

# Keytime Getting Started Guide

2015

# THANK YOU

Thank you for purchasing the Keytime software. We look forward to working with you and maintaining a long lasting working relationship..

The purpose of this booklet is to help you get started with the software. The first two pages of the guide will assist you with the installation process. The pages that follow will then give you some basic instructions for each of the Keytime modules.

This will include, creating a tax return and sending a set of accounts to Companies House.

We hope you find this guide useful and informative. If you have any questions then feel free to call us on 0161 484 3500, or you can visit our website for more information - [www.keytime.co.uk](http://www.keytime.co.uk)

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## DOWNLOADING THE SOFTWARE

You can download the Accountants' Suite using either a download link or a CD.

The download link is always updated when a new release of the software is available. The full install link is released in April and allows you to install the Keytime Accountants' Suite which includes:

- Accounts Production
- Corporation Tax
- Payroll
- Personal Tax
- Practice Manager
- P11D
- Trusts

There are regular updates to the software throughout the year, you will be able to obtain these with no extra added cost. This is to ensure you always have the latest features and are using the software to its full potential.

If you need details of the latest update or download link then contact Support on 0161 484 3500

## CD INSTALLATION

The second way to install the software is by using the CD. The installation disk will be sent to you in April and will allow you to install the Keytime Accountants' Suite which is the same installation as the download link except on a disk for your convenience.

As previously mentioned, regular updates are released introducing new features and fixing problems reported by our customers. You can request for these updates to be sent to you on a disk, just speak with your Account Manager and they can arrange for the disk to be sent to you in the post the same day.

The pages that follow will illustrate the installation process, use this as a guide and follow this whilst you do the same.

# INSTALLATION

You can download the Accountants' Suite using either a download link or a CD.

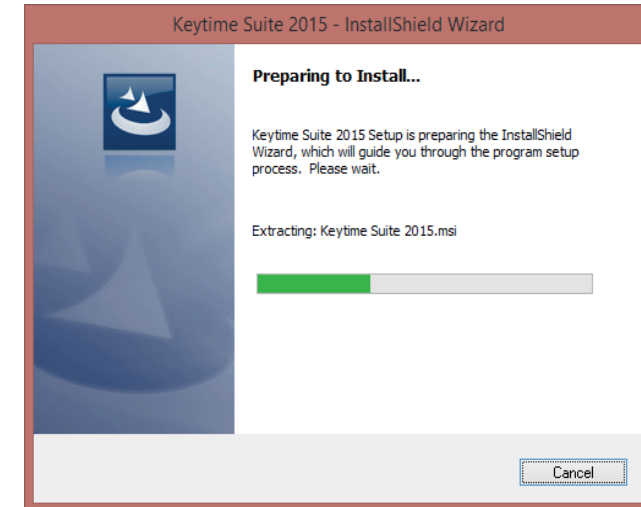
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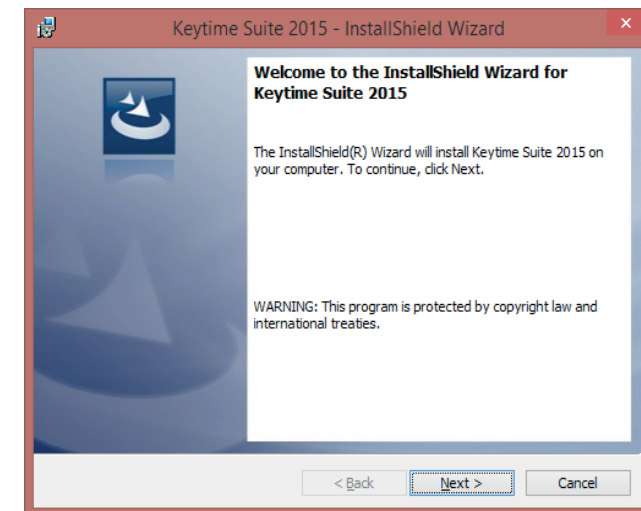
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# INSTALLATION

