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The Annual Technology Supplement to

TAXATION

August 2008

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DIGITA

Taxation Tax Technology Supplement 2008

Lightening the load

by ALLISON PLAGER

WELCOME TO THE 2008 *Taxation* technology supplement.

What a year it has been so far. Three familiar names in self assessment software have been taken over. In April 2008, Exmouth-based Digita was acquired by Thomson Reuters Group (which has also bought the US company, TaxStream) and Wolters Kluwer (which already owns CCH Software) took over MYOB's well-known PerTax family of tax software. As if this was not enough, a few weeks later, IRIS acquired the long-established Scottish software house Drummohr Technology. Changes of this nature often cause some concern among users, but the companies concerned all say that it is business as usual.

New forms

For 2007-08, HMRC redesigned the entire range of self assessment tax return forms, the first time this happened since self assessment was introduced.

While developers have the expertise to cope with such changes, the timescale has not been helpful, particularly as a facsimile return is no longer acceptable and suppliers must produce identical returns. Many suppliers said that the lateness of availability of information from HMRC has made this a very difficult year, particularly bearing in mind that the volume and severity of HMRC 'special cases' (see www.hmrc.gov.uk/ebu/sa-notes2-june08.htm#4) have been very poor compared to previous years.

The tax return changes did inevitably provide a challenge for developers. IRIS said 'an enormous amount of work was involved in incorporating the new forms' and 'this was made even more difficult by the restricted amount of time available. Obtaining approval for our electronic submissions was not as smooth a process as it has been in previous years with HMRC unable to accept certain test cases until late in the process'.

Another area that is changing significantly is capital gains tax, but as the new regime came into effect from April 2008, the suppliers have reasonable time to integrate the new rules into their products for the 2008-09 returns.

What's on offer?

As in previous years, the supplement includes information about a range of software, from self assessment tax return software to packages that help companies work out the VAT on cross-border transactions.

Contact details of each product are given in the supplement, along with an independent report on what each package does. The reports aim to give readers an overview and flavour of a product, rather than complete details of what it does, so further information should always be obtained from the software providers.

Other users are also a valuable source of information when choosing potential software. For example, they will have experience of the supplier's reliability at providing updates, how effective the support is, and generally how well the software works. They could also say how easy, or not, they found the software to use, whether training was needed and, if it was, how useful it was. The software providers will usually supply names of existing users if requested.

A good choice of supplier of self assessment software continues to exist. With this in mind, potential purchasers should decide what they want from the software and how much money they are prepared to pay for it.

A comprehensive self assessment package which produces all the return forms, supplementary pages, computations and with lots of administration and planning features will be expensive and may provide more features than, say, a small high street practice wants. The larger suppliers say that their products can be scaled down to provide a simpler solution, but the alternative might be to choose a more straightforward package from one of the smaller providers.

The future

Tax advisers have a vast array of software available to them to help across the taxes. If nothing else, a self assessment package removes the drudgery of tax return completion, and with online filing all but mandatory (paper returns must be filed no later than 31 October, thereafter they must be filed online), it is pretty much an essential tool of tax return compliance.

Contents

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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 existed for more than 25 years. It began out as an off-the-shelf self assessment software package produced by Which?, aimed at individuals to help them complete their personal tax returns. A professional version followed. The software was acquired by Acorah in 2005.

TaxCalc Pro allows an unlimited number of clients. It deals with personal and partnership tax returns, together with all the supplementary pages, including Lloyd's underwriters, MPs and ministers of religion. Data is entered using an 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. Online filing is included free of charge.

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 deals 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. The software has data mining capability, a spreadsheet checklist to collect and import client data, detailed schedules of tax return information, production of standard letters and password protection. Interactive pdf claim forms (HS302 and HS304) are automatically attached to the online filing.

New for this year, the user can copy entries for jointly held investments and capital gains to a partner's file.

TaxCalc Pro is an effective self assessment software program which is easy to use. It is competitively priced, aimed principally at small to medium sized firms, non-tax professionals, tax shops, etc.

TaxCalc Pro Suite is a straightforward corporation tax form filler with some extras. It 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 marginal rate relief, and CGT calculations including indexation and taper relief. Calculations can be exported to Word or Excel and a full listing of all data entries is made. No business calculations regarding accounting periods can be done and it is not targeted at groups. Returns can be filed online.

TaxCalc Trusts deals with all the SA900 forms and the tax calculation.

The software comes with a free pdf manual, online help screens and customer support. There is a customer website, occasional e-mail bulletin service and newsletters, online knowledge base and product review groups. Updates are provided by an automatic TaxCalc live update, and an evaluation copy can be downloaded from the website.

Contact	Sales
Address	Acorah Software Products, Ash Court, 23 Rose Street, Wokingham, RG40 1XS
Tel	08707 669935
Internet	www.taxcalc.com
Cost	*TaxCalc Pro* - £275; *TaxCalc Pro Suite* - £375; *TaxCalc Trusts* - £100
Rec spec	Windows 98SE+; Pentium 4; 256mb RAM; 100mb hard disk space

CCH Software

CCH Software is a subsidiary of the publishing company Wolters Kluwer (UK) Ltd. It has been producing tax and accountancy software for over 25 years, under a number of owners, i.e. FDS, IBM and Data Sciences. In April 2008, Wolters Kluwer bought the UK and Ireland MYOB Accountants Division and added them to the CCH family.

CCH say that 'the roadmap which will be delivered over summer will ensure that both CCH and MYOB clients will benefit from the strongest suite of products available. The combined organisation will deliver both sets of clients with a much broader range of products and services'.

Some 1,400 named firms use different combinations of the CCH product range.

CCH's software is called ProSystem and is an integrated tax and accounting software suite with modules catering for a wide range of work. Modules can be purchased on a stand alone product basis, so that organisations which prefer the best of breed approach can choose individual products to integrate with their own systems.

ProSystem modules are grouped into four categories; Taxation, which includes personal, partnership, corporate, trust and capital gains modules; Accountancy, which includes accounts production, audit, payroll and P11D modules; Practice Management, which includes time and fees, client database, document management, client relationship management and resource planning modules; and Consultancy, the added service modules.

For users who have integrated their software, shared data (names and addresses etc) is stored in one central database while financial data can seamlessly flow from module to module as directed by the users. This saves time by eliminating unnecessary re-keying of data.

Recognising the needs of the accountancy profession, CCH ProSystem not only links modules within its own suite, but integrates with other applications such as Microsoft Office. There are also links to the information content provided by CCH publishing.

The CCH database is truly open. Using industry standard tools such as MS Query, a user can interrogate any element of data in the database and then use it, for example, for mail shots or other marketing and reporting purposes. The system is very flexible: as well as accessing the data, the user can also import and export the data into and out of other packages. The system comes ready with numerous standard reports and routines plus many comprehensive tools such as the API (application programming interface) to facilitate this.

The Personal Tax module covers virtually all aspects of self assessment. It handles the full range of personal and partnership tax returns, including MPs, ministers of religion and Lloyd's underwriters. The system produces a traditional-style tax computation, backing schedules and working sheets which show a break-down of the data reported on the tax return into individual sources. The user can choose how he enters data. The user can use the HMRC forms to open a data entry screen where any number of sources can be detailed. However, if preferred, sources can be selected from a traditional drop-down menu. Another method of data entry is via a navigation pane which shows and allows entry to those parts of the system where data is present. Data can be flagged as complete or incomplete. Because all data is copied forward from one year to the next, excluding sources that have ceased, this can be the fastest and easiest way to work on a return.

All forms and reports produced by the system are produced as pdfs enabling users to e-mail them to clients and, if the document management module is in use, these can be filed in the client's folder. In addition to assisting with standard compliance work, many features are available, e.g. a notes option which will automatically generate a work in progress report, a built-in administration module, additional HMRC forms and helpsheets, a sophisticated security module, a library of standard letters that automatically pull data from the client database as well as a letter generator to enable the user to create their own templates which then can be used throughout the practice. The software can also be used for a wide range of 'what if' planning, including pension planning and change of accounting year date calculations for self employed individuals.

The online data capture module allows the client to enter data himself via a question and answer interface over the Internet. Help and validation are available throughout the questionnaire. The resulting data is uploaded into the personal tax module where the user can review and process the tax return before sending it back to the client for signature. To cut down the cost of processing tax returns, some firms are using this approach with their own staff. By loading the system onto their intranet, they can use less qualified staff to do the basic data capture and only use the more expensive qualified staff to review and finalise the return.

