

Getting started with Practice Manager Plus



taxcalc[®]

Contents

| | |
|--|----|
| Getting Started with Practice Manager Plus | 3 |
| Step 1 – Set Licence and User Permissions for Jobs and Tasks | 4 |
| Step 2 – Create a Job Template | 6 |
| Step 3 – Set up Services Offered | 9 |
| Step 4 – Bulk Activating Services for Clients | 10 |
| Step 5 – Activating a Job or Task for a Client | 12 |
| Step 6 – Running Job or Task Reports..... | 14 |
| Step 7 – Using Job and Task Widgets on the Dashboard | 15 |

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 those all 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 those all important statutory deadlines.

This guide will show you how to:

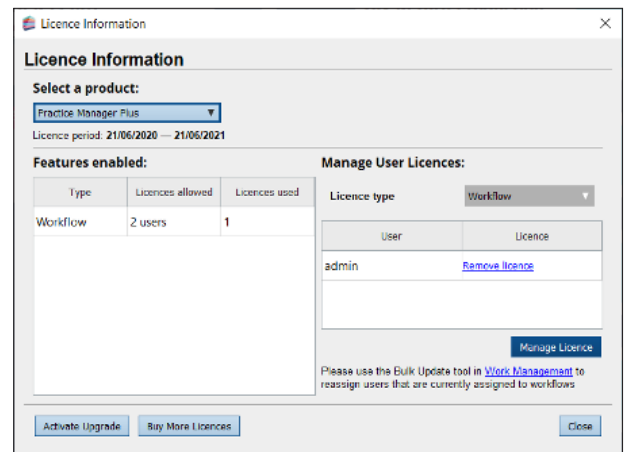
- Set up licence and user permissions to control access to Jobs and Tasks.
- Create your own customised Job Templates or use TaxCalc's predefined Templates.
- Create and manage any services offered by your firm which are automatically made available to all users and can be applied to your clients.
- 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

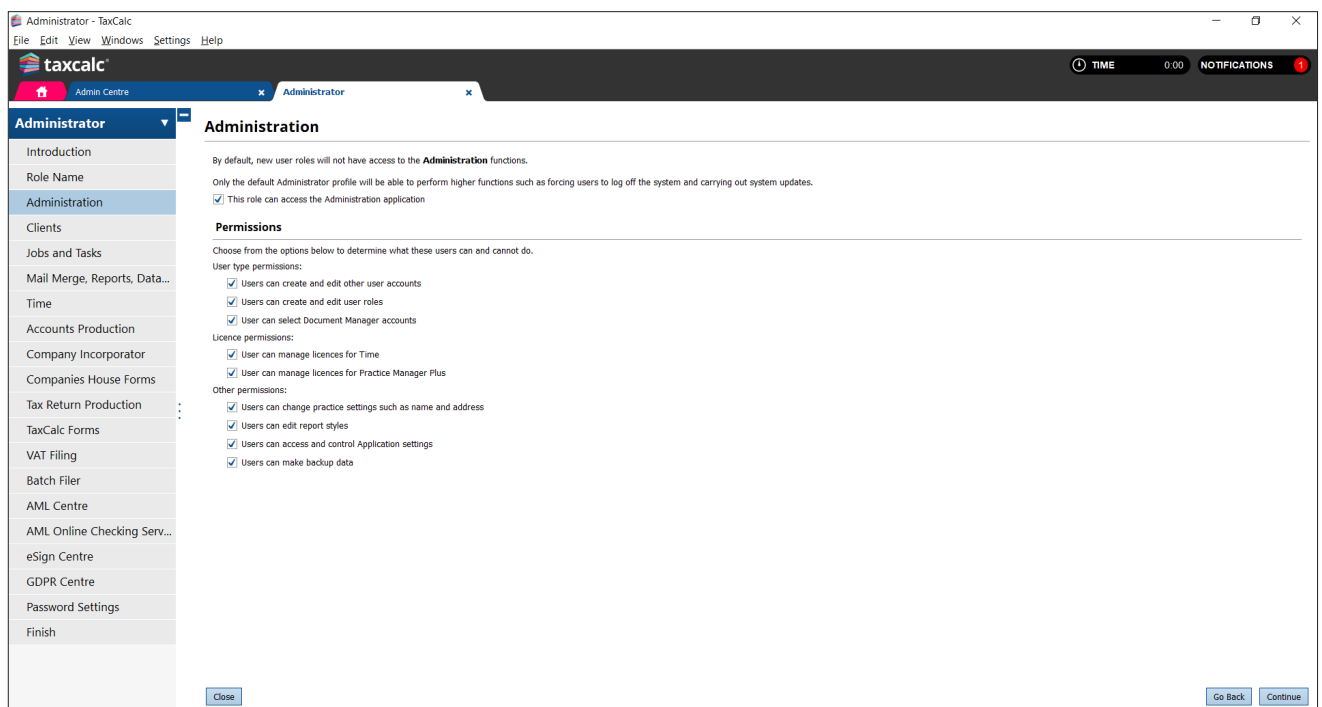
Set Licence and User Permissions for Jobs and Tasks

