

Taxation Tax Technology Supplement 2006

Technology rules

by ALLISON PLAGER

LIFE IS ALMOST unimaginable without computers. How ever would we communicate without e-mail these days? Letters are a comparative rarity whether at home or in the office. So much can be done so quickly and easily electronically, that few of us would ever wish to return to the days of dictating letters, etc. Certainly, there cannot be many tax practitioners who choose to complete tax returns manually and, even more extraordinarily, do tax computations unaided by technology. Tax software can make these jobs relatively simple, giving the practitioner time for the more interesting, value-added work such as tax planning.

Any practitioner considering purchasing or reviewing his software will find that *Taxation's* annual technology supplement looks at a wide range for tax software on the market. It provides contact details of a variety of the products available, together with an independent report on what each package does. The reports aim to give readers an overview of a product, rather than provide a detailed explanation of the software and what it does, so further information should always be obtained from the software providers. Potential purchasers might also want to quiz existing users of a particular package. They will have first-hand knowledge of how good a provider is, say with regard to telephone support, reliability, punctuality of updates. They will also be able to explain how straightforward the software is to use, what sort of training employees needed, and generally what the practice has gained by its use. Names of existing users will usually be supplied if requested by the software providers.

What do you want?

Before purchasing software, it is important to know what you want the software to do and how much money you are prepared to pay for it. For example, if you want an all singing, all dancing personal tax system which deals with all aspects of self assessment and what if scenarios, this will be a substantial investment. A simple form filler and tax calculation package on the other hand can be obtained much less expensively.

There are many suppliers of personal tax self assessment software ranging from large companies, such as Sage and CCH Software, to small independent concerns, e.g. Forbes Computer Systems and Quality Management Software. It is worth mentioning here that IRIS acquired PTP Software in October. Both companies have given assurances that there are no plans to change anything and that it is 'business as usual'.

The markets served by the providers have become increasingly blurred as nearly all of them say that their software can be used by any firm of any size. Their packages vary enormously in what they do, which is why it is important to know what you expect of a product.

Accreditation

The IT Faculty of the Institute of Chartered Accountants in England and Wales launched an accreditation for personal and partnership tax software in 2004. The scheme aims to provide

comprehensive, independent information about software packages. The information is free to members and non-members of the ICAEW, see www.icaew.co.uk.

Providers have to submit an enormous amount of detailed information when applying for accreditation and reach a very high standard to gain it. Not many firms have accreditation, perhaps deterred by the detail required, but those that have include Digita, IRIS, Deloitte and APS Advance.

Going online

It would be remiss not to mention online filing, although read Nigel Powell's article on page 3 of this supplement for more thoughts on this subject. There is no doubt that the Government continues to be very keen to promote online dealings with public departments, and HMRC is no exception. Take-up of online filing has grown massively over the last year, with nearly two million returns filed online by 31 January 2006 (see Update, *Taxation*, 30 March, page 654 for more facts and figures). The demise of the electronic lodgement service, while mourned by some in terms of its flexibility, has led more practitioners to register for Internet filing and take advantage of the speed that this service offers. HMRC recently allowed attachments to be included to returns filed online, which is a welcome improvement.

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Great care has been taken in preparing this supplement to ensure that the contents are as accurate and up to date as possible, but no responsibility can be accepted for any transactions entered into or refrained from on the basis of its contents.

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♪ Post Carter musing blues ♪

NIGEL POWELL of Digita takes a wry look at the aftermath of the Carter report.

MOST TAX PROFESSIONALS involved in personal taxation breathed a sigh of relief when Lord Carter relented on his original proposal to foreshorten the self assessment agent filing deadline, but only provided the returns are filed online. Then, with so many other pressures, everyone turned their attention elsewhere but, where does that leave us in the run up to the new regime of 2008?

Well, as a tax software provider, Digita is one of those most affected and if you thought we were being consulted by HMRC you would be wrong – we have not been as yet. But consider what has to be achieved in the time that is left.

Another year of the old system

Lord Carter said that he felt changes in software should not be imposed without giving adequate time (six months at least) for their implementation. This is not the case at present.

Around January each year, software companies are informed of the final requirements and new forms for the next year and it is unlikely that much will have changed over the previous year. Moreover we have to go all out to get our software written and tested for use by 6 April. There is no room for discussion on the part of software developers at this point, it is a case of 'get it done, but get it right'. We are required to meet the demanding standards of HMRC for their approval of our substitute forms, plus we are required to test with HMRC that we have complied with their online filing specifications and overall the timing to release is always very tight, particularly as regards advance testing of new items.

In short, we cannot sensibly look at anything new until after April, and in some cases May 2007, but the new system must come into effect by April 2008.

Existing flaws

HMRC back end systems, i.e. those used by HMRC tax inspectors, have improved so that there are fewer limitations to online filing than was originally the case, but a number of problems remain where commercial tax filing software is expected to validate and prevent certain specific cases being presented to HMRC online systems. If they did not, then some cases would give rise to rejection. In effect, software companies are required to write their software to 'error trap' such problems. Some of these are fundamental and examples include the number of iterations of, say capital gains or foreign income. There is also a limitation on

the amount of 'white space' additional information which can be provided online. When will the remaining system limitations be removed as we move toward all cases being filed online?

There are still some classes of taxpayer who may not submit tax returns online, for example MPs, judges and certain other Government servants where we originally understood that their information must be protected. But surely with 128-bit encryption, the highest available, now employed by filing online it is more secure than sending a paper return via the post? So what is HMRC's plan for them or must they all be filed by 30 September and on paper forms?

Currently, unless HMRC have changed matters very recently, there is no end to end link when filing trust returns online. You file online and HMRC receive the unpacked data but, because of a mismatch between their receiving and back end systems, they are forced to print it out and then transcribe it into their back end systems. For the hapless agent and ultimately his clients, this naturally is a source of continuing irritation and unnecessary extra cost when, perhaps, a transcription error generated at the HMRC end is misinterpreted as original user error and gives rise to HMRC correspondence.

Totally new

By 6 April 2008, a new paper based tax return for postal filing is being designed by HMRC specifically for optical character recognition and not requiring a true self calculation. Since it will be brand new and designed to avoid the usual completion errors made by the average taxpayer, a good deal of thought needs to go into its design. Software companies have seen a very early draft of the proposed form last year, but that is all. Has anyone been consulted so far? Please do not rely on software developers to be doing this since we may not be involved in the design and, indeed, it is as yet uncertain what look and feel our approximation form will take, given that it must clearly never be used in substitution for the official form?

Not for agents

As from 2008, tax software is not permitted to produce HMRC substitute paper forms. So you have a stark choice: if you wish to continue to file by 31 January as previously, you must file your clients' returns online using either HMRC online systems or commercially available software. Those who seriously contemplate continuing to use the paper form should remember that they must either abandon their tax software or instead complete the return using the tax software, then print the computer generated 'form' and finally hand complete the official paper return and post it to arrive by 30 September. Existing software users will run the new risk of unforced transcription errors when handwriting the forms and have the

additional bother of keeping scanned copies or photocopies of the signed form.

So is the new form largely likely to be a non-starter for you? This brings us to the next point: what will your tax software produce by way of forms and what will they look like in 2008?

Unofficial 'facsimile'

HMRC say that while they do state the minimum information which must be included on a facsimile used for online filing, they do not prescribe either the form layout or how you go about gaining approval from your client for submission, so long as you can demonstrate that your client has approved what you submit as his information.

Up to now most agents when e-filing, have used the computer substitute printout to send to clients for approval, and have usually demanded a 'wet' signature from the client as proof. Probably most are unaware that the form could in reality have a totally different appearance if they chose and if the software supplier offered a choice. Moreover HMRC do not stipulate that the taxpayer need give any formal wet signature authority to his agent. The agent merely has to be satisfied that the taxpayer has given his authority for that information to be transmitted and that the taxpayer has been made aware of his legal duty to present accurate and complete information. Strictly, HMRC advise the taxpayer to sign and retain the form supplied by the agent as evidence of the figures he has authorised his agent to supply electronically.

In 2008 we believe that most practitioners will want the new computer printout to resemble the official form, but software vendors will not be able to gain approval for its use as a substitute paper form.

We will need time to develop such a new form style and we will need to see an early version, since it is not going to be a minor modification of the existing form.

Consequences

It has been usual practice for agents sending the facsimile return, also to supply their client with schedules of dividends, interest and rental income etc., so as to analyse the entries made on the return. This is a hangover from pre self assessment days when the tax return required notification of full analysis but provided insufficient space to record it. Most agents would write 'as per schedule' on the form and attach the computer printouts.

Will this practice discontinue since, strictly, the requirement under self assessment has been only to provide summarised information on the return, or will clients continue to require the detail to confirm that the agent has correctly summarised the details provided to the agent? If so, tax software providers will have to map their analysis to match the new form summary entries and they will need time to do so.

HMRC have accepted that the method of reporting capital gains on the current forms is of no great help to either them or the agent when it comes to checking the calculation. Accordingly, we understand that they intend to allow simplistic reporting of the gain or loss on the form but backed up by way of a full CGT computation (supplied as a PDF attachment to the online filing). Furthermore we understand that under the new regime from 2008, HMRC will check a number of the calculations provided. The issue will be that many practices will have relied upon such calculations having been performed by either the stockbroker or

other financial adviser and some agents are used to simply quoting from such reports as are given to the taxpayer. It is becoming clear that financial advisers are nervous of the use of their calculations when they may have been indicative rather than fully researched.

It seems that many financial advisers are making a case for a change when reliance is to be placed on their figures or placing disclaimers upon the reports they otherwise produce.

It also means that the agent will always have to provide a calculation when not previously required to do so, and the agent should be aware that calculations may be subject to review so he may need to explain in greater detail how they were done.

The cultural change

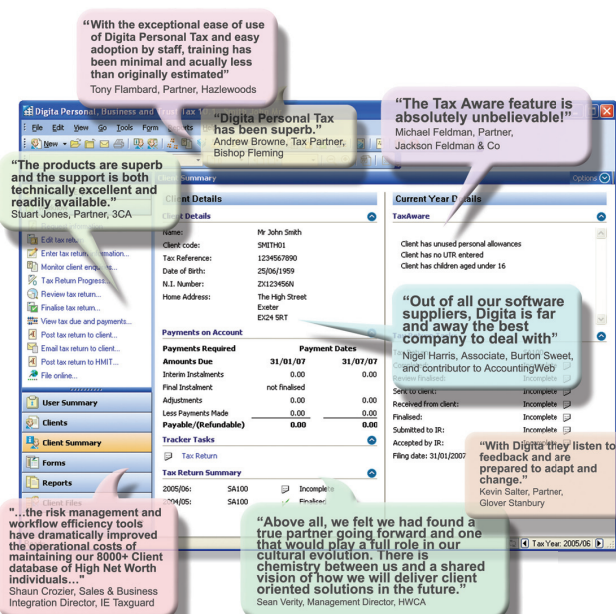
Not wishing to scaremonger, but how many clients have you asked to use e-filing for 2007, let alone 2008? For those clients you have the additional requirement (a) to persuade them to authorise you to file online on their behalf (b) maybe to alter the terms of engagement to cover the new situation and (c) establish the authority to file online with HMRC. My recommendation is that it would be best to try all this out in 2007 and not end up with the millions of other cases in a similar quandary in 2008.

The alternative does not bear thinking about, that one might have to contemplate having to chase-up high fee payers early in the tax season in order to ensure that one can file on a paper form by 30 September.

Other doubts

What happens at present if you file online and get rejected for whatever reason? Provided that it is before 31 January, you can print off the same tax return from your computer and send it by post. In the new regime, does a post 30 September 2008 rejected online filed return represent an immediate penalty for late paper filing? By now HMRC will not be issuing a physical paper return, instead they will send a notice requiring an (electronic) submission, so would it be necessary to request a paper form be issued unless a stock of paper forms is to be provided, which in itself defeats HMRC's overall objectives?

I am not an HMRC 'knocker' and I believe that greater online communication between Government agencies and the population is the right way forward. I also recognise that Government has been pushing increasingly tougher targets for reducing both manpower and costs onto HMRC, but I am concerned that inadequate time is being given to the planning for the new regime under 100% agent online filing. I would not want either the HMRC systems or our own software to have to rely upon Lord Carter's six-month advance notice for some of the items discussed.



Income tax return preparation packages

The many software packages which deal with income tax vary widely in functionality, as the following reviews show.

TaxCalc

Acorah Software Products

TaxCalc has been in existence for 25 years. It was initially self assessment software package, which individuals could buy off the shelf and use to complete their personal tax returns, produced by Which?. It was later taken over by Intuit which stopped supporting it in early 2005. However, much to everyone's relief this excellent package was rescued by Acorah Software Products, where it seems to have found a good home. Rewritten and relaunched on 1 May 2005, TaxCalc Pro, the professional version, allows an unlimited number of clients. It can be used to prepare and produce both the personal and partnership tax returns, together with all the supplementary pages, including Lloyd's underwriters and ministers of religion. Data can be entered in interview format, or directly onto the return forms. Navigator panels allow data entry via a series of pick-lists. It has a company car tax calculator and deals with foreign tax credit relief calculations.

A tax summary shows the taxpayer's total liability, and additional pages provide a complete breakdown of how the figures are reached and the payments on account. Form SA303 for reducing payments on account can also be produced. The package copes with capital gains tax computations and some

'what if' planning, but not with pension or change of accounting date planning. Data is carried forward year on year. Returns can be filed using the online filing service. It also handles online filing of forms 64-8.

TaxCalc Pro is a straightforward self assessment software program which is easy to use. While planning features are limited, the software's keen price reflects that, and it is aimed principally at small to medium sized firms, non-tax professionals, tax shops, etc, who may be less interested in products with lots of planning features. New features are planned for 2007. These include a checklist to collect client data, detailed schedules of tax return information, production of standard letters and password protection.

TaxCalc Lite, aimed at members of the public with very straightforward, can be downloaded from the Internet for £4.99. The main individual version comes on CD-ROM or online at a cost of £24.99 with updates via a TaxCalc Live Update function.

TaxCalc Trusts is a new product and was launched in July 2006. This deals with all the SA900 forms and the tax calculation.

TaxCalc Pro Suite (CT) was launched in July 2005 and is a simple corporation tax form filler with a few extras. The product follows the structure of the income tax product. Information can be entered using a 'SimpleStep' interview process or by direct form entry. All forms are covered. The software handles the non-corporate distribution charge, marginal rate relief, and CGT calculations including indexation and taper relief. No business

TAXCALC
MAKING TAX EASY

WWW.TAXCALC.COM
TEL: 08707 66 99 35
SALES@TAXCALC.COM



TaxCalc Pro 2006

TaxCalc Pro £175 - TaxCalc Pro Suite £275 (+VAT)

- Includes unlimited SA100, SA800 and CT600 returns (CT600 - Pro Suite only)
- Pro Suite also includes Non-Corporate Distributions (NCD) and Capital Gains Tax calculations
- Simple free online filing of tax returns and 64-8's
- Budget 2006 CT Calculations
- Includes client management & confidential support functions
- SimpleStep interview or Direct-to-Form data entry options available
- Free priority support by telephone & email
- Call TaxCalc for a free evaluation copy



calculations regarding accounting periods can be done and it is not targeted at groups. Returns can be filed online.

