



TaxCalc at Accountex 2019

Jamie Royston-Smith, Head of Sales



Join the conversation #ILOVEtaxcalc #Accountex2019 #switchtotaxcalc

Agenda

- Who are we?
- The TaxCalc ecosystem
- #switchtotaxcalc case study
- 3 new products launching today!
- Software demo

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Who are TaxCalc?

- The UK's largest independent supplier of practice suite software
- Cloud or Desktop – it's your choice
- Over 8,500 Accountancy Practices and counting
- Micro-practices through to regional firms

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The TaxCalc Ecosystem

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Tax Return Production
Accounts Production
MTD VAT Filer
Company Secretarial

Compliance Services

Practice Management

Client Database
Workflow*
Dashboards
Time Recording*
Onboarding
Multi-office*

Practice Compliance

Client Communications

AML Centre
AML ID Checks
GDPR Centre

eSigning
Mail Merge
Tax Questionnaires

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Coming soon*



Compliance in the Cloud

The logo for taxcalc CloudConnect is displayed within a pink cloud shape. The word "taxcalc" is in a bold, white, sans-serif font, and "CloudConnect" is in a smaller, white, sans-serif font with a registered trademark symbol.

taxcalc
CloudConnect®

- **Incredibly fast, even over 3G/4G**
- **The complete desktop experience**
- **Multiple layers of account security**
- **Automatic rolling back-up schedule**

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Affordable Integration and Connectivity



QuickBooks Online - Now with 2-way integration



Xero



FreeAgent



HMRC & Companies House

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The Digital Tax People

- MTD for VAT ready
- Working towards MTD for Income Tax

The Science Behind Compliance

- Updates to tax rates and allowances
- Legislative updates; Brexit, Financial Reporting

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Scalability

Multi-Office

Multi-Partner

Sole-practitioners

Start-ups

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Case Study [#switchtotaxcalc](#)



valued*

**Introducing Stephen Paul
Director, Valued Accountancy**

Valued has offices in Consett and Newcastle,
boasts 17 staff and services over 1500 clients

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Valued Accountancy,
County Durham

You switched to TaxCalc in January 2018 - What made you choose us?

“For many years we had invested significantly in larger solutions with a hefty price tag, and didn't really see the return on that. TaxCalc gave us the same and more for approximately half of what we were paying. We were won over by TaxCalc's ease of use, support and sheer value for money. In terms of training, the product was also much easier for the team to acclimatise to. It was a no brainer.”

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Practice Management. Re-engineered

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New Products #reasonstoswitch

New product

Practice Manager Plus

Practice Management reinvented

Take control with our game-changing practice management solution, now including Practice Manager Plus, which powers your practice with advanced workflow and other smart productivity tools.

New product

Time

Integrated time-tracking

As part of our reinvented practice management solution, Time enables you to effortlessly and accurately monitor, record and report time spent on client work across your practice.

New product

Anti-Money Laundering Centre

Demonstrate compliance and know your clients

AML Centre helps Accountants, Bookkeepers and other finance professionals meet their obligations under the Money Laundering Regulations for both their clients and their Firm.

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Let's take a look...

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A sneak preview of:

Practice Manager +

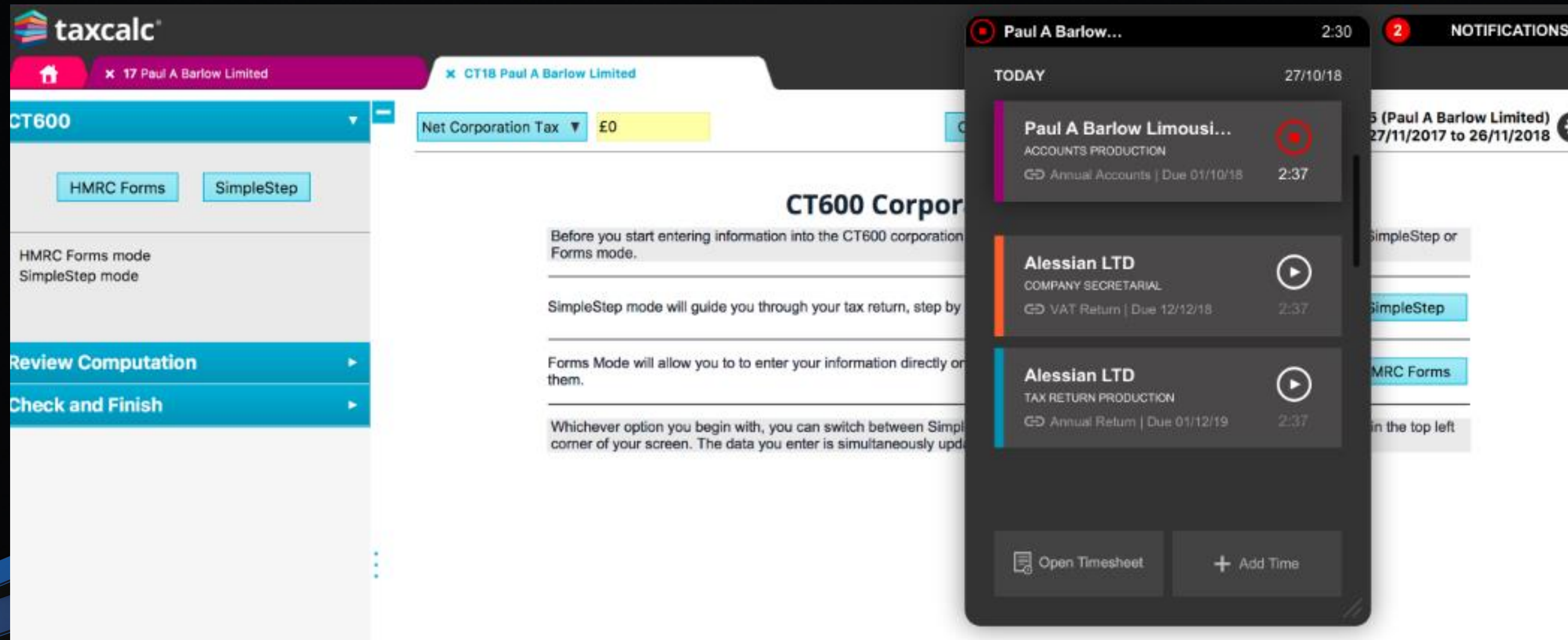
Time

AML Centre

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Time Recording



Easily record time spent
Highlights when you move away from your current task

Subject to change



Calendar view to see how you spent time

Submit your timesheet for approval

TIME

0:00

2

NOTIFICATIONS

17 Paul A Barlow Limited

CT18 Paul A Barlow Limited

TIMESHEETS

FILTER

< Mon, 25th Dec, 2018 >

WEEK

MONTH

Caitlin Dawes

ADD TIME

SUBMIT WEEK

	MON	TUES	WED	THU 20
7am	7AM 30m	7AM 2h	7AM 2h	7AM 2h
8am	7:30AM 2h	Paul A Barlow ACCOUNTS PRODUCTION	Paul A Barlow COMPANY SECRETARIAL	Paul A Barlow ACCOUNTS PRODUCTION
9am	Alkan Aerospace LTD ACCOUNTS PRODUCTION	8:20AM 2h		Rejected
10am		Paul A Barlow TAX RETURN PRODUCTION		
11am		... Pending Approval		9:30AM 2h
12am			Locked	Geoffreys Fisheries LTD
1pm				
2pm				
3pm				
4pm				

Current week: Mon 24th Dec - Sun 30th Dec 2019

In progress

Total time: 32h 34m

SUBMIT FOR APPROVAL

Previous: Mon 28th Jan - Sun 3rd Feb 2019

Rejected

Total time: 20h

SUBMIT FOR APPROVAL

Previous: Mon 21st Jan - Sun 27th Jan 2019

Approved pending

Total time: 32h 34m

Previous: Mon 21st Jan - Sun 27th Jan 2019

Approved

Total time: 32h 34m

Previous: Mon 21st Jan - Sun 27th Jan 2019

Completed

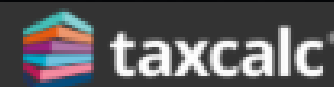
Total time: 32h 34m

Subject to change



Workflow – PM +

A new centre for all jobs and tasks ‘Work’



6

NOTIFIC

Home

×

Clients / Contacts

Task Management

Create New Task

Edit Task

Duplicate Task

Update Task

Open Linked Work

Add Note

View Task History

Delete Task

Mail Merge

Report Manager

Work

To search jobs or tasks, use the filters below:

Filter

Refresh

	Work	Name	Status	Assignee	Client	Start Date	Due Date
<input type="checkbox"/>	+ Job (9)	Account 18	In Progress	Jim Jones	Mr B. Bobson	25/11/2018	25/11/2018
<input type="checkbox"/>	+ Job (6)	CT600 TR	In Progress	Jim Jones	Mr B. Bobson	25/11/2018	25/11/2018
<input type="checkbox"/>	- Job (4)	Account 18	In Progress	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Request Records	Completed	Develpment Dave	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Prep Accounts	Completed	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Send for Approval	Completed	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Log time	In Progress	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	+ Job (2)	AML Check	Created	Sal Mias	Mr M. Davey	25/11/2018	25/11/2018

Subject to change



Define your workflow at a global level

Assign each stage to staff

Client Hub Template Creation

HELP ?

