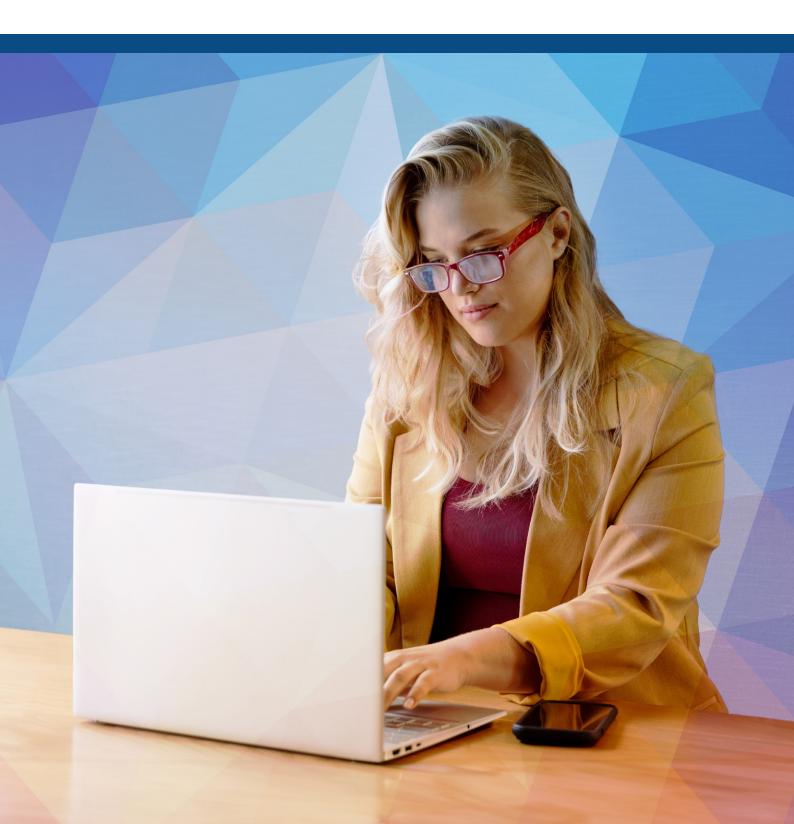


Getting started with Practice Manager Plus



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Getting started with Practice Manager Plus

Practice Manager Plus is the enhanced, integrated practice management solution everyone's been waiting for. With TaxCalc's Practice Manager (the enriched and renamed version of our trusted and popular Client Hub) working together with Practice Manager Plus, you can take even more control of how your practice works by creating, customising and co-ordinating all of your Jobs and Tasks in just a few simple steps. Whether you're a new or existing TaxCalc user, it's easy. Here's how.

As a New TaxCalc User

Take control of your practice and boost productivity with our Practice Manager toolkit. Practice Manager Plus is the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of Tasks, like requesting records from your client. Progress your work exactly as you need to, using customisable workflows so that you don't miss all those important statutory deadlines.

As an Existing TaxCalc User

You'll already be using Tasks to assign work, keep track of assignments in progress and set any notifications as deadlines approach. With Practice Manager Plus you can now create Jobs, break them down into a series of separately configurable Tasks and progress your work exactly as you need to, using customisable workflows.

Please refer to Step 5 for more details on how to transition from your outstanding work using a standalone Task to a multi-task Job.

As an Existing TaxCalc User, New Practice Manager User

If you're not yet taking advantage of our powerful Practice Manager toolkit, you can take control using Practice Manager Plus as the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of Tasks, like requesting records from your client. Progress your work exactly as you need to, using customisable workflows so that you don't miss all those important statutory deadlines.

This guide will show you how to:

- Set up licence and user permissions to control access to Jobs and Tasks.
- Create your own customised Job Templates or use TaxCalc's predefined Templates.
- Create and manage any services offered by your firm which are automatically made available to all users and can be applied to your clients.
- Apply a new Job Template to a service to run specific Tasks.
- Allocate services, fees, and jobs to your clients by bulk activating services.
- Activate the Job for a client and assign any required Jobs and Tasks.
- Run reports for specific Jobs for clients.
- Setup Dashboards and Widgets for your Jobs and Tasks.



Step 1 Set Licence and User Permissions for Jobs and Tasks

To get started, your Administrator is automatically assigned a Practice Manager Plus licence. You'll need to assign a licence to each user that requires access to Practice Manager Plus.

