



# Practice Manager Plus – Feature Overview



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# Practice Manager Plus – Feature Overview

**Practice Manager Plus is our enhanced practice management solution. With TaxCalc’s Practice Manager 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.**

## How can Practice Manager Plus help?

### 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 may 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. Each Task can also be automated so that when one Task is complete, the next one begins. Use your existing database or the TaxCalc supplied demonstration database to try out the new functionality.

### 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 automated 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. Use your existing database or the TaxCalc supplied demonstration database to try out the new functionality.

### **This guide provides an overview within the TaxCalc demonstration database of:**

- **Work Management**
- **Active Work**
- **Job Templates**
- **Dashboards**
- **Multiple Offices for your Jobs and Tasks.**

Please note: We advise for trialling the software the demo database is used as this data will no longer be available once the trial ends. Anything entered into your live database can only be undone manually and, in some cases, cannot be undone at all. However, if you do set this up in your live database these changes



will be saved should you decide to purchase the product. See [KB3067 – How do I switch between my live database and the demo database?](#)

## Additional resources

After reviewing this guide, you may also wish to explore additional resources listed below:

- For more information on Practice Manager and Practice Manager Plus, visit our [website](#)
- For details on how to setup Practice Manager Plus, see the [Getting Started with Practice Manager Plus guide](#)
- For all Practice Manager Plus guidance, see [KB3057 – Practice Manager Plus: Collateral](#)
- You can also find extensive help within [TaxCalc > Help > Contents > TaxCalc Help Manuals](#).

# Work Management

## Practice Manager > Work Management

Work Management allows you to view and manage single and recurring Jobs and Tasks.

From here you can:

- **Create, edit, duplicate, update or delete Jobs and Tasks**
- **Open the Work Item linked to the Job or Task.**
- **Add any Notes**
- **View the Work History which details the Job or Task activity as well as any notes.**

From the Work Management screen, you can see all the Jobs and Tasks associated with your clients. You can also expand specific Jobs to display the details of the Tasks within each Job.

**Please note:** Some options, for example Jobs, are only available if you have purchased Practice Manager Plus.

Work Type	Service	Assignee	Client	Start Date	Due Date	Status	Completed
Job	Confidentiality	Michelle D. Bl...	Michelle D. Bl...	21/05/2023	24/05/2023	In Progress	Yes
Job	Outstanding	Katherine...	Accounting Pro...	21/05/2023	24/05/2023	On Hold	Yes
Job	Outstanding	Katherine...	James Bell	21/05/2023	24/05/2023	Planned	Yes
Job	Outstanding	Katherine...	SARAH BELL	21/05/2023	24/05/2023	Planned	Yes
Job	Outstanding	Katherine...	Alan & Co	21/05/2023	24/05/2023	Planned	Yes
Task	Outstanding	Suparna Walker	Alan & Co	21/05/2023	21/05/2023	In Progress	Yes
Job	Outstanding	Katherine...	Deena Bhat Bhaty	21/05/2023	24/05/2023	Planned	Yes
Job	Annual Accounts	Ray Green	Ray Green	31/12/2022	30/06/2023	In Progress	Yes
Job	Annual Accounts	Ray Green	Deanna Thomas...	31/03/2023	30/06/2023	In Progress	Yes
Job	Tax Returns	Sam Roberts	Clarena Bell	31/03/2023	31/03/2023	In Progress	Yes
Job	Tax Returns	Sam Roberts	Ray Green	31/03/2023	31/03/2023	In Progress	Yes
Job	Tax Returns	Sam Roberts	Clarena Bell	31/03/2023	31/03/2023	In Progress	Yes
Job	Tax Returns	Sam Roberts	Edward Edward	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Harvey Smith	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Caroline Gault	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Account James	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Margaret Mene	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Alannah James	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Oliverina Olive	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Alannah Bell	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Baronella Bell	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Penelope Denny	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Patric Leonard	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Patric Leonard	31/03/2023	31/03/2023	On Hold	Yes
Job	Tax Returns	Sam Roberts	Sam Thomas Bell	31/03/2024	31/03/2024	On Hold	Yes
Job	Tax Returns	Sam Roberts	Clarena Bell	24/02/2024	24/02/2024	On Hold	Yes



# Active Work

## Practice Manager > Client Record > Active Work

Within a client record, the Active Work page allows you to manage all Jobs and Tasks associated with a specific client. You can see if the Jobs or Tasks are active or not and activate them where appropriate. Activating a Job for a service enables you to select the service you would like to activate and start a Job from.