Create New Job Template

This wizard will guide you through the process of creating a new job template.

✓ About the Job

✓ Clients & Work

✓ Dates

✓ Recurrence

✓ Tasks

⚠ Task Order

⚠ Automation

⚠ Summary

1 Annual Accounts - Aim Straig...

2 Company Secretarial - Johnson...

3 Tax Return Production - Acorah...

4 Annual Accounts - Hadleys & ...

5 Annual Accounts - Paul Barlow...

Edit Task Template

Create, edit, duplicate, organize and delete your tasks.

Name: Annual Accounts - Aim Straight Ltd

Type: Accounts Production ▼

Assignee: Jimmy Case ▼

Due date offset: Task completion ▼ Annual Accou... ▼ ⓘ

1 ▴ ▾ Days ▼

Start date offset: Task Selection ▼ Job due date ▼ ⓘ

1 ▴ ▾ Days ▼

The due or start date for this task will be set when the status for the selected task above is set to Completed. Then the date offset, if specified, will be applied.

Reminders

Set reminders for your task so you don't miss important deadlines.

☐ Due date reminder

Reminder: 1 ▴ ▾ Months ▼ before task is due.

☐ Start date reminder

Reminder: 1 ▴ ▾ Days ▼ before task start date.

Cancel

Go back

Continue

Subject to change

Setup automatic triggers

Client Hub Template Creation

Create New Job Template

HELP ?

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✓ Tasks

✓ Task Order

✓ Automation

⚠ Summary

Automation - Events

Please select an action and then a value to set the Job status, Task status or Work Status. When the action is performed, the statuses will be updated.

Action:

Create Tax Return

ⓘ

When the action above is completed, update the following statuses:

Set Job Status to:

In Progress

▼

Set Task Status to:

Completed

▼

Select Task to update:

Select Task

▼

Set Work Status to:

In Progress

▼

Delete

Add


Cancel

Go back

Continue

Subject to change

Easily track task stages within your jobs



6

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<input type="checkbox"/>	Task	Request Records	Completed	Develpment Dave	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Prep Accounts	Completed	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Send for Approval	Completed	Jim Jones	ABC Limited	25/11/2018	25/11/2018
<input type="checkbox"/>	Task	Log time	In Progress	Jim Jones	ABC Limited	25/11/2018	25/11/2018
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Subject to change



AML Centre – Conduct Risk Assessments for all clients

taxcalc

AML Asha Beta

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NOTIFICATIONS

Risk Assessment

Introduction

Data Protection

General Information

Risk Opportunities

Notes and Declaration

Conclusion

Review

Summary Report

Check and Finish

ASH02/IND/AE (Mr Asha Beta)

Reference Number : 765867856

Conclusion

Overall risk: 75%

HIGH RISK

Questions	Risk Outcome
2 questions qualify	High
5 questions qualify	Low risk
6 questions qualify	Normal/Low risk
1 questions qualify	Not Applicable

[View Methodology](#)

Revised risk:

Normal/High

Resultant risk:

NORMAL/HIGH

[View Methodology](#)

Identification Profile

Create Identification

AML Online Check

Engagement

Create Engagement

Close

Go Back

Continue

Methodology to Qualify Overall Risk

1

Qualify risk for each question who was qualified the risk outcome.
Always qualified 'Revised Risk' if = True, otherwise by using 'Initial Risk'.

2

Calculate score of risk for each question.

Risk Outcome	Score
High	5
Normal/High	4
Normal	3
Normal/Low	2
Low	1

3

Calculate total actual score of risk outcome.
Always qualified 'Revised Risk' if = True, otherwise by using 'Initial Risk'.

4

Calculate the total number of questions which have qualified the risk outcome.

5

Calculate total overall score of risk outcome.
Total number of questions * 5

6

Calculate overall risk measure of occurrence.
Total actual score of risk outcome divided by Total overall score of risk outcome * 100

Subject to change



Thank you for watching

Next steps: 14 day free trial or web demo?

Ask a member of our team to scan your badge

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