- From the TaxCalc home screen select Help > View Licence Information and select the Practice Manager Plus product.
- 2. Click Manage Licence and select the user(s) you want to access Practice Manager Plus:

Select a pro	luct:			
Practice Manage	er Plus 🔻]		
Licence period: 2	25/10/2022 - 25/10	/ 2023		
Features en	abled:		Manage User Lice	nces:
Туре	Licences allowed	Licences used	Licence type	Workflow
Workflow	7 users	1	User	Licence
			admin	Remove licence
			Please use the Bulk Upda	Manage Licence te tool in <u>Work Management</u> to urrently assigned to workflows

- 3. Launch TaxCalc Admin Centre from the home screen to set your users' permissions
- 4. Within the Security Roles screen select the user and click Edit Role.
- 5. From the **Administration** menu you can set the required **Licence Permissions**. Here you can determine whether users can manage licences for Practice Manager Plus:

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🚔 taxcalc		() TIME	0:00 N	OTIFICATIONS	1
Admin Centre	X Administrator X	-			
Administrator 🔻	Administration				
Introduction	By default, new user roles will not have access to the Administration functions.				
Role Name	Only the default Administrator profile will be able to perform higher functions such as forcing users to log off the system and carrying out system updates.				
Administration	This role can access the Administration application				
Clients	Permissions				
Jobs and Tasks	Choose from the options below to determine what these users can and cannot do.				
Mail Merge, Reports, Data	User type permissions:				
Time	Users can create and edit user roles				
Accounts Production	User con select Document Manager accounts Licence permissions:				
Company Incorporator	Userse permosions:				
Companies House Forms	User can manage licences for Practice Manager Plus				
Tax Return Production	Other permissions:				
TaxCalc Forms	V Users can edit report styles				
VAT Filing	Users can access and control Application settings				
Batch Filer	🗹 Users can make backup data				
AML Centre					
AML Online Checking Serv					
eSign Centre					
GDPR Centre					
Password Settings					
Finish					
	Close			Go Back Co	ntinue

6. From the **Jobs and Tasks** option you can control the users access to items of work within Practice Manager Plus:

💋 Administrator - TaxCalc		- 🛛 🗙
<u>File Edit View Windows Setting</u>	tings Help	
🚔 taxcalc'	() TIME 00	
Admin Centre	X Administrator X	
Administrator 🔻	Jobs and Tasks	
Introduction	The following permissions can be used to control users' access to items of work within Practice Manager:	
Role Name	Note: Licence management settings for Time & Practice Manager Plus can be found within the Administration role page.	
Administration	Working with Jobs and linked Tasks:	
Clients	Choose from the options below to determine what these users can and cannot do:	
Jobs and Tasks	Users can only view jobs and tasks assigned to themselves	
Mail Merge, Reports, Data	Users can view jobs and tasks assigned to anybody	
Time	Uvers can assign joos and tasks to iteams Advanced jabo/tasks options:	
Accounts Production	varventicela juote, unaso opicanto:	
Company Incorporator	v users can overe pos Note: A associated tasks will also be dieleted	
Companies House Forms	🐷 Users can delete tasks	
Tax Return Production	Note: A tesk must always remain associated with a jub	
TaxCalc Forms	✓ Uters can assign job templates to services	
VAT Filing		
Batch Filer	Working with Standalone Tasks:	
	Choose from the options below to determine what these users can and cannot do:	
AML Centre	Uters can only view tasks assigned to themeelves Uters can view tasks assigned to ambody	
AML Online Checking Serv	☑ Users can assign tasks to teams	
eSign Centre	☑ Users can delete tasks	
GDPR Centre		
Password Settings		
Finish		
	Close	Go Back Continue

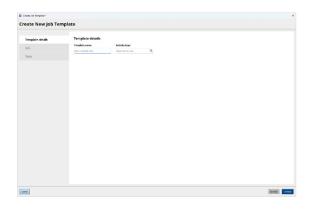
- From Admin Centre > Users you can define each user's security role, whether they have client portfolio, restricted clients and more.
- 8. From Admin Centre > Teams you can group users in teams you can later assign jobs and tasks to.



Step 2 **Create a Job Template**

We're here to make your life easier, which is why you can now create one single Job Template with multiple Tasks to automate services offered by your practice, such as Tax Returns, to use time and time again. For more detail on creating Job Templates, see <u>KB2978 – How to create a Job Template</u>.

