THE ANNUAL TECHNOLOGY SUPPLEMENT TO
TAXATION
MAY 2009

OUR YEAR TOGETHER

TAXATION

ANNUAL TECHNOLOGY SUPPLEMENT

EDITORIAL
Editor Mike Truman LLB, FCA, CTA (Fellow)
Deputy Editor Allison Plager BA(Hons)
Deputy Editor Richard Curtis
Online Editor Daniel Selwood

ADVERTISING & MARKETING
Display/Appointments
Stuart Cousins tel: 020 8212 1997
Jane Lawrence tel: 020 8212 1939
Head of Marketing Charles Barber
Marketing Manager Rakhee Patel

PRODUCTION
Production Manager Angela Waterman
Head of Design Elliott Tompkins
Designer/Production Heather Pearton

PUBLISHING
Publishing Director Simon Collin

Offices LexisNexis, 2 Addiscombe Road, Croydon, Surrey CR9 5AF.
tel: 020 8686 9141 fax: 020 8212 1988
Editorial e-mail: taxation@lexisnexis.co.uk
Website www.taxation.co.uk

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tel: 020 8212 1995

TAX & TECHNOLOGY

Welcome to the 2009 *Taxation* technology supplement. Once again *Taxation* brings you a mine of information about various software applications which it is hoped will prove useful if and when you are looking to buy or replace software.

After all the ownership changes last year, 2009 has been much quieter with no major acquisitions or mergers to report, at least as far as tax software is concerned. From the self assessment point of view, online filing was a great success with 67% of tax returns filed electronically by the 31 January. Software houses and users alike will know that online filing was not aggravation free, however, with the redesigned tax return causing great problems. It is to be hoped the many workarounds and exclusions will not be needed for 2008-09 returns.

The software

The supplement includes information about a wide range of software, from self-assessment tax return software to electronic training tools to dividend versus bonus planning.

Contact details for each product are given in the supplement, along with an independent report on what each package does. The reports aim to give readers a starting point for each product, rather than a total rundown of its functionality. Further information should always be obtained from the software providers.

Buy what you need

A good choice of suppliers of self-assessment software continues to exist and they are all very well established, even if some familiar names have now disappeared – the obvious one being MYOB although much of their software is being integrated with the CCH software (see the report on page 2 for more details). Before purchasing, it is important to know what you want from the software and how much money you are prepared to pay for it.

As well as trying out the software where possible, a demo or evaluation version will often be available, it is also helpful to speak to other users when choosing potential software. 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 user-friendly the software is and how much training was needed. The software providers will usually supply names of existing users if requested.

A comprehensive self-assessment package which produces all the return forms, supplementary pages, computations and with lots of administration and planning features comes at a cost and may provide more features than, say, a small high street practice really needs or wants. While the larger suppliers might offer scaled-down versions of their products, there are many smaller providers, eg Forbes, Keytime, QMS whose packages are comprehensive, but because they lack some of the more complex planning and reporting features of, say CCH, IRIS and Sage, are more realistically priced for the small practitioner.

Looking ahead

Most of us cannot imagine life without computers – we use them for shopping, booking holidays, communicating with each other and just playing games. It is also true that almost all tax advisers would find it hard to go back to life without technology. It has cut down the time it takes to deal with a client's basic tax compliance, giving the adviser more time to provide planning and business help.

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Compiled by Allison Plager
Front cover sponsor Digita

Income tax return preparation packages

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

Acorah Software Products

TaxCalc started out more than 25 years ago as a 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 is the professional version of the software allowing an unlimited number of clients. It deals with both the personal and partnership tax (SA800) returns, together with all the supplementary pages, including Lloyd's underwriters, MPs and ministers of religion. Data is entered using a 'SimpleStep' 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, with well over 90% of users filing 2007-08 self assessment returns online. It also handles online filing of forms 64-8. The software has data mining capability, a spreadsheet checklist to collect and import client data, an abbreviated return to check data entered, a comparison of current and previous year data showing absolute and percentage variations in the data, detailed schedules of tax return information, and password protection. Interactive pdf claim forms (HS302 and HS304) are automatically attached to the online filing.

Other useful features enable the user to copy entries for jointly held investments and capital gains to a partner's file and to transmit an anonymous version of the tax file directly to TaxCalc support.

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

A dividend database and capital allowance computations will be added later this year.

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 with the ability to make anonymous and e-mail client data for support purposes. 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 or, by calling the sales team, on 08707 669935.

Contact	Sales
Address	4 King Street Lane, Wokingham, RG41 5AS
Tel	08707 669935
Internet	www.taxcalc.com
Cost	*TaxCalc Pro* - £275; *TaxCalc Pro Suite* - £375; *TaxCalc Trusts* - £100
Rec spec	Windows XP; Pentium 4; 1024mb RAM; 100mb hard disk space

Advanced Professional Solutions Ltd

Founded in 1991, Advanced Professional Solutions (APS) practice management solution, Advance, can be linked to other SQL based software solutions using Advance Fusion. The tax systems that can be linked include, Digita's Personal Tax and Corporation Tax, CCH Software's Personal Tax and CGT, and Tax Computer System Ltd's AlphaTax.

Advance is a powerful practice management system with functionality that includes timesheet & expense processing, work in progress management, workflow, billing; client relationship management (CRM), document and email management. Advance was the first practice management solution to be accredited by the ICAEW.

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

Contact	Tim Bennett
Address	Castle Gate House, 14 London Road, Reigate, Surrey RH9 9HY
Tel	01737 24 2696
Internet	www.aps-advance.com
Cost	price on application
Rec spec	Windows XP Professional; 512mb RAM; 100mb hard disk space, SQL Server 2005

CCH

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. Since the acquisition of MYOB's UK and Ireland Accountants Division in April 2008 by Wolters Kluwer, CCH's key focus has been to build on its integrated suite of tax and accounting products. CCH have reviewed its wide range of products and have developed a product roadmap which aims to deliver .Net technology and comprehensive functionality to suit the needs of all its customers. As part of its product roadmap CCH is providing its customers with an upgrade path to their latest technology. This upgrade is at a timescale that suits them, with CCH maintaining all products while there is sufficient demand. Importantly the upgrade to the latest products is free on a like to like basis, along with the first six months free e-learning training.

