



TaxCalc and Your Practice

A detailed guide to using
TaxCalc in your practice

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Welcome

The thought of deploying new, mission-critical software into a practice is never something that practitioners take lightly. Historically, software produced for the practice market has, on occasion, been a pain to install and difficult get up and running.

Some providers employ technical specialists to install the software for you, usually remotely, whilst others let you do it yourself. Most products ask for cumbersome licence keys and if you're setting up a network, lengthy database paths, or other connection credentials.

TaxCalc is different. We believe that software should be easy to buy, easy to own and easy to use.

That's why we have invested heavily in comprehensive underlying technologies and user interface design to make you and your practice productive as quickly as possible.

This document will explain everything you need to know about deploying TaxCalc into your practice and show why we believe our software is the easiest to use in the market.

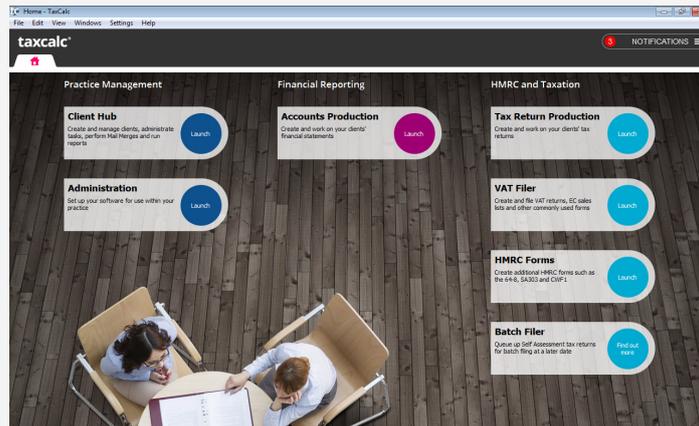
Will you install TaxCalc for me?

Yes! Whatever your infrastructure, we offer installation and data migration services for any practitioners who would rather we just handled it all.

Our charges are modest, so please speak to our team on 0345 5190 883 to discuss your needs.

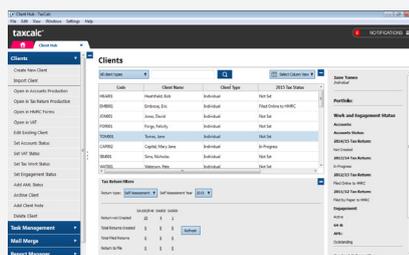
One Application. One Database.

All of TaxCalc's software products are built into one application and accessed from a single Home screen.

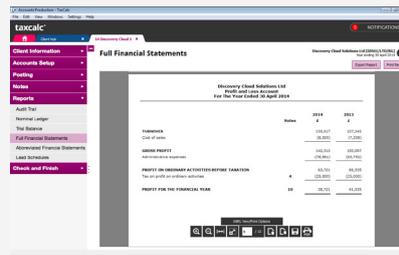


The single application model makes deployment easy: to install the suite of products, you just need to do it once.

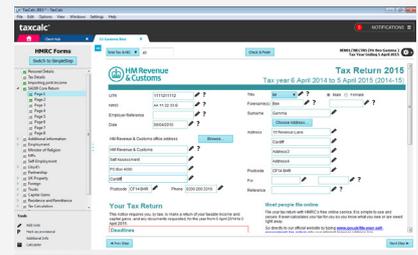
If you would like to try out any of the other modules, you'll find that they are already on your computer, ready to go! If you would like to buy a licence of a new module, it gets activated as soon as you pay for it.



TaxCalc Client Hub



TaxCalc Accounts Production



TaxCalc Tax Return Production

Similarly, all of your client data is stored in a single database. If you have previously been used to systems with multiple databases, you'll know that sharing data isn't always straightforward, even if your products come from the same supplier.

With TaxCalc, integration is one of our key development objectives and the best way to achieve that is to use a single database.

TaxCalc offers two types of database, a local one for completely standalone setups and a more powerful one that can be run across a network.

