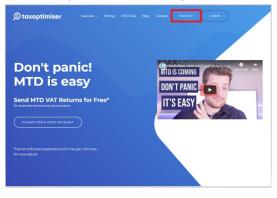


Accountant Setup Guide

Accountant Setup Guide	1
Signup	2
Setup - Create Organisations	3
VAT Settings Setup	5
Other System Template	5
Using your own format spreadsheet	6
Connecting up in demo mode	7
Uploading your file	9
Drag	9
Click	9
Checking and sending the data	11
Completed Return	12
Resetting the demo data	12
Switching to live mode	13
Connecting the live account.	14
Refreshing Data	17
Errors	18
Adding Organisation Individuals	19
Adding Additional Accountants	20

Signup

1. Click sign up in the top right hand corner.



2. Select Accountant/Bookeeper



Who are you

Accountant/Bookkeeper +
I submit on behalf of multiple organisations.
Trial period is free until you send your first real VAT return
Business/Organisation +
I submit on behalf of less than 2 organisation.
Includes first year free per organisation.
First year free starts from when you send your first real VAT return.

3. Sign up with your details

	(3)
	I am an accountant
Create a taxoptimiser account in 2	Br Firm Name
minutes	1 First Name 1 Last Name
No credit card required taxoptimiser offers a free account. We are building the future of tax tools to	© Email address
find savings, save tax and save time. Send Making Tax Digital VAT Returns and Self assessment.	Ja Password
	10 Reference
	Accept terms of service
	Signup +
	If you are an business owner sign up here tack to login form



Setup - Create Organisations

You will be presented with an initial dashboard >> click Organisations

© taxoptimiser	🗐 🌲 🚺 Michael Limie 🗸
Michael Little	FARIE Will be down for maintenance from Friday 15 March at 5 00pm to Tuesday 19 March at 8 00am. During this period you will not be able sign be able to sign up to MITD or subent VAT returns. We will still be running and all other aspects of the system will be running as normal
MAIN Dashboard	We are currently only processing VAT return for organisation on the MTD Pilot Scheme. We have a number of great features conting soon, if you have any questions please contact on heliogitaxoptimiser.co.uk.
Individual Clienta	VAT Returns To send VAT returns through Tax Optimiser you must complete the following steps.
 ♀ Firm Details > ▲ User > User > 	Coster for claim of the spinistic for more complete the neutring steps: Coster an organisation Coster an organisation Coster an organisation
	Bend your first VAT Return

Click Actions >> Add New

① taxoptimiser	≣			🌲 (🚺 Michael Little 🗸
Michael Little	Organisations			Actions ~
MAIN				+ Add New
Dashboard	Filter: Type to filter Q			Show 10 - entries C 📤 Bulk Upload CSV
En Organisations	Organisation	 Reference 	Notifications	C Action
🎍 Individual Clients)	No data available in table	
Firm Details >	Showing 0 to 0 of 0 entries			
L User >	Showing 0 to 0 to entries			
பு Logout				

Enter your details, only the VAT Registration No is required. Press Save at the bottom of the screen.

() taxoptimiser	≡		🌲 (Michael Little ~
Michael Little	Organisation		
	Organisation Name	Example Ltd	
Dashboard	Company Industry	Accountancy or book-keeping	*
Grganisations	Organisation Type	Limited Company	v
🛓 Individual Clients	Organisation Reference		
Firm Details	Company House No		
	VAT Registration No	666873590	
() Logout	VAT Scheme	Standard	*
	VAT Entity	Single Organisation	~
	Corporation Tax No		
	Company Paye Reference		
	Internal		
	Accountant	Not Selected	×
	Manager	Not Selected	×
	Partner	Not Selected	*
	Important Dates		
	Incornection Date	*	

You will now be presented with a sub menu indicated in red to navigate around the organisation account indicated in orange. To get back to the accountants main menu such as the list of organisation click on the menu indicated in green.