Online filing has been present in ProSystem since its inception and has been extensively enhanced as part of the recent compliance release for 2008 incorporating additional filing by internet validations supporting exclusions, special cases and scenarios which will create rejections at HMRC. These new validations mean that the user is made aware of any possible omittance of data and is advised what needs to be done to ensure that the return can be filed successfully or alternatively confirms that a paper return should be filed. The online filing module supports pdf attachments, and where attachments are mandatory validates for these ensuring they are present before the case is transmitted.

The Personal and Partnership system has a fully integrated Expatriate Tax module available. This has various features including a tax computation showing UK tax liability and grossed up figures from the expatriate calculations, detailed equalisation reports, tax credit calculations for US tax paid, an allocation of compensation report and a diagnostics report.

The self employed are also catered for in CCH ProSystem which supports the whole compliance process from taking the final accounts data from other final accounts packages as well as the CCH's own, creating the adjusted tax computation including the calculation and reporting of capital allowances. The system also supports 'what if' planning for changes of accounting date and the purchase and disposal of assets from the business asset register. Tax returns and supplementary pages are also available for all types of partnership, regardless of size or complexity. It has the facility to manage the production of the partnership statement which is fully integrated with the partner's personal tax pages.

Capital gains tax calculations are performed by the CGT and Dividend Scheduling module which automates the preparation of investment income and capital gains schedules, taking into account dividend payments, scrip issues, reorganisations, mergers, take-overs and de-mergers. The income schedules produced by this module can be used to support the return as can the comprehensive capital gains tax calculation submission, which will be mandatory as from April 2008. A particularly useful planning feature is the dummy sales function that 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 and used automatically in the computation. A comprehensive securities database is included free of charge which is maintained and updated by CCH. Users can download up-to-date information by visiting the CCH website, on a daily basis if required. The modular pricing and flexible usage options make the module suitable for any size of practice.

The basic version of the Trust Tax module is 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. Relevant calculations are performed 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. More complex transactions will benefit from the full package which includes 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. This module also includes the ability to file the Trust returns online.

The Return Analysis module is fully integrated with the personal tax return. It reviews the return, comparing it against that of the previous year. The process also interrogates the tax return data, assessing the client's exposure to an HMRC enquiry. Discrepancies are shown in a report,

Does your taxation software measure up?

which can be customised and sent to the client. 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 while 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.

The Practice Management software is built around a 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. Functionality within Practice Management includes Document Management which allows documents, including e-mails, to be saved into the client's file. This brings to reality the paperless office, and indeed some users prefer not to keep any papers, instead returning them to their clients to retain. The workflow management system works by recording and monitoring work in progress and deadlines. Recurring tasks are generated automatically and a list of task shows the jobs due within a specified period.

All modules come with electronic manuals and online help. There is also a telephone help-line, and at least 18 people support the products at any given time. User groups, newsletters, online knowledge base, e-mail bulletin service, seminar programmes, and product review groups are among the support offered. Training on how to use the software can be arranged at an additional cost, as can electronic training.

The main releases of the software are provided as a CD box set which includes the main installation as well as a CD containing all supporting product release, support and training resources. Updates and demos are available online.

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 XP Prof; Pentium 4 upwards; 1GB RAM; 10GB hard disk space

Digita

Digita is a very successful company which has been producing tax software for 22 years. In April 2008, Digita became part of the Thomson Reuters Group. However, managing director Jerry Rihll says it will be 'business as usual at Digita', and he will continue in his current role. The company continues to be based at its Exmouth headquarters. Digita has 'considerable growth plans and the means to invest in further research and development'. In addition, the firm is 'recruiting in all areas of the business'.

Digita's software basks in the glory of some interesting unique statistics. For example, 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 are accredited under the ICAEW's IT accredited product scheme. Also Digita is the only software supplier to have won the LexisNexis best tax software award three times: in 2007, 2006 and 2003, and to be a finalist in every year since the award was launched.

As well as producing software for professional tax practitioners, Digita develops financial software for Microsoft and MSN Money.

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. The 2008 release includes the automatic calculation of foreign tax credit relief, excluded income and the dual residency and non-UK resident worksheets IR302 and IR304.

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.

A comprehensive dividend data feed from Interactive Data calculates the dividends on shares, dividend paying unit trusts and interest paying unit trusts. It contains details of the full FTSE equity dividends, well-known unit trust managers and open ended investment companies. Data for 100 of the most popular companies is supplied free of charge, while the full feed is available at reasonable cost.

Pension and 'what if' planning are possible. Accounts details can be imported from Digita's own final accounts production software, 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.

Digita Business Tax is a comprehensive system that calculates basis periods, assessable profits, capital allowances, overlap relief and deals 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 partnership, Digita users can access the LexisNexis tax reference service through Personal, Business and Trust Tax.

Returns can be submitted online at no extra cost. As an HMRC self assessment filing partner, Digita works with HMRC to promote the filing of online returns and has jointly held seminars with HMRC to highlight the benefits of online filing.

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. This significantly reduces the risk of errors 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.

TaxAware uses artificial intelligence 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 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.

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

Digita Contact Manager provides a single point of data entry for contact and relationship information shared within the Digita range of products. It brings together client information to allow for client management in one place. Contact information is shared seamlessly across all products within the suite. As it adheres to xAPL, the ICAEW data sharing standard, it therefore also enables integration with third party suppliers' products.

An additional, optional module is available for letter writing and facsimile forms. It can, for example, generate client mailshots so that a specific service, say pension planning, could be offered to those not already receiving it. Other modules for time and fees, staff management, work flow, data mining and document management will be released in the future.

Other Digita products include Company Secretarial, a company administration package which includes electronic filing and helps with completion of form 42, and P11D Production which Digita distributes in conjunction with PKF.

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.

The software uses Microsoft SQL/SQL Express database technology which allows the user scalability of database. The products provide full integration, regardless of whether the user has only Digita products or has software from other suppliers.

Contact	Karen Gardner
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 and Business Tax from £300; Digita Trust Tax from £214
Rec spec	Windows XP/Vista; Pentium III or higher; 1Gb RAM; 4Gb hard disk space

Drummohr Technology Ltd

Drummohr Technology was acquired by IRIS in 2008. Drummohr will maintain its identity and continue to produce its software as usual. In effect, being part of a large company with all its resources gives Drummohr the ability to develop its products and keep up with the relentless pace of legislative and technological changes that tax software houses have to deal with.

Tax Assistant, Drummohr's comprehensive self assessment package, comprises an integrated suite of linked modules covering all aspects of self assessment. Used by 1,440 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. Data is entered via menus or using the on-screen tax return. 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. 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 can also be done.

The database management system, 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. Users can use the system to filter lists of clients according to chosen criteria, for example clients whose tax returns have not yet been 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. Reports are displayed on screen, can be printed, and can be saved as a pdf document for e-mailing to the client.

The Company Tax Return modules follow the style of the personal tax modules. They produce the corporation tax return and supplementary pages, as well as calculating the tax due, including marginal relief, research and development tax credit, chargeable gains and allowable losses, and capital allowances.

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

The P11D module produces forms P11D, calculating car benefits, and other benefits. Data from this module can be imported directly on to the client's tax return.

A online manual is supplied together with on-screen help, a telephone help-line, customer website, on-line knowledge base and e-mail bulletin service. 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, for users who wish to examine the software in depth.

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 £500 plus VAT
Rec spec	Windows XP or Vista; 256mb 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 twelfth year of operation. David Williams, formerly a partner in a Brighton firm of solicitors and now a retired member of STEP, 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.

In view of the forthcoming launch by HMRC of a complete new suite of inheritance tax forms, no information is available regarding the company's products – ProbateDesk, ExecutryDesk, and FormDesk-IHT400 and FormDesk-IHT400(Scotland), at the time of going to press.

Contact	David Williams
Address	Excelsior LawDesk Ltd, Summerfields, Furners Lane, Henfield, West Sussex BN5 9HS
Tel	01273 494978
E-mail	inform@lawdesk.co.uk

Financial Software Ltd

Financial Software Ltd is a specialist software house that has been operating in the UK for 14 years. It undertook the design, development and marketing of a capital gains tax solution called CGiX, which automates CGT calculations on investment portfolios. It uses an SQL Server 2005.

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;
- rules and definitions for US capital gains;
- account aggregation and shared account processing for trusts;
- UK HMRC 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 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.

Financial Software is a Microsoft certified partner.

The program is available on CD-ROM or it can be downloaded from the Internet. Evaluation copies and updates are also available from the website. In terms of support, a whole range of help is offered, including a manual, training, online help screens, helpdesk and customer website.