- 1. Launch TaxCalc Admin Centre from the home screen.
- 2. Select Applications > Practice Manager Plus > Customise Practice Manager Plus.
- 3. Select Job Templates to review the system default Job Templates.
- Templates can be edited, duplicated and deleted. You can also create and customise your own. Click
 Create to customise your own Template and enter the relevant information into the Template Info fields:
- 5. From here you can name your template and specify the Activity Type, for example, Tax Return.



6. On the Job section of the wizard, you can choose assignee (a user, a team, a portfolio manager or any custom user role) and initial status for the job. You can define recurrence for the job to automatically recreate on the next accountancy period and set reminders so that important deadlines are not missed.

You can specify the dates of the Job, for example, **Start date**, desirable **Due date**, and **Deadline**. Select the date basis, such as Statutory Deadline, Usual Year End or Custom (when you want to manually edit per client), to allow us to calculate the appropriate dates when activating the Job on each client. If 'Use client work to set dates' is ticked- the dates will be calculated according to client's work period.

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Templete details	Job details			
Job	Tax Revel	Annyana Designed X Q	Turnel T	
Tasks	Georgian jateral	🖉 facur on july completion (select)		
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- 7. You may have one or a sequence of many Tasks you want to associate with your Job Template. You can create New, Edit, Duplicate or Delete any required Tasks from the Tasks tab.
- 8. From here you can select whether you want to use Workflow mode or Checklist mode.

Workflow mode

Allows you to create sequential workflow tasks with additional information and settings for advanced handling of work. However, these tasks can be completed in any order.

Checklist mode

Allows you to create a simplified list of tasks in the form of a checklist. These Tasks are automatically allocated with the Job assignee and due date and the status is either Planned or Completed.

Dreate Job Template *				×	🗊 Carate Job Terrylate *				×
Create New Job Templa	ate				Create New Job Templa	ite			
Template details	Tasks	Workflow node Oracless sode	0	6 tasks created	Template details	Tasks	Woldfourmate Chaddin made		5 tasks created
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	Prepare Tax ReturnReview Tax Return	1	Rothin Hanger X Q, Ranael W	× ±					
	Start date (otional)	Due date lipional							
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	V the write (space) Status	Second potent <u>because</u>		Vew lask esternetion (9)					
	Serie Cer	1	😸 Ma X Q, Daniel 🕈	~ I					
	Start date (optional)	Due date (spiced)							
	Tail Completion (Tracinus)	Tali Conjiatos (Pacitus)	2 Valit Y						
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- 9. Select Workflow mode to create your sequential list of tasks.
- 10. Alternatively, select Checklist mode to create a list of checklist tasks.
- 11. Tasks in both Workflow mode and Checklist mode can be moved up or down, duplicated or deleted from the More Options menu on the right of each Task. They can also be similarly viewed in Work Management, Active Work, Dashboards and Reports.
- 12. If you have selected Workflow mode you can configure each individual Task by assigning the Task to a specific User, Team or Portfolio Manager or any custom user role, and applying a Status. You can also select the Start date offset, for example right after the previous task is completed, and the Due date offset, for example, Tax Year End. You can also set any Reminders so that you don't miss any important deadlines. For more information on Date offsets see KB2979 Date Offsets in Jobs and Tasks.



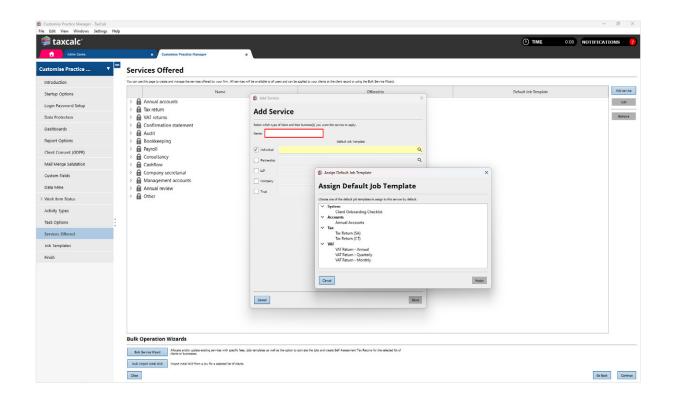
- 13. Select View task automation link to specify any conditions to automatically change Task attributes or set any notifications required. You can add multiple Task attribute changes and corresponding results.
 For example, you may select the condition, Task is Completed to then automatically Change Work Status to Records Requested. You can then add a second result to Notify User and select the user to be notified when the Task is complete. For more information see Knowledgebase Article 2980 Job Template Task Actions.
- **14.** If you have selected **Checklist mode** enter the **Task Name**. The Job assignee, due date and the status (which is either Planned or Completed) is automatically allocated.
- 15. Click Finish to complete.