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.

1. 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**:
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**:



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

Administrator - TaxCalc

File Edit View Windows Settings Help

taxcalc

Admin Centre

Administrator

TIME 0:00 NOTIFICATIONS 1

Administrator

Introduction

Role Name

Administration

Clients

Jobs and Tasks

Mail Merge, Reports, Data...

Time

Accounts Production

Company Incorporator

Companies House Forms

Tax Return Production

TaxCalc Forms

VAT Filing

Batch Filer

AML Centre

AML Online Checking Serv...

eSign Centre

GDPR Centre

Password Settings

Finish

Jobs and Tasks

The following permissions can be used to control users' access to items of work within Practice Manager:
Note: Licence management settings for Time & Practice Manager Plus can be found within the Administration role page.

Working with Jobs and linked Tasks:

Choose from the options below to determine what these users can and cannot do:

☐ Users can only view jobs and tasks assigned to themselves

☒ Users can view jobs and tasks assigned to anybody

☒ Users can assign jobs and tasks to teams

Advanced jobs/tasks options:

☒ Users can delete jobs
Note: All associated tasks will also be deleted

☒ Users can delete tasks
Note: A task must always remain associated with a job

☒ Users can view actions

☒ Users can assign job templates to services

Working with Standalone Tasks:

Choose from the options below to determine what these users can and cannot do:

☐ Users can only view tasks assigned to themselves

☒ Users can view tasks assigned to anybody

☒ Users can assign tasks to teams

☒ Users can delete tasks

Close

Go Back

Continue

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 [KB2978 – How to create a Job Template](#).

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.
4. 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 specify the **Activity Type**, for example, **Tax Return** and whether the Job is assigned to a specific **User** or **Team**.
6. The **Clients & Work** tab allows you to determine whether the Job is associated with a client or a specific item of work:

The screenshot shows the 'Create New Job Template' wizard. The left sidebar has tabs: 'About the Job' (selected), 'Clients & Work', 'Dates', 'Recurrence', 'Tasks', and 'Summary'. The main area is titled 'Template Info' and contains the following fields:

- Template name: [Text input field]
- Job Name: [Text input field]
- Activity Type: [Dropdown menu with 'Please select' and a search icon]
- Description: [Large text area]
- Assignee: ☒ User ☐ Team
- Assigned To: [Dropdown menu with 'Please select an assignee']
- Job Status: [Dropdown menu with 'Planned']

At the bottom are 'Cancel', 'Go Back', and 'Continue' buttons.

The screenshot shows the 'Create New Job Template' wizard, Step 2: Clients & Work. The left sidebar has tabs: 'About the Job', 'Clients & Work' (selected), 'Dates', 'Recurrence', 'Tasks', and 'Summary'. The main area is titled 'Client Association' and contains the following sections:

- Client Association**
Do you want to associate this job template with a client / contact?
You will be prompted to associate this job to a client / contact once the template has been applied.
☒ Yes ☐ No
- Work Association**
Do you want to associate this job template with a work item?
You will be prompted to associate this job to an item of work once the template has been applied.
☒ Yes ☐ No
- ☐ Use work association to calculate the Job dates
- Please note: All tasks within this job will follow the same client and work association options outlined above.

