



Getting Started Guide 2016



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, registering the software and creating clients. 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

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DOWNLOADING THE SOFTWARE

The easiest way to install the software is to download it from our website.

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 it's 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.

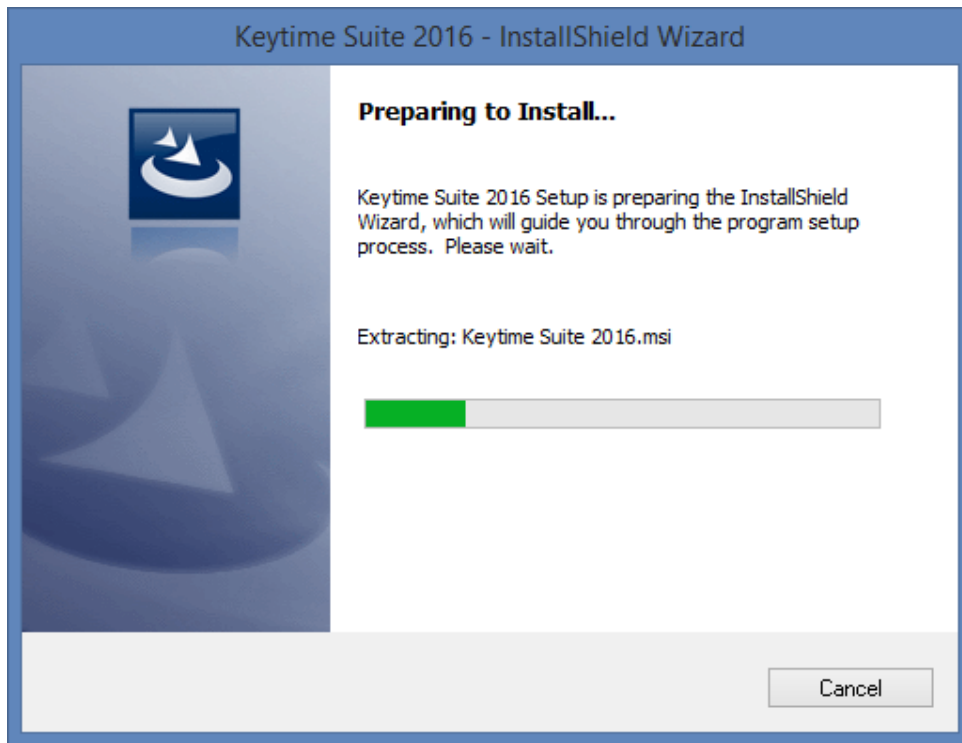
When you insert the disk into your computer, it may auto –run the install or you can open the disk in Windows Explorer to run the install manually.

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.