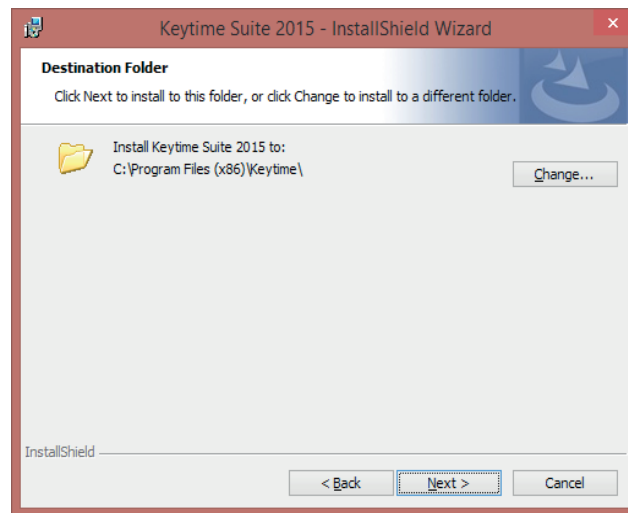


1) Start the installation

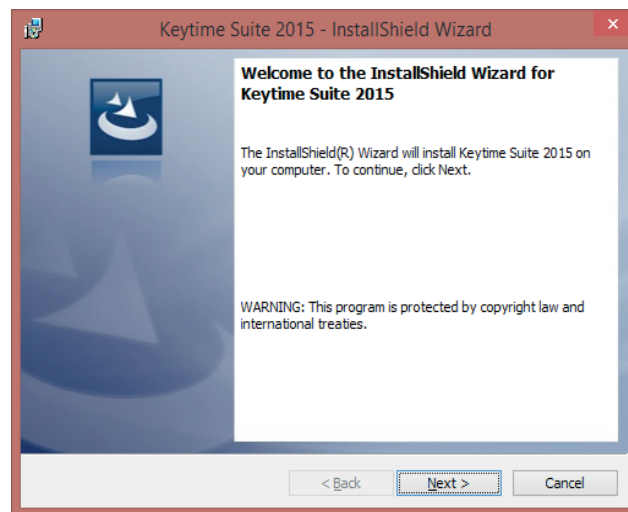


2) Click next

# INSTALLATION



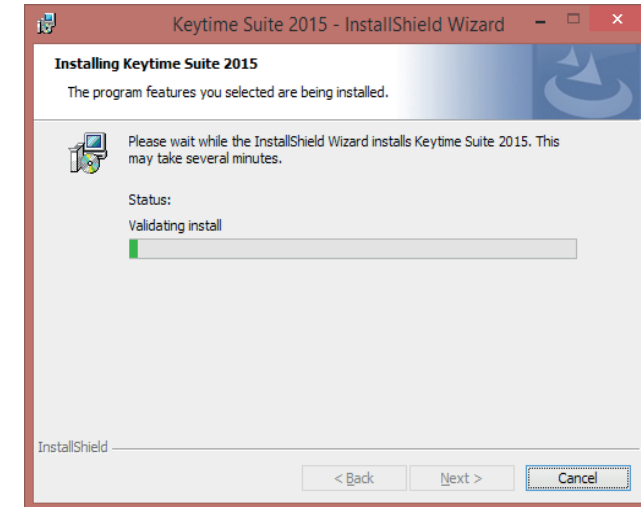
3) Click change to amend the installation location or click Next



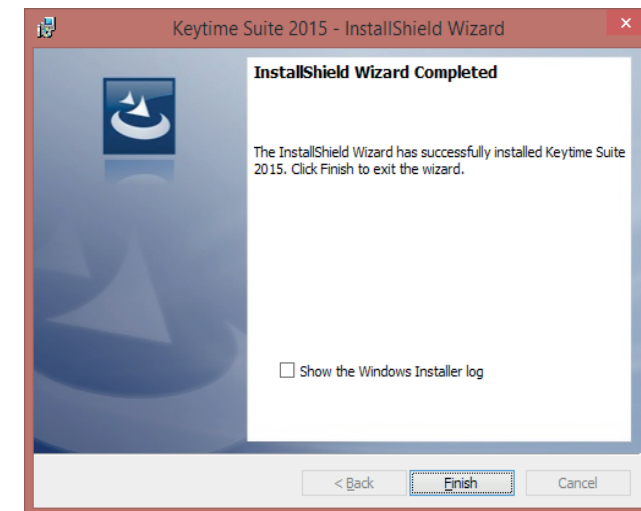
4) Click change to amend the data path or click Next

N.B - If you are a running a network installation then you would need to point the data to the network location

# INSTALLATION



5) The installation will then begin and take between 10-15 minutes



6) When the installation is complete you will see the Finish prompt

## REGISTRATION VIA INTERNET

- Open Practice Manager
- Go to File > Register
- Select the internet option under Step 1
- Enter your registration username in Step 2  
(This will be Obj- \*\*\*\*\*)
- Enter your password in Step 3
- Click Register
- You should then be able to see a list of registration codes available for the products which you have purchased.
- Tick the boxes under the activation column
- Click Save
- You will then receive a prompt stating your products have been successfully registered.

## TEMPORARY REGISTRATION

When you initially purchase the software, you may be provided with a temporary registration code which lasts 2 weeks. This provides you with full access to the software until your permanent codes are available:

- Open Practice Manager
- Go to File > Register
- Select the Phone option under Step 1
- Enter the Registration Code provided in Step 2
- Click Register
- You will then receive a prompt stating your products have been successfully registered

## PRACTICE MANAGER

- Practice Manager enables you to access any of the Keytime programs, making it easier for you to switch between which program you want to use.
- We would advise that you create your clients in Practice Manager. You can add a job which promptly creates the client in Personal Tax, Corporation Tax, Accounts Production or any other Keytime product.
- It is important that you integrate the products in order for the data to be linked to each product. To do this:

Open Practice Manager

Go to Tools > System Integration > Link to Modules

Tick the relevant boxes and click Save.

- When you purchase the Keytime software you will receive the free version of Practice Manager which contains the basic features. However if you want access to a host of additional features including Time & Fees and Communications then you can purchase the feature-rich version of Practice Manager for only £515.

## CREATING A TAX RETURN

- Open the Personal Tax program
- Click the create return button
- Choose the tax year and the type of the return: Individual or Partnership
- Click create
- Fill in your personal details
- Choose your supplementary pages
- Click finish
- You will then have the choice to create this return as a client in Practice Manager. We advise you click Yes here as this will avoid duplicates of your clients being created.
- You will then have the option to complete a 64-8 there and then. This is your choice and is for your convenience

## CREATING A SET OF ACCOUNTS

- Open Accounts Production
- Click the New button
- Select the type of accounts you want to produce:
  - Sole Trader
  - Partnership
  - Small Limited Company (ltd by shares)
  - Small Limited Company (ltd by guarantee)
- Fill in the information required
- Click Save & Close

## CREATING A COMPANY/EMPLOYEE IN KEYTIME PAYROLL

- Open Keytime Payroll
- Go to File > New Company
- Enter the company name and click Create
- Complete the information on the various tabs
- Click Save & then close the dialog box
- Click the Add button and this will allow you to Add a new employee
- Enter information in Personal Details, Financial Details, Additional Information, Pay Elements and Attachment tabs.
- Click Save



## CREATING A SET OF ACCOUNTS IN ACCOUNTS PLUS

- Open the Compac software
- Click the Accounts option from the Menu
- Click New Client
- Enter a reference for this client
- Select Yes to confirm the creation of your new client
- Enter the full client name to appear on screen and working papers
- Enter the year- end date of the accounts
- Click Yes to the prompt
- Enter LTD if the client is a Limited Company or PNR if the client is a Partnership
- Your accounts have now been created.

## CONTACT US

- Call us on 0161 484 3500
- Visit our website for more information - [www.keytime.co.uk](http://www.keytime.co.uk)
- Support | [www.support.keytime.co.uk](http://www.support.keytime.co.uk) or email [support@keytime.co.uk](mailto:support@keytime.co.uk)
- Tweet us - @KeytimeTweets
- Write to us at our registered office:

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