At the bottom are 'Cancel', 'Go Back', and 'Continue' buttons.

7. You can specify the dates of the Job, for example, **Deadline, Due by, Start from**. Select the date basis, such as Statutory Deadline, Usual Year End or Custom, to allow us to calculate the appropriate dates when activating the Job on each client. You can also set any **Reminders** for your Task so that important deadlines are not missed:

8. Set your **Job Recurrence** if you want the Job to recur. This is useful if it is related to clients or items of work that are processed frequently:

9. You may have one or many Tasks you want to associate with your Job Template. Select to create **New, Edit, Duplicate** or **Delete** any required Tasks from the **Tasks** tab:

10. To create a new Task, select **New** to enter the Task details. Configure each individual Task by assigning the Task to a specific **User** or **Team** and applying a **Status**. Select the **Due date offset**, for example, Tax Year End and set the **Start date offset** for this Task. 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](#).

11. Select **View/Add Actions** to specify any actions 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 Action, **Task Completion** to 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](#).

The screenshot shows a dialog box titled "Actions - Request Tax Return information from Client". It contains a section for "Actions" with a dropdown menu set to "Action 1 - Task completion". Below this, there are two rows for "Result": "Result 1" is set to "Change Work Status" with a dropdown for "Records Requested", and "Result 2" is set to "Notify User" with a dropdown for "HK Me". There are "Add Result", "Delete Action", and "Add Action" buttons. At the bottom, there are "Cancel" and "Save & Close" buttons. A note at the bottom states: "Actions that are associated with work will not be enabled until the item of work is linked to the job."

12. Review the Job Template configuration on the **Summary** tab and click **Finish** to complete:

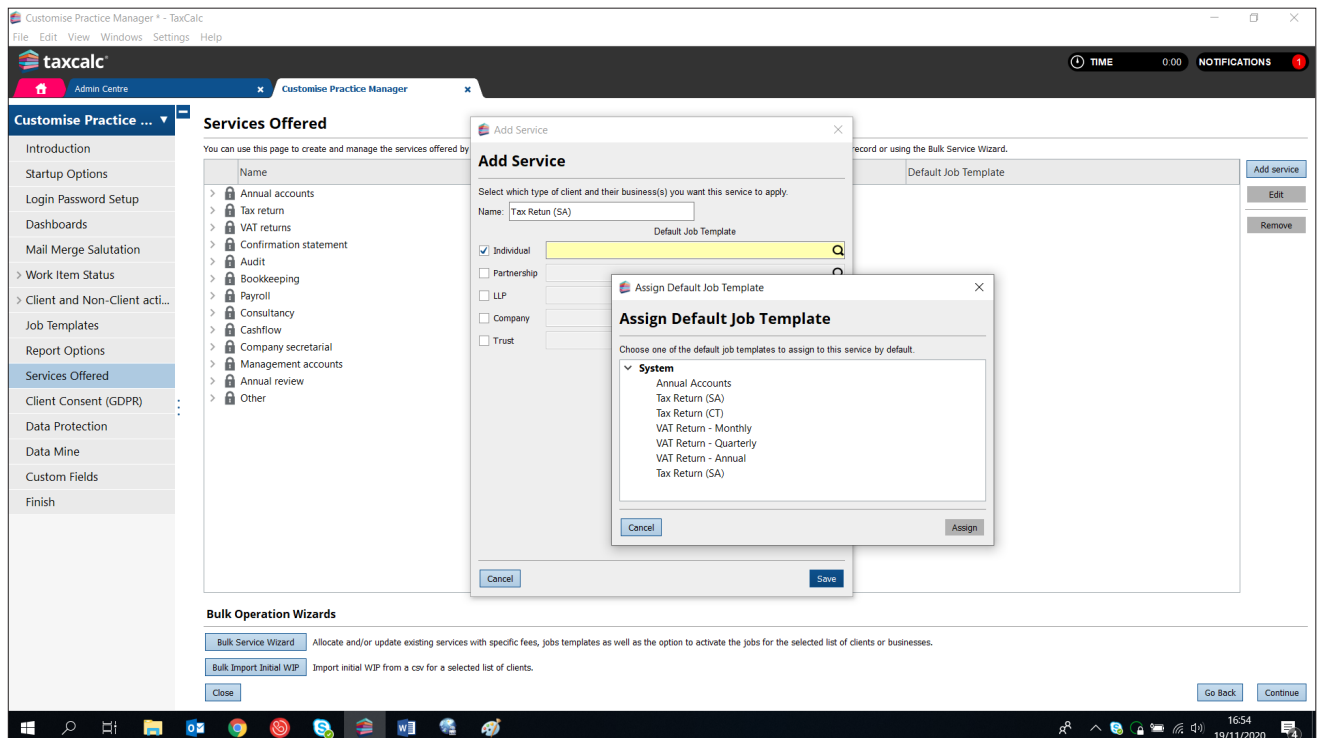
The screenshot shows the "Create New Job Template" wizard, Summary tab. It displays a summary of the job template configuration. The "Job Details" section includes: Name: Tax Return (SA) - Tax Return, Activity Type: Tax Return, Assignee: Unassigned, Deadline: Statutory Deadline, Start date: Tax Year End, Due date: Statutory Deadline. The "Task Details" section includes: Name: Request Tax Return information from Client - Tax Return, Activity Type: Tax Return, Reminder (start date): 1 Day, Reminder (due date): 1 Month, Recurrence: Yes, Client Association: Yes, Work Association: Yes. The "Summary" section on the left lists the steps: About the Job, Clients & Work, Dates, Recurrence, Tasks, and Summary. The "Finish" button is highlighted.