©				
	Example Ltd	Example Ltd	Connect to Accounting System 🛩	
		Organisation Name	Example Ltd	
	≣ ≓ Details	Company Industry	Accountancy or book-keeping	
ł	1 Individuals	Organisation Type	Limited Company ~	
¤ ≯	₩_ HMRC >	Organisation Reference		
	🗹 Notes	Company House No		
	← Back to Organisations	VAT Registration No	666873590	
		VAT Scheme	Standard ~	
		VAT Entity	Single Organisaiton ~	
		Corporation Tax No		
		Company Paye Reference		
		Internal		
		Accountant	Not Selected ~	

To add additional organisations, go back to the organisation list and click add new.

VAT Settings Setup

The organisation's VAT settings are stored per organisation.

If you are using a your own spreadsheet or a different format from our standard template click on HMRC >> VAT Settings.

Q	-					Michael Little 🗸
0		Example Ltd	VAT Return Settings			
		Overview	VAT Submission Software	Tax Optimiser	<u>۵</u>	
Ba		Details	Excel Template			
2		Individuals	Software Template (optional)	Select Template	~	
٠	¥	HMRC ~	(optional)			
1		VAT Returns	Excel Sheet Name (tab at the bottom of Excel	VAT		
ሪ		VAT Settings	NOT the filename)			
	Ľ	Notes	1. VAT Due on Sales Cell	B4		
	+	Back to Organisations	2. VAT Due on EC Acquisitions Cell	B5		
			3. Total VAT Due Cell	B6		
			4. VAT Reclaimed Cell	88		
			5. Net VAT Due Cell	B10		
			6. Total Sales Value Ex VAT Cell	812		
			7. Total Purchase Value	B13		

Other System Template

If you are using another systems format such as Sage 50, Sage 200, Access Dimensions, Quickbooks desktop etc.. Select it from the template and press Save.

Software Template (optional)	Select Template	^
	a	
Excel Sheet Name (tab at the bottom of Excel NOT the	Select Template	-
filename)	Sage 200 - CSV file	
1. VAT Due on Sales Cell	Sage 200 - Excel	
2. VAT Due on EC Acquisitions Cell	Account Master	
Acquisitions cell	Quickbooks Desktop	
3. Total VAT Due Cell	Tax Optimiser	
4. VAT Reclaimed Cell	Sage 50 - Excel	-
5. Net VAT Due Cell	B10	



Using your own format spreadsheet

If you are using your own format then you need to enter the sheet and cell references.

The sheet is indicated below in red. It is important that the names must match including spaces. The cell reference must match the relevant cell in the excel document.

		B 5- ∂-&++			W	TExample.xls	r - Excel	м	ark O'Grady			
		File Home Insert	Page	Layout	Formulas	Data F	eview \	liew He	lp Team	🖓 Tell	me ۶	2 Share
VAT		Paste	• 11 A	A =		General	6 , 🕎	Condition Format as Cell Styles		Cells	P Editing	,
		Clipboard 12 Font		rs Al	lignment	S Numbe	r G	St	yles			
B4		D3 * : ×	~	f _x								
		A		В	C	D	E	F	G	н	E.	
B5		1 2										
B6		3 Titles •	Value £	30.000.0	- 0							
00		5 VAT Due Acquisitions	£									
B8		6 Total VAT Due	£	30,000.0	0							
		8 Reclaimed VAT	£	10,000.0	0							
B10		9 10 NET VAT Due	F	20.000.0								
B12		10 NET VAT Due	£	20,000.0	0							
DIZ		12 Total Sales ex VAT	£	150.00	0							
		13 Total Purchases Ex VAT	£	50,00	0							
B13		14 Total Goods Supplied	£		-							
		15 Total Acquisitions Ex VA	т		-							
B14		16 17										
		18										
B15		VAT	+									
						Dis Dis	olay Settings	III	0 2	-	-	+ 10



Connecting up in demo mode

Click Connect to HMRC DEMO MODE

Ø	=		🜲 (Michael Little 🗸
0	Example Ltd	You are currently in demo mode and nothing will be sent to HMRC. If you are on the pilot scheme and we would like to send live returns click here.	×
	VAT Returns		Actions ~
Ba	≣ ≓ Details		
*	Individuals Connect to HMRC	· · · · · · · · · · · · · · · · · · ·	
•	W HMRC ~		
1	VAT Returns		
e ال	VAT Settings		
	☑ Notes		
	← Back to Organisations		

You will be presented with a screen for the dummy gateway. This is to simulate the steps you will go through when connecting up your real account to HMRC. Click Continue.