Step 3 Set up Services Offered

Once you have created your Job Template you can assign them to each service for your specific types of clients and their businesses.

- 1. Still within TaxCalc Admin Centre select Services Offered.
- 2. Use this page to create and manage the services offered by your firm.
- 3. You can use any of the predefined system default services, or you can create your own.
- 4. To create a new service, click Add Service.
- From here you can select the type of client to apply the service to and assign the relevant Job Template. Select your newly created Job Template from the Assign Default Job Template List:

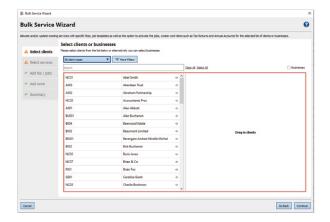




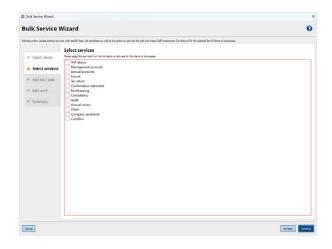
Step 4 Bulk Activating Services for Clients

Allocate and activate multiple services, fees and Job Templates for your clients. Instead of you painstakingly allocating and activating each one individually, we've made things easier in the Bulk Service Wizard option where you can allocate all services (with corresponding Job Templates) and fees to multiple clients and activate them all in one place.

- 1. From the **Services Offered** screen click **Bulk Service Wizard** to activate multiple services for your selected clients, add any fees and link a service to a Job Template.
- 2. From the **Select clients** tab select all the clients you require activating:



 Select all the services you want to activate from the Select services tab.





4. The Add fee / jobs tab allows you to add a Fee Basis and an Expected Fee for each service. You can also apply a Default Job Template and Activate each service for all your selected clients:

lk Service \						
a and/or update existing serv	Add fee / jobs	vell as the option to activate the jobs	and create Self Assessment Tax Ratur	ns for the selected list of chents or busi	rettet.	
Select clents		any applicable fees to the service. Yo	w can create jobs and Self Assessment	Tax Raturns to assist with the workfo	w of these services by selecting the a	-alleble job templates and activ
Select services	Service	Fee basis	Expected Fee	Job Template	Activate Job?	Create Work?
Add fee / jobs	Annual accounts			Q		
Add work	Tax return			Q		

 Select your newly created Job Template from the Assign Default Job Template list to link our Job Template to a specific service:

and/or update existing servi-	cas with specific fees, job temp	plates as well as the option to activate the jobs	and create Self Assessment Tax Return	s for the selected lat of clients or bus	Pesses.		
Select clients	Add fee / jobs Please use the options belo them against the client.	w to add any applicable fees to the service. Yo	v can create jobs and Self Assessment	Tax Returns to assist with the worlds	ov of these se	vices by selecting the a	valiable job templates and act
Select services	Service	Fee basis	Expected Fee	Job Template	A	tivate Job?	Create Work?
Add fee / jobs	Annual accounts	🗯 Assign Default Job Template			×		
Add work	Tex return	Assign Default	ob Template				
Summary		Choose one of the default job templates					
		Tax Return (CT) VAT Return - Annual VAT Return - Quettert VAT Return - Monthly Canat			Assgn		

Add the Fee basis, Expected fee and select to
 Activate the service for all clients you have selected:

te and/or update existing ser	vices with specific fees, job templates as	well as the option to activate the jobs	and create Self Assessment Tax Return	for the selected lat of clients or busin	NED41.	
	Add fee / jobs					
Select clents	Please use the options below to add them against the client.	any applicable fees to the service. Yo	ou can create jobs and Self Assessment 1	as Returns to assist with the workflow	w of these services by selecting the a	evailable job templates and ac
Select services	Service	Fee basis	Expected Fee	Job Template	Activate Job?	Create Work?
Add fee / jobs	Annual accounts		1500.00	Q Annual Accounts	2	
Add work	Tex return		1200.00	Q Tax Return (SA)	2	2



 If you have selected to Add Work, you can select the appropriate work item:

Bulk Service Wizard		
Bulk Service	Vizard	0
brate and/or update existing service	one with specific frees, job templates as well as the option to activate the jobs and onese Self Assessment Tax Returns for the selected list of cl	iero o bushesse.
	Add work Please use the options below to owner Self Assessment Tex Returns in bulk for the selected clients.	
 Select clents 	Tax Returns	
 Select services 	Self Assessment	
 Add fee / jobs 	Tax Year : 5 April 2023 (2022/2023 return) 🔻	
 Add work 		
 Summary 		
Cancel		Ge Back Continue

8. Review your selections from the **Summary** tab and correct any errors where appropriate, then simply click **Update**.



