Getting started with Practice Manager Plus

Contents

Getting started with Practice Manager Plus

Practice Manager Plus is the enhanced, integrated practice management solution everyone's been waiting for. With TaxCalc's Practice Manager (the enriched and renamed version of our trusted and popular Client Hub) working together with Practice Manager Plus, you can take even more control of how your practice works by creating, customising and co-ordinating all of your Jobs and Tasks in just a few simple steps. Whether you're a new or existing TaxCalc user, it's easy. Here's how.

As a New TaxCalc User

Take control of your practice and boost productivity with our Practice Manager toolkit. Practice Manager Plus is the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of Tasks, like requesting records from your client. Progress your work exactly as you need to, using customisable workflows so that you don't miss all those important statutory deadlines.

As an Existing TaxCalc User

You'll already be using Tasks to assign work, keep track of assignments in progress and set any notifications as deadlines approach. With Practice Manager Plus you can now create Jobs, break them down into a series of separately configurable Tasks and progress your work exactly as you need to, using customisable workflows.

Please refer to Step 5 for more details on how to transition from your outstanding work using a standalone Task to a multi-task Job.

As an Existing TaxCalc User, New Practice Manager User

If you're not yet taking advantage of our powerful Practice Manager toolkit, you can take control using Practice Manager Plus as the administrative powerhouse of your practice, creating efficiency across the board. Create Jobs, such as completing tax returns, and break them down into a series of Tasks, like requesting records from your client. Progress your work exactly as you need to, using customisable workflows so that you don't miss all those important statutory deadlines.

This guide will show you how to:

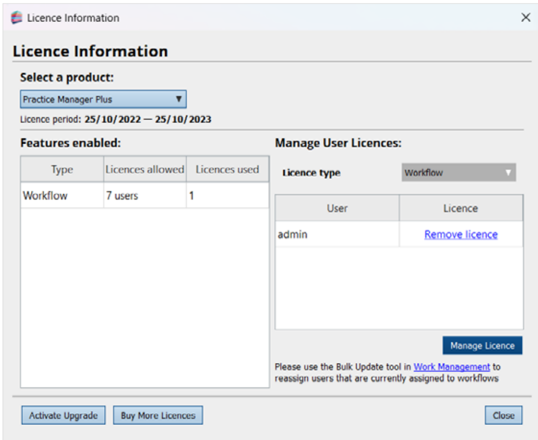
- Set up licence and user permissions to control access to Jobs and Tasks.
- Create your own customised Job Templates or use TaxCalc's predefined Templates.
- Create and manage any services offered by your firm which are automatically made available to all users and can be applied to your clients.
- Apply a new Job Template to a service to run specific Tasks.
- Allocate services, fees, and jobs to your clients by bulk activating services.
- Activate the Job for a client and assign any required Jobs and Tasks.
- Run reports for specific Jobs for clients.
- Setup Dashboards and Widgets for your Jobs and Tasks.

Step 1

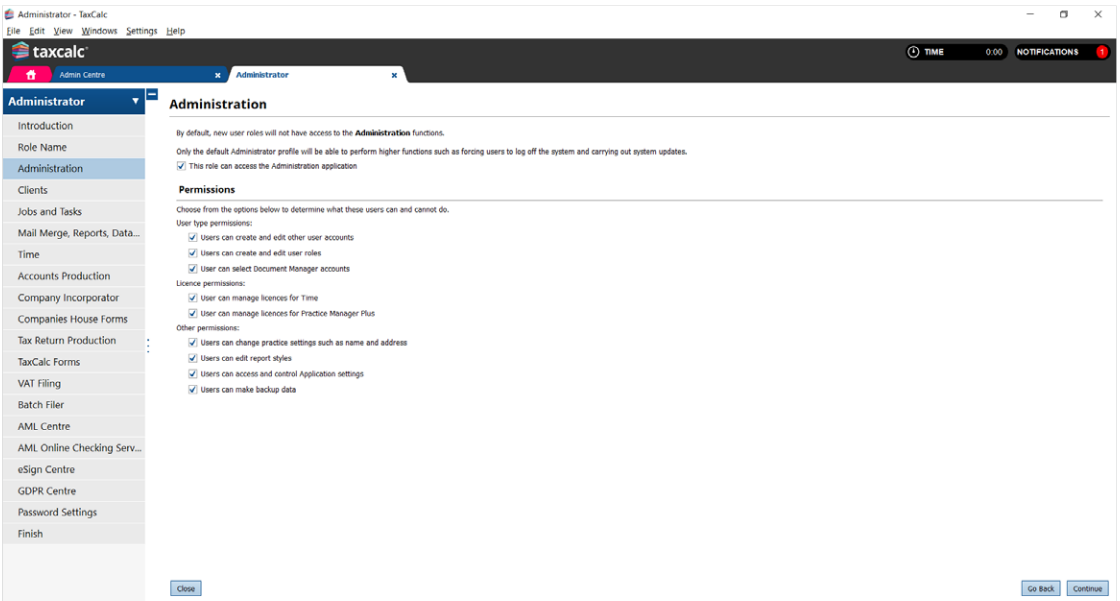
Set Licence and User Permissions for Jobs and Tasks

To get started, your Administrator is automatically assigned a Practice Manager Plus licence. You'll need to assign a licence to each user that requires access to Practice Manager Plus.