The software comes with a manual on CD or online, online help screens and a free support line. There is a customer website and more communications, e.g. an e-mail bulletin service and newsletters, with customers are planned from late 2006

Contact: Sales
Address: Acorah Software Products, Ash Court,
23 Rose Street, Wokingham, RG40 1XS
Tel: 01189 748480
Internet: www.taxcalc.com
Cost: *TaxCalc Pro* – £175; *TaxCalc Pro Suite* – £275;
TaxCalc Trusts – £100
Rec spec: Windows 98SE+; Pentium 4; 256mb RAM;
100mb hard disk space

Advanced Professional Solutions Ltd

Founded in 1991, Advanced Professional Solutions (APS) produces Advance Practice Management, which can be linked to other SQL based software solutions, including Digita's Taxability Pro and CoTax Pro, MYOB's PerTAX, CCH Taxpoint, CCH Gains, and Tax Computer System Ltd's AlphaTax, using Advance Fusion.

Advance is a powerful practice management system with its functionality flowing from a central client database. It deals with timesheet processing, work in progress management, workflow, billing; client relationship management (CRM). Advance was the first practice management solution to be accredited by the ICAEW.

APS has many well-known organisations among its clients. These include Mazars, Menzies, Saffery Champness, Armstrong Watson, Hazlewoods, Princecroft Willis, Goodman Jones, Chiene & Tait, McKenzies and Simpkins Edwards.

Contact: Sharon McBride
Address: Advanced Professional Solutions Ltd, Castle Court, 41 London Road, Reigate, Surrey RH2 9RJ
Tel: 0870 351 4878
Internet: www.aps-advance.com
Cost: price on application
Rec spec: Windows XP Professional; 256mb RAM;
100mb hard disk space



CCH Software

CCH Software is a leading supplier of tax software, and has produced tax and accountancy software for over 25 years, albeit under different names, i.e. FDS and Data Sciences, and ownership. It has approximately 1,200 named firms using its products in differing combinations. CCH Software is a subsidiary of the publishing company Wolters Kluwer (UK) Ltd.

At the beginning of 2006, CCH rebranded its entire software range to show how each individual ProSystem module fits into and makes up the integrated ProSystem suite. Each module falls under one of four segments, Accountancy, Consultancy, Taxation and Practice Management all supported with a single Client

database and using a central Console to manage the client's needs. Data has only to be entered once and it is shared by all by the relevant modules as required, this allows information to be managed more effectively, and to be used for marketing purposes. Recognising that some users like to mix and match software products from different providers, the data flows seamlessly into other such products that may be used. CCH Software uses a true open database system, which means that data is imported and exported in real time to and from packages using a variety of common technologies as well as comprehensive API tools. This makes them particularly flexible, and able to integrate not only with each other, but many other software packages.

The Personal Tax module (formerly known as CCH Taxpoint) does everything the user could want with regard to all aspects of self assessment. It handles the full range of personal tax self assessment related HMRC forms, including MPs, ministers of religion and Lloyd's underwriters, and produces backing schedules and detailed supporting computations, plus all working sheets. The user can add free-format spreadsheet schedules, which allow for more flexible analysis with direct intelligent linking of data to the tax return. The user enters information directly on to the on-screen return, by drilling down, or using the traditional menu system. Client data is carried forward each year. A 'Fast Path Window' enables the user to see what items were included in the previous year's tax return, or the same information is indicated by an asterisk against the appropriate forms of income on the drop down menus. Outstanding matters can be flagged up using the notes facility.

The software can be used for a wide range of 'what if' planning, pension planning, change of year end planning, etc. The tax calculation is produced automatically, along with the relevant statements of account, and the form SA303 to reduce payments on account is also available. A built in administration system monitors the client's progress. The system can be password protected at various levels. Letters can be written either using the library of standard letters which can be personalised, or created using the letter generator. 5 April questionnaires can be produced, in bulk if required, for each client to request tax return information. CCH Online Data Capture is a web-enabled data collection tool which can be used to collect tax return information electronically from the client. It uses a question and answer system based on the client's previous tax return, allowing the client to provide the information when he wants to and from any location, e.g. home or office. Help and validation are available throughout the questionnaire. The information flows through into the tax return, without having to be rekeyed by the user. The module can also be used to send the tax return electronically to a client for him to authorise or to supply any outstanding information; the return can be sent as a pdf file so that he has a visual version of the electronic file, but cannot make any changes himself. The accountant can customise the software's appearance as he prefers. This facility can be hosted either by the user or by CCH Software.

With regard to business the whole process of calculating the tax accounts of a sole trader is automated. For example, changes of accounting date and cessations are dealt with, and there is an asset register for capital allowances.

Partnership Tax produces partnership returns and supplementary pages for all types of partnership, regardless of size

or complexity. It has the facility to manage the production of the partnership statement and conveniently integrates with the personal tax system if partners are also personal tax clients, while also being able to cope with partners who are not held on the same system. The program links in Excel spreadsheets where needed.

The software handles Internet filing, with approximately one-third of clients using each option in 2005-06. It supports user restriction via username and password.

CGT & Dividend Scheduling automates the preparation of investment income and capital gains schedules, taking into account dividend payments, scrip issues, reorganisations, mergers, takeovers, de-mergers, and produces dividend, capital gains tax and accrued interest schedules to support the tax return. A particularly useful planning feature is the dummy sales function allows users to illustrate a client's potential capital gains tax position if a holding is sold on a given day. All existing and previous capital gains tax legislation is included. The securities database is updated centrally by CCH, and users download up-to-date databases by visiting the CCH website. The modular pricing and flexible usage options make the module suitable for any sized practice. Under its previous name, Gains, the module was highly commended for the LexisNexis best tax software award in 2003.

The basic version of Trust Tax is effectively a form-filling package that deals with trust and estate work, catering for a range of trusts, including accumulation and maintenance, discretionary, interest in possession, bare trusts and estates. The relevant calculations are done automatically, and take into account the rules relating to personal representatives, trustees of unauthorised unit trusts and trustees liable at the rate applicable to trusts. The full package allows for more complex transaction including automatic allocation of beneficiaries income, the production of the relevant form R185, as well as a traditional style tax computation and backing schedules to supplement the tax return.

The Return Analysis software reviews the tax return. It interrogates the tax return data with a view to assessing the client's exposure to an HMRC enquiry by comparing the current return with that of the previous year. Discrepancies are shown in a report, which can be customised and sent to the client. The tax return is brought in electronically, which allows the module to be used in conjunction with other tax return software packages provided that they support electronic filing. Based on the review of the data, it also evaluates business performance highlighting possible planning opportunities. It links to the CCH publications British Tax Library and Tax Investigations Reporter so users who subscribe to these publications can access relevant information at the click of a button. Users who do not subscribe to them reach a static screen help. The software, under its previous name TaxManager, won the Taxation Awards best software award in May 2004.

Proactive Client Communication integrates the CCH software technology with CCH Information, identifying news items or legislative changes which could affect clients. An e-mail alert is then sent, searching the client database and highlighting any clients who might be affected.

Pension Tax is the self administered pension scheme tax return system aimed particularly at accountants and pensioner trustees. This handy niche package deals with the returns, relevant supplementary pages and automatic calculation for any tax liability for

HMRC approved self administered pension schemes required to submit tax returns.

The Practice Management software is built around the central client database, forming a hub for all the modules. It provides time recording, billing, fees and purchase ledger functions. In addition, it has an on-screen client filing system giving users access to client correspondence. It can hold scanned documents, telephone call notes, e-mails and workflow records. Developments within Practice Management include Document Management which allows documents, including e-mails, to be saved from Word into the client's file. This brings the paperless office one step closer, and indeed some users prefer not to keep any papers, instead sending them to their clients to retain. The workflow management system works by recording and monitoring work in progress, and deadlines. Recurring tasks are automatically generated and a list of task shows the jobs due within a specified period.

All modules come with electronic manuals and on-line help. There is also a telephone help-line, and at least 15 people support the products. User groups, newsletters, online knowledge base, e-mail bulletin service, seminar programmes, and product review groups are offered. Training on how to use the software can be arranged for an additional cost.

Contact: Sales Administration

Address: CCH Software, Cleary Court, Church Street East, Woking, Surrey GU21 6HJ

Tel: 01483 775070

Internet: www.cch.co.uk

Cost: Price on application. Products are priced according to modules included, number of users and number of cases.

Rec spec: Windows 2000/XP Prof; Pentium III upwards; 128mb RAM; 1gb hard disk space

Deloitte

Deloitte offers a number of different software products, as are featured throughout this supplement. It is a substantial operation with, at the time of writing, 35 programmers directly engaged on software development. The software is used throughout the firm so effectively has instant and on-site user appraisal.

The Abacus income tax package comprises three modules: personal tax, trust and partnership.

The personal tax module copes with all the personal tax self assessment related forms, including ministers of religion, MPs and Lloyds underwriters. It handles a range of situations, including pension planning, calculation of payments on account, section 128 claims, share pools for capital gains, and expatriation issues, such as tax equalisation, hypothetical withholding tax, double taxation, and foreign currency transactions. It does not support filing by Internet.

The trust module caters for the most complex areas of trust taxation. It generates a range of relevant returns and deals with situations where the trust changes during the financial year.

The partnership module deals with trading, investment and property partnerships consisting of individual, non-resident, corporate and partnership partners. The module includes full business tax schedules to produce computations on income tax and/or corporation tax principles, allocation schedules, tax reserve calculation summaries and appropriate reconciliations.

Change of accounting date is catered for, and joiners' and leavers' adjustments are calculated for the personal tax return. All overlap reliefs are calculated and tracked. Chargeable gains for partners in certain investment funds may be calculated using the partnership gains application. The partnership module interfaces directly with the personal tax and corporation tax modules to produce individual or corporate partner's tax computations. A dynamic link between the personal and partnership modules ensures that the tax return file reflects the most up to date partnership figures.

Data can be entered either directly to the on-screen return form, or using standard tax calculation schedules. Users can design their own additional working papers and link them into the file as required. The 'what if' planning tool allows quick comparisons between the results of different situations. Notes to HMRC, queries and reminders may be added to any element of user data. A full audit trail is recorded.

Internet Organiser simplifies the data collection process and link to pay-as-you-earn and benefit systems.

The modules are used throughout the Deloitte tax practice to produce over 20,000 tax returns, and the software is also licensed to several external clients. There are no minimum or maximum client limits.

The software is supplied on CD-ROM, with an online manual and training. A help desk, customer website and online knowledge base are also available.

Contact: Conrad Young
Address: Deloitte, 180 Strand, London WC2R 1BL
Tel: 020 7303 3204
Internet: www.deloitte.co.uk
Cost: Price on application
Rec spec: Windows 2000, XP, 2003 Server; Pentium III or higher; 256mb RAM; 400mb hard disk space and up to 300kb for each computation file; MS IE5.01 or higher



Digita

Digita is a highly successful independent company which has been producing tax software for 20 years. As well as providing software for tax professionals, it has developed some of Microsoft's products including MSN Money, components of Microsoft Office, and Microsoft Money. Digita Personal, Business and Trust Tax and Corporation Tax are the only UK tax products accredited by Microsoft for use with Windows. In addition, these products together with Accounts Production are accredited under the ICAEW's IT accredited product scheme. The software will look familiar to anyone who uses Microsoft Office Products and is designed to be intuitive and straightforward to use. It uses Microsoft MSDE/SQL database technology which allows the user enormous scalability over his database. The products allow full integration, regardless of whether the user has only Digita products, or has software from other suppliers (see Digita Contact Manager below).

Digita Personal Tax (formerly known as Taxability Pro) won the LexisNexis best tax software award in 2003 and again in 2006, the only software to have won this award twice.

Digita Personal Tax handles most aspects of the self assessment tax return, including partnerships, Lloyd's underwriters, MPs and ministers of religion. HMRC help notes and help sheets are included. Tax is calculated automatically, showing the payments on account and the form SA303 for reducing payments on account can be produced. On the capital gains tax front, the user has to calculate the total gains in some cases, as the system copes with disposals only from one pool. It handles taper relief and current year and brought forward losses, loss optimisation, connected losses and attributed gains. It allows the gains to be entered as a net gain before taper relief to accommodate off-system calculations. However, full capital gains tax computation capability will be available by early 2007. A comprehensive dividend data feed from FT Interactive Data calculates the dividends on shares, dividend paying unit trusts and interest paying unit trusts. The feed for 100 of the most popular shares (not necessarily the FTSE100) is free of charge.

Pension and 'what if' planning are possible. Accounts details can be imported from Digita's own final accounts solution, as well as various other packages, such as, CaseWare, Eureka, Microsoft Excel, ProAcc, Sage SAP and SAPA, Viztopia and VT. The system also has practice management links with APS Advance, Caseware Time, Practice Engine, and Star.

Business tax is handled by Digita Business Tax. This comprehensive software calculates basis periods, assessable profits, capital allowances, overlap relief and copes with changes of accounting date. It produces the partnership forms and other required reports and summaries. All relevant data is posted automatically to the partner's personal tax return.

As a result of Digita and LexisNexis Butterworths forming a link, Digita users can access the LexisNexis tax reference service through Personal and Business Tax.

Returns can be submitted using online filing at no extra cost. Some 30% of users filed online in 2005-06.

The software has a wide range of risk management and workflow monitoring features built in. This includes the Client Review tool which compares the income sources of the client with the previous year's return, eliminating the need for paper comparisons. In this way, the risk of errors is greatly reduced, and the automation saves the time that the user would previously have spent doing the check. It also links to the Client Costing tool, enabling the user to create a risk profile of the client, and monitor changes during the review process.

Artificial intelligence, TaxAware has been included in the latest version to monitor the tax return compliance process. It constantly polls the data looking for inconsistencies, errors of entry, as well as planning opportunities, warning the user during the process. The key aspect of this technology is that all issues highlighted are specific to the client.

Digita Trust Tax was launched in 2006. This deals with forms SA900 and its related forms to allow users to prepare tax returns for trusts and estates. A distribution tool allows the allocation of Income to beneficiaries and then posted automatically to the relevant sections of beneficiaries' personal tax returns. A full range of reports and tax computations, R185 tax certificate production facilities and internet filing are included as standard.

An online manual is supplied with the software, and training can be arranged at extra cost if required. Other help is available in the form of online help-screens, telephone hotlines, customer

website, newsletters, seminars, etc. An evaluation copy on CD is available.

Digita Accounts Production produces final accounts and is also accredited by the ICAEW. Trial balances can be created in seconds and client files can be signed out for working at other sites. The program has the look of a Microsoft Office program, so will be familiar to most users. It also, crucially, links with Digita's Personal and Business Tax and Corporation Tax.

Other Digita products include Company Secretarial, a company administration package which includes electronic filing and helps with completion of form 42; Electronic Forms Production, which prints a range of approved HMRC and Companies House forms; and PIID Production which Digita distributes in conjunction with PKF.

Digita Contact Manager was launched in September. The roll-out to existing customers will start in February 2007.

Digita are bringing together client information to allow for central client management in one place. Contact information will seamlessly be shared across all products within the suite. It will centralise around the client list with add on modules to include letter writing, staff management, forms, work flow, data mining and document management. As it will adhere to xPS, the ICAEW data sharing standard, it will also integrate with other third party products.

Contact: Karen Green
Address: Digita, Liverton Business Park, Exmouth EX8 2NR
Tel: 01395 270311 **Fax:** 01395 268893
E-mail: kareng@digita.com
Internet: www.digita.com
Cost: Digita Personal & Business Tax from £199;
Digita Trust Tax from £199
Rec spec: Windows XP; Pentium III or higher;
512mb RAM; 4gb hard disk space



Drummohr Technology Ltd

Tax Assistant is a well established personal tax software program, having been produced by Drummohr Technology since 1994. Tax Assistant is an integrated suite of linked modules, covering all aspects of self assessment, and used by over 1,400 firms. It can stand alone or can be networked.