Step 5 Activating a Job or Task for a Client

You can also choose to activate services for each client individually. Therefore, once your services have been set up and allocated to the client, you can manage the associated Jobs and Tasks within Practice Manager. From here you'll be able to see what Jobs and Tasks are active and activate any new ones.

If you are already using Tasks in Practice Manager to manage your work, don't worry. Follow this guide to create your Job Templates, allocate to your Services and activate your Jobs, and when you are ready, simply de-activate your existing Task. For more information see <u>KB2981 – Deactivating an Existing Task</u>.

- 1. Select **Practice Manager** from the home screen and edit the client to activate the Job Template.
- 2. From the Active Work screen, you can manage any Jobs and Tasks associated with the client.
- Click Activate > Activate a Job to activate the Job for the client:

ble below to automa	tically schedule work for this client o	aing services.		
Active?	Service	Offered To	Default Job Template	Activate
	Tax return	Client	Tax Return (SA)	



4. The Job is now created using the Job Template where you can determine the settings required for the associated Tasks:

😫 Activete Adu *	x	🛱 Activate Job *				×
Activate Job		Activate Job				
Const Const rous Surves from Surves S	Cruity all Taine the second s	Cover Care Seale Server and France Xob Totale	printing We have a similar Management and any angle of the similar Management and any angle of the similar Management and any angle of the similar © the similar angle of t	Rearing Jik sampleties (parted) (mm) Rearings of Table-transfers attags and attags and attags and attags and attags and attags	A G Mean A G Mean	
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ient Details	Create task					Job due date 31/01/2024
ervice and Fees	Request Tax Return Information from Client		1	88 M4 X	Q, Planned V	· :
b	Start date (optional)	Due date (optional)				
isks	05/04/2023	▼ 06/04/2023 10 09:0	• •			
	Set reminder (optional) Settlings	Set reminder (optional) <u>Settings</u>				View task automation (1)
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	Prepare Tax Return		1	Unassigned X	Q Planned ¥] ~ :
	Start date (optional) did/mm//yyyy/ (177)	Due date (optional) dd/mm/yyyyy				

5. Click **Finish** to activate the Job.



6. Once activated, the Job is automatically scheduled and displayed in the client's Active Work screen and also within the Work Management screen:

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		Work Type	Service	Activity Type	Name	Assignee	Assignee Type	Client	Start Date	Due Date	Deadline	Status	Work Item Status	
		+ Job (0/8)	Tax return	Tax Return	Tax Return	Unassigned	User	foster, john	05/04/2023	31/01/2024		Planned	Not Started	05/0
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Step 6 **Running Job or Task Reports**

You can report on Jobs and Tasks to determine any overdue or outstanding Jobs or Tasks, as well as any services with linked Jobs. You can also customise and create new reports for your Jobs and Tasks.

- 1. In Practice Manager, select Report Manager.
- Select one of the system default reports to review the specified Task, Job or Services information, or select New Report to create your own report if required:

Practice Manager - TaxCalc ile Edit View Windows Settin	ngs Help	_					
🛢 taxcalc							• TIME
Practice Manager			×				
nts / Contacts	• =	Repo	ort Manager				
rk Management		-	uports, use the filter options below:				
mmunications				Report type:	All report types		
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in Report		To customia	se report categories below, select Manage Categories in the menu on	te left.			
lew Report		System					-
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dit Report		Jobs an	ad tasks				-
Delete Report			All Overdue Tasks			Task	
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		ŵ	Current SA Tax Return work status			Tax Work Statuses	-
		A	Current CT Return work status			Tax Work Statuses	=
	÷.	A	SA Returns not filed			Tax Work Statuses	
		6	Current CS01 Work Status			Company Secretarial Work Statuses	
		Clients					-
		A	All Clients Contact Information			Client	
		A	All Clients Tax Reference Information			Client	
			Clients who have given consent for emails			GDPR Consent	=
		â	Clients Enrolled for MTD			Client	=
		A	Clients above the MTD VAT Threshold			Client	
			All Clients total fee information			Client	
		A	Client Integration Status			Client	
		Ŵ	Relationship Report			Client	
		Concession of the	es reports				-
			All Services with Linked Job/Tasks			Services	
			All Services to all clients with Fee information			Services	
			All Services to all clients with Initial WIP			Services	

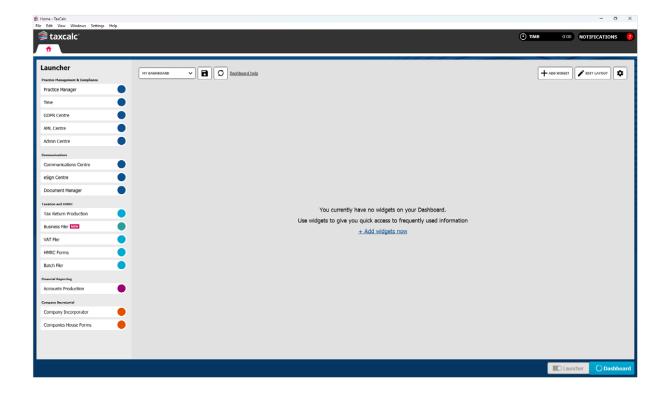


Step 7 Using Job and Task Widgets on the Dashboard

The Dashboard feature is a collection of widgets that can be added, removed, and grouped to enable fast navigation to relevant information. It shows data in a simplified structure, enabling greater efficiency for our Practice Manager users.

You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task types and statuses.

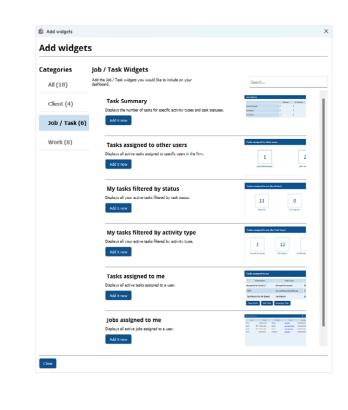
1. Select **Dashboard** at the bottom right-hand side of the main TaxCalc screen to use the Dashboard view:



 Select Add Widget to display the Add widgets dialog which details all the widgets that can be added to the dashboard.



3. Select the **Job/Task** tab:



4. Click Add it now to add a Job/Task widget to your dashboard:

Launcher	MY DASHBOARD	~ B [O Dashboard help	2						+ ADD WIDGET	EDIT LAYOUT
Practice Management & Compliance Practice Manager	Tasks assigned to me		_			+ C 🗉	Jobs assigned to me				+ (
Time	Activity Type	Name	Assignee	Client Name	Description	Due Date	Work Type	Name	Job Status	Client	Due Date
GDPR Centre	Annual Accounts	Send Year End Remi		Mytosty		24/01/2023	Job (0/6)	Client Onboarding	Planned	john foster	28/07/2023
AML Centre	Client Onboarding	Obtain professional	Hub Administrator	foster, john		28/07/2023	Job (0/10)	Annual Accounts	Planned	My trysty	03/10/2023
Admin Centre	Client Onboarding	Complete AML due	Hub Administrator	foster, john		28/07/2023	Job (0/8)	GD Tax Return	Planned	john foster	31/01/2024
ommunications	Client Onboarding	Approve engageme	Hub Administrator	foster, john		28/07/2023					
Communications Centre	Client Onboarding	Set services	Hub Administrator	foster.john		28/07/2023					
eSign Centre	Client Onboarding	Set billing	Hub Administrator	foster, john		28/07/2023					
Document Manager	Client Onboarding	Send 64-8	Hub Administrator	foster, john		28/07/2023					
axation and HMRC	Open Work Ede T	ask Update Task				Open Work Management	Open Work Edit Job	Update Job			Open Work Mana
Tax Return Production	Open Work Lde T	ask Update Task				Upen wirk eanagement	Open Work Edit Jot	Update 300			Open work eans
Business Filer	Standalone Task					+ C 🛡					
VAT Fler	•	Planned	In Pro	gress Co	ompleted	On Hold					
HMRC Forms	Annual Accounts	0	0	0	٥						
Batch Filer	Tax Return	0	0	2	0						
inancial Reporting	VAT Return	0	0	0	0						
Accounts Production	•										
ompany Secretarial											
Company Incorporator											
Companies House Forms											