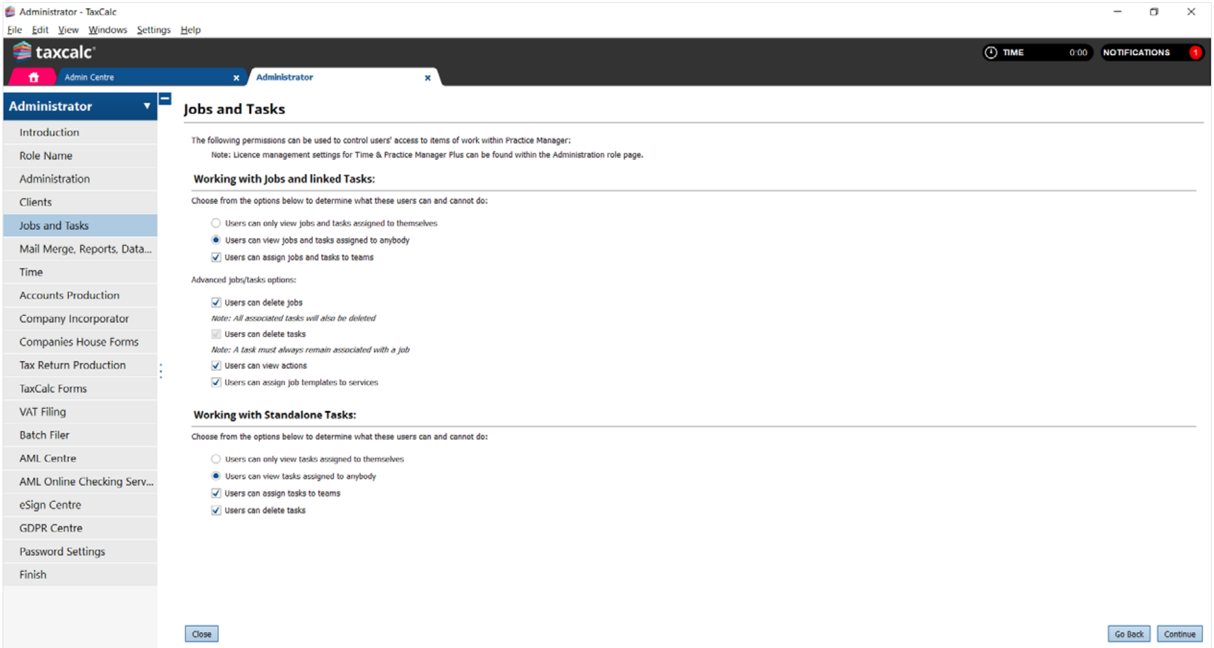
1. From the **TaxCalc** home screen select **Help > View Licence Information** and select the **Practice Manager Plus** product.
2. Click **Manage Licence** and select the user(s) you want to access Practice Manager Plus:



3. Launch **TaxCalc Admin Centre** from the home screen to set your users' permissions
4. Within the **Security Roles** screen select the user and click **Edit Role**.
5. From the **Administration** menu you can set the required **Licence Permissions**. Here you can determine whether users can manage licences for Practice Manager Plus:



6. From the **Jobs and Tasks** option you can control the users access to items of work within Practice Manager Plus:



7. From **Admin Centre > Users** you can define each user's security role, whether they have client portfolio, restricted clients and more.

8. From **Admin Centre > Teams** you can group users in teams you can later assign jobs and tasks to.

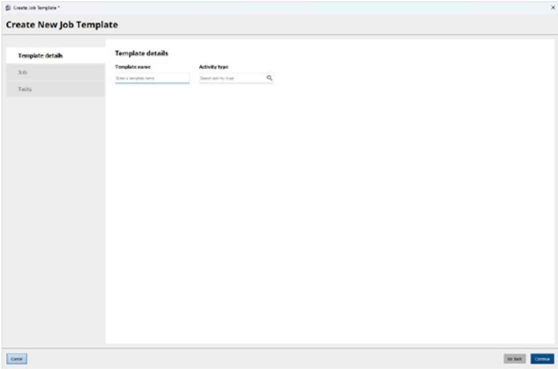
Step 2

Create a Job Template

We're here to make your life easier, which is why you can now create one single Job Template with multiple Tasks to automate services offered by your practice, such as Tax Returns, to use time and time again. For more detail on creating Job Templates, see [KB2978 – How to create a Job Template].