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**.
5. 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**:

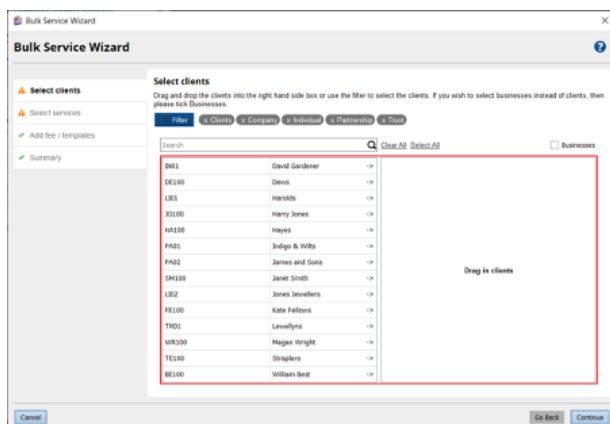


Step 4

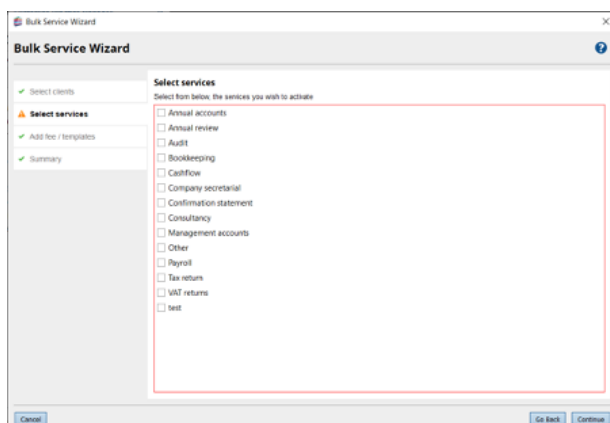
Bulk Activating Services for Clients

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.

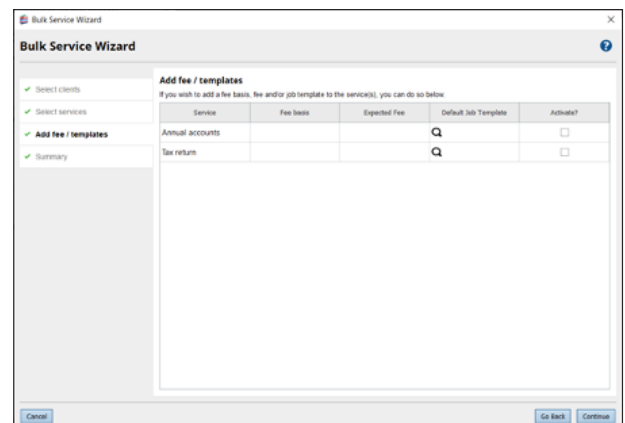
1. From the **Services Offered** screen click **Bulk Service Wizard** to activate multiple services for your selected clients, add any fees and link a service to a Job Template.
2. From the **Select clients** tab select all the clients you require activating:



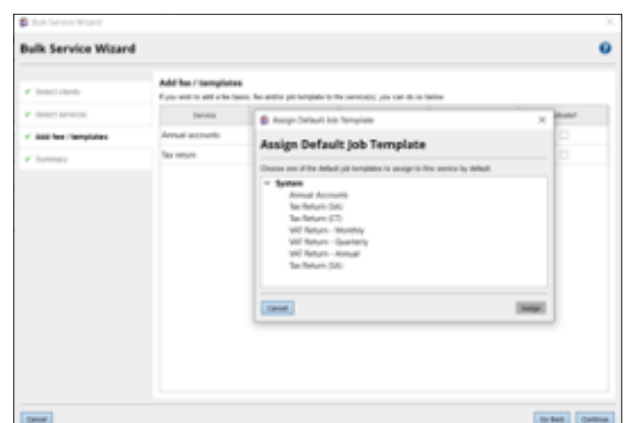
3. Select all the services you want to activate from the **Select services** tab.



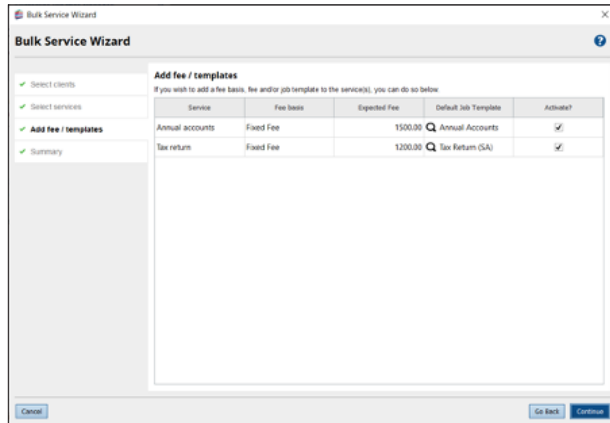
4. The **Add fee / templates** tab allows you to add a **Fee basis** and an **Expected fee** for each service. You can also apply a **Default Job Template** and **Activate** each service for all your selected clients:



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



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



| Service | Fee basis | Expected Fee | Default Job Template | Activate? |
|-----------------|-----------|--------------|----------------------|-------------------------------------|
| Annual accounts | Fixed Fee | 1500.00 | Annual Accounts | <input checked="" type="checkbox"/> |
| Tax return | Fixed Fee | 1200.00 | Tax Return (SA) | <input checked="" type="checkbox"/> |

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

“We introduced TaxCalc’s Practice Management and Time solution the day after they launched... we have been working with it ever since”

Graeme Seavor
Seavor Accounting

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 setup 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 [Knowledgebase Article 2981](#).

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.
3. Click **Activate > Activate a Job** to activate the Job for the client:

The 'Services' window displays a table for managing services. The table has the following structure:

| Active? | Service | Offered To | Default Job Template | Activate |
|---------|------------|------------|----------------------|----------|
| | Tax return | Client | Tax Return (SA) | |

Below the table, there is a 'Close' button and a note: 'If these services or job template need to be updated then please review within the services rendered page.'

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

The 'Activate Job' wizard is a multi-step process. The current step, 'About the Job', includes the following settings:

- Apply Template:** Template Category: All, Template: Tax Return (SA), Apply button.
- About the job:** Job Name: Tax Return (SA), Activity Type: Tax Return, Description: (empty text area).
- Assignee:** User (selected), Team.
- Assigned To:** HA Me.
- Job Status:** Planned.

Navigation buttons at the bottom include 'Cancel', 'Go Back', and 'Continue'.

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:

taxcalc

TIME0:00NOTIFICATIONS2

IN01 Individual

Individual (IN01)

Client Summary

Personal Information

Tax Information

Business

Companies House Authen...