Dummy Gateway					
Test site					
THIS IS A DUMMY VERSION OF THE HMRC PLATFORM					
FOR SIMULATING TESTING WITH TAX OPTIMISER					
Because this is a dummy site nothing will be sent to the HMRC site. Tax Optimiser needs permission to interact with HMRC on your behalf. To grant this authority, you'll need to:					
 Sign in to your Government Gateway account. Grant authority to interact with HMRC on your behalf. 					
This authority will last for 18 months. You can <u>remove this authority</u> at any time.					
► Details					
Continue					
Cookles Privacy.policy Terms and conditions Hele using GOV.UK	© Tax Optimiser Copyright				

You will be presented with a login screen to simulate the HMRC gateway. You do NOT need to enter your credentials here, just press sign in and it will take you to the next step.

Dummy Gateway
Dummy Gateway
THIS IS A DUMMY VERSION OF THE HMRC PLATFORM
FOR SIMULATING TESTING WITH TAX OPTIMISER
This is a test site you just need to press sign in.
User ID testuser123
Password
Sign in

You will then be presented with a screen to grant authority. Click Grant authority.

Dummy Gateway

Authority to interact with HMRC on your behalf

The $\ensuremath{\text{Tax}}\xspace$ Optimiser software application is requesting to do the following:

- View your VAT information
- Change your VAT information

It will be able to do the above for 18 months from when you grant authority. Just press Grant Authority

Grant authority Do not grant authority

You will then be taken back to tax optimiser with some demo data. When you connect it in the live mode. We will populate this with your VAT returns from HMRC API. You can not enter your own VAT period dates. As you can see in the data 18A1 is Completed, therefore we can not submit our data against it. You will need to click on 18A2.

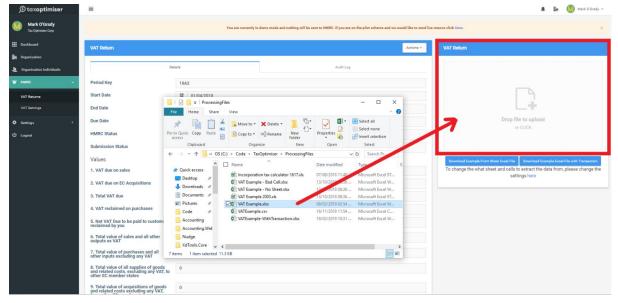
ø	=								Michael Little 🗸
0	Example Ltd		You are	currently in demo mode a	nd nothing will be sent to	HMRC. If you are on the p	pilot scheme and we would like	o send live returns click here.	×
	Overview	VAT Returns							Actions ~
Ba	🛱 Details		VAT Returns			Liabilites		Payments	
4	1 Individuals								
٠	₩ HMRC Ý	Filter: Type to filter	Q					Show: 10 Y Copy	Excel CSV PDF
L	VAT Returns	Period A Si	tart Date 📀	End Date	Due Date	Net Due	Return Status	Submission Status	Actions 3
	VAT Settings	18A1 0	1/01/2018	31/03/2018	30/04/2018	8000.00	Fulfilled	Completed	ď
	🗹 Notes	18A2 0	1/04/2018	30/06/2018	30/07/2018	0.00	Open	Confirmation of data required	ß
	← Back to Organisations	Showing 1 to 2 of 2 entries							- 1



Uploading your file

Drag

You can either drag your file on to the upload area





Click

click on the panel to open a file select dialog box and select the file you want to upload