You can:

- Create, edit, duplicate, update or delete Jobs and Tasks
- Activate Jobs or Tasks for a service that has been applied to the client.

Job/Task	Work type	Service	Activity type	Name	Assignee	Assignee type	Start Date	Due Date	Deadline	Status	Work Item Status	Actions
Job (0/1)	+	Tax return	Confirmation St...	<a href="#">Confirmation St...</a>	Unassigned	User	18/12/2023	15/01/2024	15/01/2024	Planned		Activate
Job (0/6)	+	Tax return	Tax Return	<a href="#">Tax Return</a>	Darren Bellamy	User	31/12/2022	31/12/2023	31/12/2023	In Progress	Records Requested	Create
Task		Tax return	Tax Return	<a href="#">Prep Tax Return</a>	Darren Bellamy	User	31/12/2022	31/01/2023		In Progress	Records Requested	Edit
Task		Tax return	Tax Return	<a href="#">Signed Client for...</a>	Tax Team	Team	Pending...			In Progress	Records Requested	Update
Task		Tax return	Tax Return	<a href="#">File Tax Return</a>	Tax Team	Team	Pending...			Planned	Records Requested	Bulk Update
Task		Tax return	Tax Return	<a href="#">Final Contact with...</a>	Tax Team	Team	Pending...	31/12/2023		Planned	Records Requested	Delete
Job (1/10)	+	Annual accounts	Annual Accounts	<a href="#">Annual Accounts</a>	Jay Green	User	31/12/2022	30/09/2023	30/09/2023	In Progress	Records Requested	Bulk Delete

**Please note:** Some options, for example Jobs, are only available if you have purchased Practice Manager Plus.



# Job Templates

## Admin Centre > Applications > Customise Practice Manager > Job Templates

If you are using Jobs and Tasks, you'll probably be using them for frequent work, such as Tax Returns. Instead of creating a new Job for every client each time you want to do a Tax Return, you can create a Job Template.

The Job Template can contain multiple Tasks to break down the different stages of a regular Job, however, instead of entering the details every time a Job is created, the fields are automatically populated with the selections made in the Job Template.

From the Job Templates page, you can create, edit, duplicate and delete job templates for the practice.

For more details on creating Job Templates see [KB2978 - How to create a Job Template](#).

The screenshot displays the 'Job Templates' page in the TaxCalc Admin Centre. The page title is 'Job Templates' and it includes a sub-header: 'You can customise the list of job templates available by adding new, duplicating existing, editing existing or deleting templates in the table below.' The main content is a table with the following columns: Locked, Template name, Active, Tasks, Job assignee, Job due date, Service offered, Created, and Last updated. The table lists several templates, including 'Annual Accounts', 'Tax Return (SA)', 'Tax Return (CT)', 'VAT Return - Monthly', 'VAT Return - Quarterly', 'VAT Return - Annual', 'Client Onboarding Checklist', 'Confirmation Statement', 'SA Tax Return', and 'Annual Account Limited'. Each row shows the number of active jobs, the number of tasks, the assignee, the due date, the service offered, the creation date, and the last update date. On the right side of the table, there are buttons for 'Create', 'Edit', 'Duplicate', 'Delete', and 'Manage Categories'. At the bottom of the table, there are 'Close', 'Go Back', and 'Continue' buttons. The left sidebar contains a navigation menu with options like 'Introduction', 'Startup Options', 'Login Password Setup', 'Data Protection', 'Dashboards', 'Report Options', 'Client Consent (GDPR)', 'Mail Merge/Salutation', 'Custom Fields', 'Data Mine', 'Work Item Status', 'Activity Types', 'Task Options', 'Services Offered', 'Job Templates', and 'Finish'.