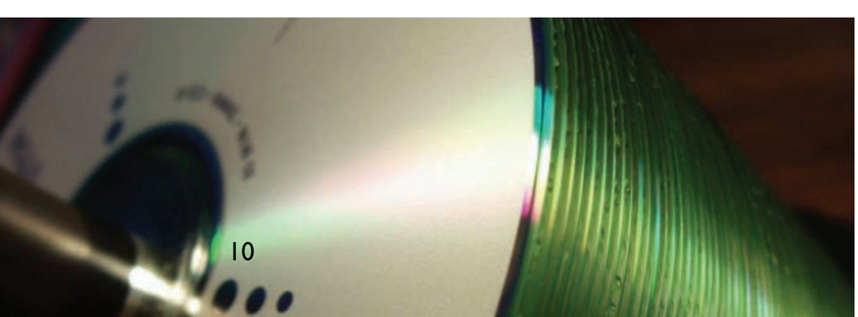
Contact	Imran Khan
Address	Financial Software Ltd, 6th Floor, Windsor House, 39 King St, London EC2V 8DQ
Tel	020 7776 9850
Fax	020 7600 9117
E-mail	imran.khan@financialsoftware.co.uk
Internet	www.financialsoftware.co.uk
Cost	price on application
Rec spec	Windows, Pentium II 266 or higher, 1mb RAM, 5mb hard disk space

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 covers 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 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. Online filing is included and ProTax has received HMRC recognition for attaching pdf files to SA100s, 800s and 900s. Forbes also has recognition for agent authorisation online.



Forbes Accounts 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 P11D for expenses and benefits, Payroll and ProTax CT which produces the new short and long corporation tax return forms and performs all necessary computations (see review in corporation tax section).

CISassist deals with the new construction industry scheme, e.g. it handles monthly payments to subcontractors, electronic processing of verification numbers, and can be used by bureau services and in house. It comprises three modules: CISbase is a proprietary database and management system for keeping track of payments to subcontractors, GovEX handles interaction with the HMRC via the Government Gateway, and CISlink is a customisable bidirectional link to external databases.

The software comes with a hard copy/online manual, and comprehensive support including a free telephone helpline, online help screens, customer website and newsletters. A demonstration version of the software can be downloaded from Forbes' website. In addition, registered users can update their software from the 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, Forbes Computer Systems, Guise House, Aspley Guise, Bedfordshire MK17 8HQ
Tel	01908 584674
Internet	www.tax.co.uk
Cost	ProTax: from £195 plus VAT. CISassist: from £595. Other prices available from www.tax.co.uk
Rec spec	Windows XP; Pentium III, 256mb RAM; 250mb hard disk space

IRIS Software Group

IRIS Software Group was formed in June 2007 through the merger of IRIS with the Computer Software Group to form one of the largest privately owned software businesses in the UK. The IRIS Group owns PTP Software and recently announced the acquisition of Drummohr.

IRIS has been producing tax software for 30 years and was the winner of the best tax software category at the inaugural LexisNexis tax awards in 2001. Its full suite of products is accredited by the ICAEW.

IRIS is renowned for being the first software company to provide fully integrated software. The products integrate completely with each other and this is a major attraction for most IRIS customers. The Central Database module forms the hub of the software. Client data is fed into this module and flows automatically into the rest of the system.

The data can also be used to create automatic client letters, and for other marketing purposes. Online filing comes as standard with all the tax modules.

IRIS Personal Tax, used on 5,070 sites, covers virtually all aspects of self assessment. It handles self-assessment returns for directors, partners, sole traders, individuals, Lloyd's underwriters, and ministers of religion; only MPs are not catered for. 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 pension planner deals with retirement annuities and personal pension contributions. Car benefit is calculated, and forms P11D are produced for clients and employees of business clients. It also has a car database giving details of carbon dioxide emissions.

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. As well filling tax returns online, forms P11D can also be filed this way. The online function is linked to Practice Management and each tax return has to be approved before it can be sent. This is safeguard means that incomplete returns cannot be submitted.

IRIS Business Tax deals with limited companies, partnerships and sole traders and is used on 5,160 sites. It draws information from IRIS Accounts Production. Wholly and partially disallowed accounts are flagged within the database. The Schedule D Case I entries can be suppressed by users who do not need it, e.g. charities and very small organisations.

Details from the optional IRIS Fixed Asset Register module are taken to provide the basis for the capital allowances schedule. For limited companies, the detailed corporation tax computation deals with apportionment over fiscal years, marginal rate relief, non-corporate distribution rate, and losses carried forward, backward or used in the period. Both the short and detailed CT600 and all supplementary pages can be produced. It copes with up to four corporation tax accounting periods. Deferred tax calculations can also be produced. The partnership return is available for partnerships with the 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. An additional module to produce the SA700 for non-resident companies is also available.

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.

IRIS Practice Management deals with practice management. All the modules link with this module enabling practices to track the progress of each return and other jobs. 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. Users who are keen to promote the paperless office can take advantage of the document scanning and file management system within the module to store all client correspondence and other documents in one place. A comprehensive search facility allows the documents to be retrieved easily.

AutoMail 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. Other modules include Accounts Production, Fixed Asset Register, Company Secretarial and Company Formations.

IRIS Trust Tax deals with the principle trust and estate tax forms (which can be filed on line), including forms R185, form 50FS for non-resident trusts, form 41G Trust Enquiry and the SA923 pensions form and relevant computations. It also links with the practice management module, so job progress can be tracked. 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 on to a laptop computer. Thus a client's tax can be worked on during, say, a visit to the client and downloaded later on to the main system.

Overall IRIS products are suitable for virtually any sized practice. Small firms can opt for a 'starter pack'. This includes Personal Tax, Business Tax and Accounts Production, and 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.

The modules come with context sensitive help and training is available at extra cost. Additional help is available via pdf factsheets, a help desk, customer website, online knowledge base, newsletters, e-mail bulletin service and seminar programmes. The system comes on CD-ROM with updates supplied either online or on CD-ROM.

Contact	Sales department
Address	IRIS Accountancy Practice Solutions, Riding Court House, Datchet, Berkshire SL3 9JT
Tel	0844 815 5555
E-mail	enquiries@iris.co.uk
Internet	www.iris.co.uk
Cost	price is dependent on number of clients and number of software users
Rec spec	Windows XP/Vista; XP 1ghz P3 1gb RAM/Vista 3ghz P4 2gb RAM; 400mb hard disk space

Keytime

Keytime is an independently owned company that has produced its self assessment software, Tax Professional for more than ten years, and has produced its payroll software for 17 years. It provides a wide range of software including personal and corporate tax, accounts, practice management, payroll and P11D. The Client Manager forms the central hub for the various other modules of the Accountants Suite. Client data is entered only once and stored in Client Manager, from where it is made available across all the modules used. Integration within the various modules is continually being enhanced, for example, a CT600 can be completed from within Final Accounts.

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, but not MPs or Lloyd's underwriters. 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. If preferred, users enter information onto the onscreen tax return or they 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. An online filing facility is included in the software.

The package comes with a hard copy 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 with over 1,400 users. 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 level of integration offered. Recent new products are Keytime Trust Tax (SA900) and Keytime Company Secretary.

Keytime Corporation Tax Professional produces the CT600 form, calculating the profits chargeable to corporation tax and inclusive of Internet filing. 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.

All the Accountants Suite modules are accredited by the Institute of Financial Accountants.

Contact	Anthony Boggiano
Address	Keytime, Pennine House, Denton Lane, Chadderton, Oldham, Lancs OL9 8PU
Tel	0161 484 3500
E-mail	info@keytime.co.uk
Internet	www.keytimeco.uk
Cost	Tax Professional - £185 to £370; Corporation Tax Professional - £185 to £370; Final Accounts - £185 to £370; Payroll: £299; P11D Calculator - £99
Rec spec	Windows Vista, XP or 2000; 256/512mb RAM; 0.5/1mb hard disk space

MYOB

MYOB produces the PerTAX family of software, one of the best known brand names in tax software. In April 2008, Wolters Kluwer bought the UK and Ireland MYOB Accountants Division and added them to the CCH family. CCH says that 'the roadmap which will be delivered over summer will ensure that both CCH and MYOB clients will benefit from the strongest suite of products available. The combined organisation will deliver both sets of clients with a much broader range of products and services'.

MYOB's software is fully integrated and covers personal tax, trusts, partnerships, securities, capital gains tax, business tax and corporation tax.

The PerTAX family has been rewritten in .NET technology, bringing new functionality and greater efficiency for working. Some 112 firms have installed the new software. The new look software has been designed to be more intuitive, easier to navigate and to reduce the time taken to complete a tax return. The data entry will take the user through fewer screens, thus requiring fewer keystrokes and mouse clicks; the navigation also means direct access is given to tasks and error corrections.