The Tax Return module covers all self assessment tax years. Most supplementary pages are catered for, including Lloyd's underwriters and ministers of religion, although not MPs. Data can be entered in a variety of ways: directly on to the on-screen tax return, by using pull-down menus, tool bars, or page selection tabs. The user can put additional information on notepad pages using context sensitive notepad icons, and this information is printed in the form of supporting schedules.

Several calculators are available, including capital allowances, business tax adjustments, car benefits, and capital gains. Data can be imported from most accounts production software packages, e.g. Compac, Eureka, Hartley, Sage, VT and any SNF compatible accounts software. The user can print an information request for each client for the next year's return, and the return can be printed in summary form. The tax calculation is done automatically following the HMRC's calculation, with a summary version

also available. The calculation deals with lump sum payments, chargeable event gains, top slicing relief and the non-resident's exemption. It calculates the payments due on account, as well as the form SA303 for reducing those payments. An estimate of the following tax year's calculation is also possible.

The database, TaxBase is fully compatible with Microsoft Access, and holds the tax related information for all clients, e.g. names, business and employment details, and pension contributions. An internal tax administration record is created for each client, and a diary feature lists various events for up to four years. Thus users can create specific lists of clients, relating say to all those who have not yet had their tax returns submitted. Other administration features include a register of tax office addresses, a dividend database of company dividends which can be edited by the user, mail merges, and the generation of standard letters. Forms 64-8 can also be produced.

Other modules include the Trust and Estate Tax Return, the Partnership Return and the Repayment Claim, which deals with the HMRC R40 form. All are similar to the Tax Return module, and can be used either in conjunction with TaxBase or on a standalone basis. A Pensions Planner deals with allocating tax relief arising from retirement annuity payments and personal pension contributions, covering the tax years 1988-89 to date. For the years from 2001-02, it automatically chooses the basis year of most benefit to the client. Reports are displayed on screen, can be printed, and can be saved as a pdf document for e-mailing to the client.

The Corporation Tax Return module follows the style of the personal tax modules. It produces the corporation tax return and supplementary pages, as well as calculating the tax due, including marginal relief, research and development tax credit, non-corporate distribution charge, chargeable gains and allowable losses, and capital allowances.

Online filing is supported by the FBI Courier module available at an extra cost. This allows users to file individual, partnership, trust and company tax returns online.

The PIID module produces forms PIID, calculating car benefits, and other benefits. Data from this module can be imported directly on to the client's tax return.

An online manual is supplied together with on-screen help, a telephone help-line, customer website, on-line knowledge base and e-mail bulletin service. Training can be supplied at an agreed price. The software is available on CD-ROM and updates of the program can be downloaded from Drummohr's website. An evaluation kit is available, free of charge, containing a limited version of TaxBase and the Tax Return programs.

Contact: Sales
Address: Drummohr Technology Ltd, 3 Mount Frost Drive, Markinch, Fife KY7 6JQ
Tel: 01592 753111
E-mail: sales@drummohr.com
Internet: www.drummohr.com
Cost: Tax Assistant: from £380 plus VAT
Rec spec: Windows XP; Pentium/Athlon 1ghz;
128mb RAM; 300mb hard disk space

Excelsior LawDesk Limited

Various niche companies exist in the software market and one such is Excelsior LawDesk Limited, now in its eleventh year

of operation. David Williams TEP, formerly a partner in a firm of solicitors in Brighton, created this small concern which produces software primarily for estates work. The products, which are all Excel based, are highly specialised, but ones which fill a gap nonetheless.

Approved, calculating replicas of the 40 plus pages of the IHT 200 with its Supplementary Pages, Worksheets, C4 Corrective Account/Inventory, Excepted Estates Form 205 and Small Estates Form 207 are all included in ProbateDesk, a product which assists with estate accounting. It can be used to compile estate accounts and print interim statements as well as store information regarding the estate more widely and actions taken in the administration. ExecutryDesk is the Scottish version of ProbateDesk and includes the forms C1 and 2 plus the C5, C5 (OUK) and C5(SE).

The calculating replicas are also available as standalone products as FormDesk – IHT 200 and FormDesk – IHT 200 Scotland (which again includes the forms C1 and C2 plus the C5, C5 (OUK) and C5(SE)).

As all Excelsior LawDesk products are based in Excel, their appearance and operation should be familiar to many and easy to use. Work sheets can be inserted and linked from Excel if required and if computer memory permits. There are various on-screen text notes on the forms, but the software assumes that any forms are being filled in by someone who has a working knowledge of trusts and estates. Being based on Excel spreadsheet template files they can be used on most personal computers. The packages are supplied on CD.

Contact: David Williams
Address: Excelsior LawDesk Ltd, Summerfields, Furners Lane, Henfield, West Sussex BN5 9HS
Tel: 01273 494978
E-mail: inform@lawdesk.co.uk
Cost: FormDesk – IHT 200 - £525 plus VAT for one user and £95 plus VAT for additional users. FormDesk – IHT 200 Scotland – £595 plus VAT for one user and £120 plus VAT for additional users. ProbateDesk – £2,250 plus VAT for a two user licence and £375 plus VAT for each additional user. ExecutryDesk – £3,275 plus VAT for a two user licence, and £395 plus VAT for each additional user. There are no annual maintenance charges for any of the products. But for ProbateDesk and ExecutryDesk training and travel costs are payable in addition to the one-off fees mentioned.
Rec spec: Windows 2000 or above; Microsoft Excel 2000 or above for all products; 64 Mb RAM; files take from approximately 0.9 Mb to 2.2 Mb hard disk space depending on the product.

Financial Software Ltd

Financial Software Ltd is a specialist software house that has been operating in the UK for over 12 years. It undertook the design, development and marketing of a capital gains tax solution called CGiX, which automates CGT calculations on investment portfolios.

CGiX contains CGT legislation from 1965 and holds corporate event data for all UK listed companies since early 1982. Financial Software receives data from four different data vendors and can provide a global corporate event service. CGiX corporate event transaction types cover over 100 CGT specific definitions of corporate events.

The product can integrate with standard investment management systems through a configurable interface, thus allowing the investment management system to use the database to calculate and format reports and What-If scenarios. Other key features include:

- capital event history for UK unit trusts, open-ended investment companies, off-shore funds and hedge funds with extensive coverage of equalisations;
- broad coverage of international capital events;
- dividend and income processing and reporting;
- historic dividends for UK quoted securities since 2004 and broad coverage of international dividends;
- processing and CGT reporting of traded options and other forms of linked and fungible securities;
- legislation database containing rules and definitions for UK CGT and Income tax relevant to individuals, companies and life companies with chronological context;
- UK rebasing rules, indexation and taper relief including election of March 1982 and 1965 values;
- take-on positions for pooling including adjustment of costs and indexation allowance for rights taken up within 1982/85 pool;
- transfer and relief processing such as inter-account transfers, probate, employee shares schemes, gifts, gain deferrals, venture capital trusts;
- short sales;
- loss allocation to external gains, gains to external losses and losses carried forward;
- rules and definitions for Australian CGT and income;
- account aggregation and shared account processing for trusts;
- UK Revenue formatted CGT reports in addition to an extensive reporting pack that includes backdated portfolio valuation, capital gains, income and calculation audit reports;
- detailed audit trails;
- multi-currency functionality;
- thin client browser-based solution with relational database technology and application server architecture;
- system segregation within a single database for multiple companies;
- single sign-on security for imbedding within host applications;
- MSMQ messaging;
- WSDL web services.

CGiX Australia was released in March 2006. This product contains the rules and definitions for calculating capital gains and income with respect to Australian tax rules. It also includes a corresponding Australian reporting pack that includes specific detail, such as cost basis methods and managed fund distributed capital gains, as required for Australian tax reporting. FSL also plans, in conjunction with its European partners, to release an international calculation and country specific tax reporting capabilities.

Financial Software is a Microsoft certified partner. The company has an extensive list of clients, has developed ties and solutions with other key international institutions and software vendors.

Contact: Dee Muldoon
Address: Financial Software Ltd, 6th Floor, Windsor House, 39 King St, London EC2V 8DQ
Tel: 020 7776 9850 **Fax:** 020 7600 9117
E-mail: deemuldoon@financialsoftware.co.uk
Internet: www.financialsoftware.co.uk
Cost: price on application
Rec spec: SQL server 2000, Pentium II 266 or higher 256mb RAM



Forbes Computer Systems

Forbes Computer Systems is an innovative independent company which has been producing the competitively priced self assessment software, ProTax since 1992. It is a registered Microsoft partner and a member of the Microsoft Empower ISV program.

ProTax is the well known self assessment program which allows an unlimited number of clients. Used by some 1,250 firms, the program is available in modules which can be bought individually or as a complete suite. The software handles personal tax, trusts, partnerships and corporation tax. Virtually all aspects of self assessment are handled including Lloyd's underwriters, ministers of religion, MPs, R40 repayment claims, pension planning, other 'what if' planning, form SA303 for reducing payments on account, and form SA700 non resident landlords. The forms, backing schedules, payments on account and a complete tax liability calculation are all produced. Data is entered directly on to the tax return forms or via a step-by-step wizard. Much of the data can be drawn from the Client Database module, which flows automatically into the rest of the system. Accounts details can be imported from Forbes Accounts, the company's new accounts production system, as well from many other external accounts providers. A comprehensive dividend database is available at a small additional cost. A range of standard letters and reports can also be produced, along with an information request questionnaire, which can be sent to clients.

The company is directly involved in the development of new technology and has embraced electronic filing wholeheartedly from its early days. Returns can be filed online and Forbes reckons some 60% did so in 2005-06. ProTax has received HMRC recognition for attaching pdf files to SA100s, 800s and 900s. Forbes also has recognition for agent authorisation online.

ForbesAccounts is a comprehensive final accounts production system for sole traders, partnerships and limited companies. Trial balances can be created instantly and the software automatically updates the data on partnership, self-employed and corporation tax returns.

The software is intuitive and easy to use. Cross product compatibility and integration has further enhanced this. Other modules include: CoSec, a company secretarial package that includes electronic filing; ProTax Planner, a planner for Schedule D cases, Tempus time recording software, ProTax PIID for

expenses and benefits, Payroll and ProTax CTSA which produces the new short and long corporation tax return forms and performs all necessary computations (see review in corporation tax section).

The software comes with a manual, and comprehensive support including a free telephone help-line, customer website and newsletters. Training can be supplied at an extra cost. A demonstration version of the software can be downloaded from Forbes' website. In addition, registered users can update their software from Forbes' website, from which they also have online access to Notes online, with up-to-date technical information and news.

Contact: Sales
Address: Forbes Computer Systems, 38 Station Road, Woburn Sands, Milton Keynes MK17 8RU
Tel: 01908 584674
Internet: www.tax.co.uk
Cost: ProTax: from £195 plus VAT. Other prices available from www.tax.co.uk
Rec spec: Windows XP; Pentium III, 256mb RAM; 250mb hard disk space



IRIS Software Ltd

IRIS Software Ltd, a well-known, specialist independent developer of software has been producing tax software for 27 years and it is used by some 5,000 accountancy practices. The company has been growing fast in the last few years, and this has culminated recently with the acquisition of PTP Software Ltd and Professional Tax Practice Ltd (see also the review of PTP Software).

IRIS won the best tax software category at the inaugural LexisNexis tax awards in 2001 and its full suite of products is accredited by the ICAEW. It attained gold certified status in the Microsoft Partner Programme in August 2006. This means that IRIS has demonstrated a certain level of expertise with Microsoft technologies.

The key words for IRIS products are full integration. They integrate completely with each other and this is a major attraction for most IRIS clients. The Central Database module forms the hub of the software. Client data is fed into this module and flows automatically from there into the rest of the system. The data can also be used to create automatic client letters, and for other marketing purposes. This module has become more flexible since it is now written on a SQL platform, allowing for greater manipulation of the data.

The IRIS Personal Tax module handles self-assessment returns for directors, partners, sole traders, individuals, Lloyd's underwriters, and ministers of religion, only MPs are not catered for. Practically all aspects of self assessment are covered by the software. Much of the required client information is drawn from the single central database, with reliefs and other income entered separately. The software has a tree menu structure, similar in style to Windows Explorer, and users use the mouse to move up and down the tree, or if they prefer use the tab key.

The software produces the relevant backing schedules and tax calculations, payments on account, with capital gains tax being calculated automatically. The pensions planner deals with retirement annuities and personal pension contributions. Car

benefit is calculated, and forms P11D produced for clients and employees of business clients. It also has a car database giving details of carbon dioxide emissions.

The system can be password protected, and there is a context sensitive help facility. At the start of the tax year, automatic checklist letters for each client can be organised, listing the relevant entries in the previous year's return and asking the client to enter in the current year's figures. Tax returns can be filed online, as they can be in all IRIS products. This feature is provided at no extra charge.

The IRIS Business Tax module deals with limited companies, partnerships and sole traders. It produces the CT600 for companies, and the self assessment partnership tax return for partnerships, drawing the information from the client's accounts in the single central database. Wholly and partially disallowed accounts are flagged within the database.

Details from the Fixed Asset Register module are taken to provide the basis for the capital allowances schedule. The detailed corporation tax computation deals with apportionment over fiscal years, marginal rate relief, non-corporate distribution rate, film tax, and losses carried forward, backward or used in the period. It copes with up to four corporation tax accounting periods. Deferred tax calculations can also be produced. Partners' shares of profit are calculated automatically, and details placed in the appropriate personal tax records. Sole traders' data is automatically stored in the personal tax record for transfer to the self employment schedule of the SA100. Data entry for tax disclosure is available to comply with the disclosure of tax avoidance schemes legislation in all the tax packages. In addition it has a UITF 40 facility.

IRIS Business Tax is available as a standalone module so that it can be used in conjunction with other brands of accounting software. This makes it attractive for practitioners who might wish to review their business tax software, without changing their existing accounts production system. It links with IRIS Practice Management, enabling it to track the progress of a client's job, list the services provided to the client, and store correspondence. Another useful feature is the extract/import facility by means of the purchase of a 'screen', whereby users can extract a client's data from the main system and put it onto a laptop computer. Thus a client's tax can be worked on during say a visit to the client, and then downloaded later onto the main system.

The IRIS Dividend Service is a separate module which uses data from Financial Express/Prestel, providing users with information on all UK listed companies and unit trusts. Clients' dividends are calculated automatically and entered into the relevant boxes on the tax return.

Practice management functions are provided by the IRIS Practice Management module. This module is the company's best selling additional product to existing customers. It effectively controls the workflow, producing a list of daily tasks for each user. It is available all the time, so that employees can work on other IRIS modules at the same time. It also has a data-mining facility, whereby the user can ask specific questions to produce a report on personal tax data. Another aspect of this module is that helps practices become paperless. Users can take advantage of the document scanning and file management system within the module to store all client information in one place. A comprehensive search facility allows the documents to be retrieved easily.

Other modules available include AutoMail which generates

routine correspondence for clients. This has a wide range of templates which the user can amend and store as necessary. Time & Fees automates the timesheet process, collecting the information to raise invoices. It also allows supervisors to monitor employees' work. There are also Accounts Production and Fixed Asset Register modules.

IRIS Trust Tax deals with the principle trust and estate tax forms and relevant computations. It also links with the practice management module, so job progress can be tracked. Two event triggers are generated by the module: one when the job is created, and the second when the final return is printed. Returns can be filed online together with supporting schedules.