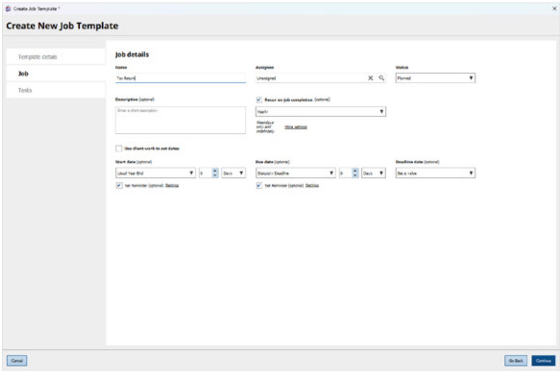
1. Launch **TaxCalc Admin Centre** from the home screen.
2. Select **Applications** > **Practice Manager Plus** > **Customise Practice Manager Plus**.
3. Select **Job Templates** to review the system default Job Templates.
4. Templates can be edited, duplicated and deleted. You can also create and customise your own. Click **Create** to customise your own Template and enter the relevant information into the **Template Info** fields:

5. From here you can name your template and specify the **Activity Type**, for example, **Tax Return**.



6. On the Job section of the wizard, you can choose assignee (a user, a team, a portfolio manager or any custom user role) and initial status for the job. You can define recurrence for the job to automatically recreate on the next accountancy period and set reminders so that important deadlines are not missed.

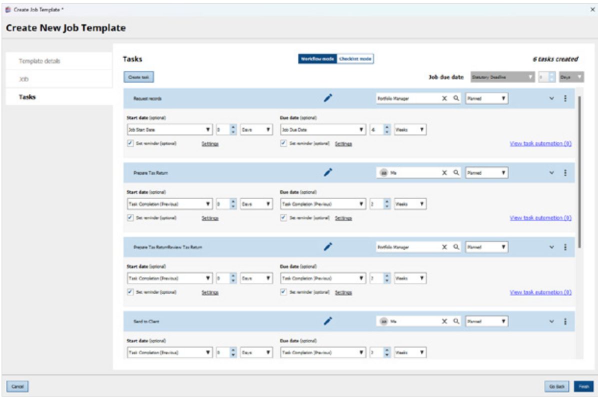
   You can specify the dates of the Job, for example, **Start date**, desirable **Due date**, and **Deadline**. Select the date basis, such as Statutory Deadline, Usual Year End or Custom (when you want to manually edit per client), to allow us to calculate the appropriate dates when activating the Job on each client. If 'Use client work to set dates' is ticked- the dates will be calculated according to client's work period.

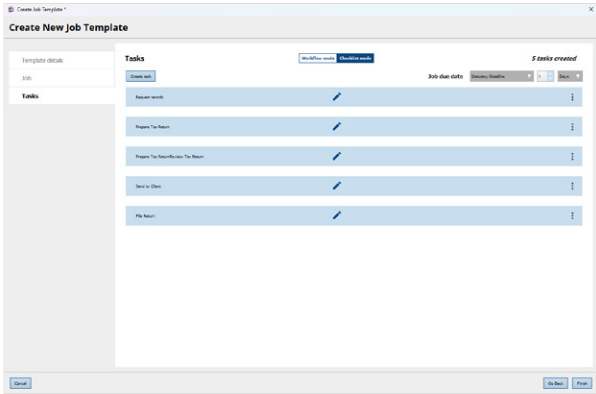


7. You may have one or a sequence of many Tasks you want to associate with your Job Template. You can create New, Edit, Duplicate or Delete any required Tasks from the Tasks tab.

8. From here you can select whether you want to use **Workflow mode** or **Checklist mode**.

- **Workflow mode**
  Allows you to create sequential workflow tasks with additional information and settings for advanced handling of work. However, these tasks can be completed in any order.
- **Checklist mode**
  Allows you to create a simplified list of tasks in the form of a checklist. These Tasks are automatically allocated with the Job assignee and due date and the status is either Planned or Completed.





9. Select **Workflow mode** to create your sequential list of tasks.

10. Alternatively, select **Checklist mode** to create a list of checklist tasks.

11. Tasks in both Workflow mode and Checklist mode can be moved up or down, duplicated or deleted from the **More Options** menu on the right of each Task. They can also be similarly viewed in Work Management, Active Work, Dashboards and Reports.

12. If you have selected **Workflow mode** you can configure each individual Task by assigning the Task to a specific **User**, **Team** or **Portfolio Manager** or any custom user role, and applying a Status. You can also select the **Start date offset**, for example right after the previous task is completed, and the **Due date offset**, for example, Tax Year End. You can also set any **Reminders** so that you don't miss any important deadlines. For more information on Date offsets see KB2979 – Date Offsets in Jobs and Tasks.

13. Select **View task automation** link to specify any conditions to automatically change Task attributes or set any notifications required. You can add multiple Task attribute changes and corresponding results.

    For example, you may select the condition, **Task is Completed** to then automatically **Change Work Status** to **Records Requested**. You can then add a second result to **Notify User** and select the user to be notified when the Task is complete. For more information see Knowledgebase Article 2980 – Job Template Task Actions.