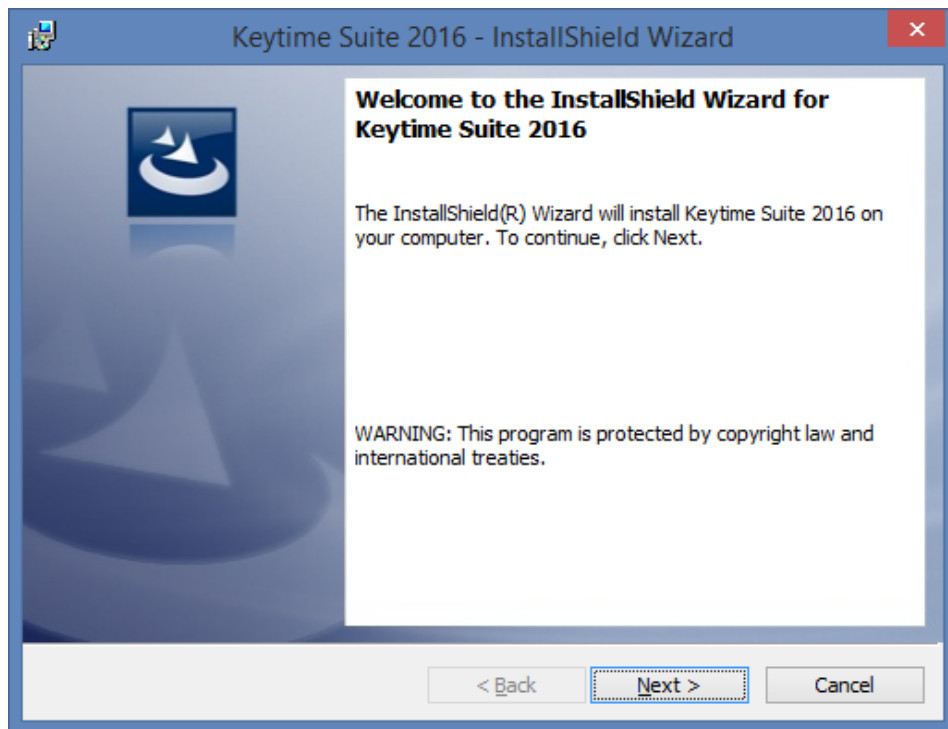
INSTALLATION

1) The Installation will start to run

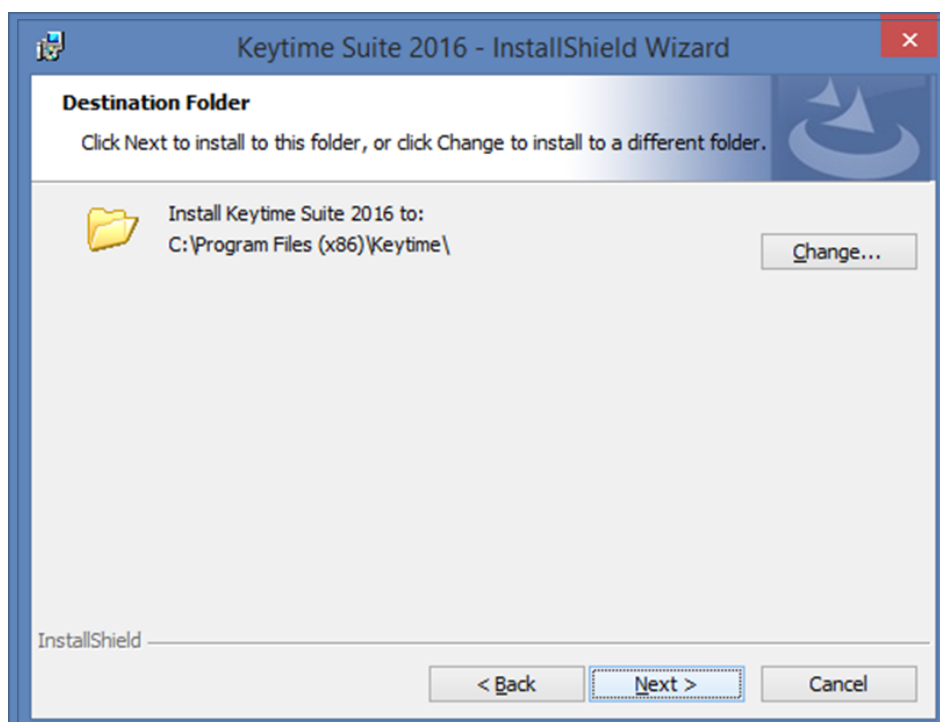


2) At this point you may get a Microsoft Installation Prompt, please accept this and let it run through