Overall IRIS products are suitable for virtually any sized practice. Small firms can opt for a 'starter pack' which can hold between 25 and 300 clients. IRIS's new starter pack, incorporating Personal Tax, Business Tax and Accounts Production, was designed specifically for smaller practices, tax advisers and start ups. The entry level caters for ten clients, but it can be upgraded as the business's client base develops.

It is not widely known that IRIS Personal Tax can be bought as a stand-alone module, and smaller practices can buy a free-standing version especially tailored to their needs. The modules come with a manual, and training is available at extra cost. Additional help is available via online helpscreens, additional pdf manuals, a help desk, customer website, newsletters, customer user groups, e-mail bulletin service and seminar programmes. The system comes on CD-ROM, and users can download updates, KnowledgeBase and fact sheets from the IRIS website.

Contact: Sales and Marketing Department
Address: IRIS Software Ltd, Riding Court House, Datchet, Berkshire SL3 9JT
Tel: 01753 212444
E-mail: enquiries@iris.co.uk
Internet: www.iris.co.uk
Cost: price is dependent on number of clients and number of software users, call 01753 212444 for a quotation.
Rec spec: Windows 2000; 128mb RAM; 230mb hard disk space

Keytime

Keytime has produced the self assessment software, Tax Professional for eight years, and has produced its payroll software for 15 years. It recently took responsibility for LKA Consultants' users and has incorporated all of the features of LKA's Objective Tax software into its own product. Overall, Keytime provides a wide range of software including personal and corporate tax, accounts, practice management, payroll and P11D. The software has been integrated so that Client Manager forms the central hub from the various other modules of the Accountants Suite can be launched. Client data is entered only once and stored in Client Manager, from where it is made available across all the modules used.

Aimed mainly at small to medium sized firms, Tax Professional produces a range of HMRC approved personal tax returns, including partnerships, trusts, capital gains, ministers of religion, and the SA800 partnership return. The client's liability is computed automatically, and shows the payments on account

due. Form SA303 can be produced to reduce these payments. Information is entered using an interview format, and optional wizards help simplify this process. Alternatively, users can take advantage of the rapid data entry facility. Each set of pages has its own rapid data entry screen through which all the relevant information for that section can be entered.

The software keeps track of the annual return process using the client tracker feature. This charts important dates relating to a client's return, for instance, when the information is received, when the return is sent to the client for approval and then submitted to HMRC, and when an invoice is raised. Standard letters can be produced and there is a mailmerge facility. Password protection is available.

Tax Professional is approved by HMRC for filing by Internet, and 75% used this facility in 2005-06.

The package comes with a manual, online help screens, includes free support including telephone helpline, updates and enhancements. HMRC help notes are included, as is context sensitive help. The complete program can be downloaded from the firm's website, as can an evaluation copy and updates.

Tax Professional is an effective package, which is designed to complete the client's tax return. Additional features relate to administration, rather than planning. Practitioners who need a software package which produces professional looking tax returns with automatic tax calculations are likely to find this product good value, particularly with the new level of integration offered.

Corporation Tax Professional produces the CT600 form, calculating the profits chargeable to corporation tax. It also does capital gains tax computation and allocates capital losses. Other features include: analysis of brought forward and current year trading losses, and capital allowance calculation.

Practice management is dealt with by DRIVE. This provides communications management (letter, e-mail, fax, etc), tracks deadlines, deals with time and billing, client accounting, practice accounts, document management and integrates with the other Keytime products. Keytime also produces Payroll, P11D Calculator and Final Accounts.

Contact: Sales
Address: Keytime, Pennine House, Denton Lane,
Oldham, Lancs OL9 8PU
Tel: 0161 484 3500 **Fax:** 0845 456 3104
E-mail: info@keytimesystems.co.uk
Internet: www.keytimesystems.co.uk
Cost: Tax Professional – £370; Corporation Tax
Professional – £370; P11D Calculator – £145;
Final Accounts: £370; Payroll: £299
Rec spec: Windows XP or 2000; Pentium 400;
256mb RAM; 60mb hard disk space



MYOB

MYOB produces the PerTAX family of software, one of the best known brand names in tax software. The software is fully integrated and covers personal tax, trusts, partnerships, securities, capital gains tax, business tax and corporation tax.

MYOB is rewriting PerTAX in .NET technology, bringing in new functionality and faster working. The new look software has

been designed to be more user friendly and easier to navigate; screens will be user definable. The data entry will take the user through fewer screens, thus requiring fewer keystrokes and mouse clicks. Among the new features will be the SA970, SA700, risk analysis, variance and ratio and margin reports.

The new software will be backed by a new database, MYOB Central which will comprise a launch area for all MYOB applications. MYOB Central is a central database for shared data, security, reporting and home pages for users to create views of the data most suitable to them e.g. tax return status summary, graphical views of aged WIP and debtors, tasks awaiting approval. It allows complete personalisation of the desktop and the way users want to work.

In addition to producing tax returns faster and in a more intuitive way, the new PerTAX will have all the functionality of its antecedent. It is a comprehensive personal tax system handling virtually everything that could be desired in self assessment. It produces all the standard self assessment forms, including MPs, and tax computations. Information is entered by drilling down to underlying data entry screens, via the tax return or the computation, or through a data entry menu system, with the information automatically being carried through to the tax return.

The tax liability is calculated automatically along with the statements of account, payments due etc. Items can be flagged for attention using the workflow system and notes can be added to any source for review. Information can be transferred in from any accounting system which can provide a simple text file in the required format. This includes all major accounting software suppliers. In addition, MYOB has special arrangements with PAS P11D Organiser to draw P11D details into PerTAX automatically.

ParTAX handles partnerships. It produces facsimile SA800 and supplementary pages, using the information from the PerTAX Family database. It deals with multiple accounting periods within the tax basis period and data can be imported from external sources, such as a trial balance. The information integrates fully with PerTAX so that the individual partner's allocation of income is included in the partnership pages of the personal return.

The BusinessTAX module handles all aspects of the business tax requirements for unincorporated businesses including updating personal and partnership tax returns, and integrates fully with the other PerTAX Family products. This comprehensive module deals with various aspects of self employment including the change of accounting date rules, overlap relief, capital allowances, asset movements, and farmers' averaging.

PerTAX users also receive as part of the package an error and exception report. This provides an automatic risk analysis of the tax return, uncovering small mistakes made during the preparation of the return, or any changes made since the previous return. This means that problems can be sorted out before the return is submitted to HMRC, reducing the likelihood of an enquiry or rejection at the government gateway. MYOB is a great supporter of online filing, and this function is incorporated in the software.

The database is user-definable, which allows, say particular groups of clients to be grouped together. This is useful for both administration and marketing purposes. Taking the marketing aspect a few steps further, PerTAX eSP is an optional module which integrates into PerTAX. It is a data warehousing tool, allowing users to make queries and produce reports on personal

tax data. It has a drag and drop facility so that the user can drill down into data to ask specific questions such as 'which clients are coming up to retirement but do not have a pension?' The reports can be imported into Excel, csv, rich text, etc. so that the user can manipulate the information as required. This useful tool is easy to use, and can help the user manage risk in the practice.

A new service, the MYOB Tax Club is currently under way and part of this service includes data mining reports with topical letters ready for mail merging.

The PerTAX software family runs under the database platform Microsoft SQL, which is likely to be of most use to larger firms, and under MSDE (free from Microsoft) which may be more suited to smaller practices.

The Aide Mémoire module is an intelligent mail merge facility which can be used to obtain tax return information from clients. It produces questionnaires or standard letters using Microsoft Word templates, which can be customised as the user wishes. The letters produced can be posted or e-mailed to clients. PerTAX eQuest is an electronic product which uses the information contained in a client's tax return to generate a questionnaire relating to the client's next tax return. The user can post the questionnaire to his website. The information is encrypted for security, and is password protected so that only the client and the adviser can access it. The client completes the questionnaire online, and the information can be posted through to PerTAX by the user into the relevant tax return, without the need to re-key anything.

An automated workflow module will also be available for compliance procedures such as tax return completion, money laundering regulations and client engagement. The workflow system integrates exceptions, filing validations and review procedures all of which are backed by mail merge letters which can be easily stored in the software.

SecTAX is the securities and capital gains tax system, linking to PerTAX. It tracks a client's share dealings, recording dividend and interest received. The software uses an interactive wizard to automate tracing capital gains tax histories. Then the information pre-populates the tax returns.

TrusTAX deals with the administration of trusts and estates, calculating the tax liability of the trust or estate and printing a facsimile SA900 return. It is linked to the TrustAccounts package for completion of the return and there is also an R185 package which provides the necessary calculations and compliance returns for beneficiaries.

PIID Organiser is linked to PerTAX, and produces forms PIID, calculating benefits, such as car benefit, accommodation, automatically. It can also be used independently of PerTAX.

A new Tax Factory function will allow any application to flood data through to and from PerTAX in XML. This integration means that client, tax and task information can be entered directly to or exported from PerTAX and the integration is not limited to MYOB software, so users will find the integrations with other branded software.

The alpha version is currently being reviewed by 15 firms varying from smaller practitioners to big four, with the final software ready for shipping in April 2007. Existing users who might be concerned that they will have to migrate to the new system immediately can rest assured that the new software will be run in conjunction with the current PerTAX for two years, with both systems being fully updated for Budget changes, new tax year, etc.

Practice management is provided by Viztopia Practice Management which also sits within the central database. This allows static client data to be shared, cross application reporting etc. Singleview is a document scanning, filing and management system, which also saves and stores e-mails sent to and received from clients.

With regard to help and support, the products come with in-built help. Training is provided for a fee. In addition, there are on-line help screens, a help desk, website with extensive support information and facilities, customer user groups, newsletters, seminar programmes, and product review groups. Training on the new PerTAX software will be available free of charge for existing clients to ensure they are up and running as soon as possible. The training will be available as e-learning which clients can download from the Internet.

Contact: Marketing department, Accountants division

Address: MYOB, Westec House, West Gate,
London W5 1YY

Tel: 020 8997 5500

Internet: www.myob.co.uk

Cost: prices on application

Rec spec: Windows 2000 and above; hardware requirements, memory and disk space depend on the number of users, clients and other application running on the PC



GROUP

PTP Software Ltd

PTP Software was part of the well-known PTP Group which also comprised the Professional Training Partnership and Professional Tax Practice. It was recently acquired by IRIS Software and is now part of the IRIS Group. Customers will be 'totally unaffected', however, said Martin Leuw of IRIS. It is 'business as usual' with no major changes to the PTP products or the way it conducts business. It was also confirmed that PTP's software prices would be frozen for April 2007, making it the sixth consecutive year that PTP prices have been unchanged.

So users will be pleased to know that PTP will continue to produce its reasonably priced, effective software, which it has done since 1994, developed through a combination of the firm's own programmers and joint ventures.

Tax Return is the income tax return package, and offers all the supplementary pages, apart from those for MPs. Information is entered on to the tax return, rather than using a menu system, with a fanned page taking the user to the many backing schedules available. An eye icon indicates that information was included in the previous year. Tax calculations are performed automatically, and a validation system checks that the information all corresponds. Data can be imported from various accounts preparation packages, including Sage SAP and SAPA, Viztopia, Eureka, Compac, ProAcc and VT. The software calculates payments on account, and produces the form for reducing payments on account, SA 303. It also has a dividend database, and an events section enabling the user to track the progress of the client's affairs. The HMRC help notes are available by using the FI button.

The software produces a range of reports and standard letters. Returns can be filed online for an extra charge. The capital gains facility deals with computations, although there are restrictions on the number of enhancement expenditure entries it can handle. With regard to planning, the Tax Fast module deals with change of accounting year, and CGT Planner deals with capital gains tax planning.

An on-line manual and hard copy installation guide are supplied. Training is available at extra cost, £350 for a half day, although as the software is so simple to use, not many clients take up this option. In addition, there are on-line help screens, a free telephone hotline, and customer website. The website also contains a lot of useful information, together with some handy hints of how to make full use of the software.

The Partnership Return module has the same look as Tax Return, and is similar to operate, using the same database. Once a partnership's details have been entered onto the Partnership Return, the partners can be added by clicking as appropriate from the list of clients contained in the Tax Return database. When the partnership information has been dealt with, it automatically makes the appropriate entries on the partnership supplementary pages.

Trust Return also uses the style of Tax Return, and deals with any type of trust and required calculations. The program includes a dividend database and links to the TROIKA trust management program.

Tax Return, Partnership Return and Trust Return are part of a Tax Platform. The advantage to users of this is that, by using data common to all three returns, users can access all years from one program.

PTP Accounts is the final accounts preparation software for sole traders, partnerships and limited companies. It has same look as the Tax Platform, and links seamlessly with CT Platform, Tax Return and Partnership Return. The software produces a pdf version of the accounts for e-mailing to the client.

Tax Fast is the year end planning, current year basis and change of accounting date module. It also includes adjustments for the abolition of the cash basis, the ability to calculate tax provisions for partnerships, the ability to determine the impact of UITF 40 and has a separate input facility for partners' personal expenses.

CT Platform collects the data, performs the calculations and checks that the necessary boxes have been completed for corporation tax self assessment. The module includes an adjusted tax computation and capital allowances calculator and copes with the non-corporate distribution charge where appropriate. Small companies marginal relief is calculated automatically. It has standard letters and mailmerge facilities, and a pdf version of the return can be e-mailed to clients. Online filing of the return is also available.

Tax Data contains assorted useful tax information including tax rates, allowances, and addresses. The principal claims and elections are included as pro forma documents, which can be cut and pasted for submission to HMRC. Wizcalcs enable the user to carry out calculations on screen in respect of authorised mileage rates, small companies marginal relief, VAT, etc.

Practice management is dealt with by The Professional Office. This comprises time recording, billing and work in progress, client addresses, marketing functions, ledgers, reports and system

administration. Considerable amounts of tedious, but necessary, administration can be automatised, for instance by creating customised marketing or reports.

Company Car Planner allows the user to input the basic data relating to the employee, including the make and model of vehicle, tax and National Insurance rate, the program then calculates the benefit for the period over which the car will be provided. The user can then view the alternative methods of funding based on a combination of in-built and user-defined factors.

Clients' capital gains tax liabilities can be calculated using CGT Planner. This takes into account all the legislation relating to taper. The user enters the details of the transaction, acquisition date and costs, disposal date and proceeds, any other related costs, etc., and the program automatically calculates the capital gains liability taking into account all the available reliefs, including retirement relief, hold-over and roll over relief. An 'optimiser' function shows the most beneficial time to complete the disposal. CGT Share Pooling enables the user to build up the cost history of each holding and calculate the gain on a post 1998 part or full disposal applying all the matching rules.

PTP's inheritance tax software comes as two modules. IHT Planner deals with the calculation of lifetime transfers and the chargeable estate; IHT Return, deals with the completion of forms IHT200, 205 and 207 using the data already entered into IHT Planner and populating the appropriate pages of the form. IHT Return is also available as a stand alone program, allowing the user to complete the form on screen automating the calculation of the inheritance tax liability without carrying out any inheritance tax planning work.

PTP also has a company secretarial package called PC Share Register Plus, and some additional spreadsheet planners including Incorporation Planner, Dividend v Salary Planner, Tax Credit Planner and NIC Planner.

PTP's software is aimed at all practitioners and is used by sole traders to top five firms alike and is also used by tax shops. It is consistently reliable, easy to use and popular. A demonstration CD of the various products is available.

Contact: Sales department
Address: PTP Software Ltd, 10 Lakesmere Close, North Oxford Business Centre, Kidlington, Oxford OX5 1LG
Tel: 01865 370470
Internet: www.ptpgroup.co.uk
Cost: Tax Return: from £99 plus VAT to £575 plus VAT. Partnership Return: from £99 plus VAT to £299 plus VAT. Trust Return: from £99 plus VAT to £575 plus VAT. PTP Accounts: from £99 plus VAT to £1,199 plus VAT. CT Return: from £99 to £575. Company Car Planner: from £99 plus VAT to £199 plus VAT. CGT Planner from £49 plus VAT to £99 plus VAT. CGT Share Pooling from £99 plus VAT to £199 plus VAT. Tax Fast: from £99 plus VAT to £199 plus VAT. IHT Planner from £99 plus VAT to £199 plus VAT. Pricing is subject to number of returns (where appropriate), and whether on network or stand alone basis
Rec spec: Windows XP; Pentium; 128mb RAM; 500mb hard disk space

Quality Management Software Ltd

Quality Management Software Ltd is a small, independent supplier of taxation software which has been producing its self assessment package, SA2000, since 1997, and CT600 since 1999. The software is aimed mainly at small and medium sized firms of accountants and tax shops.

SA2000 is an Excel spreadsheet with a database and is straightforward to use. There is no limit on the number of users or clients in one office. The individual tax return module deals with personal tax returns, including those for Lloyd's underwriters and ministers of religion. Users enter information directly onto the on-screen tax return, and move along the return using the tab button. The tax calculation is performed automatically and contains in-built cross-checks to ensure that the responses on the return are consistent.

A 'Know your client' page provides a useful summary of the client's income and tax bill. The system has a tax planner and calculates capital gains tax, taking into account taper relief if the user enters the percentages. An additional capital gains tax module is also available which calculates indexation, taper relief. Information can be imported from accounts preparation packages.

Separate modules are available for partnership returns and trust tax returns with additional analysis for beneficiaries. The partnership and individual returns are linked automatically, and there are additional reports for non-residents. SA2000 supports online filing at no extra cost.

CT600 produces the corporation tax CT600 form and calculates the tax automatically. It deals with trading companies with multiple trades, non-resident landlord companies and group relief. It has extra sheets for accounts reconciliation, and details of the tax computation. It includes sections for disallowable items and items taxable under Schedule A, D cases V and VI.

The software also allows users to identify intangible assets and keeps track of capital allowances and written down values carried forward from year to year. Reports can be exported to other applications, including Excel.

The corporation tax package is enhanced regularly and includes transitional rules for the removal of the non-corporate distribution charge. Practitioners who have to deal with small companies will find it useful, as they are unlikely to require a lot of extra features which they will rarely, if ever, use.

The software comes with a hard copy manual and training. Other support comes in the form of a help desk and newsletters.

The company has joint ventures with the Mercia Group Ltd and PracticeNet. It also produces tax software for the Jersey tax return. QMS also has payroll software which handles online filing. Its latest product is CIS Return, launched in 2006. This will produce statements and allow the online verification of subcontractors.

An evaluation copy of the individual tax software can be downloaded from the company website.

Contact: Andrew Bolton
Address: Quality Management Software Ltd, 4 Huxley Close, Godalming, Surrey GU7 2AS
Tel: 01483 429078
E-mail: sales@sa2000.co.uk
Internet: www.sa2000.co.uk
Cost: price on application
Rec spec: Windows XP; Pentium; 128mb RAM; and 20mb hard disk space

Sage (UK) Limited

Sage Taxation Suite is an integrated suite of software covering all aspects of personal and business tax. Sage Practice Solution was released during 2006 to provide enhanced integration between the various Sage products for practice. At the heart of this is the Practice Hub which integrates client data from the various software applications. This means that data is entered only once and then flows through to the user's other software modules. This allows for greater manipulation of the data by the user, as well as giving the user a 'one-stop shop' view of the client details.

Sage Personal Tax is a comprehensive package producing the SA100 form, related supplementary return forms including ministers of religion, MPs and Lloyd's underwriters, calculating income tax, and capital gains. It is straightforward to use, with its explorer style making it familiar to most PC users. A 'wizard' takes the user through the steps of setting up a client. Users can use either the keyboard or the mouse to move around the program and income/expense or gains sources have intuitive input screens that make additional options available only when applicable. Where the user is responsible for husband and wife or other joint income scenarios, percentage shares are applied and the apportioned income details are automatically transferred between joint holders. Form SA303 can be produced.

Information can be password protected at various levels. Additional information can be added to the client's tax return, and there is also a notepad for information or reminders which are not to be included on the return. Pension planning can be carried out.

Dividend income is available via on-screen access to a securities database listing all relevant transactions of UK listed companies. Earlier in 2006, Sage entered into a partnership with Financial Software Ltd to distribute its powerful capital gains software under the name Sage Capital Gains. This is a comprehensive web-based package which deals with a client's capital gains calculations for both securities and other assets, including property transactions, dividend calculations and what-if planning. Its full securities database is updated daily and contains 1965 and 1982 rebasing prices. Other features include full capital gains legislation and calculations, CGT calculations for securities and other assets including the business asset rules, and comprehensive in-built reports. This module will integrate with Sage Taxation in December 2006.

Sage Business and Partnership Tax deal with virtually any scenario for self-employed clients. This module deals with overlap relief, capital allowance calculations, partnership profit sharing, cash-basis adjustment, farmers' averaging, change of accounting year planning and produces the SA800 series of returns, automatically populating the relevant personal tax returns.

Accounts data can also be imported from most other accounts production systems. Practice management functionality is available via the integrated Sage Practice Solution. This includes standard reports and letters for clients. There is a central administration function, client data storage and a comprehensive library of standard reports and letters to clients and third parties, including letters of engagement. Users are also able to create and save their own report and letter templates. Easy interrogation of the client data held in the database can generate all reports and letters, all of which can be exported into Microsoft Word if required. Client information is carried forward year on year,

and individual or batch production of client-specific 'annual data questionnaires' based on the information provided for the previous year's return can be easily produced. Users are able to allocate tasks and reminders to clients or different users. Benefits and expenses are dealt with by Sage PI ID.

User guides and getting started guides are included with the software, and extra training, if needed, is available. Other support includes telephone hotlines, monthly support bulletins, seminar programmes and product review groups. Updates can be downloaded from the Internet where appropriate.

Sage supports filing by Internet for both individuals and partnerships. All software prices are based on numbers of users and clients. Interest free payment plans are available over longer contract terms.

Contact: Sales team/Support team
Address: Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel: 0845 111 11 11
Internet: www.sage.co.uk
Cost: Sage Taxation Suite - from £555 (including annual licence); Sage Capital Gains - £50 per portfolio
Rec spec: Windows 2000/XP; 512mb RAM; 30gb hard disk space

Taxshield

Taxshield is a brand name of Price Pearson Ltd, a West Midlands firm of chartered accountants. Launched ten years ago, the tax software products are designed and tested within the company to ensure compliance and ease of use. The software is used by firms of all sizes ranging from sole practitioners to the big four.

Personal Tax Manager Professional 2005/2006 is the self assessment software which produces HMRC approved personal tax return forms SA100, R40 and SA800 together with the supplementary pages.

A control tracking system allows the user to track each individual return from start to completion. A guidance panel is shown on-screen at all times. The tax calculation is produced, showing payments on account. Data from other accounts packages cannot be imported, although information can be brought in from Taxshield PI ID Manager, and data can be carried forward year on year. 'What-if?' planning is possible by amendment of existing data, including pension planning, but not changes of accounting year. Lloyd's underwriters and ministers of religion are not catered for. The adjusted figure for capital gains tax needs to be entered manually, but the system then deals with it in the calculation. The software is compatible for filing by Internet. Personal Tax Reporter Solo is also available. This permits the completion of three personal tax returns and includes filing by Internet capability.

The corporation tax module Corporation Tax Manager 2005/2006 produces forms CT600, all the supplementary pages, and potentially unlimited computations. It allows Schedule A computations, and calculates capital allowances. Two versions are available: one for simple returns, and one for more complex returns. It is aimed at the small to medium sized practice which needs a cost effective package that will deal with relatively straightforward computations.

Business Tax Manager calculates adjusted Schedule D Case I and Schedule A profits and capital allowances. It integrates fully

with the personal tax product, or can be used on its own. Thus the calculations of the adjusted Schedule D case I, Schedule A profits and capital allowances will automatically be imported into the partnership return, and the partnership/business pages in the personal tax return as required.

All products come with an online manual and telephone support. There are also help screens and newsletters. Evaluation copies of the software can be downloaded from the company's website.

Contact: Louise South
Address: Taxshield, 11 – 12 Hingley Street, Cradley Heath, Warley, West Midlands, B64 5LA.
Tel: 0870 6091918 **Fax:** 01384 455991
E-mail: sales@taxshield.co.uk
Internet: www.taxshield.co.uk
Cost: Personal Tax Manager Professional - from £180 plus VAT to £1,025 plus VAT; Personal Tax Manager Solo (3 returns) - £19.99 plus VAT; Corporation Tax Manager - from £120 plus VAT to £735 plus VAT; Business Tax Manager - from £150 plus VAT to £860 plus VAT
Rec spec: Windows 95 or above; 64mb RAM; 60mb hard disk space

Working From Home

Employers are increasingly expecting employees to work from home for at least some of the week. Many of these employees do not know that they can claim tax relief for part use of home for work, provided that the nature of the job necessitates that the employee works from home. Even if they are aware that they can claim expenses, they do not know what to claim or how.

Working From Home, formerly known as Instant Tax Refund, is specifically designed for such employees. It works by asking the employee a series of questions and using that information to produce a letter and supporting computations to the tax office. Using the software, employees can calculate the tax which can be reclaimed relating to the expenses incurred when working at home, e.g. use of home office, own car, capital equipment and the additional cost of heating, lighting, and other expenditure. In addition, the program produces employees' claims for using their own cars for work and flat rate expenses under Extra-Statutory Concession A1.

It will handle refund claims going back up to six years. The software is suitable for all employees who incur job-related expenses, including those who do not work at home. It is supplied on CD-ROM and includes an online manual together with online help screens, a help desk, customer website and newsletters.

Corporate licences and multi-user licenses are available for companies purchasing on behalf of their employees or for accountants to use on behalf of their clients.

Contact: David Kitley
Address: Working From Home Ltd, 8 Highgrove Park, Maidenhead, Berkshire SL6 7PQ
Tel: 01628 626330 **Fax:** 01628 781306
E-mail: info@workingfromhome.ltd.uk
Internet: www.workingfromhome.ltd.uk
Cost: £16.98 (ex VAT)
Rec spec: Windows 2000, XP, NT; 128mb RAM; 1mb hard disk space

Corporation tax

The packages covered in this category vary in widely in terms of what they do and the markets they serve, and are priced accordingly.



CCH Software

CCH ProSystem Corporation Tax was developed specifically for corporation tax self assessment, and covers accounting periods ended on or after 1 April 1998. Following the style of other CCH Software products in appearance, it produces the various HMRC corporation tax forms including the CT600 and all supplementary pages, as well as comprehensive computations and supporting schedules.

Data is entered using drop-down menus, or the data navigator which is based on an explorer-tree type structure. The latter can be useful for review purposes, and enables the user to see what items were included in the previous year's computation. This is a comprehensive package dealing with most aspects of corporation tax, including the research and development tax credit, expensive car lease restriction, the non-corporate distribution charge, capital disposals including pre 1965 time apportionment, capital allowances, capital losses, trading companies, investment companies, and group relief. It calculates tax payment automatically, showing quarterly instalments where applicable. Other features include income and expense analysis, tax planning screens, and claims and election tracking. The software is FRS19 and IAS12 compliant.

A 'briefcase' facility permits the user to work remotely, and then bring back the updated version to the database.

A built in administration system monitors deadlines, and will report on outstanding liabilities and those due for action or payment. As with other CCH Software products, the open database allows the user to produce his own reports, and caters for direct links from other accounts packages. Using Excel links, spreadsheets which have been prepared during the audit can be copied into the system, and relevant figures assigned back to the appropriate data entry fields, as well as new spreadsheets being created within the system. A link takes users to CCH's Corporation Tax Manual.

Help features are as described in the CCH Software personal tax entry.

Contact: Sales Administration
Address: CCH Software, Cleary Court, Church Street East, Woking, Surrey GU21 6HJ
Tel: 01483 775070
Internet: www.cch.co.uk
Cost: Price on application. Products are priced according to modules included, number of users and number of cases.
Rec spec: Windows 2000/XP Prof; Pentium III upwards; 128mb RAM; 1gb hard disk space

Deloitte

Abacus Corporation Tax is a comprehensive corporation tax program aimed at large companies. It has modules for general UK corporate tax, authorised investment funds, investment

trusts, life company taxation and petroleum revenue tax. The software is licensed to the tax departments of over 270 major companies in the UK, including 58 of the FTSE100. It is also used throughout the tax practice.

Abacus Corporation Tax has an extensive suite of standard schedules covering investment and multiple trade companies, as well as specialist companies, e.g. oil ring-fence companies. It copes with long and short periods of account, payments on account, interest calculations, foreign currency, foreign exchange, and intangibles. Other specialist modules are available, including general insurance and Lloyd's. The 'what if' tool allows quick comparisons to be made between the results of different scenarios.

Abacus Group module provides an up-to-date tax position for the group, and controls group relief and group payment allocations, advance corporation tax, shadow advance corporation tax, eligible unrelieved foreign tax surrenders between group members, and notional intra-group transfers under TA 1988, s 171A. A set of deferred tax schedules summarises the information contained in the underlying computations and calculates the aggregate group tax position.

Other features include a full audit trail, full automatic recalculation, automatic error trapping and automated cross-referencing of all schedules. The software supports online filing of the corporation tax return and computation.

A number of complementary administration tools are included in the standard package. For example, Administrator enables the user to track time limits, linking into the computations to track their current status and allocate statutory and non-statutory tasks. Taxpack develops an Excel taxpack from the Abacus computation allowing data entry at remote sites. When the work is complete, the detail is directly uploaded back into the computation, representing huge time-savings in rekeying.

Training is included in the licence fee, and the software is supported by on-screen and Internet help, a knowledge system, newsletters, as well as telephone and e-mail hotlines.

International modules are available to support corporate tax compliance in overseas jurisdictions. Currently these cover Ireland, The Netherlands and Hong Kong reporting requirements. These modules are used in the Deloitte practice, and licensed to in-house tax departments in numerous major corporations with activities in these jurisdictions.

Abacus VAT is a comprehensive solution incorporating end-to-end automation. It starts with a link to, and automated upload from, the source accounting system, progressing to an automated analysis and exception reporting engine, and finishes with automatically populated VAT workpapers and VAT returns.

The software covers VAT filing across the EU, and can also automate European sales list filing. The technology is also enabled for e-filing.

Comprehensive risk management processes include protected system formulae and a full audit trail and track changes functionality. The system also enables comparisons to prior period and prior year figures.

The system includes a range of workpapers to support the return enabling the user to make adjustments to accounting system figures in a systematic and visible way. A number of standard tests to provide automated checking of data include:

- standard rate not applied on domestic purchases;
- no self-assessment on EU acquisitions;
- duplicate invoices;
- standard rate not applied on domestic supplies;
- EU sales with no VAT registration number.

Full prior period and prior year comparative figures are also included, and users can also create bespoke tests on the data captured in Abacus VAT.

Global Backbone, launched in August 2005, keeps track of the compliance processes and the tax teams in multiple tax jurisdictions.

With regard to controlled task management and workflow monitoring, the system is programmed to guide users through the relevant compliance tasks and deadlines, with instructions on what to do and when. Each user sees an individual task list, showing upcoming activities, colour-coded by degree of urgency. The system can be set up to automatically email individual task lists to users, for example, on a Monday morning or ten working days before the due date. Overdue tasks can be set to be automatically escalated if they are not completed by a certain date. Users can look forward to see what their workload will be at a future date. Users can create their own tasks, for example, to deal with a tax authority enquiry.

Summary status reports display the up-to-date compliance and reporting status across all relevant countries. A traffic-light key allows users to immediately see any overdue events and upcoming work. Summary reports indicate how many tasks have been completed out of the total compliance burden.

An organised online Filestore offers centralised storage and access to tax returns, statutory accounts, underlying data and any other relevant documentation. It also allows access to market-leading tax news services and technical publications, for example, Deloitte's Country Guide website.

One of Global Backbone's key advantages is its accessibility. Deploying the system requires no loading of additional software on the tax team's PCs. Instead it uses a series of distinct web applications with integrated authentication and operates via a standard web browser.

In general, the website is hosted by Deloitte for Global Backbone users.

Global Backbone is built on industry-standard platforms: Microsoft SQL Server; Microsoft Windows Server 2003; and EMC documentum eRooms.

Contact: Conrad Young
Address: Deloitte, 180 Strand, London WC2R 1BL
Tel: 020 7303 3204
Internet: www.deloitte.co.uk
Cost: Price on application
Rec spec: Windows 2000, XP, 2003 Server; Pentium III or higher; 256mb RAM; 400mb hard disk space and up to 300kb for each computation file; MS IE5.01 or higher



Digita

Digita Corporation Tax is the only corporation tax software accredited for Windows XP by Microsoft.

The software calculates the mainstream corporation tax chargeable, incorporating marginal small companies relief, if applicable, for trading and investment companies. While this software would be unlikely to suit huge corporates and is not designed for them, it does handle the requirements of all but the tiny percentage of corporates with highly complex tax affairs. It applies the correct tax rates applicable to both close investment holding companies and open ended investment companies. The software deals with long accounting periods automatically apportioning income and expenditure where necessary. It carries out various calculations including research and development tax credit, non-corporate distribution charge, adjusted profit, expensive car lease restrictions, losses carried forward and TA 1988, s 419 charge for loans to participators. There is also a payment management tool.

With regard to capital allowances, Corporation Tax calculates the allowance and balancing charges for each chargeable period and supports separate capital allowance computations attributable to a Schedule A business, resulting in a completed tax computation and CT600.

Turnover, profit and loss, and balance sheet fixed asset values can be imported from Digita Accounts Production, which can then be used in the new deferred tax calculator to work out the amounts required for provision under Financial Reporting Standard 19.

Client company files can be exported onto a laptop enabling the user to work at sites other than the office. It has a progress lock down feature with automatic update of tracking of relevant filing and processing dates and events. The individual who carried out the particular section of work is recorded, together with a time and date for each event tracked.

The Online Filing Manager allows for batch filing of forms and computations to the Government Gateway which can be programmed to run at specific times of the day or night. This feature monitors the submission of data in the background so that users can continue to work on other clients. The submission progress automatically updates the event and date tracking system.

Digita provides plentiful support, see the review in the Personal Tax section.

Contact: Karen Green
Address: Digita, Liverton Business Park, Exmouth EX8 2NR
Tel: 01395 270311
E-mail: kareng@digita.com
Internet: www.digita.com
Cost: Digita Corporation Tax from £169 exclusive of VAT
Rec spec: Windows XP; Pentium III; 512mb RAM; 4gb hard disk space

Finansol Ltd

CTax is an automated corporation tax return package, producing the corporation tax computation and return.

The computation simply requires profit and loss account entries. The package analyses allowable and disallowable expenses, allocates brought forward and current year trading losses, computes capital gains, capital allowances, and profits chargeable to corporation tax which feeds directly into the

return to calculate corporation tax, marginal relief, and tax on non corporate distributions where still applicable.

The package is used in three ways:

- by those who require the computation and return;
- by those who have prepared their own computation and require a package to complete the return calculations and print the return forms;
- several CTax customers have purchased bespoke versions to import their own computation entries into the return to complete the process.

Essentially this is an inexpensive, no-frills product aimed at small to medium sized practices, non tax professionals, financial advisers and those with limited financial expertise, which nonetheless does what it says and will doubtless be sufficient for many clients with small businesses.

Other products in the Finansol range include the following. Finansol Incorporation Calculator can be used free from the website. The user just types his projected annual earnings into the relevant box, presses 'submit', and a comparison of the tax due under the self employed rules and under incorporation follows. A desktop version of this calculator is also available.

Finansol Salary v Dividends Calculator helps the user choose the most tax effective combination of salary and dividends to extract from a company.

Finansol NCD Calculator can also be used free from the website for assistance in calculating the maximum dividend that can be extracted from a while leaving sufficient profits to pay corporation tax (for companies with accounting periods spanning 1 April 2006).

A hard copy and on-line manual are supplied with the software, and there are also on-line help screens and a help desk. Training is not supplied on the basis that the software is extremely easy to use.

Contact: Finansol Ltd
E-mail: tax@finansol.co.uk
Internet: www.finansol.co.uk
Cost: Finansol Corporation Tax from £50;
Incorporation Calculator (desktop version)
- £25; Salary v Dividends Calculator - £25
Rec spec: Any: programs take minimal disk space



Forbes Computer Systems Ltd

Forbes CTSA is a corporation tax software that completes both the tax computation and the relevant tax forms for all chargeable periods created, aimed chiefly at the high street practitioner with some company clients. CTSA produces both the new short and long corporation tax return forms as well as all the supplementary forms. The module includes an adjusted profit computation and a capital allowances program. Small companies marginal relief and non-corporate distributions are calculated automatically.

ProTax CTSA also enables the user to submit all the necessary documents, including the computations and accounts, online. Importantly, the software is XBRL-enabled, ready for the new advances in Internet filing currently being finalised by

the HMRC. Data is entered directly on to the tax return forms. Much of the data can be drawn from the Client Database module, which flows automatically into the rest of the system. Accounts details can be imported from Forbes Accounts, the companies new accounts production system, as well as from many other external accounts providers.

Support is as outlined under Forbes' entry in the personal tax section of this supplement.

Contact: Sales
Address: Forbes Computer Systems, 38 Station Road,
Woburn Sands, Milton Keynes MK17 8RU
Tel: 01908 584674
Internet: www.tax.co.uk
Cost: ProTax CTSA: from £95 plus VAT
Rec spec: Windows XP; Pentium III; 256mb RAM;
250mb hard disk space



MYOB

CorTAX SA is MYOB's self assessment corporation tax software. This produces the facsimile CT600 and supplementary forms CT600A, B, C, E, G and H and automatically calculates the corporation tax liability. The computations can be printed in draft form if required (with a simulated watermark showing 'draft'), and hyperlinks, shown as blue text, refer back to how the computation was carried out. The user can drill down from the computations. The software includes a comprehensive range of cross-referenced backing schedules.

Setting up a client is a speedy process, with only the company code and name required for basic set up. Information can be entered using drop-down menus, or by drilling down from the relevant entry in the tax return. Alternatively, shortcut keys can be used to carry out all operations via the keyboard.

There is also a report pack built into CorTAX which gives a summary of each company, including variance reports, group overviews and loss schedules.

CorTAX SA handles long and short accounting periods, capital allowances, shadow advance corporation tax, foreign tax, close companies, dormant companies, groups, investment companies, hybrid companies and trading companies.

On-line help is available based on an Explorer tree structure, with hyperlinks to specific topics. The client file can be locked, so that the user can carry out work elsewhere, without colleagues in the office being able to make changes to the file.

Everything is extractable in pdf. The computation can be in Excel, should the user wish to carry out his own modelling. Returns can be filed online with pdf attachments.

CorTAX is aimed at small to medium sized firms and has been designed to be simple to use. It has the functionality which most practitioners will need for day-to-day dealings with their company clients. Its intention is to provide technical competence without overwhelming the user with features that he is rarely, if ever, likely to use. However, because of the flexible nature of the software, new features can be developed if clients call for them.

Contact: Marketing department, Accountants division
Address: MYOB, Westec House, West Gate,
London W5 1YY

Tel: 020 8997 5500
Internet: www.myob.co.uk
Cost: prices on application
Rec spec: Windows 2000 and above; hardware requirements, memory and disk space depend on the number of users, clients and other application running on the PC

Sage (UK) Limited

Sage Corporation Tax (powered by Abacus) is a modular packaged product powered by Deloitte & Touche LLP's Abacus technology. Sage has an arrangement with Deloitte to sell Sage Corporation Tax (powered by Abacus) to accountants. The powerful Sage Corporation Tax (powered by Abacus) Advanced module package for general UK corporation tax includes a comprehensive tracking and administration database for management reporting. In addition, risk management, group, deferred tax and advanced plus modules are available. The software provides a transparent 'real-time' tax calculation which allows users to insert additional pre-customised schedules or user defined schedules into the pro formas as required, which automatically link and reference to existing schedules.

It has an impressive range of standard schedules covering trading, investment and multiple trade companies, and more specialist companies, e.g. ring-fence companies. It deals with long and short periods of account. Other features include full automatic recalculation, automatic error trapping, deferred tax calculations, automatic instalment calculations, daily interest calculations on late paid tax and automated cross-referencing of all standard schedules. The risk module enables a full audit trail, on-screen reviewing using queries within data cells and also has a set of schedules for estimating future payments on account required under corporation tax self assessment. The software supports filing by Internet.

The group module provides an up-to-date tax position for groups of any size, and allows the control of group relief, group payment allocations and advance corporation tax, shadow advance corporation tax, and eligible unrelieved foreign tax surrenders between group members. The module also assists with notional intra-group transfers. The underlying individual group company computations are updated automatically at the request of the user. A set of deferred tax schedules summarises the information contained in the underlying computations and calculates the aggregate group tax position.

For ease of data collection, an Excel workbook can be produced from within the software. It contains the previous year's company tax details for comparisons and once the current details are completed (by clients, or other members of staff) this can be imported back into the corporation tax working file, speeding up the whole computation process and ensuring accuracy of data. The software integrates fully with other Sage software. Comprehensive accounts data transfers from both Sage final accounts packages provide another method of quick, secure data entry.

On-screen help, manuals, newsletters, seminar programmes and product review groups as well as telephone hotlines are also available.

Sage Corporation Tax (powered by Abacus) Lite module is an entry level version of Sage Corporation Tax (powered by Abacus)

Advanced package. It is aimed at users with limited corporation tax knowledge and those with large volumes of small, simple returns. Users can generate form CT600, CT600 (Short), and supplementary forms CT600A, C and J plus supporting computations for trading and investment companies. It allows quick and efficient production of high quality output for those returns requiring very little data input and minimal detail. This package also has a comprehensive tracking and administration module and supports filing by Internet.

Contact: Sales department/Support department
Address: Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel: 0845 111 11 11
Internet: www.sage.co.uk
Cost: Sage Corporation Tax (powered by Abacus) from £555 (including annual licence)
Rec spec: Windows 2000; 1gb RAM; 30gb hard disk space

Tax Computer Systems Ltd

Tax Computer Systems Ltd is an independent software company which has been producing its very powerful and comprehensive corporation tax software, Alphatax for 14 years. It is the only company in the United Kingdom which specialises in corporation tax software, and many of its employees are qualified corporate tax professionals. The software is used by 22 of the top 25 accountancy firms, and 70% of the top 50 firms, as well as by over 600 companies.

Alphatax is a fully comprehensive package specifically designed for corporation tax self assessment. Operating in a Windows explorer tree environment makes the software straightforward to use. It covers all aspects of a company's corporation tax needs, coping with corporation tax back to 1 April 1987, and dealing with practically every aspect of corporation tax that the user could want. It covers compliance, planning and tax accounting, production of the CT600 forms and backing schedules, and copes with trading, investment and property companies, as well as multi-trade companies, investment companies with trades, and divisions and foreign branches. It produces full capital gains tax computations, including wasting assets and leaseholds. Data collection is supported through the use of an optional automated Tax Pack function. Full review functionality is provided including diagnostics, changed values tracking, full audit trail of all updating actions and recording the source of all input data. Management reports can be customised to the precise requirements of clients so that risk factors, client service exposures, and planning opportunities can be monitored. Group relief is catered for and the Group planning function allows flexible management of a large corporate structure. Significant investment has been made to integrate the Group functionality with the main product to ensure that the performance matches that of the main product. In addition, the package deals with tax accounting, and deferred tax in accordance with the Financial Reporting Standard 19 and International Accounting Standard 12 disclosure requirements. The tax and retail prices index tables from Tax Computer Systems' website can be downloaded. The program links electronically to LexisNexis Tax Direct for subscribers to that service, providing the advantage of instant access to legislation. Returns can be filed by Internet.

Accounts integration is an add-on function that works with any financial system by mapping to any CSV file output

Alphatax is available as a standard, full working package with no client number restrictions, and users range from in-house corporate departments to lawyers and to the largest firm of accountants. In addition several small firms use Alphatax, as it is possible to customise the program, 'switching off' some features which they do not need, for example, the facility for dealing with quarterly payments.

The Alphatax Managed Service is an Internet service and can be run from any browser. It uses Oracle RDB technology, and enables users to work off-site. Data can be stored and accessed from a central repository over the Internet or via a company Intranet by accredited users. In addition to firewall protection, the system's data encryption assures users of complete operational security. Access for individuals and departments to data files is controlled in line with pre-agreed authorisation procedures and, similarly, access to computations is restricted to the specific engagement terms and progress stage on a client-by-client basis and by accounting period.

Alphatax Enterprise is a client server, the aim being to unite all those involved in the process of corporation tax. All the information relating to all the companies in a corporate group or professional firm client portfolio is stored on a central database, which is an industry standard relational database, Oracle or MS SQL. Different individuals can work on files at various locations, although

access can be strictly controlled. Any changes made are automatically updated centrally, so that there are not several versions of the same data at one time. Access can be through a network or over the Internet, the latter making it possible, if wished, for the client and the adviser to have access to the data. It has been enhanced this year by the introduction of Alphacap. This allows asset information to be collected, stored and then analysed by the tax professional according to its tax treatment, with a full reconciliation to the source data. Information relevant to the calculations and disclosure in the tax computations can then be passed seamlessly into Alphatax Enterprise. Factors such as chargeable gains and capital allowances are taken into account. It can also help with contingency planning and provisions for deferred tax.

A hard copy manual and training are supplied with the software. Other support includes online helpscreens, telephone hotlines, e-mail support, online knowledge base, website, customer user groups, newsletters, product review groups and an annual user conference.

Contact: Sales and marketing department
Address: Tax Computer Systems Ltd, Centurion House, London Road, Staines, TW18 4AX
Tel: 01784 410369
Internet: www.taxcomputersystems.com
Cost: Price on application
Rec spec: Windows 2000; 512mb RAM; 50mb hard disk space

Employment packages

Suppliers of employment tax packages are numerous, and the following reviews are a selection of just a few available. The suppliers range from one-man bands and niche software companies up to the big four firms of accountants and mainstream software companies. The products accordingly range in capability: some deal with every aspect of dealing with benefits and expenses removing all the hard work from dealing with forms P11D and related matters, while others are straightforward pay-as-you-earn calculators which tell the employer how much tax and National Insurance should be paid on an employee's salary. Full-scale human resource and payroll software products are not covered in this supplement.

Deloitte

Deloitte's P11D Benefits in Kind product is a scalable, powerful and flexible compliance and reporting system and is licensed by more than 200 large companies across all industry sectors. It handles all P11D reportable benefits, and produces information for HMRC and employees in various printed and electronic formats, including e-mail, online services and intranet publication.

The software produces forms P11D and P46(Car), configurable employee letters, and files for magnetic media/online services submission to HMRC. It also calculates the cash equivalents for all benefits, and copes with multi-employee benefits and multi-access, and produces a full range of management reports, e.g. Class 1A National Insurance contributions by employee or benefit. User-defined reports can be printed and exported.

Information can be carried forward from one year to the next, and new data can be added through intuitive benefits

screens, or using the flexible importer from spreadsheets and most payroll packages.

The software comes with initial training, full hotline support and regular updates.

Contact: Conrad Young
Address: Deloitte, 180 Strand, London WC2R 1BL
Tel: 020 7303 3204
Internet: www.deloitte.co.uk
Cost: Price on application
Rec spec: Windows 2000, XP, 2003 Server; Pentium III or higher; 256mb RAM; 400mb hard disk space and up to 300kb for each computation file; MS IE5.01 or higher

FleetPro Technical Services Ltd

FleetPro provides an on-line calculation service on company car benefit and car fuel benefit for most new cars currently sold in the UK via its www.cartaxpro.com website. The site features a wide range of calculators and search features covering company car benefit, car fuel benefit, 'cash or car' and 'lease or buy'.

The website will calculate whether a company car driver would benefit from taking a cash allowance rather than a company car, using either a cash allowance figure supplied by the user or by calculating the allowance required if it is not already known.

Users can also search the site for cars that meet selection criteria such as P11D value, carbon dioxide emissions and monthly tax bill.

The website can also perform instant 'lease versus buy' illustrations to identify the most tax-efficient way for a company to fund a company car, taking account of the 50% restriction on the recovery of VAT on lease rentals and the restriction on tax relief for 'expensive' leased cars.

FleetPro has a distribution agreement with CAP Motor Research Ltd to include its database of cars, including prices, options, equipment lists, residual values, running costs and carbon dioxide emissions, plus a built-in vehicle finance calculator, so users can use real-time vehicle information and create 'what-if' scenarios to help their decision-making.

On-line help screens and a helpdesk are available. The website also has a comprehensive on-line library covering the tax rules on company cars.

Contact: Russell Thoms
Address: FleetPro Technical Services Ltd, PO Box 103, Twickenham TW2 5RT
Tel: 08700 88 70 75 **Fax:** 08700 88 70 76
E-mail: info@fleetpro.co.uk
Internet: www.cartaxpro.com
Cost: cartaxpro.com – usage based licensing available
Rec spec: Internet access

Keytime

Keytime's P11D Calculator calculates all taxable benefits, and produces HMRC standard forms P11D. It is a multi company product and has no limits on numbers of employees. A telephone helpline and online help are available, and the form creator ensures that only the relevant sections of the form for each individual are completed. An SQL multi-user version is available for 2007. Keytime P11D Filing by Internet is a new module which will allow users to file forms P11D and P11D(b) by Internet will be available from May 2007.

Contact: Sales
Address: Keytime, Pennine House, Chadderton, Oldham, Lancs OL8 1QG
Tel: 0845 456 3103 **Fax:** 0845 456 3104
Internet: www.keytime.co.uk
Cost: P11D Calculator: single user - £145 plus VAT including support; multi-user pricing available on request; loyalty discounts for existing users
Rec spec: Windows XP and above; Pentium; 256mb RAM; 1gb hard disk space

PKF

PKF has completely rewritten its successful P11D software for 2006-07. Using .net technologies the new software supports databases in all versions of Microsoft SQL server, from the single user and workgroup editions through to full enterprise servers. This gives the software immense flexibility to serve any size of organisation.

Integration with common HR, fleet and accounting systems ensures data only need be entered once, and further custom integrations can also be provided.

The software incorporates a detailed employee advice form, which fulfils legal requirements for providing employees with their P11D information, and also explains to employees in detail how benefit values have been calculated.

Full facilities are provided for online filing, which has been successfully used by many clients for the past two years. In addition the software provides full calculation of benefit values, allowance for partial or full dispensations, PAYE settlement agreements, a fleet management module, and extensive validation of data prior to final output.

Updated annually, the software allows users to choose which items and employee data to carry forward from year to year, automatically removing employees who have left, or benefits surrendered.

Contact: Ian Everett
Address: PKF, Farringdon Place, 20 Farringdon Road, London EC1M 3AP
Tel: 0800 100 7113
E-mail: p11d@uk.pkf.com
Internet: www.pkf.co.uk/p11d
Cost: From £140
Rec spec: Windows 2000/XP, 512mb RAM, 200mb hard disk space



PTP Software Ltd

Tax Expense collects and reports benefits and expenses throughout the year for completion of forms P11D. The various related forms, i.e., P11D, P11D(b) and P46(Car) can be produced. The system distinguishes between taxable and non-taxable expenses, and those covered by dispensations and pay-as-you-earn settlements. Class 1A National Insurance calculations are also performed.

Two versions of the software are available: one for advisers, which produces the forms only, and one for employers, which can track expenses through the year and then produce the forms.

PTP Payroll is aimed mainly at small employers who file end of year returns online. The software deals with all tax and National Insurance calculations and has a Net to Gross Calculator as well as allowing for statutory sick, maternity and paternity pay. Payslips can be produced as required. As with Tax Expense, there is an advisers' version and an employers' version. The former allows advisers to process a number of clients' payroll, depending on the licence taken, while the latter is a single version for only one payroll.

Contact: Sales department
Address: PTP Software Ltd, 10 Lakesmere Close, North Oxford Business Centre, Kidlington, Oxford OX5 1LG
Tel: 01865 370470
Internet: www.ptpgroup.co.uk
Cost: Tax Expense: employers' version - £150 plus VAT to £499 plus VAT; advisers' version - £99 plus VAT to £325 plus VAT. PTP Payroll: employers' version - £49 plus to £99 plus VAT; advisers' version - £99 plus VAT to £325 plus VAT
Rec spec: Windows XP; Pentium; 128mb RAM; 500mb hard disk space

QTAC Solutions Ltd

First developed in 1984, QTAXPro calculates the tax and National Insurance due on a net salary figure using a net or gross salary figure, something which would otherwise be a nightmare task. The user enters the information where indicated, and the software does all the hard work. It handles multiple weeks of pay, contracted in and out National Insurance codes, K tax codes, directors' National Insurance, and has tax and National Insurance contribution tables going back to 2000-01. The user can print a report of the details, or a payslip, and help screens are available at every stage. The software can be customised to take account of up to a hundred deductions and additions.

The product can be downloaded from the website. All that is needed to get the program working is a user pin number, and this is available by calling QTAC. The program is also on CD-ROM. This software is extremely simple to use, and is very good value for money. In addition, the company produces QTAC Payroll Professional, a fully featured, high benefit suite for companies employing 200 to 2000, and bureaux up to 10,000 employees, QTAC Payroll Manager which is a full payroll package, both of these products will include the new construction industry scheme features from April 2007 at no additional cost. QTAC Payroll Assistant which is an advanced calculator, and The Payroll Bureau@QTAC offers a payroll bureau service.

Contact: Mark Smith
Address: QTAC Solutions Ltd, Qtac House, Kingsfield Lane, Longwell Green, Bristol BS30 6DL
Tel: 0117 935 3500 **Fax:** 0117 935 3545
E-mail: support@qtac.co.uk
Internet: www.qtac.co.uk
Cost: From £99 plus VAT per single user copy
Rec spec: Windows 95 or higher; IBM compatible PC; 32mb RAM; 15mb hard disk space

Taxshield

Launched in 1995, P11D Manager 2005/2006 produces HMRC approved forms P11D, P11D(b), P9D, P46 (car) and Class 1A National Insurance reports. It integrates fully with Personal Tax Manager Professional.

The software calculates Class 1A National Insurance, and contains references to the relevant legislation. A range of benefit calculations are included, such as cars (including calculation of carbon dioxide emissions), vans and fuel, relocation expenses, medical insurance, beneficial loans and living accommodation.

Data entry is done using a navigation panel which helps the user find his way around the package. The relevant data can be transferred from year to year, and information can be entered whenever it is convenient to the individual user. Data can also be imported and transferred from other products to reduce set-up time.

Contact: Louise South
Address: Taxshield 11 – 12 Hingley Street, Cradley Heath, Warley, West Midlands, B64 5LA
Tel: 0870 6091918 **Fax:** 01384 455991
E-mail: sales@taxshield.co.uk
Internet: www.taxshield.co.uk
Cost: From £85 (ex VAT) plus £1 for each form P11D up to 500 forms, then 75p per P11D for the next 500 forms, and 50p for any remaining forms
Rec spec: Windows 95 and above; 64mb RAM and 60mb hard disk space

The Hessel Group

The Hessel Group has been producing software used to track and report employee benefits for relocation and costs for international assignments for 12 years. The software, RMS (Relocation Management System) prepares the P11D/PSA/W2 reports and is a full 32 bit Windows product with an open architecture database, which allows information from or to other packages to be imported or exported.

The software shows eligible expenses under the statutory £8,000 limit and amounts chargeable to tax. Data is extrapolated to show total expenses paid to individual employees, amounts paid in excess of the statutory limit and the amount of grossed up tax due. Gross-ups can be calculated at marginal rates or by using tax tables.

A P11D tax report worksheet is included, which can show either no gross-up, a fixed rate gross-up or tax table calculation for dealing with those employees whose relocation expenses and benefits move them from the standard to the higher rate of tax. In addition the software will produce PAYE settlement agreement reports. Calculations and reports are produced at the touch of button.

The package charged on a 'per move' basis. Moves can be purchased in blocks. It comes with a manual on CD, and training is available at a cost of £1,000 a day. In addition, there is a help desk, website, seminar groups, and an annual client conference at a prestigious location.

Contact: Geoff Davidson
Address: The Hessel Group, PO Box 139, Crowborough, East Sussex TN6 1WW
Tel: 01892 669901
E-mail: geoff.davidson@669901.co.uk
Internet: www.thehesselgroup.ltd.uk
Cost: RMS priced per move with discounts available for larger volumes
Rec spec: Windows XP; Pentium 4; 256mb RAM, 50mb hard disk space

Electronic information

Publishers of online products and other electronic information aim to produce solutions which enhance the traditional reference books. The advantages of these products include speedy access to databanks of information, with rapid searching facilities and the ability to copy and add to the stored details.

CompuCraft Ltd

TaxHub is an internet-based information service for the busy tax practitioner containing a wealth of varied material including:

- over 130,000 informative summaries of articles from the 50 main tax and accountancy publications including Taxation,

- TAXline, Tax Adviser and The Tax Journal, dated from 1991;
- links to the full text of the journals where available;
- full text indexing to the HMRC guidance manuals, incorporating standardisation of all legislation references;
- a private jottings facility allowing users to add their own material together with links to relevant documents held in-house or on the Internet, providing an immediate means of sharing information throughout the firm;
- a public community area which allows users to publish queries, tax tips or full articles, to add to existing threads or to make direct contact with other users (all items added and all contacts can be anonymous if required);
- instant searching of the HMRC website.

Enquiries are made by simply entering one or more keywords using a Google-like interface. All queries make use of two unique features:

- an association table e.g. searching for 'offshore trust' automatically finds references to 'non-resident/offshore/overseas settlement/trust';
- tax-intelligence e.g. searching for 'ICTA 1988 s 556' recognises 'Taxes Act 88 sections 555-557' as a hit!

Contact: James MacKenzie
Address: CompuCraft Ltd, 38 Fir Tree Road, Wolverhampton, West Midlands, WV3 8AN
Tel: 01902 342154
Email: taxhub@compucraft.co.uk
Internet: www.taxhub.info
Cost: from £150 plus VAT
Rec spec: Internet access

Interactive Data

Interactive Data (Europe) Ltd Securities Taxation Service

The Securities Taxation Service comprises a range of invaluable reference tools for tax professionals providing a wealth of securities taxation information. Services are customisable and provide instant access to the latest data where and when the user needs it via www.sectax.co.uk. These services are used by a wide range of taxation and financial professionals to help with:

- capital gains tax calculations;
- completion of capital gains tax and income tax returns;
- portfolio management and investment decisions;
- tax planning.

The UK & Irish Capital Gains Tax Service details capital changes chronologically from 31 March 1982 with full event details, capital gains tax adjustment factors and appropriate market values. The UK Registrars Service contains contact details for every UK and Irish listed company. The UK Exemptions Service identifies securities and qualifying corporate bonds that are exempt from capital gains tax. CGT Capital Losses details all securities declared of negligible value since 6 April 1965 together with liquidations and liquidator contact details.

Changes of Names provides changes of names for UK and Irish listed companies and unit trusts since 1965. The UK & Irish Dividend & Interest Service gives full details of dividend and interest payments on UK and Irish listed companies and unit trusts, with a

history of up to ten years. The International Dividend & Interest Service includes dividend and interest payments for over 200,000 internationally listed securities in 59 countries.

In addition Interactive Data offers a number of further products that complement the Securities Taxation Service. These include the Capital Events Diary which contains complete details on capital changes for securities listed on the London and Irish Stock Exchanges, available on a daily or weekly basis. The Bondholder details final redemptions, capital events, takeovers, mergers and acquisitions and dividends. The Register of Company Names is a weekly list of newly registered companies and name changes.

The International Securities Service contains full details on all capital events and forthcoming dividends with coverage of over 70,000 listed equities and preference shares in more than 120 countries. FOREX features exchange rates for 24 currencies against either Sterling, Euros or US dollars.

Many of these services are also available in CD-ROM or print format.

Finally, eProbate provides a fast, competitively priced probate valuation service. It enables those who complete regular probate valuations to make better use of internal resource by allowing Interactive Data to perform the calculations. In addition the company offers an online submission and delivery service for ad hoc valuations. Further information is available on www.eProbate.co.uk.

FT Interactive Data is an Interactive Data business.

Contact: Interactive Data (Europe) Ltd, Fitzroy House, 13-17 Epworth Street, London EC2A 4DL
Tel: 020 7825 8100 **Fax:** 020 7608 2032
E-mail: bip.sales@interactivedata.com
Internet: www.ftinteractivedataclients.com
Cost: Dependant on the service and number of modules and licences required



LexisNexis Butterworths

The new LexisNexis Butterworths service is the culmination of more than two years of extensive customer consultation, rigorous testing and a significant financial investment by LexisNexis worldwide to provide the next generation of online information. Users now have a single point of access to hundreds of trusted tax and accountancy primary sources, such as Simon's Direct Tax Service, Tolley's Tax Annuals, De Voil Indirect Tax Service, The Yellow and Orange Tax Handbooks, as well as wide ranging source materials from Excise Duties Cases to Inland Revenue Manuals.

The LexisNexis Butterworths Tax Library contains a comprehensive collection of materials for the professional, including an extensive list of market leading tax titles. Up-to-the-minute news and reports and an array of source materials such as case reports and legislation are part of this library, as well as specialist information on company law, trusts and estates, charities, payroll and employment related issues.

General Tax 1 gives users access to a huge range of material including: bulletins index, events listing, Everyform - Tax Forms,

general case digests, key official journal materials, Tolley's Tax Guide, UK Act summaries, UK Bill summaries, UK journals index, UK legal news analysis, UK newspaper index, UK Parliament statutory instruments, UK regulatory materials summaries, UK statutory instrument summaries.