CCH's software suite is called ProSystem and is an integrated suite of compliance and practice management products. The CCH ProSystem Suite allows everyone in the practice to find, use and enter the information they need through one place, CCH Central. CCH Central plays a core role by providing not only a single client facing user interface but also access to the single database and cross suite functionality. It allows individuals within the practice to personalise their working environment through 'home pages' displaying the information real-time that is relevant to them. It also allows users to interrogate and extract the valuable data that the practice holds, putting it to good use. More so it relieves the practice of having to enter data into many different places, and with one common user interface, makes training and using the products much easier.

The CCH ProSystem suite includes: Personal Tax, Corporation Tax, Partnership Tax, Trust Tax, Practice Management, Accounts Production, Document Management, Audit Automation, Trust Accounts, Insolvency and Strategic Planning.

Some 2,500 accountancy and tax-related firms use different combinations of the CCH product range and CCH's figures show that they have 95% coverage of the market for firms with more than 75 employees.

The software has been rewritten in .Net technology, bringing new functionality and greater efficiency for working. 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 CCH 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 CCH Tax Factory as it also works with third party applications, thus removing the need to rekey data. CCH Tax Factory allows seamless data transfer to and from CCH Personal Tax while retaining the security and validations which exist at the standard user interface.

The new look Personal Tax offers 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, CCH is a reseller of PKF P11D Software which allows users to draw P11D details into Personal Tax automatically. (See under Employment packages for information on PFK P11D Software.)

CCH Partnership Tax handles partnerships. It produces facsimile SA800 and supplementary pages, using the information from the Central 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 Personal Tax 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.

Personal Tax 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. CCH is a great supporter of online filing, and this function is incorporated in the software along with batch processing to reduce administration time. The Filing by Internet 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, CCH Tax Explorer is an optional module which integrates into Personal Tax. 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 easily 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 software 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.

CCH also have web enabled tools to allow client data to be collected via the internet and imported directly in the tax products to save the need to re-key data..

An automated workflow module is also 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.

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. 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.

CCH Trust Tax 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 Personal Tax in XML. This integration means that client, tax and task information can be entered directly to or exported from Personal Tax and the integration is not limited to CCH software, so users will find the integrations with other branded software.

CCH Practice Management also sits within the central database. This allows static client data to be shared, cross application reporting etc. CCH Document Management 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 CCH Personal Tax 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
Address	Westgate House, Westgate, London W5 1YY
Tel	0844 561 8181
Internet	www.cch.co.uk
Cost	prices on application
Rec spec	Windows 2000 SP4/.NET V2.00; 512mb+ RAM

Digita

Digita is a very successful company which has been producing tax software for 23 years. It provides software to one top four firm, three top ten as well as many top 100 firms and hundreds of small to medium firms, sole practitioners and some FTSE250.

In April 2008, it became part of the Thomson Reuters Group. It is however, business as usual at Digita, with the company now having access to the huge technological resources of a global conglomerate which will help it develop its products to an even greater extent than it already did.

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 XP and Vista. 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.

As well as producing software for professional tax practitioners, Digita has developed 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 software includes the automatic calculation of foreign tax credit relief, excluded income and the dual residency and non-UK resident worksheets IR302 and IR304. An optional extra will provide for the equalisation calculations for expat employees paid net of tax.

On the capital gains tax front, the system is now able to handle fully all aspects of the new post 5 April 2008 CGT regime for any type of asset. For partial security disposals it calculates the average cost to compare to the disposal proceeds. The simple CGT client schedule produced as a pdf attachment is then used with online filing.

An inbuilt 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.

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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.

Returns can be submitted online. 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. Digita collects anonymous statistics which show that more than 95% of Personal Tax users filed at least some clients' returns online.

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. The tool 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. 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 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 (available at Digita's or the client's premises, or over the Internet). 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	Liverton Business Park, Exmouth EX8 2NR
Tel	01395 270311
Fax	01395 268893
E-mail	kareng@digita.com
Internet	www.digita.com
Cost	price on application
Rec spec	supplied on request

Drummohr™ PART OF IRIS

Drummohr Technology Ltd

Drummohr Technology was acquired by IRIS in 2008, however it has maintained its identity and continues to produce its software as usual. The benefit of being part of a large company with all its resources is that Drummohr has greater 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 over 1,400 firms, it can stand alone or can be networked.

The Tax Return module covers all self assessment tax years. Most supplementary pages are catered for, including Lloyd's underwriters and ministers of religion, but not MPs. Data is entered 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 user defined criteria. 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 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 main Tax Assistant packages includes a licence to use the basic version of the Company Tax module. This produces the corporation tax return CT600 and automatically calculates corporation tax liability, marginal relief and tax due on non-corporate distributions, based on the entries made on the on-screen CT600 form. The full version of the Company Tax module, priced separately, includes everything on the basic version, but also the supplementary pages and other features, for example, trading computations, capital allowances, loan relationships, taxed income, overseas income, property income, enhanced research and development expenditure and capital gains. There is also a facility to include a section of additional information in free text form to accompany the schedules.

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 a telephone help-line, customer website 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 Riding Court House, Riding Court Road, Datchet, Berks SL3 9JT
Tel 0844 815 5544
E-mail sales@drummohr.com
Internet www.drummohr.com
Cost Tax Assistant: from £500 plus VAT; Company Tax Return: £450 plus VAT; Trust Tax: £450 plus VAT
Rec spec Windows XP; 1Gb RAM; 1Gb hard disk space

Excelsior LawDesk Limited

Various niche companies exist in the software market and one such is Excelsior LawDesk, 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.

At the time of going to press, new versions of the company's products are under construction to incorporate the new suite of inheritance tax forms.

Contact David Williams
Address 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 15 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	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, form SA800 partnerships 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. On screen 'sticky notes' can be used to flag up queries.

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 the largest privately owned software business in the UK. IRIS has been producing tax software for 31 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, so that, for example, a client's change of address has only to be entered once. 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 believes it set the UK record for tax return e-filing with 1.745 million returns filed with HMRC by the January 2009 deadline. IRIS's share, which includes IRIS, PTP and Drummohr, accounted for just over 46% of all returns submitted using third party software.

IRIS Personal Tax, used on 5,270 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. A benefit of this to users in 2008 was that they did not have to learn the layout of the new returns as the data fields in the software are consistent.

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 5,427 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, eg 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. For example, it is possible to track a return from the initial checklist through to it being accepted by HMRC. 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 online), including forms R185, form 50FS for non-resident trusts, form 41G trust enquiry, and the SA 923 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 and additional modules added 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 is available as a CD-ROM or online.

Contact Sales department
Address Riding Court House, Datchet, Berkshire SL3 9JT
Tel 0844 815 5555
E-mail enquiries@iris.co.uk

Internet www.iris.co.uk/practice
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, all with the small and medium sized practice in mind.

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 Accounts Production.

Tax Professional produces a range of HMRC approved personal tax returns, including partnerships (short and full pages), 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 on-screen 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.

Change of accounting year and planning is available, but not pension planning.

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 and good-value package with over 1,400 users, particularly considering the level of integration offered.

Keytime Trust Tax (SA900) was launched in September 2008. This deals with all aspects of completing forms SA900 and submitting them online, but also producing a paper version for the client.

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 calculations. While not aimed at high-end companies, this software is suited to high street accountants with a few companies as clients.

Practice management is dealt with by Client Manager Plus, available summer 2009. This provides communications management (letter, e-mail, fax, etc), tracks deadlines, deals with time and billing, document management and integrates with the other Keytime products. Keytime also produces Payroll, P11D Calculator, Accounts Production, and Books (an online accounting solution), Backup (online data backup software that allows the user to protect his files by dragging and dropping them into remote storage).

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.keytime.co.uk
Cost Tax Professional - £185 to £370; Corporation Tax Professional - £185 to £370; Accounts Production – £185 to £370; Payroll: £299; P11D Calculator - £99; Trust Tax - £185 to £370
Rec spec Windows Vista, XP or 2000; 256/512mb RAM; 0.5/1mb hard disk space

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 unchanged with its independent development team and support staff in Kidlington. Many of PTP's products have been made compatible for Microsoft Windows Vista, but look exactly as before. They continue to be compatible with Windows XP and Windows 2000.

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 on to 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 completes limited company tax returns CT600. It 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 included in the product.

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, fees and work in progress, client contact details, 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. A current database of official carbon dioxide emissions for all current cars is included.

Clients' capital gains tax liabilities can be calculated using CGT Planner. This handles claims for hold over, roll over and entrepreneurs' relief. 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. An 'optimiser' function shows the most beneficial time to complete the disposal.

PTP's IHT Planner calculates lifetime transfer tax, lifetime transfer on death tax and the chargeable estate at the date of death. It also deals with what-if? Planning, for example showing the effect of projected lifetime gifts and the likely death estate. The IHT400 return and all supplementary forms can be produced using IRIS Laserform.

PTP also has a company secretarial package called PC Share Register Plus, and some additional spreadsheet planners including Incorporation Planner, Dividend v Salary Planner, and Tax Credit 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	10 Lakesmere Close, North Oxford Business Centre, Kidlington, Oxford 0X5 1LG
Tel	01865 370470
Internet	www.ptpsoftware.co.uk
Cost	Tax Return: from £120 plus VAT to £625 plus VAT. Partnership Return: from £120 plus VAT to £355 plus VAT. Trust Return: from £120 plus VAT to £625 plus VAT. PTP Accounts: from £120 plus VAT to £1,290 plus VAT. CT Platform: from £120 to £625. Company Car Planner: from £115 plus VAT to £230 plus VAT. CGT Planner from £60 plus VAT to £120 plus VAT. Tax Fast: from £115 plus VAT to £230 plus VAT. IHT Planner from £115 plus VAT to £230 plus VAT. Pricing is subject to number of returns (where appropriate), and whether on network or stand alone basis
Rec spec	Windows XP; Pentium 4.1; 1Gb RAM; 1Gb 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

Forbes Computer Systems

EMAIL: SALES@TAX.CO.UK **WWW.TAX.CO.UK**

"I am delighted with your product, regularly using the personal tax, corporation tax, P11D and tempus packages. Your company is innovative and your fees reasonable. Keep up the good work."

"Brilliant - easy to use - the best! Saves me ££££ in time and effort"

A complete range of products available separately or as an integrated suite.

Tax Software

- ProTax SA100 (personal)
- ProTax SA800 (partnership)
- ProTax CTSA
- ProTax SA900 (trust)
- ProTax IHT

P11D,Payroll,CIS

- Payroll
- P11D including efiling
- CISassist - CIS manager & efiler

Accounts

- Sole trader
- Partnership
- Limited Company
- XBRL
- Fully integrated with tax

Company Secretarial

- Company forms
- Company register
- Electronic filing
- Electronic incorporation
- Submission of XBRL accounts
- Integrated with accounts

Practice Management

- ClientBase
- Tempus time and fees
- Diary / Planner
- Cross product status logging

High Level of Functionality and Ease of Use

Data entry and navigation have been designed to be flexible and user friendly, allowing data entry either directly onto forms or by means of a step-by-step wizard. This flexibility allows both a high level of functionality and a very short learning curve.

Independent Software

Continuous improvement of our products and support remain our primary goals. It is through this strategy that we have successfully competed in an aggressive market place. Our close bond with our clients has ensured that we are one of the few independent tax software developers in the UK. This will remain so. Our approach to training and technical support enables our clients to get the most out of the software.

For more information or to download a demo visit **www.tax.co.uk**

Forbes Computer Systems Ltd
Guise House
Aspley Guise
MK17 8HQ

Phone
01908 584674

Fax
01908 584676

E-mail
sales@tax.co.uk

Website
www.tax.co.uk

is aimed mainly at small and medium sized firms of accountants and financial advisers, although has customers of all sizes.

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. It also can be used to produce the SA800 partnership tax return and the SA900 trust tax return. The partnership and individual returns are linked automatically, and there are additional reports for non-residents.

Information is 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. Information can be imported from accounts preparation packages.

SA2000 supports online filing at no extra cost. Forms and reports can be saved to Adobe pdf format for archiving and can be attached to e-mails. Some 70% of users are believed to have used this facility in the last filing year.

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. There is also a helpdesk and online knowledge base.

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, and IHT100 deals with the completion of inheritance tax returns.

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, partnership and trust tax returns, company tax returns, accounts production, limited companies, book-keeping, payroll and practice management. The software is fully integrated in a relational database, so all client data can be shared across the modules used. The client data may be accessed by products from other suppliers eg: spreadsheets and word processing. As the software is written in Oracle it has great flexibility and excellent data mining capability.

The Taxation module deals with personal, partnership and trust self assessment tax returns. Most of the supplementary pages are catered for, although not currently Lloyd's underwriters, minister of religion, or MPs. 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 in hard copy or PDF format for sending to the client. A full range of reports, eg R40, SA303 and 64-8, are available. Pension planning can also 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, investment companies with trading sources, and unit trust and open-ended investment companies. 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, eg the client's personal tax return.

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 or online manual, training, online help screens, telephone hotline, customer website, and newsletters. The package can be supplied on CD-ROM or online.

Contact	R Ford
Address	146 Pinehurst Rd, West Moors, Ferndown, Dorset BH22 0AT
Tel	01202 890897
E-mail	sales@pinacleaccounts.co.uk
Internet	www.pinacleaccounts.co.uk
Cost	from £150
Rec spec	Windows or Linux; 1Gb RAM; 5Gb 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 individuals partnerships and trusts, together with the facility to include pdf attachments to the electronic return. Success rates for online filing exceeded 99% for all return types in the year to 31 January 2009

Validation against both HMRC's and Sage's own validation criteria ensure that returns are suitable for electronic submission and that errors are caught and repaired before the return is filed.

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 be entered directly on to the on-screen tax return.

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 deal with self-employed clients and clients in partnerships. Business accounts data is available from Sage Instant Accounts Production, 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 for trading income, cash-basis and UITF40 adjustments, farmers' averaging and change of accounting year planning.

Sage Partnership Tax produces the full range of partnership SA800 returns. These can be populated with the data from Business Tax or completed manually. Full partnership profit sharing across all income types is also included. Full validations are carried out to ensure the return is valid for electronic submission.

Sage Trust Tax delivers the full range of SA900 forms together with the trust tax calculation and includes the same validation process as individual and partnership returns.

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. Individual clients 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. All updates can be downloaded from the Internet, with all critical releases additionally sent to customers on CD. Software prices are based on numbers of users and clients.

In April 2009 Sage Instant Taxation was launched. This produces the full range of SA100 returns and schedules included in Sage Taxation, sharing the same comprehensive validation rules for online filing. This is an entry level product aimed at smaller practices preparing up to 100 self assessment returns for individuals. Prices start from £99 or it can be purchased as part of a compliance starter pack aimed at smaller accountants including Sage Instant Accounts Production, Sage Corporation Tax (powered by Abacus) Lite and Sage Practice Solution

Contact	Sales team/customer services
Address	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 XP or above; 1Gb RAM; 10Gb hard disk space

Taxshield

Taxshield is a brand name of Shield Products. Launched 14 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 is the self assessment software dealing with most aspects of self assessment, including R40 and SA800 together with the supplementary pages.

It is laid out for easy and clear access to all areas with a user-friendly approach. The tax calculation is produced, showing payments on account 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. Advisers can choose from 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 for inclusion in the partnership return, and the partnership/business pages in the personal tax return as required.

All products come with 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	Jan Brookshaw/Wayne Turner
Address	Finch House, 28/30 Wolverhampton Street, Dudley, West Midlands, DY1 1DB
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

Ever increasing numbers of employees work from home for at least some of the week. Many 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 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 ITEPA 2003, s 367 (formerly Extra-statutory Concession A1).

It handles 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	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	£17.35 (ex VAT) single client, £65 (ex VAT) up to ten clients, £195 up to 100 clients
Rec spec	Windows 2000, XP, Vista; minimal RAM; minimal hard disk space

Corporation tax

The packages covered in this category vary in widely in terms of what they do and the markets they serve, and are priced accordingly. Many of the personal tax self-assessment providers also provide a corporation tax module which, although may be little more than a form filler, may provide all the functionality the user requires. These are not included in this section, but referred to in the preceding reports where applicable.

taxcalc professional tax made clear

Acorah Software Products

TaxCalc Pro Suite is a straightforward corporation tax form filler aimed at the small adviser with some companies as clients, rather than large conglomerates. It is not tailored to cover groups of companies, rather it provides tax computations, capital gains tax calculations including indexation and taper relief together with automatically created pdf computations. It follows the structure of the income tax product.

Information can be entered using a 'SimpleStep' interview process or by direct form entry. All CT600 forms are covered. The software handles marginal rate relief and calculations can be exported to Word or Excel.

A full listing of all data entries is made. No business calculations regarding accounting periods can be done. Returns can be filed online.

An enhanced version will be released later this year to include XBRL computations and accounts.

The software comes with a free pdf manual, online help screens and customer support with the ability to make anonymous and e-mail client data for support purposes. 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	4 King Street Lane, Wokingham, RG41 5AS
Tel	08707 669935
Internet	www.taxcalc.com
Cost	*TaxCalc Pro Suite* - £375
Rec spec	Windows XP; Pentium 4; 1024mb RAM; 100mb hard disk space

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For further information call the team on +44 (0)20 7825 8100 or email enquiries@interactivedata.com

www.interactivedataclients.com

Interactive Data

CCH

CCH Corporation Tax 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 CCH Corporation Tax which gives a summary of each company, including variance reports, group overviews and loss schedules.

CCH Corporation Tax 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.

CCH Corporation Tax 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
Address	Westgate House, Westgate, London W5 1YY
Tel	0844 561 8181
Internet	www.cch.co.uk
Cost	prices on application
Rec spec	Windows 2000 SP4/.NET V2.00; 512mb+ RAM

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 which is an integral part of Deloitte Tax. The software is used throughout the Deloitte tax practice, so effectively has instant and on-site user appraisal.

Abacus Enterprise Direct Tax Compliance (the corporation tax package) creates a platform for managing tax compliance and reporting on a global basis comprising three modules:

- 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 proprietary 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, including more than half 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.

It 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, eg they can instantly see and review the computation and tax return, 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 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, 1Gb RAM

DIGITA

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, facilitating 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. It records the individual who carried out the particular section of work, 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 broad support, as described in the review in the Personal Tax section of this supplement.

Contact Karen Gardner
Address Liverton Business Park, Exmouth EX8 2NR
Tel 01395 270311
E-mail kareng@digita.com
Internet www.digita.com
Cost price on application
Rec spec supplied on request

£* Finansol Ltd Tax Software

Finansol Ltd offers CTax and CT Calculator.

CTax is an automated corporation tax return package, which produces the corporation tax computation and CT600 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 feed directly into the return to calculate corporation tax, and marginal relief.

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.

CT Calculator is a corporation tax calculator. It performs all corporation tax calculations, but does not complete the CT600 forms.

A hard copy and online manual are supplied with the software, and there are also online 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 CTax from £25; CT Calculator £15
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 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

ONEsource Tax Provision

Thomson Reuters is a well-known source of intelligent information for businesses and professionals. The tax and accounting business of Thomson Reuters (formerly Thomson Tax & Accounting) provides technology and information solutions, as well as integrated tax compliance software and services to accounting, tax and corporate finance professionals in accounting firms, corporations, law firms and government.

ONEsource is the corporate software and services brand.

The ONEsource Tax Provision Solution is a suite of configurable web-based tax reporting tools for corporation tax. ONEsource Tax Provision 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/Alphatax for compliance purposes.

ONEsource Tax Provision 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 charge and overall tax charge including changes in deferred taxes per the balance sheet.
- Reports on all unused tax losses globally, as well as any unrecognised values (impairments of deferred tax assets), and rules around utilisation.
- 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.

A wide range of support is offered including manual, training, online help screens, telephone hotlines, customer website, seminars, and newsletters.

Contact Thomas Hendreich

Address 58-64 City Road, London EC1Y 2AL
Tel 020 7068 3530
E-mail thomas.hendreich@thomsonreuters.com
Internet www.taxstream.eu; www.onesource.thomsonreuters.co.uk
Cost price on application
Rec spec Windows XP; Pentium 41.5; 768mb RAM; 50mb hard disk space

Sage (UK) Limited

Sage Corporation Tax (powered by Abacus) is a modular packaged product powered by Deloitte 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, including online filing and a comprehensive tracking and administration database for management reporting. Risk management, group, deferred tax and advanced modules are also available. The software provides sets of annual packs covering single trade, investment and multiple trade companies, and more specialist companies, eg ring-fence companies. 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 software 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 in foreign currencies can also be prepared

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 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 individual group companies' 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 all Sage final accounts packages provide another method of quick, secure data entry.

AutoUpdate allows updates to the software to be downloaded from the Internet 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 all Sage final accounts packages.

Contact Sales team/customer services
Address 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 XP or above; 1Gb RAM; 10Gb hard disk space

Tax Computer Systems Ltd

Tax Computer Systems Ltd is an independent software company which has been producing its very powerful corporation tax software, Alphatax for 18 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 22 of the top 25 accountancy firms, and 76% of the top 50 firms, as well as by 650 large 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 virtually all 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 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 program is supplied on CD-ROM, with major releases distributed twice a year (after the Budget and in autumn). Minor updates can be downloaded from the website.

The Alphatax Hosted Service is an Internet service and can be run from any browser. It uses Microsoft SQL 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. The obvious benefit of using the hosted service is that the user has no internal IT costs relating to this aspect of his business.

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.

In addition, Tax Computer Systems produces software for life companies; both products integrate seamlessly with Alphatax. Alphalife-EV is a modelling tool aimed at actuaries and projects the tax liability for life companies over five to 50 years. Then there is Alphalife which is a tax engine for life companies dealing with all necessary tax computations. This software has a host of features including tax accounting under IFRS and UK GAAP, I-E computation, unit trust deemed disposals, calculation of s 432A percentages, s 432A allocations of income and gains, and PHI computation.

An online 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, and an annual user conference.

Contact	Sales team
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 or later; 256mb RAM; 100mb 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.

Hessel

Launched in 2009, Hessel provides a software service that tracks and reports the complex tax and benefit trails arising around local and international assignments. Uniquely, specific online portals allow travelling employees, administrators and suppliers to easily keep all information current. This ease of use leads to increased compliance and reduced cost leakage, which, in turn, results in more timely accurate tax and benefit reporting.

The data recorded can be sliced to show total expenses paid to individual employees, amounts paid in excess of the statutory limit and the amount of grossed up tax due. Gross-ups can be calculated at marginal rates or by using tax tables. P11D tax reports can show either no gross-up, a fixed rate gross-up or tax table calculation for dealing with those employees whose relocation expenses and benefits move them to a higher rate of tax. In addition the software will produce PAYE settlement agreement reports. But because of the way the data is collected and held, it is much more versatile, for example you can now look at suppliers across regions, and negotiate cost and tax savings accordingly.

Based on the well established Hessel RMS software [relocation management system] the open architecture database allows full integration with most other reporting software. To ensure smooth migration, prior to initiation Hessel works closely with clients to process map workflows. The programme is hosted on Hessel servers.

Contact Geoff Davidson
Address Croham House, Crowborough, East Sussex TN6 1WW
Tel 01892 669901
E-mail geoff.davidson@hessel.co.uk
Internet www.hessel.co.uk
Cost Priced per move . Consultancy £1,200 a day. In addition, there is a help desk, website, seminar groups, and an annual client conference at a prestigious location.

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. Appropriate forms can be filed online.

Contact Anthony Boggiano
Address 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 human resource, 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, and is available from PKF or tax software suppliers CCH and Digita.

PKF's P11D software recently won an Accountancy Age award for its technical superiority, ease of use, high levels of user satisfaction, and innovation of time saving features.

Contact Jennifer Nethersole
Address 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. It makes the calculations automatically using a database of carbon dioxide emissions by car type. 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 10 Lakesmere Close, North Oxford Business Centre, Kidlington, Oxford 0X5 1LG
Tel 01865 370470
Internet www.ptpsoftware.co.uk
Cost Tax Expense: employers' version - £175 plus VAT to £550 plus VAT; advisers' version - £120 plus VAT to £375 plus VAT.
Rec spec Windows XP; Pentium 4.1; 1Gb RAM; 1Gb hard disk space

QTAC Payroll Products

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 nightmare task. The user enters the information where indicated, and the software does all the hard work. It handles multiple weeks of pay; contracted in and out National Insurance codes, K tax codes, directors' National Insurance, and has tax and

National Insurance contribution tables going back to 2003-04. 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 Products. 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 construction industry scheme 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.

Contact	Sales
Address	Qtac House, Kingsfield Lane, Longwell Green, Bristol BS30 6DL
Tel	0117 935 3500
Fax	0117 935 3545
Internet	www.qtac.co.uk
Cost	From £ 115 excluding VAT per single user copy
Min spec	Windows 95 or higher; IBM compatible PC; 32mb RAM; 15mb hard disk space

Sage (UK) Limited

Sage 50 P11D 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. All 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 fast, sophisticated, and all benefits are covered, including company vans, fuel charges and beneficial loans. Features include, easy integration with Microsoft and the award winning Sage 50 Payroll and NI number validation. It is aimed at anyone looking at producing multiple P11Ds and it is fully supported by Sage's technical helpline.

Contact	Sales team/customer services
Address	North Park, Newcastle upon Tyne NE13 9AA
Tel	0191 294 3000
Internet	www.sage.co.uk
Cost	Sage 50 P11D - from £160 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 1997. 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.

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 uses 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	Jan Brookshaw/Wayne Turner
Address	Finch House, 28/30 Wolverhampton Street, Dudley, West Midlands, DY1 1DB
Tel	0870 609 1918
Internet	www.taxshield.co.uk
Cost	price on application
Rec spec	(PC)1Gb RAM, 1Gb hard disk space; CD-ROM 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 a very useful 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 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®

LexisNexis – EU Tax Cases Tracker

EU Tax Cases Tracker is the new online service from LexisNexis to help you track the progress of tax cases through the European Court of Justice, from a national court referral to Advocate General opinion through to full ECJ judgment, and includes an e-mail alert notifying the user of cases as they progress through the system. It allows the user to see not only how a direct or indirect tax case in Europe may affect his business but also, in one search, will show the full judgment, HMRC guidance, and links to legislation, commentary, related cases, etc. in one place.

The service provides real time, authoritative information through its unique editorial board of 16 expert EU tax consultants, practising in the key EU jurisdictions, who are monitoring and analysing developments in all the important tax cases.

It will provide the following, together with expert analysis:

- Early identification of cases that are likely to be referred, i.e. rumoured and prospective cases, or which have been referred, to the ECJ and the issues they raise.
- Tracking of cases once they are with the registry at the ECJ: e.g. tracking the various written stages in the procedure, and any decisions taken regarding the disposition of the case.
- Tracking when the advocate general's opinion and the judgment are published.
- Tracking what happens to a case once it returns to the national court, or the impact in terms of national legislation.
- Uniquely, identification of those cases that are not being referred to the ECJ, e.g. where national courts considered that the issue was *acte claire* making it unnecessary to make a reference.

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

LexisNexis®

Lexis®Library

LexisLibrary, formerly known as LexisNexis Butterworths Online, provides important tax reference materials such as *Simon's Direct Tax Service*, *Tolley's Tax Annuals*, *De Voil Indirect Tax Service* and *The Yellow and Orange Tax Handbooks* for tax and accounting professionals.

The material is instantly searchable and browsable from the homepage and the service can be personalised suit specific practice areas within the user's firm.

Users can:

- immediately access a comprehensive online library of legal, tax and regulatory information;
- receive expert interpretation of the law and how to apply it;
- be flexible by tailoring their own search preferences;
- respond faster and more accurately to business needs through rapid delivery of up-to-date intelligence;
- can increase efficiency and make research easier and quicker through LexisLibrary's extensive cross-referencing, hyperlinks and suggested related documents.

The aim is to save users time and money so that their profitability and cost-efficiency can be maximised.

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

LexisNexis®

Nexis®

Nexis provides tax and accountancy professionals with a vast range of 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. The archive goes back to 1975 enabling users to research the past as well as emerging markets with daily updates.

Nexis gives users access to:

- a vast range of company, financial and market reports including Hoover company profiles, Dun & Bradstreet, ICC Directors;
- over 7,000 business and trade publications including *Accountancy Age*, *Journal of Accountancy* and *Tax Adviser*;
- all UK and Irish newspapers, both national and regional broadsheets and tabloids;
- an extensive selection of international and emerging market newspapers, this includes *Le Monde*, *USA Today* and *Die Welt*;
- over 400 global newswires, websites, industry newsletters and trade press, media transcripts, newswires, press releases and more than 2,000 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

Automatic Data Processing, Inc (NASDAQ: ADP), with nearly $9 billion in revenues and over 585,000 clients and based in the US, is one of the world's largest providers of business outsourcing solutions. Leveraging nearly 60 years of experience, ADP offers a wide range of HR, payroll, tax and benefits administration solutions from a single source. ADP's easy-to-use solutions for employers provide excellent value to organisations of all types and sizes. ADP is also a leading provider of integrated computing solutions to auto, truck, motorcycle, marine and recreational vehicle dealers throughout the world.

ADP's sales/use/VAT solutions include Taxware Enterprise, 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 250 countries.

Contact	Terry Corallo
Address	ADP Taxware, 401 Edgewater Place, Suite 260, Wakefield, MA 01880-6210, United States
Tel	001 973-974-7640
E-mail	terry_corallo@adp.com
Internet	www.adp.com
Cost	Price on application

KPMG

The KPMG LINK family of products from the KPMG International Executive Services practice deals with various issues created by an employer's expatriate population. The expatriate tools are typically developed in partnership with other overseas KPMG practices which allows the firm to develop tools for the global market more effectively.

LINK Enterprise Assignment Manager is designed to provide comprehensive and efficient management of the international assignment process. It helps human resource and tax professionals evaluate tax and compensation options for international assignments, maintain up-to-date assignee data, track assignees throughout the life cycle of an assignment, prepare compensation reports and process and report non-payroll compensation items.

Traditionally, clients have licensed and implemented all features of LINK Enterprise Assignment Manager. However, an unbundled option is available that allows a client to implement the LINK EAM modules of their choice. The four modules included within LINK EAM are Demographics, Compensation, Cost Projector, Actual Pay.

Within the Demographics module the application can track over 300 standard data elements, categorised primarily as employee or assignment related data. In addition, the 5.5 version of LINK EAM offers the user the ability to create new data entry fields and create new data entry pages through configuration in the admin module. As a result the amount of data elements that the system can store is now almost limitless. The added benefit of these fields being created and configured by the user ensures that the cost of expanding the systems data storage capabilities is kept to a minimum.

In addition to storing data elements the Demographics module also provides the user with the e-file cabinet. This supplements the storage capabilities providing a repository for assignment and employee related documents. These documents can take the form of many formats including Word or Excel documents, scanned images, and e-mail messages.

The Compensation module (Assignment Policy and Compensation Package Tracking) can house an unlimited set of assignment policies and associated allowances. This 'policy rulebook' is used across all phases of the assignment to create a standard set of rules for reporting, exception tracking and cost management. Client policies and allowances are globally configured via an administrative tool. With this tool, allowances are configured using a variety of characteristics including whether the allowance is calculated or manual input, the nature of the calculation, the default currency, and many more. Next, policies are built by selecting the appropriate allowances. This defines the global set of allowances and policies.

The application is extremely flexible allowing users with appropriate security privileges to deviate from policy by adding or subtracting allowances from the default policy or manually overriding calculated amounts. All payments made outside of policy are tracked as exceptions and are quantified in the policy exception report.

The Cost Projector Module is used for all home hypothetical and home/host actual tax calculations, which allows for accurate and comprehensive results instead of a simple marginal rate calculation. Detailed reports provide invaluable backup to all relevant tax amounts (federal, local and social insurance). These reports can be shared to give the line managers, assignees, and management a greater sense of accuracy to the budgeting process.

The Actual Pay Module is designed to capture all historical payments from payrolls and any applicable paying system in order to provide details of what an assignee was actually paid, regardless of international location.

Detailed pay classes and codes can be setup to represent each payroll's pay codes, or globally to be used across all payrolls so that the values can be loaded into the KPMG LINK repository via a standard electronic interface. Where electronic interfaces are not feasible or practical, data entry screens are available for manual data entry. These screens also serve as a resource to review data and approve costs entries that were manually entered. Several standard reports allow for the reporting of this data in detailed and summary formats.

A recent enhancement to the application also allows users to run reports to compare the cost of the assignment as budgeted at the outset, with the actual assignment costs in order to identify areas of incremental or unexpected cost and to aid future planning.

A trial version of the LINK EAM application can be made available via the web but a meeting with KPMG to assess a clients needs is required before access can be obtained.

A variety of support and training packages are available to employers licensing the software. Support includes online help screens, telephone hotlines, customer user groups, newsletters and seminar programmes. KPMG has a dedicated helpdesk personnel however the first line of support is generally the local team that implemented the application. In Europe there is a team of approximately 20 individuals who provide support to the firm's clients.

Another KPMG product for the international field is Global Equity Tracker. This is aimed at helping the HR, payroll and tax functions of multinational companies with an internationally mobile workforce and long-term incentive compensation plans.

It is essentially an online system which provides companies with greater control over the management of awards and assists employers with establishing the reporting and withholding requirements when delivering incentive compensation to cross-border employees.

Known as GET, it is built as an integrated solution designed to sit within and communicate with corporate networks. It can receive data from and send instructions to client's internal systems as well as the systems of external parties like share plan administrators. A trial version of the application via KPMG's web interface can be arranged after an initial meeting with KPMG to asses a potential clients business requirements.

An online manual is supplied together with some training. Annual support includes help desk and online help screens.

Contact Geoff Perkins
Address 1 Salisbury Square, London EC4Y 8BB
Tel 020 7311 3316
E-mail geoff.perkins@kpmg.co.uk
Internet www.kpmg.co.uk
Cost LINK EAM: £250,000 to £500,000; LINK Cost Projector: $14,000 to £55,000
Rec spec LINK EAM: workstation: Windows 200/XP, 512mb RAM; LINK Cost Projector: Windows 98, ME, NT, 2000 or XP; 128mg RAM, 22mg free disk space; GET: Windows XP Pro (SP2) or higher; IE 6.0 SP1 or higher; 1gb RAM; 250mb free disk space

LexisNexis – Comtax

Comtax provides the international tax planner with the strategic tools needed to achieve more effective tax planning in a globalising economy. These tools will help make calculations, keep track of changing legislation, and present tax alternatives to management in an easy-to-understand manner.

The software enables users to identify, then investigate all alternative tax planning opportunities, taking into account the specific legislation applying to each country in question. In this way, the system supports the tax planner throughout the process of identifying and evaluating all possible courses of action. It does everything from calculating the possible alternatives, to providing instant access to the specific wording of the applicable tax laws and treaties.

Covering over 120 countries, all data is updated monthly, i.e. effective tax rates, income situation, international restrictions and policies and special arrangements with governments.

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

Vertex® Global Tax Solutions Ltd

Vertex Global Tax Solutions Ltd is the UK subsidiary of Vertex Inc., the US provider of enterprise corporate tax automation solutions.

The company offers a software solution, Vertex® Value Added Tax *O Series*®, which helps businesses manage their VAT and sales tax 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 or sales tax 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 Value Added Tax O Series 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 also 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.

To assist companies with their global provision needs, Vertex also provides a web-enabled, tax accounting solution with Vertex® Provision Global Tax Office™. This facilitates the annual and interim provision process for large, global organisations.

In addition to their VAT and global provision offerings, Vertex supplies solutions for every major line of business tax including: income tax, sales tax, consumer use tax, communications tax, and payroll tax. To further assist specific industries, Vertex has developed specialised solutions for the leasing and retail industries.

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

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 implications of a proposed development, pointing them towards relevant certificates etc to ensure VAT compliance and also that costs are minimised.
Recently updated, it now possible to access the basic product without charge.

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, eg 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 product is used some 100 businesses, including two big four firms, ten top 20 (excluding big four), and two FTSE 250 companies, so is clearly suitable for any sized business which deals with construction.

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 e-mail bulletin service.

Contact	Phillip Henwood
Address	4 Eyes Ltd, 29 Dingley Lane, Streatham, London SW16 1AZ
Tel	07793 707 839
Internet	www.4eyesltd.co.uk
Cost	free basic access or £350 a quarter with support
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 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 2009, is available from May 2009. Various updates and enhanced models will be available for download from the update site as and when necessary.

Used by some 1,500 firms, the product has nearly 100 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 and has been shortlisted on two other occasions.

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 9 - £320 plus VAT; discounts apply for multiple offices
Rec spec 100mb hard disk space; Office 2003/2007 is required for the interactive checklists.

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 100,000 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, 6 Snow Hill, London EC1A 2AY
Tel 0870 850 3824
Fax 020 7248 6545
E-mail howard.rosenberg@beprofessional.com
Internet www.beprofessional.com
Cost from £30 a month plus VAT

BPP LEARNING MEDIA

BPP Learning Media

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

BPP Learning Media has recently gone digital, introducing eBooks, a new era in study for both the ATT and CTA syllabuses. There are many benefits in adopting this route, such as portability, space saving as well as removing the need to carry heavy text books when moving from location to location.

In addition, BPP Learning Media produces Understand Taxation which is a generic interactive taxation package covering UK personal and business tax. Updated annually, it comprises 21 modules each relating to a different aspect of the UK tax system, eg 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 user is progressing through the material. Designed to be straightforward to use, the user works at their 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; 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

£* Finansol Ltd Tax Calculators

Finansol Ltd produces three calculators to help businesses or their advisers calculate the tax benefits of incorporation, and to run the incorporated business tax efficiently. The Incorporation Calculator and Salary v Dividends Calculator were developed when incorporation first became popular and have remained inexpensive, while informative, accurate, and easy to use.

Incorporation Calculator compares the tax bill as a self employed worker to the predicted tax bill with a company. Visitors to www.finansol.co.uk may try the free web version. The desktop version produces, for any earnings level, a detailed breakdown of all taxes incurred under each scenario. Incorporation Calculator assumes that profits are withdrawn from the company in the most tax efficient manner.

Salary v Dividends Calculator finds the most tax effective combination of salary and dividends to extract from a company. It produces, for any level of company earnings, and for unlimited combinations of salary, dividend or retained profits, a detailed breakdown of all taxes.

Advance Incorporation Calculator was developed more recently. When tax and National Insurance rates are announced several years in advance, it is helpful to use them for future predictions. It compares taxes paid by unincorporated and incorporated businesses for current and future tax years. Again, a detailed breakdown of all taxes incurred under each scenario is produced.

The calculator is updated whenever new tax rates for future years are announced, and can compare taxes for up to three years ahead. For example this year's calculator will include comparisons up to 2011-12. Bearing in mind that comparison calculations become more complicated in 2010-11 due to the new income-related personal allowance restriction, and again in 2011-12 due to the new 45% tax on income and extra 37.5% tax rate for dividends, the usefulness of this calculator, which accounts for these complications with ease, is therefore increasing.

A hard copy and online manual are supplied with the software, and there are also online help screens and a help desk. Training is not supplied as the software is extremely easy to use.

Contact Finansol Ltd
E-mail tax@finansol.co.uk
Internet www.finansol.co.uk
Cost Promotional prices apply at start of financial year, see website for current prices
Rec spec Any, programs take minimal disk space

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 roll, 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 news checks – 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 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 your questions via email 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 ten 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 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 large sized firms. Supplied on CD-ROM, user guides, training, presentation packs, promotional material, help screens and hotline support are also 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 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 - £297 plus VAT; individual products - £87 plus VAT. Free updates included in the price
Rec spec Windows 98 and above; 64mb RAM; 50mb hard disk space; Excel 98 and above

Sensatus

Sensatus is a web software house which develops sophisticated web-based portfolio management software for private investors and investment clubs. This is available to license to accountancy firms under affiliate reseller agreements, multi-licence arrangements or own brand white-label solutions. The web-tools enable clients to see a consolidated view of their investments and update and manage their portfolios online at any time.

Timetotrade provides detailed portfolio analysis, taxation and performance reports using a variety of metrics; and clients are able to view real time their capital gains tax liabilities relating to their investment transactions in shares and funds and use the system to generate HRMC tax return forms 185(new) and SA108, including detailed supporting calculations.

Both pre and post 2008 capital gains share identification tax rules are supported. There is also added support for an extensive range of share reorganisations, plus the ability to generate detailed supporting calculations for inclusion with HMRC capital gains tax submissions. Capital gains tax for unit trust and OEICs fund transactions including equalisation payments and notional distributions are also supported. The computations also support an extended range of investment types and work on providing taxation support for currency trading (Forex) and derivative investment products that include options, warrants, and contracts for difference is being finalised.

The user can generate historical tax returns by adjusting the year end dates and therefore view liabilities relating to different periods of ownership; for example a user can view their tax liabilities for the year ending 5 April 2008 including the share identification rules, indexation and taper relief for that period, then adjust the end date to year end 2009 and the related cost from the old rules are carried forward with the new rules applied to any disposals within that 2008-09 tax year.

The solution is based on an ASP model with the application hosted in a secure data centre and access available through any web enabled device such as a PC web-browser or mobile device such as an iPhone. Website updates are performed monthly; it is consistently updated as rules and new products become available

An online manual is available and training is supplied with the software at no extra cost. Other help comes in the form of online help screens, help desk, customer website, online knowledge base, e-mail bulletin service, newsletters, seminar programmes and monthly web seminars.

The service is suitable for a wide range of users from sole practitioner to large firms, as well as non-tax professionals and private investors and investment clubs.

The timetotrade software is a web-based solution that is hosted on remote servers in a secure data centre. The tools can be integrated into firms' own websites and data exchanged between existing in-house systems.

Contact info@sensatus.com
Address 9 Marine Square, Brighton BN2 1DN
Tel 01273 62433
Internet www.timetotrade.eu
Cost Investment Club: £99 a year; Individual Investor £199 a year
Rec spec Windows, MAC, UNIX, LINUX; any modern PC, laptop or mobile web enabled device

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ROY MARTIN
President and CEO
Thomson Reuters Tax and Accounting Division

To find out more about our award winning software:

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