Contact Information

Bank Details

Engagement

Services Rendered

Anti-money Laundering

Relationships

Active Work

Document Manager

Passwords

Notes

Finish

Active Work

Displayed below is a table of all active Jobs and Tasks that have been associated with this client.

Filter

| | Work Type | Service | Activity Type | Name | Assignee | Start Date | Due Date | Deadline | prk Item Period E | Status | Work Item Status | Time Logged | |
|--------------------------|-----------|------------|---------------|----------------|--------------|------------|------------|------------|-------------------|---------|------------------|-------------|--------------|
| <input type="checkbox"/> | Task | | Tax Return | Test | ZZ Z Z | 18/11/2020 | | | | Planned | | | Activate |
| <input type="checkbox"/> | Task | | Annual Acc... | Annual Acc... | HA Hub Ad... | 18/11/2020 | | | 31/12/2020 | Planned | Not Set | | Create |
| <input type="checkbox"/> | + Job (1) | Tax return | Tax Return | Tax Return ... | HA Hub Ad... | 05/04/2020 | 31/01/2... | 31/01/2021 | | Planned | | | Edit |
| | | | | | | | | | | | | | Update |
| | | | | | | | | | | | | | Bulk Update |
| | | | | | | | | | | | | | Delete |
| | | | | | | | | | | | | | View History |
| | | | | | | | | | | | | | Log Time |

Close

Go BackContinue

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**.
2. 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:

The screenshot shows the TaxCalc Practice Manager web application. The left sidebar contains a navigation menu with the following items: Clients / Contacts, Work Management, Mail Merge, and Report Manager (which is currently selected). Under the Report Manager menu, there are options: Run Report, New Report, Duplicate Report, Edit Report, Delete Report, Import Reports, and Manage Categories. The main content area is titled 'Report Manager' and includes a search filter section with 'Report type' (set to 'All report types') and a 'Name of report' search box. Below this, a table lists various system default reports, each with a lock icon, a description, and a category. The table is organized into sections: System, Client, Task, and Job. The reports listed include: Client Integration Status, All Overdue Tasks, All Outstanding Tasks Due this Month, All Clients Contact Information, All Clients Tax Reference Information, Current SA Tax Return work status, Current CT Return work status, SA Returns not filed, Current CS01 Work Status, Clients who have given consent for emails, Clients Enrolled for MTD, Clients above the MTD VAT Threshold, All Overdue Jobs, All Outstanding Jobs Due this Month, All Outstanding Job Deadlines Due this Month, All Clients total fee information, All Services to all clients with Fee information, All Services to all clients with Initial WIP, All Services with linked Jobs, Business Profit and Income Comparison, and All Clients Contact Information3.

| System | Report Name | Category |
|----------------------------------|--|-----------------------------------|
| System | Client Integration Status | Client |
| | All Overdue Tasks | Task |
| | All Outstanding Tasks Due this Month | Task |
| | All Clients Contact Information | Client |
| | All Clients Tax Reference Information | Client |
| | Current SA Tax Return work status | Tax Work Statuses |
| | Current CT Return work status | Tax Work Statuses |
| | SA Returns not filed | Tax Work Statuses |
| | Current CS01 Work Status | Company Secretarial Work Statuses |
| | Clients who have given consent for emails | GDPR Consent |
| Client | Clients Enrolled for MTD | Client |
| | Clients above the MTD VAT Threshold | Client |
| | All Overdue Jobs | Job |
| | All Outstanding Jobs Due this Month | Job |
| | All Outstanding Job Deadlines Due this Month | Job |
| | All Clients total fee information | Client |
| | All Services to all clients with Fee information | Services |
| | All Services to all clients with Initial WIP | Services |
| | All Services with linked Jobs | Services |
| | Business Profit and Income Comparison | Client |
| All Clients Contact Information3 | Client | |