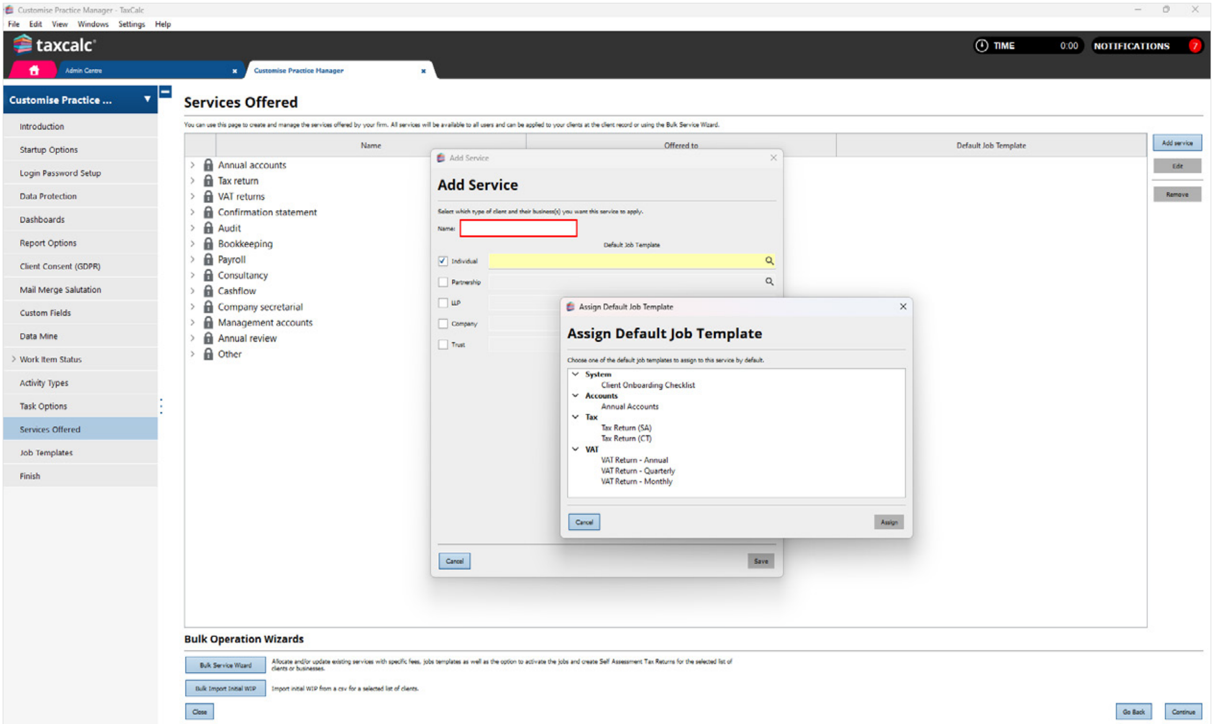
14. If you have selected **Checklist mode** enter the **Task Name**. The Job assignee, due date and the status (which is either Planned or Completed) is automatically allocated.
15. Click **Finish** to complete.

Step 3

Set up Services Offered

Once you have created your Job Template you can assign them to each service for your specific types of clients and their businesses.

1. Still within **TaxCalc Admin Centre** select **Services Offered**.
2. Use this page to create and manage the services offered by your firm.
3. You can use any of the predefined system default services, or you can create your own.
4. To create a new service, click **Add Service**.
5. From here you can select the type of client to apply the service to and assign the relevant Job Template. Select your newly created Job Template from the **Assign Default Job Template List**:



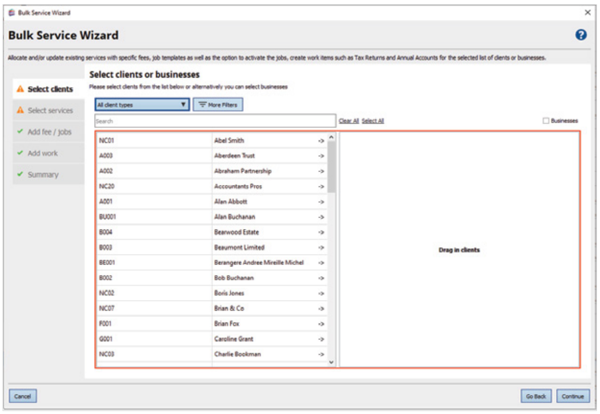
Step 4

Bulk Activating Services for Clients

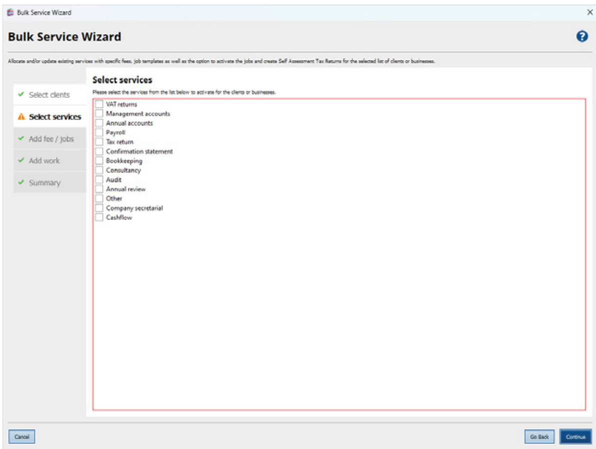
Allocate and activate multiple services, fees and Job Templates for your clients. Instead of you painstakingly allocating and activating each one individually, we've made things easier in the Bulk Service Wizard option where you can allocate all services (with corresponding Job Templates) and fees to multiple clients and activate them all in one place.

1. From the **Services Offered** screen click **Bulk Service Wizard** to activate multiple services for your selected clients, add any fees and link a service to a Job Template.