Locked	Template name	Active	Tasks	Job assignee	Job due date	Service offered	Created	Last updated	
	System								...
🔒	Annual Accounts	0	10	Unassigned	Statutory deadline	Annual acc...	09/10/2023	System - 09/10/2023	Create
🔒	Tax Return (SA)	2	8	Unassigned	Statutory deadline	-	09/10/2023	System - 09/10/2023	Edit
🔒	Tax Return (CT)	0	6	Unassigned	Statutory deadline	-	09/10/2023	System - 09/10/2023	Duplicate
🔒	VAT Return - Monthly	0	8	Unassigned	Statutory deadline	-	09/10/2023	System - 09/10/2023	Delete
🔒	VAT Return - Quarterly	0	8	Unassigned	Statutory deadline	-	09/10/2023	System - 09/10/2023	Manage Categories
🔒	VAT Return - Annual	0	8	Unassigned	Statutory deadline	-	09/10/2023	System - 09/10/2023	
🔒	Client Onboarding Checklist	0	6	Portfolio ...	2 weeks after the date of last engagement	-	05/10/2023	System - 05/10/2023	
	Confirmation Statement	0	1	Unassigned	Custom	-	09/10/2023	Hub Administrator - 11/10/2023	
	SA Tax Return	0	1	Unassigned	2 weeks before the tax year end	Tax return	11/10/2023	Hub Administrator - 11/10/2023	
	Annual Account Limited	0	1	Unassigned	1 months before the usual year end	-	09/10/2023	Hub Administrator - 11/10/2023	



# Dashboards

Dashboards display a collection of widgets that can be added, edited, removed and grouped to enable fast navigation to relevant high-level insights to your practice. It's designed to show data in a simplified structure for 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.

You can:

- **Manage dashboard owners and set new owners where required – accessible in Admin Centre**
- **Switch to different dashboards containing various TaxCalc widgets**
- **Create public dashboards that can be shared with other users.**

**Please note:** You can only setup multiple dashboards if you have purchased Practice Manager Plus. Practice Manager users will have the ability to configure one dashboard.

The screenshot displays the TaxCalc dashboard interface. The top navigation bar includes 'File', 'Edit', 'View', 'Windows', 'Settings', and 'Help'. The main dashboard is titled 'MY DASHBOARD' and features several widgets:

- Tasks assigned to me:** A table with columns: Activity Type, Name, Assignee, Client Name, Description, Due Date. Data rows include 'Annual Accounts' (due 30/06/2023) and 'Tax Return' (due 31/01/2024).
- Client Counter:** Four circular gauges showing counts for 'Individuals' (3), 'Partnerships/LLPs' (5), 'Companies' (7), and 'Trusts' (4).
- Filing Status - Accounts:** A table showing client counts for 'Limited Companies' and 'Limited Liability Partnerships' across categories like 'Accounts not Created' and 'Accounts not Required'.
- Client Engagement Status:** A bar chart showing the distribution of clients across 'New', 'Active', 'Inactive', and 'On Hold' categories.
- Jobs assigned to me:** A table with columns: Work Type, Name, Job Status, Client, Due Date. Data rows include 'Tax Return (SA)' jobs in 'Planned' and 'In Progress' states.

The left sidebar contains a 'Launcher' menu with categories like 'Practice Management & Compliance', 'Communications', 'Taxation and HMRC', and 'Financial Reporting'. The bottom right corner shows a toggle for 'Launcher' and 'Dashboard'.



# Multiple Offices

## Admin Centre > Firm Details

Multiple Offices allows you to assign clients and users to specific offices:

The screenshot shows the 'Engagement' form in the taxcalc system. The form is titled 'Engagement' and includes a sidebar with navigation options: Client Summary, Personal Information, Tax Information, Business, Companies House Authen..., Contact Information, Bank Details, Engagement (selected), Consent Management, Services Rendered, Anti-money Laundering, Relationships, Active Work, Security, Notes, and Finish. The main form area contains the following fields and options:

- Select the client's engagement status: Active
- Date of last engagement: 16/12/2019
- Date of client loss: [empty]
- UK status: Completed
- Enter the date of last completion: [empty]
- Assign the client to a portfolio group: No Portfolio
- Assign the client to an office: Main Office
- Bookkeeping software: [empty]
- Method of payment: Direct Debit (DD)

Buttons for 'Close', 'Go Back', and 'Continue' are visible at the bottom of the form.

You can then specify filing credentials on a per-office basis. Therefore, each user assigned to a specific office can utilise these credentials, allowing them to quickly populate the correct credentials for a given office when the firm filing credentials option is selected on HMRC or Companies House submissions.

This screenshot is identical to the one above, showing the 'Engagement' form for client 001 James Peters. It displays the same sidebar and form fields, including the 'Assign the client to an office' dropdown set to 'Main Office'.

You can filter your clients in dialogs and reports according to their assigned office. You can also restrict users to see only the clients relevant to their assigned office.