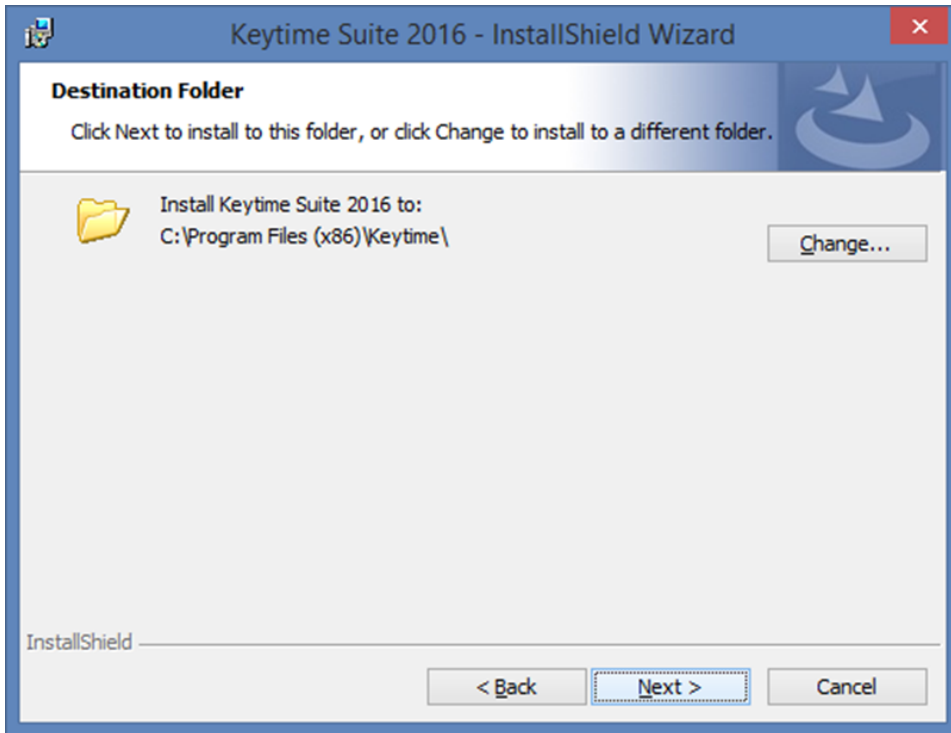
3) Press Next to start installing



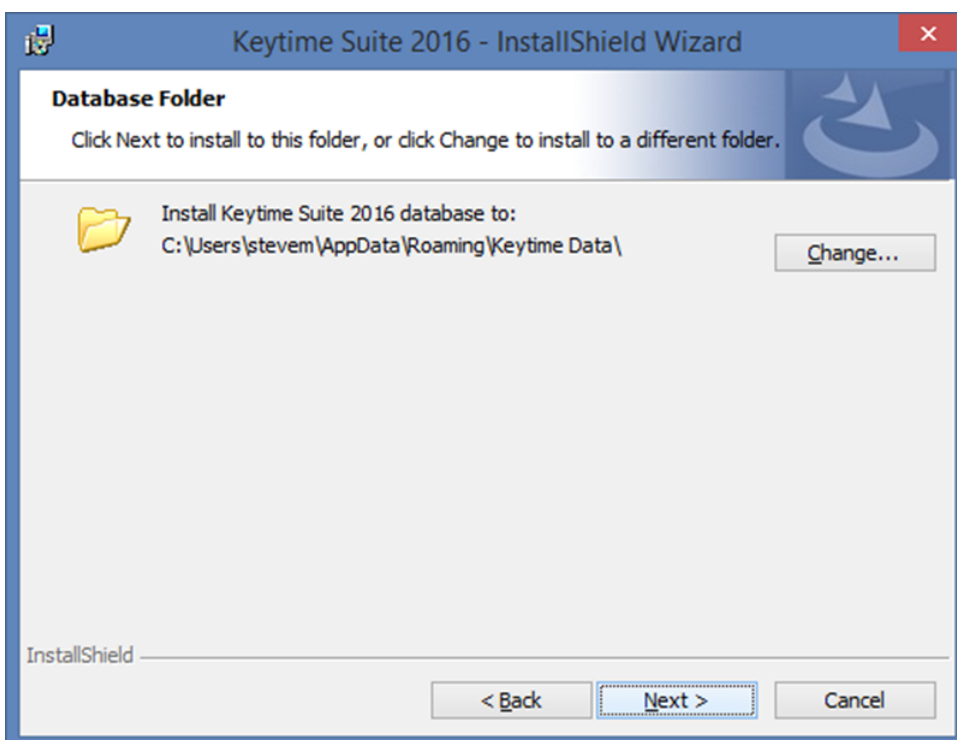
4) Press Next to start installing



5) Click Change to amend the installation location, then press Next

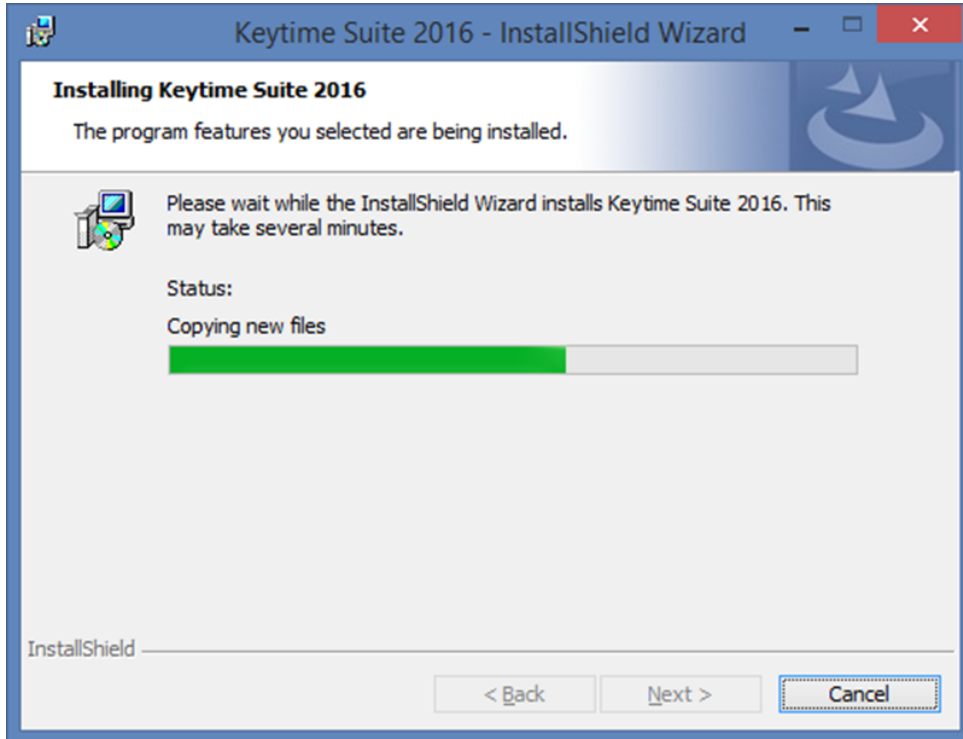


6) Click Change to amend the data location, then press Next



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

7) It will take 5-10 minutes to install the software



8) When the installation is complete, you will see the Finish prompt



REGISTRATION VIA INTERNET

- Open Practice Manager
- Go to File > Registration
- Enter your registration username in Step 1
(This will be Obj- *****)
- Enter your password in Step 2
- 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 > Registration
- Click on Two Week Trial Key
- Enter the Activation Key that was provided
- Click Activate
- You will then receive a prompt stating the trial codes were added

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.
 - To add a client in Practice Manager, click the Add button in the top left hand corner.
 - Fill in the required information such as Client Name and Address or if it is a Company, enter the Registered Number and Click Data Check to pull down a few basic pieces of information from Companies House
 - Click Save to create the client
 - You can then send this information across to the other Keytime Packages by clicking on Jobs, click Add and Select the module or Job you wish to add to the client such as Accounts Production or SA100
- 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 £541.
- Whilst we recommend that you create your clients in Practice Manager, you can also follow the instructions on the following pages to create the clients directly into the modules instead.

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 to 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
 - LLP
 - Small Limited Company (ltd by shares)
 - Small Limited Company (ltd by guarantee)
 - Charity (Please see information below regarding the Charity Accounts)
- Fill in the information required
- Click Save & Close

CHARITY ACCOUNTS

There is also a charity account format available from as little as £78. If you have Charities registered, you will be given the option to choose Charity when selecting the type of accounts required.

If you do not have Charity available as an option and you require it, please contact us on 0161 484 3500.

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
- Support | www.support.keytime.co.uk or email support@keytime.co.uk
- Tweet us - @Keytime

- Write to us at our office:

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