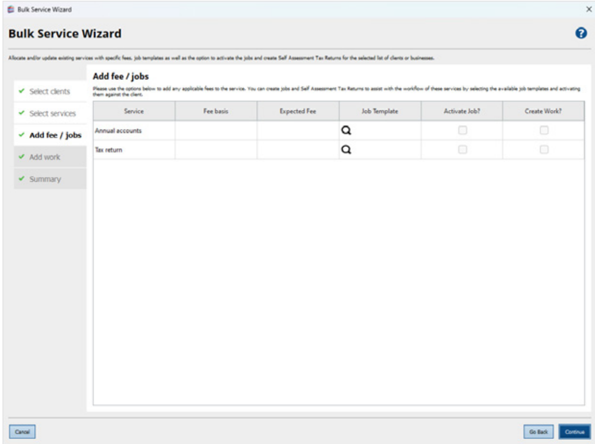
2. From the **Select clients** tab select all the clients you require activating:



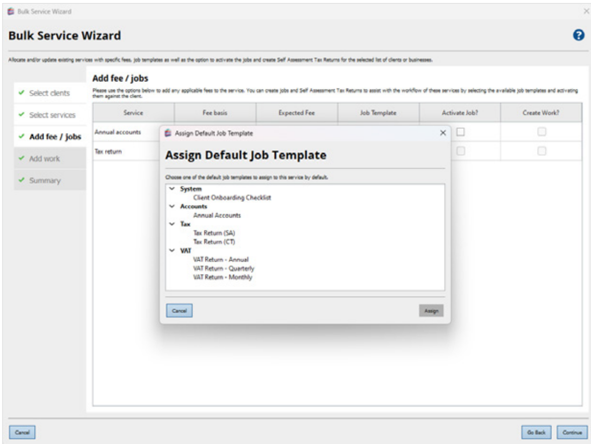
3. Select all the services you want to activate from the **Select services** tab.



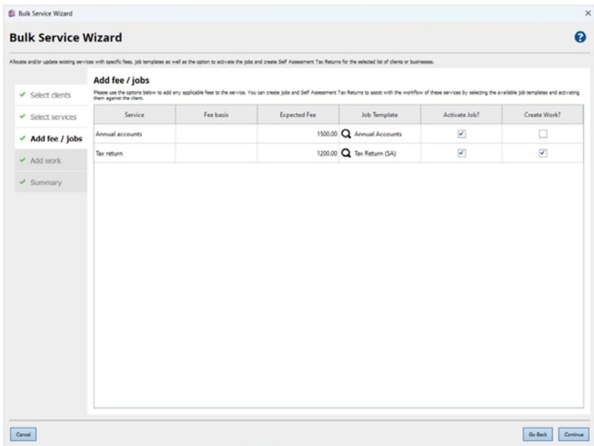
4. The **Add fee / jobs** tab allows you to add a **Fee Basis** and an **Expected Fee** for each service. You can also apply a **Default Job Template** and **Activate** each service for all your selected clients:



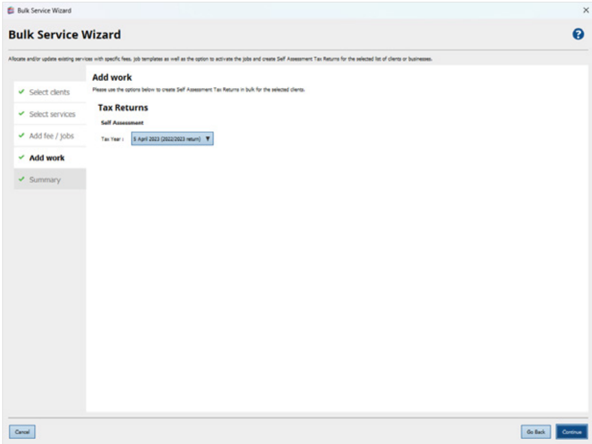
5. Select your newly created Job Template from the **Assign Default Job Template** list to link our Job Template to a specific service:



6. Add the **Fee basis, Expected fee** and select to **Activate** the service for all clients you have selected:



7. If you have selected to **Add Work**, you can select the appropriate work item:



8. Review your selections from the **Summary** tab and correct any errors where appropriate, then simply click **Update**.

> "We love the integration... it makes our lives a huge amount easier"
>
> **VN Accountancy**

Step 5

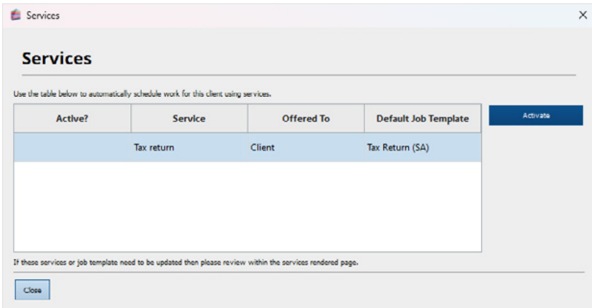
Activating a Job or Task for a Client

You can also choose to activate services for each client individually. Therefore, once your services have been set up and allocated to the client, you can manage the associated Jobs and Tasks within Practice Manager. From here you'll be able to see what Jobs and Tasks are active and activate any new ones.

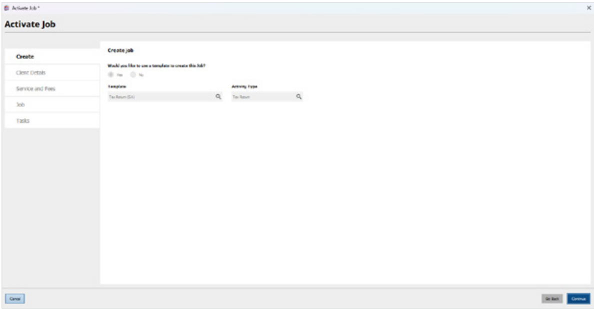
If you are already using Tasks in Practice Manager to manage your work, don't worry. Follow this guide to create your Job Templates, allocate to your Services and activate your Jobs, and when you are ready, simply de-activate your existing Task. For more information see KB2981 – Deactivating an Existing Task.

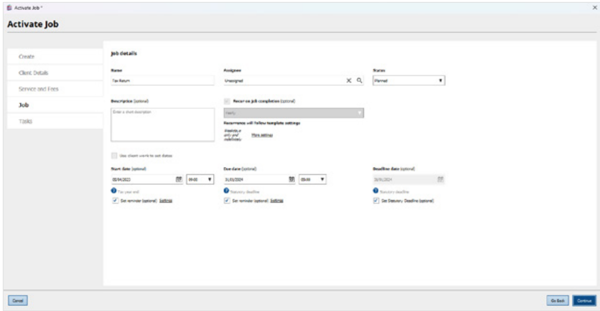
1. Select **Practice Manager** from the home screen and edit the client to activate the Job Template.
2. From the **Active Work** screen, you can manage any Jobs and Tasks associated with the client.

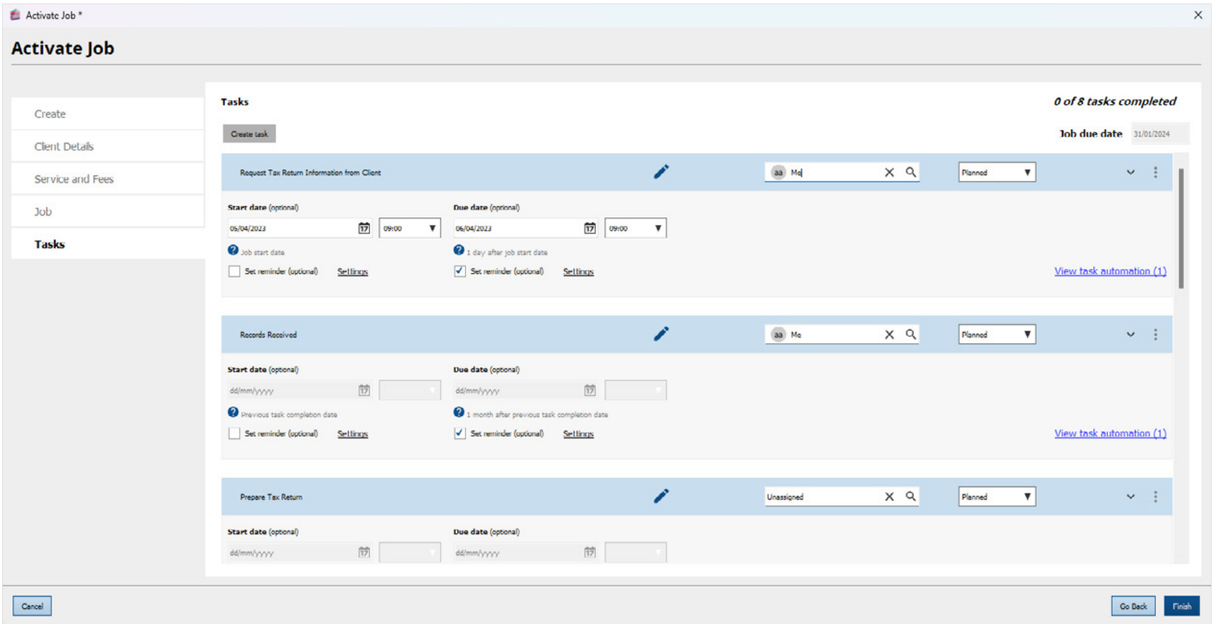
3. Click **Activate > Activate a Job** to activate the Job for the client:



4. The Job is now created using the Job Template where you can determine the settings required for the associated Tasks:

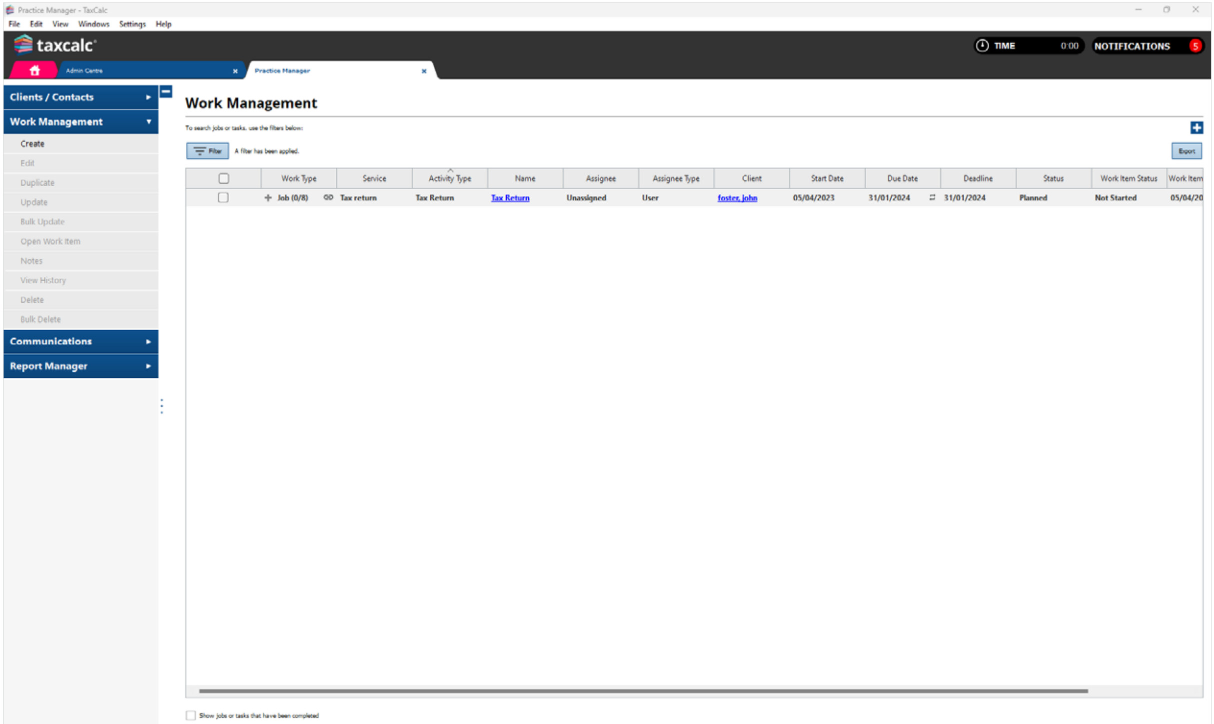






5. Click **Finish** to activate the Job.

6. Once activated, the Job is automatically scheduled and displayed in the client's Active Work screen and also within the Work Management screen:

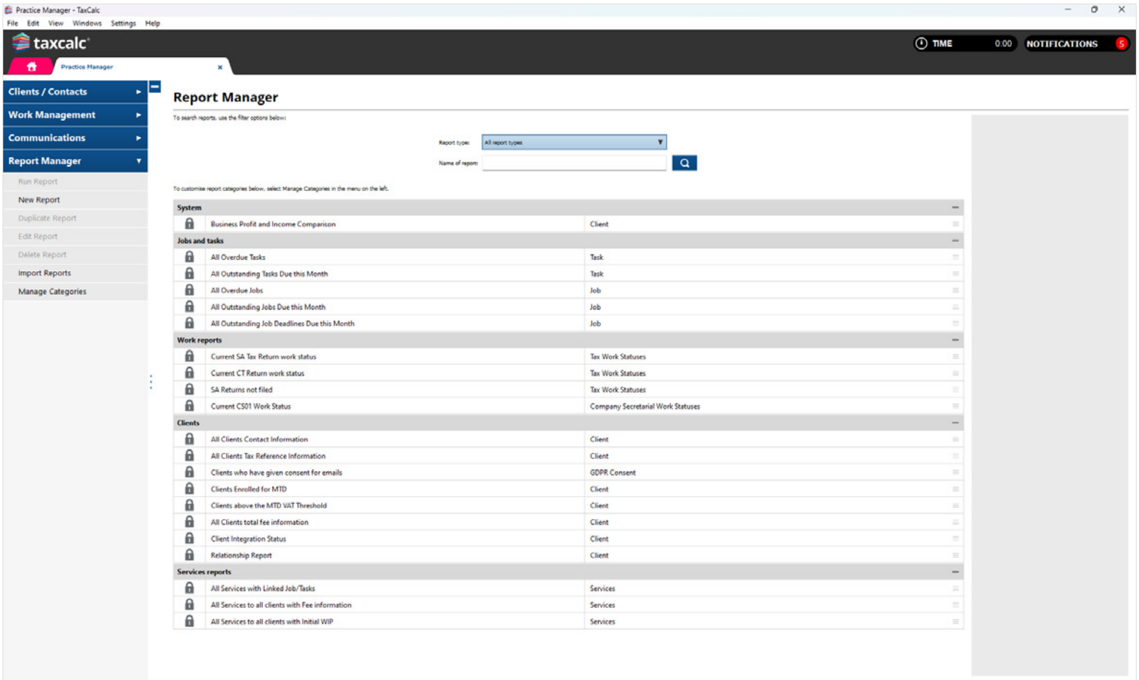


Step 6

Running Job or Task Reports

You can report on Jobs and Tasks to determine any overdue or outstanding Jobs or Tasks, as well as any services with linked Jobs. You can also customise and create new reports for your Jobs and Tasks.