The software is backed by MYOB Central, which is effectively a personalised desktop, offering the user complete integration. It 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 percentage of returns filed by portfolio/staff, tasks awaiting approval. Users who prefer to mix and match their tax and accounting software can reap the benefits of the integration provided by the Tax Factory© as it also works with third party applications, thus removing the need to rekey data. The tax factory allows seamless data transfer to and from PerTAX while retaining the security and validations which exist at the standard user interface.

The 'new look' PerTAX continues to offer a comprehensive personal tax system handling pretty much all aspects of self assessment. It produces all the standard self assessment

forms, including MPs, and two styles of tax computation. 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.

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 is a reseller of PKF P11D Software which allows users to draw P11D details into PerTAX automatically. (See under Employment packages for information on PFK P11D Software.)

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. Individual partnership statements can also be printed from the system for the partners.

Within the new system the business tax module has been completely integrated with self employment so that the basis period information along with capital allowances etc. are calculated from the creation of the accounting period. This comprehensive system 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 real-time report which is available on screen along side the data entry menu and the computation. The tax return is reviewed automatically, 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 along with batch processing to reduce administration time. The Efiling module provides efficiencies such as automated schedule attachment for Capital Gains and also PDF creation for client review.

Alongside the error and exception report sits the risk and variance reporting modules which allows further trade and analysis reports to be run across the client base before return submission.

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.

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 users can send to clients in order to obtain tax return information. 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 is 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 and allows automation via default triggers built into the software such as 'start tax return when tax year created'. It allows the firm to set up its own procedures and automate the steps. Each user is updated with his next task on his homepage.

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. The information then 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 Trust Accounts package for completion of the return and there is also an R185 package which provides the necessary calculations and compliance returns for beneficiaries.

A new Tax Factory function allows 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.

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 the next two years, with both systems being fully updated for Budget changes, new tax year, etc. The conversion itself is simple and allows the firm to decide which portfolios or individual clients are upgraded as and when.

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, as are online help screens, a help desk, website with extensive support information and facilities, customer user groups, newsletters, seminar programmes, product review groups, focus groups and annual client days. 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. This training is available as e-learning which clients can download from the Internet, alternatively clients can request onsite or classroom training.

The software is fully scalable and can be used by any size firm.

Contact	Marketing department, Accountants division
Address	MYOB, Westgate House, Westgate, London W5 1YY
Tel	020 8997 5500
Internet	www.myob.co.uk
Cost	prices on application
Rec spec	Windows 2000 SP4/.NET V2.00; 512mb+ RAM

PTP Software Ltd

PTP Software has been producing reasonably priced, effective software since 1994. It became part of the IRIS Software Group in 2006 giving it the backing of a much bigger company, and access to a wider team of expertise and knowledge to call on as and when required. However, outwardly PTP appears the same with its independent development team and support staff in Kidlington. All PTP's products have been made compatible for Vista, but look exactly as before. They continue to be compatible with most older versions of Windows.

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 Compac and VT. The software calculates payments on account, and produces the form for reducing payments on account, SA303. It also has a dividend database with over 350 FTSE companies, 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 F1 button.

The software produces a range of reports and standard letters. Online filing is included in the software and attachments can be sent with the form. 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 online manual and installation guide are supplied. Training is available at extra cost for users. In addition, there are online help screens, a free telephone hotline, and customer website. The website contains plenty of useful information, together with some handy hints of how to make full use of the software.

The Partnership Return module resembles Tax Return in appearance, 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 including annual investment allowance (AIA) 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 automised, 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 0X5 1LG
Tel	01865 370470
Internet	www.ptpgroup.co.uk
Cost	Tax Return: from £115 plus VAT to £600 plus VAT. Partnership Return: from £115 plus VAT to £340 plus VAT. Trust Return: from £115 plus VAT to £600 plus VAT. PTP Accounts: from £115 plus VAT to £1,230 plus VAT. CT Return: from £115 to £600. Company Car Planner: from £110 plus VAT to £220 plus VAT. CGT Planner from £55 plus VAT to £110 plus VAT. CGT Share Pooling from £55 plus VAT to £110 plus VAT. Tax Fast: from £110 plus VAT to £220 plus VAT. IHT Planner from £110 plus VAT to £220 plus VAT. Pricing is subject to number of returns (where appropriate), and whether on network or stand alone basis
Rec spec	Windows XP; Pentium; 256mb RAM; 500mb hard disc 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 financial advisers.

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. Information can be entered directly onto the on-screen tax return, using the tab button to move along the return. Alternatively, an interview format can be used The tax calculation is performed automatically using its own version of the tax calculation. It 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 where applicable and follows the new rules for purchases and sales. 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.

IHT100 which is for the completion of inheritance tax returns.

Particularly suited to users who have to deal with small companies, the corporation tax software, CT600, produces the corporation tax CT600 form and calculates the tax automatically. It deals with expensive car lease restriction, non-corporate distribution charge, research and development tax credits, fixed asset reconciliation, non-resident landlord companies and group relief. It has extra sheets for accounts reconciliation, and details of the tax computation. Sections are included 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 software comes with a hard copy manual and training. Further support is provided by means of a helpdesk and newsletters.

The company has joint ventures with the Mercia Group Ltd and PracticeNet. It also produces tax software for the Jersey tax return. CIS Return, launched in 2006, produces statements, allows the online verification of subcontractors and supports online filing. PAYE2000 allows the completion of employers' end of year returns for online submission.

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; 128mb RAM; and 20mb hard disk space

RFA Ltd

RFA Ltd has been producing its tax and accounting software since 1993. Known as Pinacle, the software deals with personal tax returns, company tax returns, accounts production, bookkeeping, payroll and practice management. The software is fully integrated in a relational database, so all clients data can be shared across the modules used. It also integrates with products from other suppliers for users who prefer to use best of breed software. As the software is written in Oracle it has great flexibility and excellent data mining capability.

The Taxation module deals with personal and partnership self assessment tax returns. Most of the supplementary pages are catered for, although not Lloyd's underwriters, minister of religion, MPs or the SA900 trust tax return (although there are plans to include these in future). Up to ten employments and four self-employments can be included. Data is entered via the on-screen tax return and the computation is done automatically, including capital gains tax computations. The data can be previewed before printing and a facsimile return and schedules can be produced for sending to the client. A full range of reports, e.g. R40, SA303 and 64-8, are available. In addition, pension planning can be carried out. Online filing is included.

In addition, a P11D module is available. This generates facsimile P11D and P11D(b) forms and supporting schedules. Historical data is easily available for comparison and review. The integration uses company and employee data in common with payroll and transcribes P11D data to the benefits section on the employment pages of the personal tax return.

The company tax module produces the company tax return and does the tax reconciliation. It copes with group relief, what if planning, research and development tax credits, expensive car lease restriction, multiple trading companies, and trading companies with multiple trades. It has a capital gains facility.

Data is carried forward year on year and a checklist is created for the collection of client data.

The Accounts module produces clear accounts for sole traders, partnerships, companies, limited liability partnerships, doctors, trusts and investment syndicates. Once entered, the information flows seamlessly into other modules, e.g. the client's personal tax return, so there is no need to rekey or press any buttons to transfer this information.

Aimed at the smaller end of the accountancy firm market, the software is simple and intuitive to use.

Help comes in the form of a hard copy manual (extra cost), training, telephone hotline, customer website, newsletters and e-mail bulletin service. The package is supplied on CD-ROM, but updates can also be obtained online.

Contact	R Ford
Address	RFA Ltd, 146 Pinehurst Road, West Moors, Ferndown, Dorset BH22 0At
Tel	01202 890899
E-mail	sales@pinacleaccounts.co.uk
Internet	www.pinacleaccounts.co.uk
Cost	from £890
Rec spec	Windows or Linux; 512mb RAM; 10mb hard disk space

Sage (UK) Limited

Sage provides an integrated suite of software to cover all accountancy practice needs. Sage Practice Solution provides enhanced integration between the various Sage products for practice. At the heart of Sage Practice Solution is the Practice Hub where users can maintain their client data. Once keyed, data flows from the hub through to the user's other software modules, which allows for greater efficiency of data maintenance for the user. The software sits on a SQL database.

Sage Taxation offers a range of modules including Control Centre, Personal, Business, Partnership and Trust Tax and currently supports electronic filing for both individuals and partnerships, together with the facility to include pdf attachments to the electronic return.

Sage Personal Tax is a comprehensive package producing the self assessment return and related supplementary pages, including ministers of religion, MPs and Lloyd's underwriters, supporting data schedules, and calculations of income and capital gains tax. There is menu style data entry for keying in client data, or details can entered direct on to the on-screen tax return. Full validations of returns ensure they are valid for electronic submission. The data for a tax year can be rolled forward to enable the calculation of an estimated liability for the next tax year. Where appropriate an application to reduce tax payments on account can be generated on Form SA303. The software also includes the facility to record joint income data for husband and wife, or other joint income scenarios, and percentage shares can be applied to apportion the income details and then apply these automatically between the joint holders. To increase efficiency and accuracy, dividend income is available via on-screen access to a securities database listing all relevant transactions of UK listed companies.

Sage Business and Partnership Tax provide for self-employed clients and clients in partnerships. Business accounts data is available from Sage Accounts Production and Sage Accounts Production Advanced, and can also be imported from most other accounts production systems. Sage Business Tax can be used to compute the adjusted profit for tax purposes for sole trade and partnership businesses. Functions include detailed capital allowance calculations, overlap profits and reliefs, partnership profit sharing, cash-basis and UITF40 adjustments, farmers' averaging and change of accounting year planning. Sage

Partnership Tax includes the range of partnership SA800 returns that may be pre-populated with the business data, or that can be selected separately for manual completion. Full validations are carried to ensure the return is valid for electronic submission.

Sage Control Centre collates client data from Sage Taxation modules to provide a central administration function with a comprehensive library of standard reports and letters. Users are also able to create and save their own report and letter templates.

The client data held in the database can be used to generate letters for export into Microsoft Word format. Batch production of client-specific annual data questionnaires based on the information available for the previous tax year's return can also be produced. Users are able to create tasks and reminders to allocate against clients or assign to different users. Information can be password protected.

The software uses an explorer style navigator making it familiar and easy to use for most PC users. Income, expenses, reliefs and gains have intuitive input screens that make additional options available only when applicable. Data entry is flexible with users able to use either the keyboard or the mouse to move around the program.

Guides are included with the software, and extra training, if needed, is available. Other support includes telephone customer service, monthly support bulletins, seminar programmes and product review groups. Updates can be downloaded from the Internet where appropriate. Software prices are based on numbers of users and clients.

Contact	Sales team/customer services
Address	Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel	0845 111 11 11
Internet	www.sage.co.uk/accountants
Cost	Sage Taxation - from £215 (including annual licence);
Rec spec	Windows 2000 or above; 1gb RAM; workstation 1gb/server 6gb hard disk space

Taxshield

Taxshield is a brand name of Ice Blue Marketing and Design Ltd. Launched 12 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 is the self assessment software dealing with most aspects of self assessment, including 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 P11D 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 catered for. The adjusted figure for capital gains tax needs to be entered manually, but the system then deals with it in the calculation. Returns can be filed online.

The corporation tax module Corporation Tax Manager 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 a manual, online help screens, telephone support and newsletters. In addition, there is a customer website and online knowledge base. Evaluation copies of the software can be downloaded from the company's website.

Contact	Louise South/Mark Walters
Address	Taxshield, 11 – 12 Hingley Street, Cradley Heath, West Midlands, B64 5LA
Tel	0870 609 1918
Internet	www.taxshield.co.uk
Cost	price on application
Rec spec	(PC) 1Gb RAM, 1Gb hard disk space; DVD reader; (server) 2Gb of RAM; 1Gb 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 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. It looks similar to the other ProSystem modules and 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 module 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 payments 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 ProSystem modules, the open database allows the user to produce their own reports, and caters for direct links from other accounts packages. Using Excel links, spreadsheets which have been prepared during the audit can be brought into the system, and relevant figures assigned back to the appropriate data entry fields, as well as new spreadsheets being created within the software. 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, the number of users and, in some circumstances, the number of cases.
Rec spec Windows XP Prof; Pentium 4 upwards; 1GB RAM; 10GB hard disk space

Deloitte.

Deloitte

Deloitte offers a number of different software products, of which the Abacus Enterprise suite and P11D are covered in this supplement. There are around 35 programmers directly engaged on software development within Deloitte's Tax Management Consulting Group. The software is used throughout the Deloitte tax practice, so effectively has instant and on-site user appraisal.

The firm has recently launched a new business tax suite called Abacus Enterprise. This comprises three modules which link to create a platform for managing tax compliance and reporting on a global basis. The modules are:

- the Management module, that enables users to control their tax compliance and associated processes;
- the Compliance module, that enables accurate and timely tax calculation and filing of tax returns;
- the Accounting module, that provides the framework in which companies can undertake the financial reporting of tax.

Each module can operate on a stand-alone basis, or link together to create one global platform. Deloitte's propri-

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etary products have a place in this framework, as do the third party products with which they work.

Over 270 companies use Abacus Enterprise Direct Tax Compliance (the corporation tax package), including around 60 of the FTSE 100 companies. Some 200 plus companies use Abacus Enterprise Workflow to manage tax compliance processes globally. Both products are also used extensively throughout Deloitte.

Abacus Enterprise Direct Tax Compliance is a comprehensive package coping with virtually all aspects of corporation tax, for example, research and development tax credit, non-corporate distribution charge, fixed asset reconciliation, multiple trades, investment companies with trading sources, double tax relief optimisation, interest calculations, quarterly payments, interest payments and capital disposals. It has capacity for dealing with property investment, the oil industry, unit trusts and open-ended investment companies and non-resident landlord companies.

It has a comprehensive group facility which controls group relief and group payment allocations, capital losses, eligible unrelieved foreign tax surrenders between group members, and what-if planning. 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.

With regard to administration or risk and process management, Abacus Enterprise Compliance provides a controlled environment, supporting the heavily regulated tax compliance and reporting processes. All schedules are logically and automatically cross-referenced, removing the possibility of manual error, easing navigation and allowing reviewers to easily identify the source and destination of data.

Abacus Enterprise Compliance provides a familiar spreadsheet user interface and its standard process ensures consistent preparation of computations. The product is highly scalable and configurable. To reduce complexity and enhance ease of use, computations only contain the calculations which are relevant to the particular company circumstances. Users can see everything they need on the screen: they can instantly see and review the computation and tax return on screen; they can see and review the system calculations and trace back from return to source data,

In addition, users have the flexibility to customise their computations. For instance, any of their own working papers may be included in the file and integrated into the submitted return. Transparent logic allows users to see how all the results are derived and to trace numbers back from the return to source.

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.

Abacus Indirect Tax Compliance 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 work papers 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 includes a range of work papers 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 Enterprise Indirect Tax Compliance.

Abacus Enterprise Workflow is an online solution that keeps real-time track of corporate income tax, indirect tax and associated reporting processes across multiple jurisdictions. Deloitte have mapped the compliance processes used by member firms across the world, and embedded the resulting database of rules into Abacus Enterprise Workflow. The status of compliance tasks and their related deadlines is presented in an easy to understand visual format via a web browser. An online filestore provides storage for all returns and supporting documentation.

Contact	Albert Fleming
Address	Deloitte, 2 New Street Square, London EC4A 3BZ
Tel	020 7936 3000
Internet	www.deloitte.co.uk
Cost	Price on application
Rec spec	Windows 2000, XP, 2003 Server, Vista

Digita

Digita Corporation Tax 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 the largest corporates and is not designed with them in mind, it handles 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, 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.

A group relief module is also available. This allows a group of companies to be linked and displayed in one view. This facilitates easy allocation of losses within the group. Each company is automatically updated as required and form CT600C is completed with all relevant details.

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 deferred tax module which sits within Corporation Tax 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.

The software 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 system produces a pdf copy of the computations automatically and saves them for review and onward to completion.

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 or when absent. The submission progress automatically updates the event and date tracking system.

Digita provides plentiful support, as described in the review in the Personal Tax section of this supplement.

Contact	Karen Gardner
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 £167 exclusive of VAT
Rec spec	Windows XP/Vista; Pentium III; 1 Gb 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 Finansol products 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. Another product, Finansol Advance Incorporation Calculator, compares taxes paid by unincorporated businesses with those paid by incorporated businesses over the next three years, so is useful for future planning.

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 corporation tax software, ProTax CT, completes both the tax computation and the relevant tax forms for all chargeable periods created. It 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. This is a straightforward program suitable for most companies that the high street practitioner will deal with, but is not aimed at multi-national conglomerates.

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, and from various other external accounts providers.

ProTax CT also enables the user to submit all the necessary documents, including the computations and accounts, online. Importantly, the software is XBRL-enabled, and supports electronic filing of the corporation tax computation in XBRL.

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

Contact	Sales
Address	Forbes Computer Systems, Guise House, Aspley Guise, Bedfordshire MK17 8HQ
Tel	01908 584674
Internet	www.tax.co.uk
Cost	ProTax CT: from £195 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, H and J and automatically calculates the corporation tax liability. Returns can be filed online with pdf attachments. 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.

It does not take long to set up a client 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.

Online 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. It is intended 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, Westgate House, Westgate, London W5 1YY
Tel	020 8997 5500
Internet	www.myob.co.uk
Cost	prices on application
Rec spec	Windows 2000 SP4/.NET V2.00; 512mb+ RAM

sage

Sage (UK) Limited

Sage Corporation Tax (powered by Abacus) is a modular packaged product powered by Deloitte & Touche LLP's Abacus technology used by over 1,800 individual accountancy practices.

The Standard module is a powerful package covering virtually all aspects of general UK corporation tax, and which includes a comprehensive tracking and administration database for management reporting. Risk management, group, deferred tax and advanced modules are also available. The software provides a set of packs comprising standard schedules; each pack has a basic set of schedules to which additional standard schedules can be added and which are automatically cross-referenced to existing schedules, as necessary. User-defined schedules can be created if required.

The impressive range of standard schedules covers 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 (comprehensive or simple), automatic instalment calculations, daily interest calculations on overpaid and late paid tax and the full range of the CT600 suite of forms. Computations can be prepared in foreign currencies.

The risk module enables a full audit trail, on-screen reviewing using queries within data cells, allows what-if scenarios and track changes and also has a set of schedules for estimating future payments on account required under corporation tax self assessment. The software supports online filing.

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. The group module's deferred tax schedules summarise the information contained in the underlying computations and calculates the aggregate group tax position.

For data collection, a Taxpack (an Excel workbook) can be produced from within the software. It contains the previous period's tax details for comparisons and once the current period's 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. Comprehensive accounts data transfers from both Sage final accounts packages provide another method of quick, secure data entry.

An automatic update function can be used to update the RPI and interest rates tables and other changes released prior to the next main release.

On-screen help, guides, newsletters, training 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) Standard 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 online filing and data transfers from both Sage final accounts packages.

Contact	Sales team/customer services
Address	Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel	0845 111 11 11
Internet	www.sage.co.uk/accountants
Cost	Sage Corporation Tax (powered by Abacus) from £199 (including annual licence)
Rec spec	Windows 2000 or above; 1gb RAM; workstation 1gb/server 6gb 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 16 years. It is the only company in the UK which specialises in corporation tax software, and many of its employees are qualified corporate tax professionals. The software is used by 18 of the top 20 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 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 users who subscribe to that service, giving them 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. Four main platforms are available to corporates: Business Entry, Business Group, Business Advanced and Business Corporate. Each platform contains the core Alphatax product and Tax Accounting function, with additional products added on to each platform suiting the needs of the corporate.

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.

Alphacap 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.

Alphatrac integrates advanced web-based data collection tools with process management functionality, bringing enormous levels of risk management and efficiency into corporate tax processes. It is used to show how tax will integrate with other mainstream business issues.

In addition, Tax Computer Systems produces software for life companies. These are:

- Alphalife-EV which is a modelling tool aimed at actuaries and projects the tax liability for life companies over five to 50 years; and
- Alphalife which is a tax engine for life companies dealing with all necessary tax computations.

Both products integrate seamlessly with Alphatax.

A hard copy manual and training are supplied with the software. Other support includes online help screens, 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

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 vary 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, P11D(b) and P46(Car), configurable employee letters, and files for 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	Albert Fleming
Address	Deloitte, 2 New Street Square, London EC4A 3BZ
Tel	020 7936 3000
Internet	www.deloitte.co.uk
Cost	Price on application
Rec spec	Windows 2000, XP, 2003 Server, Vista.

Keytime

Keytime 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 also available. Keytime P11D Filing by Internet allows users to file forms P11D and P11D(b) by Internet.

Contact	Anthony Boggiano
Address	Keytime, Pennine House, Denton Lane, Oldham, Lancs OL9 8PU
Tel	0161 484 3500
Fax	0845 456 3104
E-mail	info@keytime.co.uk
Internet	www.keytime.co.uk
Cost	P11D Calculator £99, loyalty discounts for existing customers
Rec spec	Windows Vista, XP and 2000; 256/512mb RAM; 0.5/1mb hard disk space

PKF

PKF's P11D software uses Microsoft .NET technology and SQL databases to provide reliability, security and scalability for all businesses and professional practices whether they produce 20 P11Ds or tens of thousands.

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

PKF P11D incorporates a detailed employee advice form in electronic format, which fulfils legal requirements for providing employees with their P11D information, and also explains to employees in detail how benefit values have been calculated. This can be printed, saved as a pdf or e-mailed directly to employees.

Full facilities are provided for online filing. In addition the software provides full calculation of benefit values, live update facility, customisable user permissions and security levels, allowance for partial or full dispensations, PAYE settlement agreements, a fleet management module, and extensive validation of data prior to final output.

Updated annually, PKF P11D 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. The software is used by many of the large firms of accountants as well as by businesses of all sizes.

Contact	Jennifer Nethersole
Address	PKF, Farringdon Place, 20 Farringdon Road, London EC1M 3AP
Tel	0800 100 7113
E-mail	p11d@uk.pkf.com
Internet	www.pkfp11d.co.uk
Cost	From £150
Rec spec	Windows 2000 -Vista, 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., P9D, 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. It also deals with s 336 claims, online filing of forms P11D and has the facilities for standard letters and mail merge. Forms can be produced as a pdf for sending to clients.

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.

Contact	Sales department
Address	PTP Software Ltd, 10 Lakesmere Close, North Oxford Business Centre, Kidlington, Oxford 0X5 1LG
Tel	01865 370470
Internet	www.ptpgroup.co.uk
Cost	Tax Expense: employers' version - £170 plus VAT to £530 plus VAT; advisers' version - £115 plus VAT to £360 plus VAT.
Rec spec	Windows XP; Pentium; 256mb RAM; 500mb hard disk space

QTAC Payroll Solutions

QTAC has been developing PAYE software since 1994. One of its handiest products is the tax and National Insurance calculator, QTAXPro. This works out the tax and National Insurance due on a net salary figure using a net or gross salary figure, something which would otherwise be a night-mare 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 additions and deductions.

The product can be downloaded from the website www.qtac.co.uk. All that is needed to get the program working is a user pin number, and this is available by calling QTAC Payroll Solutions. 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 Payroll Professional, a fully featured, high benefit suite for companies employing 200 to unlimited, and bureaux up to 10,000 employees; Payroll Manager which is a full payroll package, both of these products include the new construction industry scheme which were introduced by the HMRC in April 2007 at no additional cost; Payroll Assistant which is an advanced calculator; and The Payroll Department offers a payroll bureau service. The payroll programs are all HMRC accredited. They also operate in conjunction with a number of major IR35 payroll providers.

Contact	Sales
Address	QTAC Solutions Ltd, Qtac House, Kingsfield Lane, Longwell Green, Bristol BS30 6DL
Tel	0117 935 3500
Fax	0117 935 3545
Internet	www.qtac.co.uk
Cost	From £110 excluding VAT per single user copy
Rec spec	Windows 95 or higher; IBM compatible PC; 32mb RAM; 15mb hard disk space

Sage (UK) Limited

Sage 50 P11D Professional covers all aspects of benefits and expenses management, including the production of substitute forms and reports. Tested and approved by Ernst & Young, it handles complex benefits packages.

The required forms and list reports for HMRC submission are produced and can be filed online as required. Information can be carried forward year on year, and details can be added throughout the year.

The software is a fast, sophisticated, multi-user program suitable for organisations with a need for volume processing. All benefits are covered, including company vans, fuel charges and beneficial loans. Features include batch entry processing, benefit templates, audit trails, Microsoft integration, and NI number validation. It includes many practical productivity features and management information analyses. It is aimed at companies, accountancy firms and payroll bureaux which have to produce between 250 and 6,000 forms P11D.

In addition, Sage produces Sage 50 P11D, a package for organisations with less complex benefits management requirements.

Both products carry data over to the next year, and are fully supported by Sage's technical helpline.

Contact	Sales team/customer services
Address	Sage (UK) Limited, North Park, Newcastle upon Tyne NE13 9AA
Tel	0191 294 3000
Internet	www.sage.co.uk
Cost	Sage 50 P11D - from £150 plus VAT; Sage 50 P11D Professional - from £300 plus VAT
Rec spec	Windows 2000 or above; 1gb RAM; workstation 1gb/server 6gb hard disk space

Taxshield

P11D Manager is a long established P11D package, having been produced since 1995. It deals with HMRC approved forms P11D, P11D(b), P9D, P46 (car) and Class 1A National Insurance reports and 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/Mark Walters
Address	Taxshield, 11 – 12 Hingley Street, Cradley Heath, West Midlands, B64 5LA
Tel	0870 609 1918
Internet	www.taxshield.co.uk
Cost	price on application
Rec spec	(PC) 1Gb RAM, 1Gb hard disk space; DVD reader; (server) 2Gb of RAM; 1Gb hard disk space

Electronic information

A vast array of electronic information is available to tax advisers. These range from CD-ROMs of printed material to digital magazines to websites. The search facilities are often highly impressive, finding in seconds information that would take considerably longer to find in printed material.

CompuCraft Ltd

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

- over 170,000 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.
- a new legislation 'search and explore' facility which shows the legislation with all the deletions and insertions highlighted, and also provides facilities to see the material as originally published or in its latest state.

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
E-mail	taxhub@compucraft.co.uk

Internet www.taxhub.info
Cost from £200 plus VAT
Rec spec Internet access

Interactive Data (Europe) Ltd

Securities Taxation Service

With over 40 years experience as a provider of capital gains tax and dividend services, Interactive Data's Securities Taxation Service provides a wealth of securities taxation information. The service comprises a range of invaluable reference tools for tax professionals, providing instant access to the latest data where and when the user needs it.

The following are key features and benefits of Securities Taxation Web:

- services can be customised to meet the user's individual needs;
- regular updates across all services;
- multiple user licenses available;
- no need to store books, set up servers or install updates;
- up to 25 years dividend history;
- hypertext links to view capital histories and name changes.

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, and tax planning.

Many of the services are also available in CD-ROM and print formats:

- UK & Irish Capital Gains Tax Service;
- UK Registrars Service;
- UK Exemptions Services;
- UK & Irish Dividend & Interest Service;
- International Dividend & Interest Service.

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

LexisNexis® Butterworths Online

The LexisNexis Butterworths Online service provides a vast wealth of information for tax and accountancy professionals. The LexisNexis Butterworths Tax Library contains a comprehensive collection of materials for the professional. It gives users 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*.

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 Welcome Pack gives users access to a huge range of material including: bulletins index, events listing, Everyform – Tax Forms, General Case Digest, key official journal materials, *Tolley's Tax Guide*, UK Act summaries, UK legal news analysis, UK journals index, UK newspaper index, *Simon's Tax Cases*.

General Tax Practitioner includes *Tolley's Tax Annuals* covering income tax, corporation tax, capital gains tax, inheritance tax, VAT cases 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.

Tax news is a tax news information resource providing accurate and concise updates in tax law and practice, it includes *Taxation* magazine, *Taxation* and *Tolley's practical newsletters*.

Contact Marketing department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Internet www.lexisnexis.co.uk/lnb
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

Nexis®

Nexis provides tax and accountancy professionals with information on over 46 million companies through a combination of company reports, financial information, market research and news sources from over 20,000 trusted global sources.

Nexis gives users access to:

- a vast range of company, financial and market reports including Hoovers, Dun & Bradstreet, ICC directors;
- over 7000 business and trade publications including *Accountancy Age*, *Journal of Accountancy* and the *Tax Adviser*;
- all UK and Irish newspapers, both national and regional broadsheets and tabloids;
- an extensive selection of international & emerging market newspapers, this includes *Le Monde*, *USA Today*

and *Die Welt*;

- Over 400 global newswires, websites and over 2000 blogs.

Contact	Marketing department
Address	Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel	020 7400 2984
Internet	www.lexisnexis.co.uk/nexis
Cost	price on application

International tax packages

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

ADP Taxware

ADP Taxware is based in the US. The company develops global transaction-based tax calculation and compliance systems designed to simplify tax accounting procedures so that businesses worldwide 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 became part of Automatic Data Processing, Inc in November 2006.

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.

A manual is provided, along with a website, helplines, customer user groups and newsletters.

Contact	Jim Panagas
Address	ADP Taxware, 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

LexisNexis®

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	Customer services
Address	Halsbury House, 35 Chancery Lane, London WC2A 1EL
Tel	0845 370 1234
Cost	price on application
Rec spec	Windows 98 and above; Pentium III, 128mb RAM; 50mb hard disk space

TaxStream

TaxStream is a tax accounting and reporting software platform originally developed in the early 1990s. In February of 2008, TaxStream was acquired by the tax and accounting division of Thomson Reuters, and is an essential addition to their market leading global tax software and services. The TaxStream Solution is a suite of customisable web-based tax reporting tools for corporation tax. TaxStream provides a complete data warehouse for all critical documents needed to support the tax expense calculation, reporting and planning needs of the company. It automates the tax note, proof of tax, and other requirements for audit and disclosure purposes.

In essence the software allows automation of information from any general ledger, financial reporting or fixed asset software. Data can also be imported and exported from Abacus for compliance purposes.

TaxStream includes complete domestic and foreign tax accounting calculations, self-reconciling reports, dynamic review screens, and a simplified web-based tax pack wizard designed to assist non-tax users in the collection of data from foreign and remote locations. Work flow controls and audit trails help to satisfy the requirements of Sarbanes-Oxley and improve internal controls. Features include:

- Reports at the lower entity, filing group, sub-consolidation, regional, and full group levels.
- Taxes separated by the type of tax on profit such as corporate and trade taxes, as well as the effective tax rate associated with each.
- A robust visibility into all effective tax rate impacting items, including the reason for the impact, and summaries of the tax rate reconciliation.
- A full configurable roll forward of all deferred tax positions, and tracking both of gross and tax-effected values.
- Current tax provision and overall tax provision including changes in deferred taxes according to the balance sheet.
- Reports on all unused tax losses globally, as well as any unrecognised values (impairments of deferred tax assets).
- Entity-by-entity views of the detailed tax provisions for current and deferred taxes, and effective tax rate reconciliations.
- Effect of tax rate changes on the deferred tax positions and overall tax rate.
- Automatic revaluations of deferred items in non-reporting currencies due to currency translation adjustments.

Contact	Russell Dover
Address	TaxStream Ltd, Adelaide Chambers, Peter Street, Dublin 8, Ireland
Tel	+353 1 483 0867
E-mail	sales@taxstream.eu
Internet	www.taxstream.eu
Cost	price on application
Rec spec	Windows XP; Pentium 41.5; 768mb RAM; 50mb hard disk space

Vertex Global Tax Solutions Ltd

Vertex Global Tax Solutions Ltd is the UK subsidiary of Vertex Inc, the leading US provider of tax automation software.

The company offers a software solution, Vertex Value Added Tax O Series, which helps businesses manage their VAT compliance responsibilities. It analyses the transaction data provided through an interface with an enterprise resource planning or host financial system, recognises the pertinent facts of the transaction, determines which jurisdiction has domain over the transaction, and whether the buyer or seller has to account for VAT on the transaction.

The system will then calculate tax based on Vertex-supplied or user-defined rate and rule taxability data, return the tax calculated to the financial application and record the information in an internal database for future use in reports, returns preparation or audit documentation.

Essentially, the system helps a business manage:

- VAT rate and rule data;
- intra-EU acquisitions and dispatches;
- domestic supplies, imports and exports;
- simplifications such as triangulation and distance sales;
- global VAT reporting.

Vertex is accessible via a centralised system which updates and maintains VAT information on a global scale, thus reducing the total cost of ownership. However, the software is available on CD-ROM and some products can be downloaded from the Internet.

A wide range of support is offered. For example, an online or hard copy manual is supplied, along with training, online help screens, help desk, customer user groups and seminar programmes.

ERP partners include SAP, Oracle, PeopleSoft and JD Edwards.

Contact	Alan James
Address	Vertex Global Tax Solutions Ltd, 1 Furzeground Way, Stockley Park, Uxbridge, Middlesex UB11 1EZ
Tel	020 8622 3053
Internet	www.vertexgts.co.uk
Cost	price on application
Rec spec	Windows XP, Vista; 2gb RAM, 10gb hard disk space

Niche packages

4 Eyes Ltd

VAT Property Solutions was developed, in 2004, for 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/repaired or refurbished? what will be done with the finished building? The software works out the VAT treatment, and provides an explanation. Technical jargon is explained, and copies of relevant certificates produced. It has all the relevant forms and can be printed to give an audit trail of the decision making process.

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

Training on the software can be arranged. Additional help comes in the form of a help desk, online knowledge base, tax technical training courses, and also an e-mail bulletin service.

Contact Phillip Henwood
Address 4 Eyes Ltd – Tax Solutions,
29 Dingley Lane,
Streatham, London SW16 1AZ
Tel 07793 707 839
Internet www.4eyesltd.co.uk/www.vatpropertysolutions.co.uk
Cost £400 a quarter; one licence covers all staff in client company
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 eight 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 commonly met by the practitioner.

This year's version, Tax Tips and Tools 2008, was launched in April 2008. Various updates and enhanced models have since been available for download from the update site. These are available after registration of the product online.

The latest version has 97 practical tax models including company or own car, should I incorporate?, tax credits calculators, inheritance tax calculators, deferred tax calculators, interactive checklists, payroll calculators, and National Insurance calculators. By way of help, the software includes on screen help buttons and examples and a help desk is available.

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

The software is also available as LexisNexis Tax Tips and Tools and distributed by LexisNexis.

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 8 - £300 plus VAT; discounts apply for multiple offices
Rec spec Windows 2003/XP/Vista plus Office 2003/2007, 100mb hard disk space

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 31,000 businesses, via leading organisations such as Barclays, AXA, Nectar, BT, Business Link and by a growing network of independent insurance brokers, accountants and financial advisers.

Contact Howard Rosenberg
Address beprofessional, 23-35 Farringdon Street, London EC4A 4HL
Tel 020 724 86205 Fax 020 7248 6545
E-mail howard.rosenberg@beprofessional.com
Internet www.beprofessional.com
Cost price on application

BPP Learning Media

BPP Learning Media has a range of study materials both published and online for various professional examinations, including the new CTA syllabus, ATT and the FTA associateship exam.

Over the summer BPP Learning Media will be launching new eTexts for the ATT syllabus, together with a new suite of study materials for the new CTA syllabus, i.e. law and ethics, awareness, advisory and application papers. ETexts for the advisory level of the new CTA syllabus will be available from summer 2008 onwards.

In addition, BPP Learning Media produces Understand Taxation which is a generic interactive online tax package covering UK personal and business tax. It comprises 21 modules each relating to a different aspect of the UK tax system, e.g. 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, tax tables and RPI table are included. A demonstration module can be downloaded from the website at www.eql.co.uk; alternatively a 30-day evaluation can be arranged.

Contact Karen King
Address BPP Learning Media, 3 Michaelson Square, Kirkton Campus, Livingston, West Lothian, EH54 7DP
Tel 01506 472255
Internet www.bpp.com/learningmedia
Cost contact customer services on 0845 075 1100
Rec spec Windows 98 and above; Pentium III; 64mb RAM; 45mb hard disk space per title

LexisNexis®

KYC ID

KYC ID from LexisNexis aims to protect organisations from increased exposure to the criminal and financial risks associated with the anti-money laundering regulations and protect their reputation. Using this money laundering compliance tool, organisations can meet regulatory requirements of the ICAEW and every accounting body in the UK and Ireland with the minimum of effort.

This tool allows small and mid-market accountancy firms to conduct money laundering checks on UK individuals and companies online. Customers gain access to the service through a single search screen. Checks can be performed when taking on new or renewing existing client relationships.

KYC ID offers users:

- individual checks with the GB URUTM ID verification service, electoral role, DVLA, passports, utility company databases, politically exposed persons;
- company, director profiles of all UK and Ireland public and private companies and their directors from ICC;
- sanction checks – all key UK and global lists including: Bank of England, OFAC, EU, Interpol and FBI;
- negative newschecks – extensive news content from UK and Ireland newspapers, trade press and newswires – updated daily with a 30 year archive;
- audit trail – the results are saved with a summary that is time and date stamped.

Contact Marketing department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Internet www.lexisnexis.co.uk/kycid
Cost price on application

LexisNexis®

LexisNexis Tax Webinars

LexisNexis Tax Webinars are one-hour lunchtime live audio-visual web broadcasts, designed to keep tax practitioners up to date with latest tax developments, across a wide range of areas, including:

- topical capital gains tax issues;
- HMRC powers;
- international tax;
- employment tax;
- tax risk;
- property taxation;
- family office wealth management.

The format of the webinar is as follows:

- watch and listen to leading tax experts in the one-hour audio visual broadcast;
- submit questions via e-mail to receive a guaranteed answer from industry experts;
- earn two CPD points by completing the post-event online assessment.

All webinars are available for download for at least six months after the broadcast.

The webinars are delivered over the internet and require no specialist equipment.

Contact Marketing Department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Internet www.lexisnexis.co.uk/onlinewebinars
Cost price on application

Profitsoft Ltd

Profitsoft Ltd has been developing premium added value software for accountants for nine years. The company is closely associated with an independent accountancy practice, which assists 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, although each can be bought separately if preferred.

The four modules are:

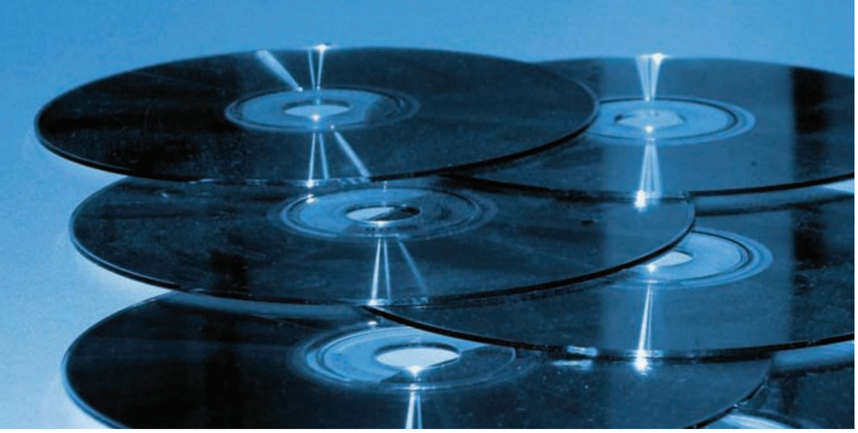
- DividendPro: Dividend v Bonus/Salary Tax Planner – this module calculates the net amount receivable under dividend and bonus or salary for up to six shareholders, taking into account each individual's own circumstances. It copes with all corporation tax rates and splits accounting periods where rates 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, for example, 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 aimed particularly at tax professionals in small to medium sized firms. User guides, training, presentation packs, promotional material, help screens and hotline support are provided. The products 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 - £295 plus VAT; individual products - £85 plus VAT. Free updates included in the price
Rec spec Windows 98 and above; 64mb RAM; 50mb hard disk space; Excel 98 and above

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 of large companies. The software is innovative, robust, and user-friendly.

Tax Automation's products bridge the gap between finance and tax. The principle behind its software is to give tax professionals ownership of the data they require by taking source ledger data from enterprise resource planning systems such as SAP and Oracle, or business reporting systems such as Hyperion, and then analysing, categorising, and consolidating into required formats, for example creating fully formatted Excel spreadsheets.

The products are aimed at those areas of greatest concern to in-house tax professionals: tax accounting and reporting, managing capital expenditure on a multi-year basis and managing the increasing risk of user-developed spreadsheets.

For example the Capital Assets Database manages the interaction of taxes applicable to capital expenditure for capital allowance, capital gains tax and the capital goods scheme. In essence, it tracks capital assets tax costs, dealing with capital allowance claims, timing difference reports, part disposals, rollover relief and contingent gains and what if? disposal planning on asset portfolios. The broad and integrated tax coverage coupled with a multi-year data warehouse, allows the user to see how these complex rules interact and how the same expenditure affects the different calculation regimes.

The Spreadsheet Assurance Service gives a clear picture of the spreadsheet systems used in an organisation, how they fit into business processes and their importance to the organisation. The service is split into three categories:

- Documentation: this provides comprehensive documentation of all aspects of spreadsheets, including:
  - summary of intent and purpose;
  - sheet summaries;
  - detailed cell information with formulae;
  - detailed list of internal links between work sheets;
  - named ranges and tracing cell relationships;
  - links to external spreadsheets;
  - audit report of sheet structure and data trail;
  - data validation and conditional formatting;
  - objects, hyperlinks and pivot tables; and
  - detailed analysis of VBA macros.
- Review and Risk Assessment: having undertaken a comprehensive documentation exercise, there may be items that should be brought to the attention of senior management. As part of a project, they can provide a review report highlighting those areas in the spreadsheets that contain computational or procedural risk.
- Re-engineering: Tax Automation uses tried and tested functions and methods to ensure the user's spreadsheets are robust and auditable; leading to increased reliability, accuracy and peace of mind.

Tax Automation provide personalised support from initial implementation and ongoing use via telephone, e-mail and where necessary site visits.

Contact Bryony Clinton
Address Tax Automation Ltd, Wyvols Court, Swallowfield, Reading, Berkshire RG7 1WY
Tel 0118 988 0241
E-mail bryony.clinton@taxautomation.co.uk
Internet www.taxautomation.co.uk

Index