Key sources within General Tax 2 include Tolley's Tax Annuals covering income tax, corporation tax, capital gains tax, inheritance tax, value added tax and national insurance contributions and the Yellow Tax Handbook which provides up-to-date information on legislation relating to income tax, capital gains tax, corporation tax, national insurance contributions, tax credits, petroleum revenue tax and inheritance tax.

Key sources in General Tax 3 include Tolley's Tax Annuals, the

Yellow Tax Handbook and Simon's Direct Tax Service.

Finally, key sources within General Tax 4 include De Voils Indirect Tax Service and Simon's Direct Tax Service.

Contact: Customer services
Address: Halsbury House, 35 Chancery Lane, London WC2A 1EL
Tel: 0845 370 1234
Internet: www.lexisnexis.co.uk/exploresinglesource
Cost: price on application
Rec spec: Browser Versions Netscape Navigator: 7.1 or above; Microsoft Internet Explorer: 6.0 or above (PC); Microsoft Internet Explorer: 5.2.3 or above (MAC)

International tax packages

Various packages can be purchased or subscribed to which provide guidance and tax planning assistance in the international tax arena.



Comtax

Distributed by LexisNexis

The Swedish company Comtax has, since 1985, been producing cross-border transaction software aimed primarily at multinational companies, tax consultants, lawyers and banks. The Comtax System is a simulation tool containing a detailed database of tax rates, withholding rates and similar tax information for 120 countries, and can be customised to include countries of the user's choosing. All data is updated monthly, and can be downloaded from the Internet if wished.

The program simulates cross-border repatriation of dividends, interest and royalties with the aim of minimising tax. A company may, for example, consider an acquisition involving several companies. The user enters the necessary information to create a model representing the structure of the transaction. It may consist of an existing group structure and other relevant settings, such as different tax positions.

Once the relevant details of each company have been entered, the model can be used to provide the optimum or possible tax implications of the transaction. The calculations are performed in seconds, and provide a starting point for the planner to determine the optimum route for a company to take.

The calculations from the program are in an easy-to-read format, and graphics are available. The output can be exported to other applications to be used in reports or presentations.

Two additional modules are available, Capital Gains on Shares and Thin Capitalisation. These modules offer an automatic analysis on the implications of these rules on cross-border scenarios simulated in the Comtax System. Manuals are provided, and there are also on-line help, extended on-screen tooltips, a help desk, Internet assistance, newsletters, and seminar programmes.

Contact: Ian Wood
Address: Halsbury House, 35 Chancery Lane, London WC2A 1EL
Tel: 020 7400 2500

E-mail: Ian.Wood@lexisnexis.co.uk
Cost: price on application
Rec spec: Windows 98 and above; Pentium III, 128mb RAM; 50mb hard disk space

Sabrix

Sabrix provides enterprise-level transaction tax management software and integrated tax research for 140 countries, as well as 11,500 tax jurisdictions in the US. The Sabrix Application Suite allows corporate tax specialists to spend more time on strategy rather than generating returns.

The Sabrix Suite comprises a number of applications, including the Sabrix VAT Manager. This application manages VAT accounting, e.g. input and out VAT, reverse charges and distance sales. It also handles EU tax issues, such as triangulation, US imports and exports, and other international tax requirements. New features simplify compliance with EU Sixth Directive mandates for language-specific messages on invoices involving exemptions, triangulation, or reverse charge procedures. Sabrix provides the required local language messages, including required local tax law messages. It also supports the creation of custom authority-specific VAT messages for added flexibility.

To simplify reporting and filing, the Sabrix Suite provides a single source of data for all transactions, across all business systems and geographies. Tax rule and rate upgrades are provided at least monthly, and can upload automatically. Tax data can be extracted for automated tax-return filing packages, spreadsheets, data mining and custom reporting.

Sabrix now offers country-specific, pre-configured VAT reports that facilitate the population of monthly and quarterly VAT and GST returns. The reports duplicate current tax returns for international tax authorities, including box and line numbers, text, amounts and totals, enabling tax professionals to enter summarised data quickly into forms for filing. Reports support VAT filing formats for a number of European and Asian countries, including complex tax returns for countries such as Germany and Greece.

Sabrix provides comprehensive installation services and support, including on-site consulting, a hard copy or electronic manual, training, website, telephone helpline and online help screens. Demonstrations are available online and custom evaluations are available by request.

Contact: Stewart Nivison
Address: Sabrix Ltd, 2nd Floor, Berkeley Square House,
Berkeley Square, London W1J 6BD
Tel: 020 7887 6511
Internet: www.sabrix.com
Cost: from £27,000
Rec spec: type, size and configuration of hardware depends
on user activity and transaction volume

Taxware LP

Taxware LP is based in the US. It develops global transaction-based tax calculation and compliance systems designed to simplify tax accounting procedures so that businesses around the world can minimise the risks and costs associated with sales/use tax, consumer's use tax, and VAT compliance. Legislative initiatives such as Sarbanes Oxley are covered.

Taxware Enterprise is an integrated tax calculation and compliance solution which automatically calculates taxes for sales, purchases and rentals. It covers all US and Canadian taxes as well as calculations of value added and other consumption taxes for over 100 countries. TaxSolver is a forms preparation system which links directly into the other Taxware products, and other tax transaction products, automatically populating the forms with data taken from those systems.

Support is provided in the guise of a manual (on-line or hard copy), website, helplines, customer user groups and newsletters.

Contact: Jim Panagas
Address: Taxware LP, 401 Edgewater Place, Suite 260,
Wakefield, MA 01880-6210, United States

Tel: 001 781-557-2600 Fax: 001 781-557-2606
E-mail: jim.panagas@taxware.com
Internet: www.taxware.com
Cost: Price on application

VAT Applications NV

VAT Applications NV develops automated applications to deal with the problematic issues surrounding VAT at international level.

iVATAssistant/Expert ensures VAT accuracy on all transactions. It prevents inadvertent under-declarations and ensures full VAT deductibility on international purchase invoices and reduces time spent researching VAT issues and the cost of external advice.

iVATReporting links to the user's ERP system to analyse each transaction and deliver the compliant VAT rate, invoice text and reporting requirements automatically. VAT returns and other reporting requirements can be generated instantly for all EU member states.

A manual and training are supplied along with telephone hotlines.

Contact: Jeroen Schweitz
Address: VAT Applications NV, OL Vrouwstraat 6 b4,
1850 Grimbergen, Belgium
Tel: +31 6 1001 7257
E-mail: schweitz@vatat.com
Internet: www.vatat.com
Cost: iVAT Assistant/Expert 600/2,000 euro;
iVAT Reporting – 13,000 euro plus 1,500
euro/country
Rec spec: Pentium 2; 256 mb RAM

Other packages

4 Eyes Ltd

VAT Property Solutions has been developed for use by the construction sector, in response to requests from clients who wanted a solution to enable non-VAT specialists to decide the VAT treatment of a construction or refurbishment project. It is a standalone product which allows clients and their advisers to identify the VAT and stamp duty land tax implications of a proposed development.

The system is very simple to use. It is accessed by log-on and password over a secure Internet connection, and the user then responds to a series of questions about the project, e.g. what will be built/repared or refurbished? what will be done with the finished building? The software works out what the VAT treatment will be, and provides an explanation. All the technical jargon is explained, and copies of relevant certificates produced.

The software is maintained and updated centrally to take account of legislative changes, variations in HMRC's policy and VAT tribunal decisions.

A manual is supplied, as is a help desk, customer website, and e-mail bulletin service. Training on the software can be arranged.

Contact: Phillip Henwood
Address: 4 Eyes Ltd, 29 Dingley Lane, Streatham,
London SW16 1AZ
Tel: 07793 707 839

Internet: www.4eyesltd.co.uk
Cost: £300 a quarter for an unlimited user
subscription within any single organisation
Rec spec: Computer with web browser

BBS Computing Ltd

Tax Tips and Tools was developed in partnership between BBS Computing Group and the 2020 Innovation Group six years ago. This practical, easy to use software is a reasonably priced tax toolbox on a CD containing a wide variety of spreadsheet tools, tax marketing tools, letters, and computations highlighting some of the complexities of the UK tax system that would be commonly met by the practitioner.

This year's version, Tax Tips and Tools 6, was launched in May 2006, with another update in August. The latest version has 76 practical tax tools including an IHT Calculator, Should I incorporate?, Car tax calculator, Maximum NI calculator, Admitting a partner, and Incorporation issues and elections. Updates are available over the Internet via a secure website after registration of the product online.

Tax Tips and Tools 4 won 'Best tax software' in the LexisNexis Taxation Awards 2005.

Contact: Kevin Salter

Address: BBS Computing Ltd, 30 Bear Street,
Barnstaple, Devon EX32 7DD
Tel: 01271 375271
Internet: www.bbscomputing.co.uk
Cost: Tax Tips and Tools 6 - £275 plus VAT;
discounts apply for multiple offices
Rec spec: Windows 2000/XP

beprofessional

beprofessional is a provider of business subscription software and services. The products combine the power of the Internet, comprehensive content and ease of use to help growing businesses solve their compliance needs. Launched in 2002, with investment from Deloitte and City law firm Berwin Leighton Paisner, beprofessional provides services to over 22,000 businesses, via leading organisations such as Barclays, AXA, Business Link and by a growing network of independent insurance brokers, accountants and financial advisers.

Contact: Howard Rosenberg
Address: beprofessional, 1 Maltravers Street,
London, WC2R 3EE
Tel: 020 7240 7971 **Fax:** 020 7836 6217
E-mail: howard.rosenberg@beprofessional.com
Internet: www.beprofessional.com
Cost: price on application



BPP Professional Education

Scotland's oldest established provider of e-learning, EQL is to be rebranded BPP Professional Education from January 2007 (having become a fully-owned subsidiary company of BPP back in 1999). The company provides interactive training solutions in finance, accountancy and business related subjects. Interactive Taxation Tutor is the training package covering UK personal and business tax. Its 21 modules each relate to a different aspect of the UK tax system, and include the personal tax computation, corporation tax, unincorporated business tax losses, self assessment, inheritance tax, tax planning, capital gains tax, and VAT. Each module takes between one and two hours to complete and includes learning objectives. A reporting module shows how the student is progressing through the material. Designed to be straightforward to use, the student works at his own pace, and can stop and start at any time. Manuals or workbooks, and training are not required as each module is self-explanatory. An online calculator, help, glossary and tax tables are also included. A demonstration module can be downloaded from the website at www.eql.co.uk.

In addition, BPP produces an interactive training solution, ATT Tax, for students studying for the Association of Taxation Technicians qualification. This produces 38 hours of tuition and takes students through a range of tax subjects from National Insurance to industrial buildings allowance to the corporation tax computation. It has a module wholly dedicated to examination format and tips to help the student with revision and exam preparation.

Contact: Karen King
Address: BPP Professional Education, 3 Michaelson
Square, Kirkton Campus, Livingston,
West Lothian, EH54 7DP
Tel: 01506 472255
Internet: www.eql.co.uk; www.bpp.com
Cost: contact karen@eql.co.uk
Rec spec: Windows 95 and above; Pentium 133;
16mb RAM; 25mb hard disk space per course

Profitsoft Ltd

Profitsoft Ltd has been developing premium added value software for accountants for seven years. The company is associated with two independent accountancy practices, which assist in developing, testing and using the products, helping to ensure that they are effective in practice.

The software is supplied as the Tax Doctor package which includes four tax saving modules. Alternatively, each module can be bought separately.

The four modules are:

- DividendPro: Dividend v Bonus/Salary Tax Planner – this calculates the net amount receivable under dividend and bonus or salary for up to six shareholders, taking into account each individual's circumstances. It copes with all corporation tax rates and splits accounting periods where rates change.
- IncoPro: Incorporation Tax Planning System – this shows the different tax, National Insurance and net income under incorporation for sole traders and partnerships projected over two years.
- TaxplanPro: Pre Year-end Tax Planning System – this is for year-end planning on tax payable, accounting profit and cash flow. It calculates marginal rates of corporation tax and dividends carried forward and keeps the client aware of tax saving opportunities.
- CartaxPro: Car Tax Reduction System (plus Free Log Sheet and Claim Form System) – this shows the best ways of saving tax, e.g. company car or additional salary over three years, and simplifies the record keeping process. It deals with owned, leased, contract hired, hire purchased, lease purchased or contract purchased cars, and assesses the depreciation, running costs, tax rates, allowances, VAT and National Insurance.

These tools are simple to use, and generate good quality tax and business reports in minutes. They are accompanied by user guides, presentation packs, promotional material, help screens and hotline support. They can stand alone or be used on a network, and are available on a free trial offer/money back guaranteed basis.

Contact: Kay Halliday
Address: Profitsoft Ltd, Cross Street Chambers, Cross
Street, Wakefield, West Yorkshire, WF1 3BW
Tel: 01924 239919 **Fax:** 01924 376404
E-mail: info@profitsoft.co.uk
Internet: www.profitsoft.co.uk
Cost: Tax Doctor - £245 plus VAT; individual products
- £64.95 plus VAT. Free updates included in the
price
Rec spec: Windows 98 and above; Excel 98 and above;
64mb RAM; 50mb hard disk space

Tax Automation Ltd

Tax Automation began operating in 2001. It is a specialised consultancy which provides packaged and bespoke software for tax professionals, focusing primarily on solutions that manage tax risk.

Tax Automation's products bridge the gap between accounting and tax. The software works by taking source ledger data from enterprise resource planning systems such as SAP, Oracle and others and analysing, categorising and posting it directly into Excel or third party tax computation engines.

Capital Assets Database manages capital expenditure for capital allowance, capital gains tax, capital goods scheme and stamp duty land tax purposes. In essence, it tracks capital assets tax costs, dealing with capital allowance claims, part disposals, rollover relief and contingent gains or what if? disposal planning on asset portfolios. The broad and integrated tax coverage allows the user to see how these complex rules interact and how the same expenditure affects the different calculation regimes. All the reports or searches can be exported to Excel. It is available as an Enterprise Edition for users with large asset portfolios and as a Desktop Edition for companies with a smaller asset base.

Tax Analyser creates a centralised tax database allowing the generation of detailed accounts analysis schedules which support the corporation tax computations directly from source ledger data. Additional annotation and links to scanned documents can be added to support and document tax decisions made.

Excel Add-Ins give access to complex tax related calculations without the user having to program them himself. A number of

Add-Ins containing detailed tax related functions are available including:

- period of account and accounting period handling;
- tax charge calculations;
- capital allowance calculations;
- corporation tax self assessment penalties and interest calculations; and
- access to up-to-date RPI and tax table rates, including wasting asset calculations.

The Form Generator application produces facsimile forms directly from Microsoft Office products such as Excel and Access. Data can be placed directly from spreadsheets or databases on to HMRC approved forms such as the CT600, P11D or stamp duty land tax returns. Template spreadsheets are available which can be used straight out of the box, or customised using simple 'click and point' to link data to the form. It also supports the creation of barcode images in pdf417 format for stamp duty land tax forms or XML output to submit form data across the internet.

Contact: Mark Betkowski

Address: Tax Automation Ltd, 400 Thames Valley Park Drive, Thames Valley Park, Reading, Berkshire RG6 1PT

Tel: 0118 965 3458 **Fax:** 0118 965 3558

E-mail: mark.betkowski@taxautomation.co.uk

Internet: www.taxautomation.co.uk

Cost: price on application

Rec spec: Windows XP; 512mb RAM; 500mb hard disk space (server)

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