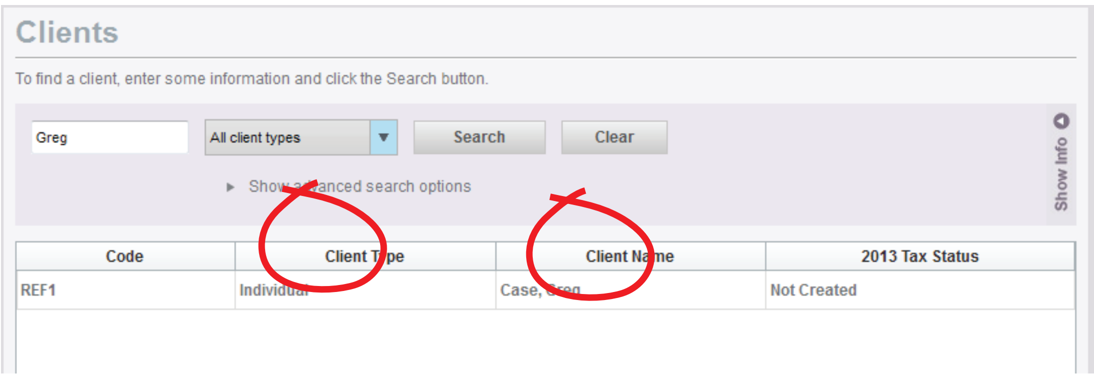
1 Click on the column header and hold the mouse button down



2 Drag the column to its new position



3 Release the mouse button to place the column again

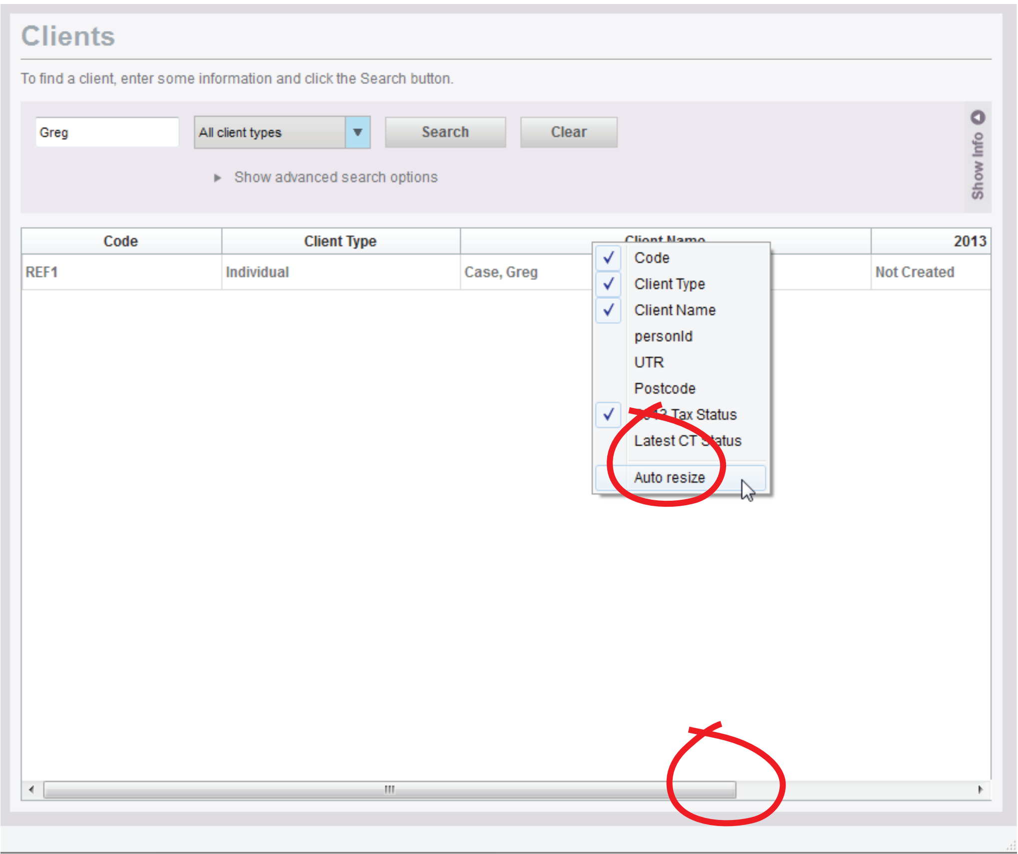


Auto Resize

If the columns are too wide and do not fit the screen, a horizontal scroll bar will be displayed.

If you click the right mouse button while over the table, a menu appears that includes the an option called **Auto Resize**. If you select this, TaxCalc will try and resize all of the columns (and the information contained within them) neatly onto your screen.

Depending on your resolution and the number of displayed columns, this may not be possible and the scrollbar will remain. Remember, you can hide the right-hand information panel for more space by following the instructions in Step 1.

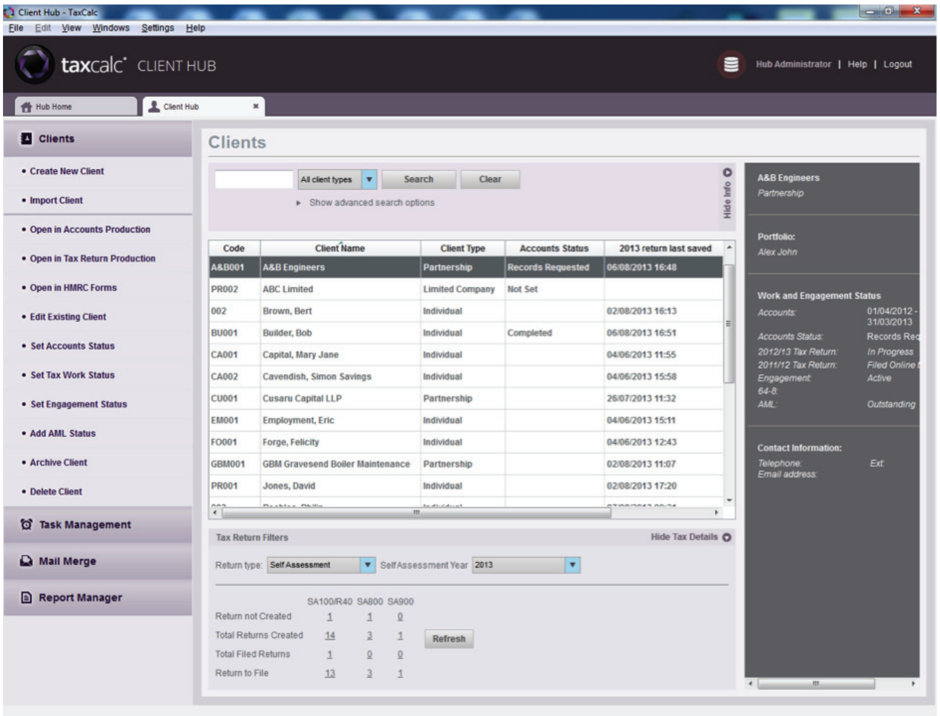


If you want to sort the information differently, click on the column header you wish to sort by, For example if you would like your clients in alphabetical order right mouse click n the Client Name column header, click again to sort in reverse order.

STEP 4

Displaying the Tax Status Dashboard

In the bottom right of the Client Hub Screen there is a 'Show Tax Details' option. Clicking this will display the current status of the practices tax return workload. Selecting 'Hide Tax details' will hide the tax status dashboard.



You can switch between Self-Assessment and Corporation Tax to display the information regarding different types of tax returns. You can view the current status of each self-assessment tax year or choose a year end of CT600's, to only show those you may be currently working on.

After making selections, select Refresh to update the table.

Within the table if you wish to drill into the clients that fall into that category, click on the number that is underlined. This will filter the Client List to show those particular clients. i.e. Individual clients whose 2013 tax returns have not been created.

FAQ's for all TaxCalc products can be found at **www.taxcalc.com/support**

If you require further assistance please contact our Support Team:
Email: support@taxcalc.com **Phone:** 0845 5190 882