Standalone or Network?

TaxCalc is available in two deployment configurations:

1. Standalone – intended for sole practitioners to store client data locally on a single computer
2. Network – intended for practices with one or more users, each accessing data from a central location

Our Network version is designed to avoid needing a dedicated server. You can simply bless one computer on the network with the database and as long as you don't disconnect it or turn it off, everybody else can share the data.

Of course, if you do have a dedicated server, that's great!

Installation of Standalone

To install the Standalone version of the software, simply choose it at point of download and run it on the computer that you are going to use.

Installation of Network

To install the Network version:

1. Download the Network installer and run it on the computer that will host the database.

This is usually a server but can actually be any computer on your network that doesn't get disconnected or turned off.

During the installation process, choose the "Full installation on Primary (or only) machine" option.

2. For any computers that are to connect to the database, download the Network installer again and, on each computer, choose the "Additional machine installation" option.

TaxCalc will automatically set itself up to run on your network.

Do I have a network?

Sometimes practitioners don't think that they have a network and are amazed to find that they do!

If you have computers that share the internet through a router, usually wireless, TaxCalc can make use of this to set up its own network service and share data across the computers.

Can I switch from Standalone to Network?

Yes, you can! We know that practices grow and circumstances can change and we offer a migration service at a modest fee.

If you are planning with the future in mind, you can always install the network version of the software to start off with, even if just on one computer.

Will TaxCalc run over a Virtual Private Network (VPN)?

Yes! TaxCalc has been optimised to run over a VPN with little to no degradation in operating performance.

The Discovery Service

When we were designing the technology platform that our software would be developed upon, we took into consideration the computer equipment that firms are likely to already have in their practices.

We found that practice infrastructures varied considerably, from dedicated servers, file shares and wired networks, to remote connections, virtual private networks, terminal services, hosted or virtual desktops, all the way down to cohorts of seemingly unconnected computers!

At the very least, we found that practitioners tend to provide their staff with internet access through a wireless router and often with access to a central data store, often in the cloud.

With this in mind, we developed a technology called the Discovery Service, which works with both wired and wireless routers to broadcast the presence of the database to computers on the network, just like how the router broadcasts the presence of a shared internet connection.

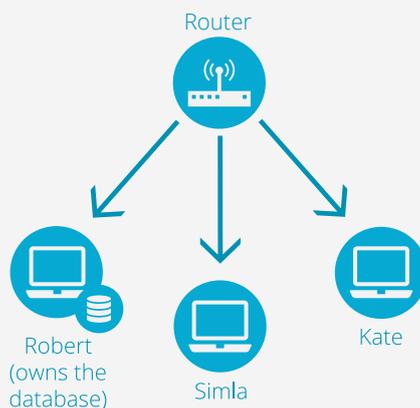
It's self-configuring, won't interfere with any other services and will work on even the most simple of networks. If a computer shares an internet connection, it will automatically share and connect to the TaxCalc database.

Basically, it just works!

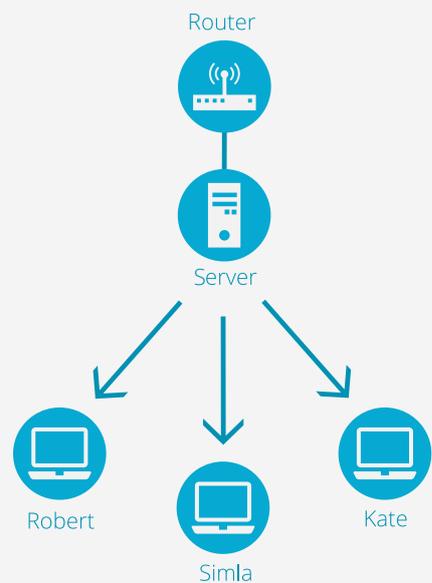
1) Standalone



2) Network, no server:



3) Network, central server:



Licensing and Upgrading

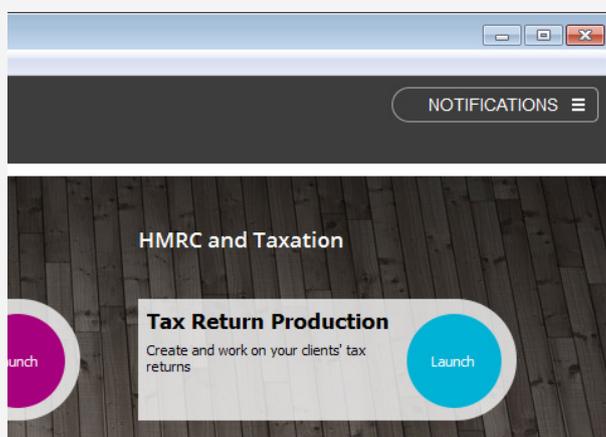
You will license TaxCalc during the installation process. To do so, you will be asked for your TaxCalc customer account details – your email address and password that are used to log into our website.

TaxCalc will take these credentials and fetch your licence key from our servers using a secure connection. Note that an internet connection is required to do this.

TaxCalc checks your licence each time it starts up. If you have bought new software products, renewed your licences, upgraded them or opted to take a trial of a product you do not currently use, simply restart your software for the changes to take effect.

Updates

TaxCalc will periodically release updates to your software and you will be notified of this fact through the Notifications panel, found in the top right of the screen.



Updates come in two forms:

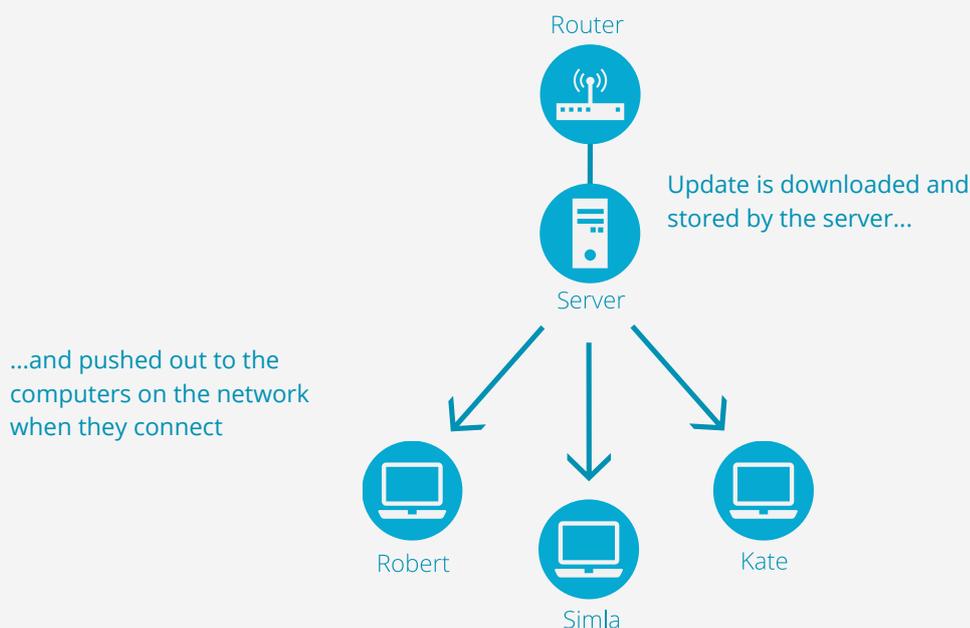
- Data updates – small packets of data, received over the internet to keep various data sets up to date, such as HMRC office addresses, Mail Merge templates, dividend data and RPI data.
- Software updates – formal updates to improve the functionality of the software.

Updates are downloaded in the background, enabling you to carry on with your work.

Updating a Network Installation

When an update is released and accepted by you, it will be downloaded to the server (or the computer that looks after the database).

Once applied, all computers that are connected to the server will be disconnected. When they reconnect, the update will be applied to the remote computers as well.



User Accounts

Both Standalone and Network versions of TaxCalc are primed for multi-user usage. Access is provided using a username and password, which you will set for each user.

Users can be assigned to a security role, which can limit access to key functionality.

Standalone versions are given the option of turning off multi-user access when you run the software for the first time. This stops the logging in screen from displaying whenever the software starts. However, we recommend keeping this screen to protect your data.

A special account, called 'admin' is provided within the system that has access to every function of your software. It is initially used to set up the other users on the system but also has some unique privileges, such as running updates, resetting user passwords and removing password protection on clients.

You will set the admin account password when you start your software for the very first time.

Users and security settings can be set up via the Administration application, which is accessed from the TaxCalc Home Screen.

Migrating Data

If you are joining TaxCalc having previously used a competitor product, you'll be pleased to learn that we have been developing tools and processes to help you transfer your data from your old system.

The success of this varies from system to system, but at the very least, we should be able to import core client data, such as names, addresses, tax references and so on.

To find out what we can and cannot transfer from your current software provider, please call us on 0345 5190 883.

Be Immediately Productive

One of the things that can prevent firms, especially larger firms, from switching software providers is training. Not only can software take time to learn, reducing productivity of staff, training is often an expensive additional extra that can substantially increase your investment.

TaxCalc is different.

When designing our software, our ethos is that you should be able explore our products, easily working out how you use it. We want you to be productive as quickly as possible.

We are one of the last software companies to offer an open trial of our software and we want prospective customers to be able to immediately see what they need to do.

In doing so, we've considered the workflow that our users need to go through when trying to achieve a task, and made this obvious on the screen. Take TaxCalc Accounts Production, for example: all of the key steps required to produce a set of accounts (review standing data, post transactions, enter notes and produce reports) are found on the left hand side of the screen. Nothing is hidden.

A lot of the features in TaxCalc are guided, whether by using SimpleStep, which is a questionnaire-like process, or by using a Wizard, used to handle specific matters such as the creation of a relationship between two clients.

Finally, when you reach the end of a process, Check & Finish will review and validate your entries, presenting you with any matters that need to be brought to your attention. Should any matters arise, Check & Finish includes hyperlinks to take you to any software screen that helps you resolve the issue.

User Interface Design Principles

TaxCalc has been built around the following design principles:

- TaxCalc is a multi-product application, and is built around your clients. As you open them in TaxCalc Client Hub, TaxCalc Accounts Production and TaxCalc Tax Return Production, they will appear in tabs, just like a web browser.
- When you open an application, all of your actions will be found in a menu on the left hand side of the screen.
- SimpleStep will guide you through a process but, once you know your way around, you are free to jump to any step by clicking on its title in the left hand menu.
- Most screens will have an action button  which provides you with quick access to other applications and useful functions. By using this button, you can use the currently open client in another application, open another account or tax year, check and update any active tasks for the client or record an on-the-spot note.
- The Notifications panel will bring to your attention a wide variety of matters that require your attention. This can be anything from a database backup reminder, to there being updates to apply, to task and deadline reminders.

Starting TaxCalc for the First Time

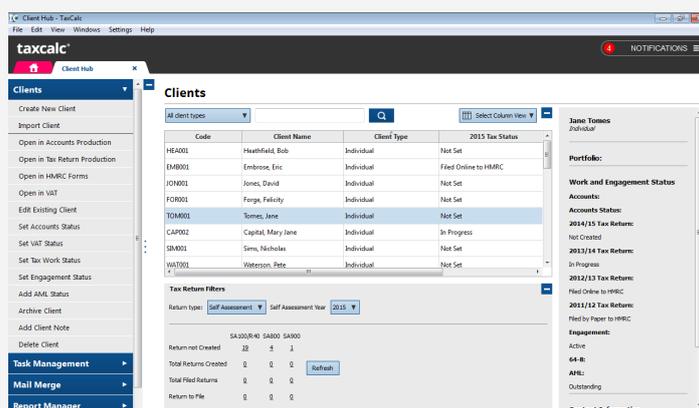
We have designed TaxCalc to be as easy to use as possible. When you start up for the first time, you will be greeted by our First Run Wizard, which will capture your practice's name, address, filing credentials and so on. If you fancy doing this later, you'll find this information in the Administration application.