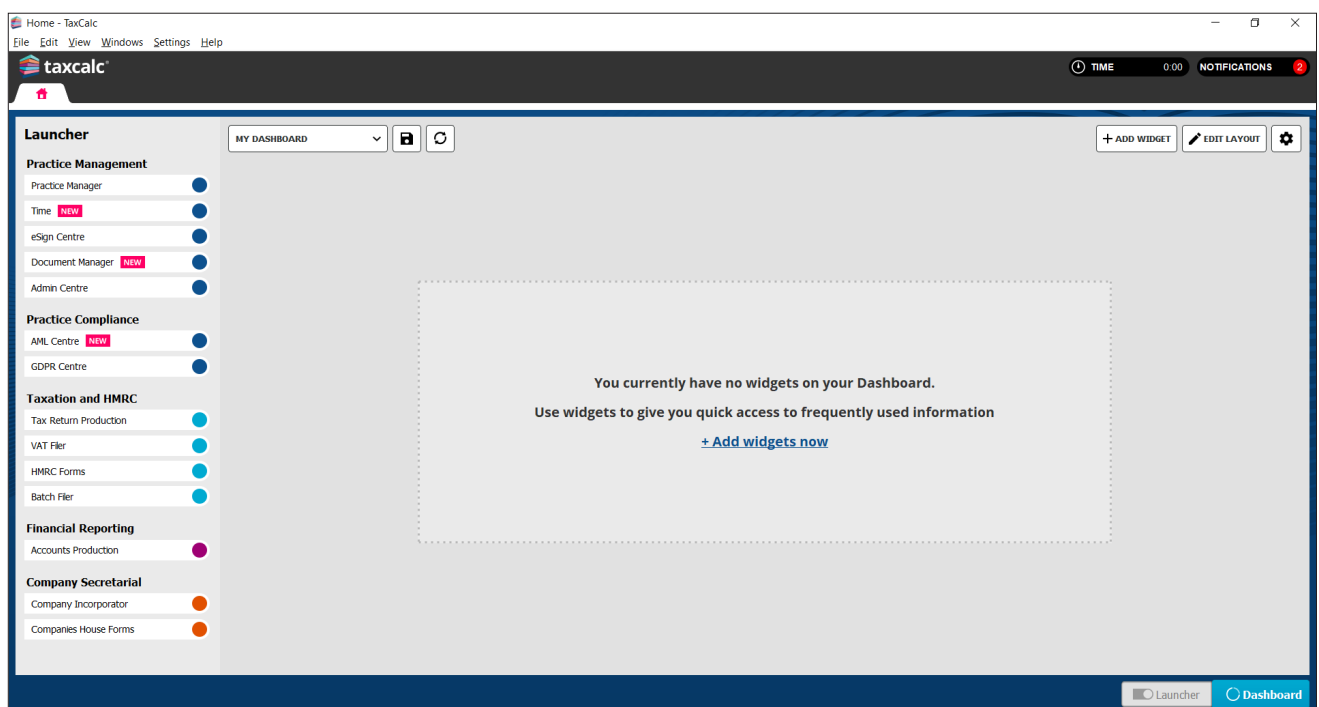
Step 7

Using Job and Task Widgets on the Dashboard

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

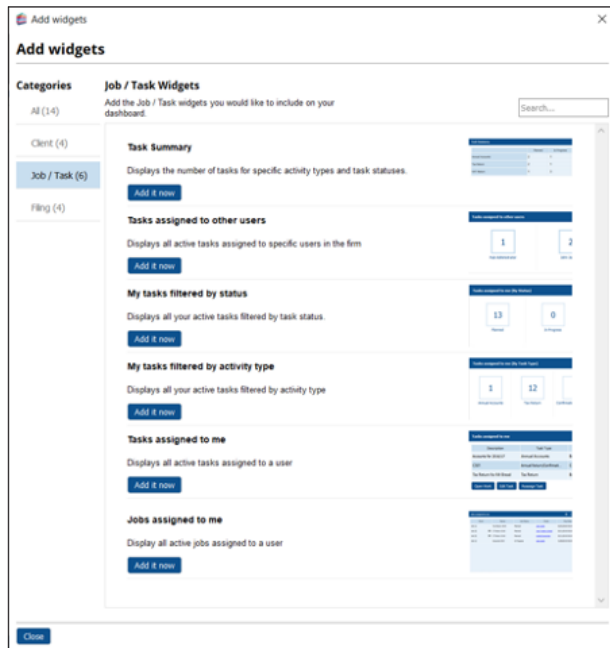
You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task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

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



2. 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:

