

THE SimpleStep® GUIDE TO CUSTOMISING YOUR CLIENT HUB AREA

taxcalc®

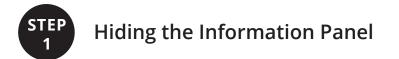
The main Client Hub area is very flexible, allowing you to choose the information you see at a glance. Rather than displaying a simple client list, with client codes and names you can display items such as the tax return status, UTR's and/or details of when the latest return was saved.

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:

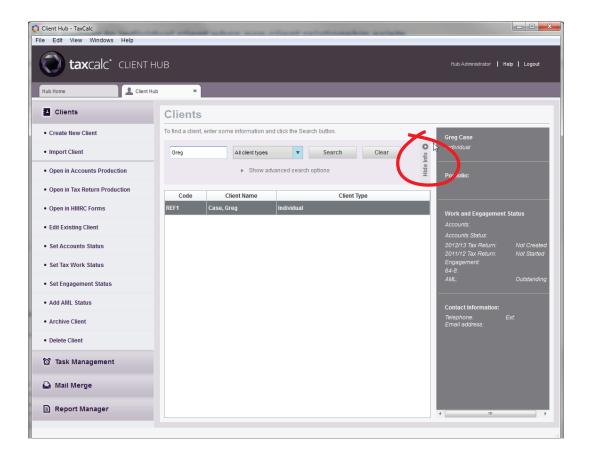
- Hide the right-hand information panel, to give you more room for your client list.
- Add or remove columns in the table, to give you the displayed information that you prefer.
- Resize the columns and change their order to suit your tastes.
- Display tax status dashboard to see the practices current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





First, access the Client Hub.

In the top-right there is now a Hide Info option. Clicking Hide Info will remove the entire righthand 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.

Clients		
To find a client, e	enter some information and	click the Search button.
Greg	All client types ► Show adva	Search Clear
Code	Client Name	Client Type
REF1	Case, Greg	Individual



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.

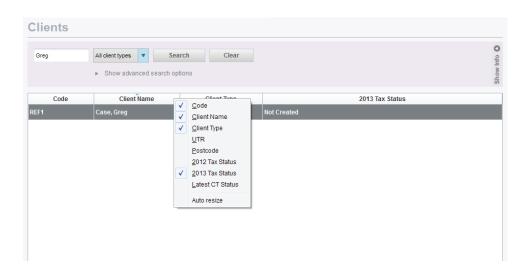
Latest CT Status

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.

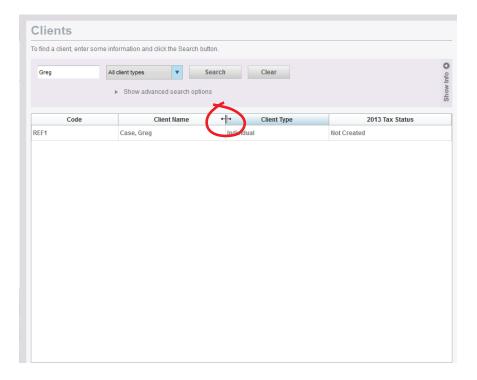
You can easily show or hide these columns (and the default columns) by rightclicking on any of the column headings and then clicking on the relevant column name. Alternatively you select and order the columns by selecting View from the top menu bar followed by Customise your Client List.





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

To find a client, enter s	ome information and click the Sea	rch button.		
greg	All client types	Search Clear		
	 Show advanced search 	options		
Code	Client Name	Client Type	2013 Tax Status	
REF1	Case, Greg	Individual	Not Created	

2 Drag the column to its new position

Clients		
To find a client, enter so	me information and click the Search button.	
Greg	All client types Search Clear > Show advanced search options	Show Info
Code	Client lame Client Type Client Type 20	013 Tax Status
REF1	Case, Greg Additional Not Created	

3 Release the mouse button to place the column again

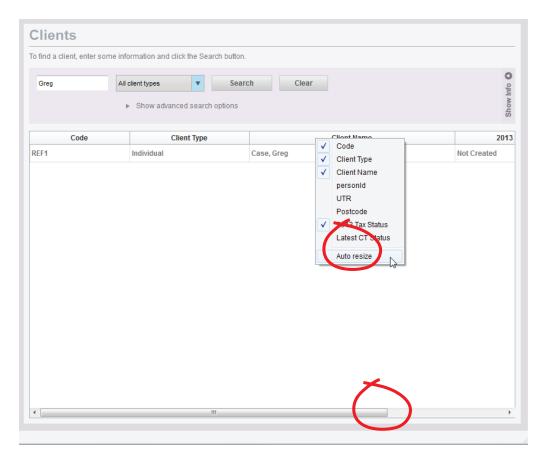
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Code	Client T/pe	Client Name	2013 Tax Status	
REF1	Individua	Case, Sten	Not Created	

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.



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.

Hub Home	lub	*					
L Clients	Clien	ts					
Create New Client		All client types V Search Clear					
Import Client		Show advanced search options				Partnership	
Open in Accounts Production						Portfolio:	
Open in Tax Return Production	Code A&B001	Client Name	Client Type	Accounts Status		Alex John	
Open in HMRC Forms		A&B Engineers	Partnership	Records Requested	06/08/2013 16:48		
Open in HMRC Forms	PR002	ABC Limited	Limited Company	Not Set		Work and Engagement	
Edit Existing Client	002	Brown, Bert	Individual		02/08/2013 16:13	Accounts: ≡	01/04/2012 31/03/2013
Set Accounts Status	BU001	Builder, Bob	Individual	Completed	06/08/2013 16:51	Accounts Status:	
	CA001	Capital, Mary Jane	Individual		04/06/2013 11:55	2012/13 Tax Return: 2011/12 Tax Return:	In Progres Filed Onlin
Set Tax Work Status	CA002	Cavendish, Simon Savings	Individual		04/06/2013 15:58	Engagement	
Set Engagement Status	CU001	Cusaru Capital LLP	Partnership		26/07/2013 11:32	64-8: AML:	
	EM001	Employment, Eric	Individual		04/06/2013 15:11		
Add AML Status	F0001	Forge, Felicity	Individual		04/06/2013 12:43	Contact Information:	
Archive Client	GBM001	GBM Gravesend Boller Maintenance	Partnership		02/08/2013 11:07	Telephone:	
Delete Client	PR001	Jones, David	Individual		02/08/2013 17:20	Email address:	
Dente calent		Backlas Bulla	to dividual		,	•	
Task Management	_						
	Tax Retu	rn Filters			Hide Tax Details	P	
A Mail Merge	Return typ	pe: SelfAssessment 🔽 SelfAsse	essment Year 2013	*			
Report Manager							
		SA100/R40 SA800 SA900					

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

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