When completed, you'll be presented with the TaxCalc Home Screen.

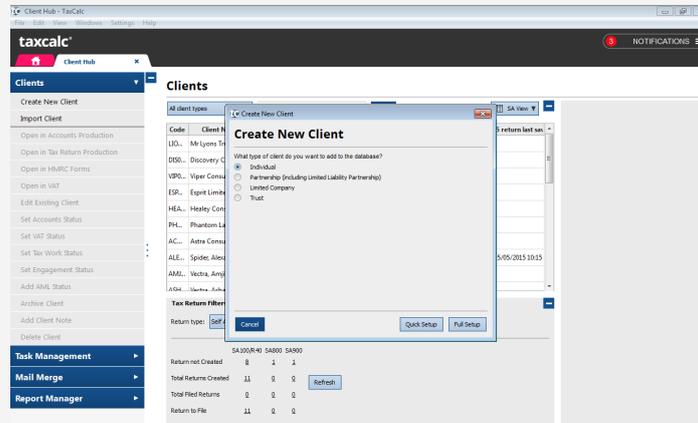


To take your first steps with TaxCalc:

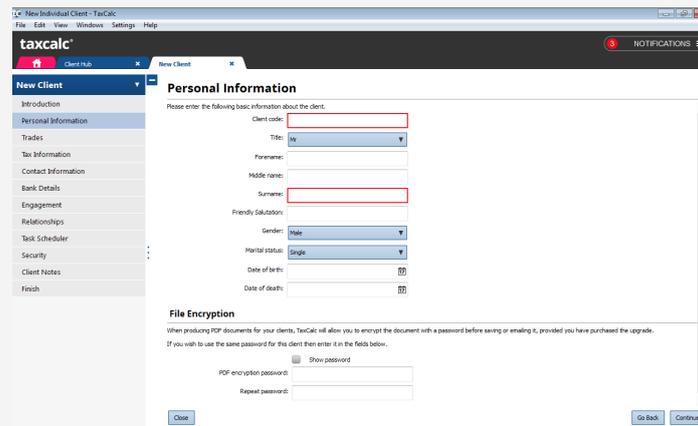
1. Click on the Client Hub button



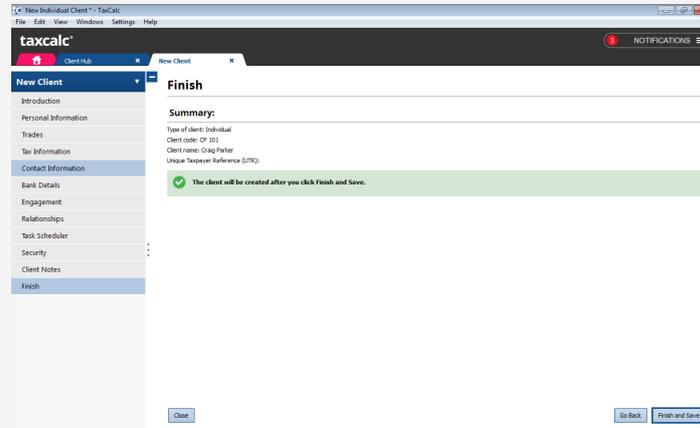
2. Click on the Create New Client command, found on the left hand side of the screen



3. Choose the client type that you wish to create and click the Full Setup button



4. Work your way through the SimpleStep. Any essential information will be highlighted in red.



5. When you reach the Finish step, click on the Finish and Save button to commit your client to the database.

See how easy it is? Now if you return the TaxCalc Home Screen (click on the home tab in the tab bar), you can open your client in TaxCalc Accounts Production or indeed in any of the other applications.

We hope that you enjoy using TaxCalc!