👂 Open					×	ick Here.	
$\leftrightarrow \rightarrow \uparrow \uparrow \square$	This PC > OS (C:) > Code > TaxOptimiser >	ProcessingFiles	0 V	Search Proces	ssingFiles 🔎		
Organize 👻 New	folder				BE • 🔟 🕐	T Return	
Accounting	^ Name	Date modified	Туре	Size			
Accounting.Wel	Incorporation tax calculator 1617.xls	07/08/2018 11:48	Microsoft Excel 97	232 KB			
Nudge	VAT Example - Bad Cell.xlsx	13/10/2018 08:36	Microsoft Excel W	11 KB			
XdTools.Core	VAT Example - No Sheet.xlsx	13/10/2018 08:36	Microsoft Excel W	11 KB			
-	VAT Example 2003.xls	13/10/2018 08:36	Microsoft Excel 97	27 KB			
o Creative Cloud Fil	VAT Example.xlsx	09/02/2019 02:54	Microsoft Excel W	12 KB		1011	h .
🐉 Dropbox	VATExample.csv	16/11/2018 11:54	Microsoft Excel C	1 KB			ck horo)
oneDrive	VATExample-WithTransaction.xlsx	18/02/2019 10:31	Microsoft Excel W	478 KB			ck here)
This PC							CLICK
3D Objects							
Desktop							
Documents							
🖶 Downloads	÷					Jownload Example Front Sheet Excel File	Download Example Excel File with Transaction
F	ile name: VAT Example.xlsx		~	Customised	Files (*.xlsx;*.xls;*.xl ∨		o extract the data from, please change t ings here
				Open	Cancel	sett	ngs nere
0.00							
ases 0.00							
0.00							

It will then take a few seconds to upload the file

	You are currently in demo mode and	d nothing will be sent to HMRC. If you are on the pilot scheme and	ee would like to send live returns click Here.	
VAT Relam			VAT Return	
				L¥
				Drop file to upload or CLICK
				sample Front Sheet Event File Download Example Event File with Transaction the what sheet and cells to extract the data from, please change f
	0.00 Processing this may take a few s	second		settings here
			Send VAY Reserv	

The data will then be updated.

VAT Return				Actions ~
De	taila		Audit Log	
Period Key	18A	2		
Start Date	≣	01/04/2018		
End Date	ŧ	30/06/2018		
Due Date	≝	30/07/2018		
HMRC Status	Ope	n		
Submission Status	Con	firmation of data required		
Values				
1. VAT due on sales	200	0.00		
2. VAT due on EC Acquisitions	0.00)		
3. Total VAT due	200	0.00		
4. VAT reclaimed on purchases	112	.00		
5. Net VAT Due to be paid to customs or reclaimed by you	188	8.00		
6. Total value of sales and all other outputs ex VAT	100	00		
7. Total value of purchases and all other inputs excluding any VAT	560			
8. Total value of all supplies of goods and related costs, excluding any VAT, to other EC member states	0			
9. Total value of acquisitions of goods and related costs excluding any VAT, from other EC member states	0			
Is all the data correct?			_	
			Ser	nd VAT Return

Checking and sending the data

You then need to check the data and make sure it is correct and press Send VAT return

VAT Return				Actions ~
De	taila		Audit Log	
Period Key	18A	2		
Start Date	≣	01/04/2018		
End Date	=	30/06/2018		
Due Date	首	30/07/2018		
HMRC Status	Ope	n		
Submission Status	Con	firmation of data required		
Values				
1. VAT due on sales	200	0.00		
2. VAT due on EC Acquisitions	0.00)		
3. Total VAT due	200	0.00		
4. VAT reclaimed on purchases	112	.00		
5. Net VAT Due to be paid to customs or reclaimed by you	188	8.00		
5. Total value of sales and all other outputs ex VAT	100	00		
7. Total value of purchases and all other inputs excluding any VAT	560			
8. Total value of all supplies of goods and related costs, excluding any VAT, to other EC member states	0			
9. Total value of acquisitions of goods and related costs excluding any VAT, from other EC member states	0			
s all the data correct?			-	
			Se	nd VAT Return

You will then be presented with a declaration box to confirm the details. The notes are internal and Click Accept.

alse declaration can result in	prmation you are making a legal declaration that the information is true and complete. A
. VAT due on sales	2000.00
. VAT due on EC cquisitions	0.00
. Total VAT due	2000.00
. VAT reclaimed on urchases	112.00
. Net VAT Due to be paid o customs or reclaimed by	1888.00
. Total value of sales and Il other outputs ex VAT	10000
. Total value of purchases nd all other inputs xcluding any VAT	560
. Total value of all upplies of goods and elated costs, excluding ny VAT, to other EC tember states	0
. Total value of cquisitions of goods and slated costs excluding any AT, from other EC member tates	0
ote	
	Close Accept



Completed Return

If there are no error and HMRC accept your return you will receive a receipt with the Processing date, Payment indicator, Form Bundle Number and Charge Ref Number.

These are all generated by HMRC and the Payment indicator is the form of payment they have for you on file.

In the demo mode nothing is actually sent to HMRC.

	Audit Log		
		HMRC Processing Date	06/03/2019
18A2		Payment Indicator	BANK
		Form Bundle	256660290587
30/06/2018			aCxFaNx0FZsCvyWF
		Number	
Fulfilled			Print Rec
Completed			
2000.00			
0.00			
2000.00			
112.00			
1888.00			
10000			
560			
0			
0			
	a) 0.004x/0118 a) 0.007/2018 a) 0.077/2018 a) 0.077/2018 b) 0.077/2018 b) 0.077/2018 b) 0.077/2018 c) 0.077/2018 c)	B 20 040/01 H B 20 040/01 H Limited 2000/000 H	# 20 04.70 18 Number # 20 04.70 18 Charaber # 30 04.70 18 Charaber uttimet Charaber completed Charaber 2000 .00 Charaber 112.06 Charaber 0000 Charaber 300 Charaber

Resetting the demo data

In demo mode you can reset to the test data by clicking Actions on the VAT return screen and Reset Test Data

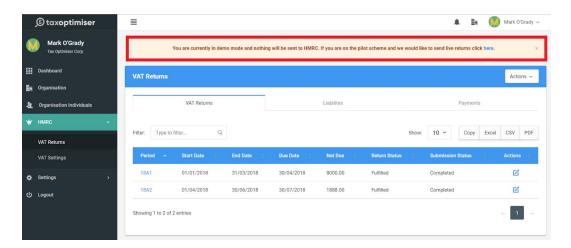
© taxoptimiser	≣							Ba 🚺	Mark O'Grady 🗸
Mark O'Grady Tax Optimiser Corp		You are currently in de	mo mode and nothin	g will be sent to HMR(C. If you are on the pi	lot scheme and we we	ould like to send live return	s click here.	×
Dashboard	VAT Returns								Actions ~
Organisation								₩ Rese	t Test Data
L Organisation Individuals		VAT Returns			Liabilites		P <mark>y</mark> n	Numu	
₩ HMRC ~									
VAT Returns	Filter: Type to	filter Q				:	Show: 10 ~ Co	ppy Excel	CSV PDF
VAT Settings	Period 🔷	Start Date 🔹	End Date 🔹	Due Date 💲	Net Due 💲	Return Status	Submission Statu	s \$	Actions 3
🗘 Settings >	18A1	01/01/2018	31/03/2018	30/04/2018	8000.00	Fulfilled	Completed		ß
ப் Logout	18A2	01/04/2018	30/06/2018	30/07/2018	1888.00	Fulfilled	Completed		ß
	Showing 1 to 2 of	2 entries							- 1 →

Switching to live mode

Before April you need to sign up to HMRC MTD Scheme.

https://www.gov.uk/guidance/sign-up-for-making-tax-digital-for-vat#sign-up

Once you have received email confirmation. You will need to click the banner on the VAT returns screen



Then click set to live mode.

axoptimiser Mark O'Grady	Live mode						ر ×		Mark OʻG				
ax Optimiser Corp board	mode all your retu	Please ensure you have received an email from HMRC confirming that you are on the HMRC Pilot. Once you set to live mode all your returns all your submission will be your actual live returns. If you need to sign up to the pilot scheme please click here											
nisation Individuals C ~						Close	Set to live mode	Payments					
Returns	Filter: Type to	filter Q					Show: 10 ¥	Copy Exc	el CSV				
Settings	Period ^	Start Date 💲	End Date 🔹	Due Date 💲	Net Due 🔹	Return Status	3 Submission	Status 💲	Actions				
igs >	18A1	01/01/2018	31/03/2018	30/04/2018	8000.00	Fulfilled	Completed		ď				
ut	18A2	01/04/2018	30/06/2018	30/07/2018	1888.00	Fulfilled	Completed		ď				
	Showing 1 to 2 of	2 entries							-				

Connecting the live account.

If you are using your Agent account for the first time then you will need to click using the Connect to HMRC using the agent account. If you are using the organisation account then click view and submit using the organisation account

Example Ltd III Overview III Details I Individuals III Individuals III HMRC VAT Returns VAT Returns VAT Settings III Notes III Returns	 Individuals W HMRC VAT Returns VAT Settings 	
 Details Individuals HMRC VAT Returns VAT Settings Notes 	 Details Individuals HMRC VAT Returns VAT Settings Notes 	Example Ltd VAT Returns
Betails ■ Individuals ■ HMRC VAT Returns VAT Settings C Notes	Betails ■ Individuals ■ MRC VAT Returns VAT Settings © Notes	Connect to HMRC Connect to HMRC
Individuals Image: Marketurns VAT Returns VAT Settings Image: Modes	Individuals Image: Marketurns VAT Returns VAT Settings Image: Marketurns Image: Marketurns	e Details using Agent Account 🦉 View and Submit (using 🍟
VAT Returns VAT Settings VAT Setting	VAT Returns VAT Settings VAT Setting	
VAT Settings	VAT Settings	¥ HMRC →
C/ Notes	Z Notes	VAT Returns
		VAT Settings
← Back to Organisations	← Back to Organisations	y Notes
		 Back to Organisations

You will then be taken the HMRC's gateway. Click Continue.



Authority to interact with HMRC on your behalf

- Tax Optimiser needs permission to interact with HMRC on your behalf. To grant this authority, you'll need to:
- 1. Sign in to your Government Gateway account.
- 2. Enter the 6 digit access code we'll send to your mobile phone, landline or other device.
- You might need to confirm who you are by answering some security questions on, for example, your passport, P60 or other documents.
- 4. Grant authority for this software to interact with HMRC on your behalf.

This authority will last for 18 months. You can <u>remove this authority</u> at any time.

If you're an agent

To use the Making Tax Digital APIs, sign in with the user ID and password for your agent services account.

To use the APIs that pre-populate a Self Assessment return, sign in with the account that's enrolled for Self Assessment for Agents - it's the same account you use to access the HMRC agent portal.

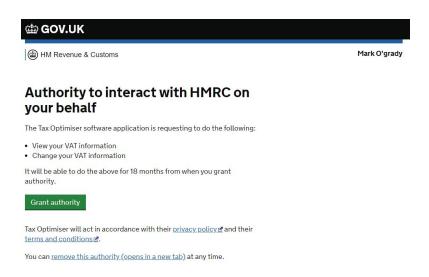




Enter your real gateway credentials

Hand GOV.UK
BETA This is a new service - your <u>feedback</u> will help us to improve it
Sign in using Government Gateway
Government Gateway user ID This could be up to 12 characters.
β.
Password
Sign in
Create sign in details
Problems signing in
I have forgotten my password
I have forgotten my Government Gateway user ID

At this stage it may ask you to set up more 2 factor authentication. This video explains the concept of 2 factor authentication <u>https://www.youtube.com/watch?v=OmvCeNsTa1g</u>. Once you get to the final screen, Press Grant authority, this allows our software to retrieve the data and submit data on your behalf.



You will then be presented with your VAT Periods. To select a period click on the period link in blue and follow instructions from <u>Uploading your file</u>

① taxoptimiser	=						A Br	Mark O'Grady
Mark O'Grady Tax Optimiser Corp	VAT Returns							Actions ~
Dashboard		VAT Returns		1	Liabilites		Payments	
Organisation								
Organisation Individuals	Filter: Type	o filter	Q				Show: 10 ~ Copy I	Excel CSV PDF
<pre>/ HMRC →</pre>	Period ^	Start Date 💲	End Date ု	Due Date 💲	Net Due ု	Return Status	Submission Status	8 Actions 3
VAT Returns	#001	02/11/2018	28/02/2019	07/04/2019	0.00	Open	Confirmation of data required	Ľ
VAT Settings	19B1	01/03/2019	31/05/2019	07/07/2019	0.00	Open	Confirmation of data required	C
Settings >								
Logout	Showing 1 to 2 o	f 2 entries						- <u>1</u>

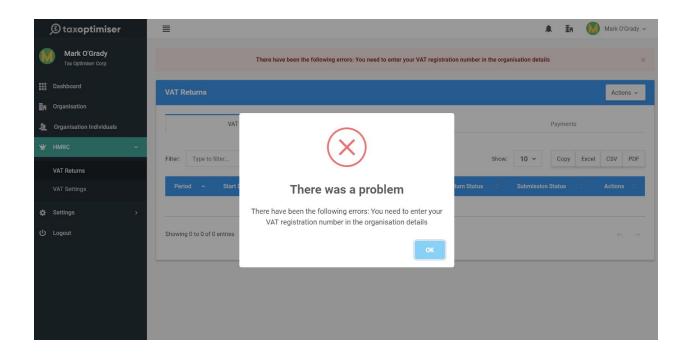
Refreshing Data

We intermittently refresh your periods however if your periods do not appear or you have fixed an error then click Refresh data

Mark O'Grady							A En 🕔	Mark O'Grady 🔨
Tax Optimiser Corp	VAT Returns							Actions ~
Dashboard	VAT Returns		Liabilites		Payr C Refresh data			
 Organisation Organisation Individuals 	Filter: Type to 1	filter	٩				Show: 10 ~ Copy Excel	CSV PDF
₩ HMRC Ý	Period 🗠	Start Date	End Date	Due Date	Net Due 🔅	Return Status	Submission Status	Actions
VAT Returns	#001	02/11/2018	28/02/2019	07/04/2019	0.00	Open	Confirmation of data required	ß
VAT Settings	19B1	01/03/2019	31/05/2019	07/07/2019	0.00	Open	Confirmation of data required	ß
호 Settings > 신 Logout	Showing 1 to 2 of 2	2 entries						← 1 →

Errors

If you there are any problems you will receive an error. With an explanation. You then just need to fix the error. If it does not make sense then please contact our support support@taxoptimiser.co.uk



Adding Organisation Individuals

You can give clients access to their organisations. Within the organisation click on individuals and Add New. They will only be able to see organisations that they belong to.

Q	≣			🜲 🕔 Michael Litt	tle ~
0	Example Ltd	Individual User		Add Ne	ew
		Filter: Type to filter Q		show: 10 - Copy Excel CSV PI	DF
Bn 2	1 Individuals	Individual User	^ No data available in table	Actions	0
۰ ۱	≌ HMRC >	Showing 0 to 0 of 0 entries		-	\rightarrow
ц С	← Back to Organisations				

You only have to enter the first name, last name and email address and specify to Send Credentials. The user will then receive an email with a link to create a password.

ø			
•	Example Ltd	Client	
	Overview	First Name	Mark
 Ba	🖬 Details	Last Name	Jacobs
-n -	1 Individuals	Email	mark.jacobs@taxoptimiser.co.uk
•	₩ HMRC >	SendCredentials	8
1	C Notes	Phone Number	7879775840
с U	← Back to Organisations	National Insurance Number	
		Personal UTR	
		Address Line 1	5 Kings Road
		Address Line 2	
		Address Line 3	
		Address Town	London
		Address Postcode	SE1 2EE
		IncomeTaxCode IsDefaultTaxCode	
		TakeHomePay	0
			·
			Save

The rest of the details will be used later for self assessments.

Adding Additional Accountants

) taxoptimiser 🛕 🛛 🚺 Michael Little 🗸 Michael Little Add New Filter: Type to filter... Q Show: 10 - Copy Excel CSV PDF Dashboard Organisations AccountantUser ^ Action Individual Clients Michael Little 6 🔅 Firm Details 1 Showing 1 to 1 of 1 entries 🖆 Firm Support Cases 🧕 Users L User ل Logout

Click on Firm Details >> Users and Add New

You only have to enter the first name, last name and email address and specify to Send Credentials. The user will then receive an email with a link to create a password.

) taxoptimiser	≣	🌲 (Michael Little 🗸
Michael Little Accountant1	Accountant	
MAIN	First Name Jessica	۵.
Dashboard	Last Name Preston	
. Organisations	Email jessica.preston@taxoptimiser.co.uk	
🎍 Individual Clients	SendCredentials Ø	
🖨 Firm Details 🗸 🗸		_
🛱 Firm		Save
Support Cases		
🧕 Users		
L User >		
ල් Logout		