1. In **Practice Manager**, select **Report Manager**.
2. Select one of the system default reports to review the specified Task, Job or Services information, or select **New Report** to create your own report if required:



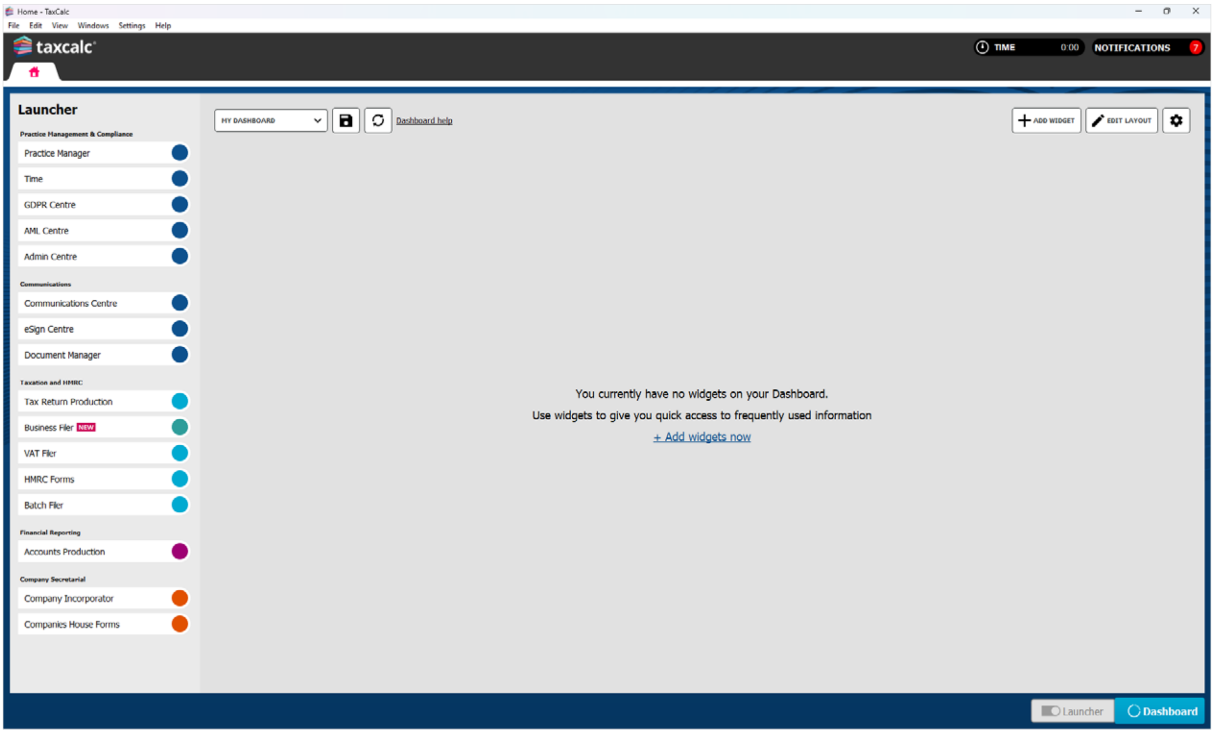
Step 7

Using Job and Task Widgets on the Dashboard

The Dashboard feature is a collection of widgets that can be added, removed, and grouped to enable fast navigation to relevant information. It shows data in a simplified structure, enabling greater efficiency for our Practice Manager users.

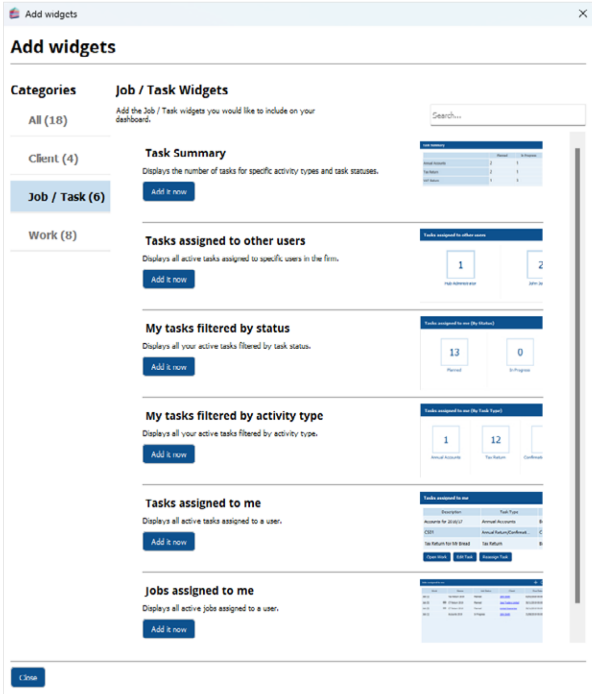
You can use Jobs and Tasks widgets to see at a quick glance which Jobs and Tasks are assigned to you or to other users and at what stage each one is at. You can then filter them by Task type and status or just view the Task summary to show a simplified view of the total number of Tasks for specific Task types and statuses.

1. Select **Dashboard** at the bottom right-hand side of the main TaxCalc screen to use the Dashboard view:



2. Select **Add Widget** to display the Add widgets dialog which details all the widgets that can be added to the dashboard.

3. Select the **Job/Task** tab:



4. Click **Add it now** to add a **Job/Task widget** to your dashboard: