

Keytime

Getting Started Guide

THANK YOU

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

This guide will help you get started with the software; we will guide you through the installation and software registration process, entering your practice details, setting up staff and offer some basic instructions on how to add clients and jobs. We hope you find this guide useful, full software user manuals and various other resources can be accessed or downloaded from support.keytime.co.uk. If you have any questions, please do call us on 0344 815 5560

DOWNLOADING THE SOFTWARE

A full installation of Keytime software, which includes all modules, is available to download from our support website:

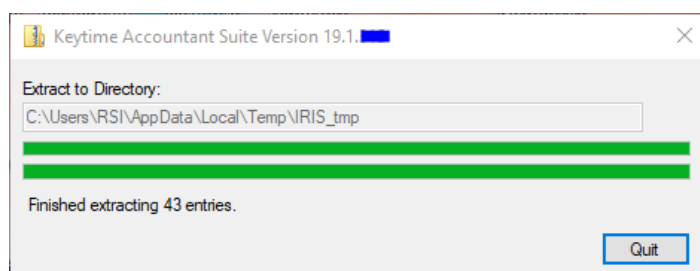
<https://kb.keytime.co.uk/keytime/keytime/latest-version-numbers>

> Getting Started

Software updates are issued periodically throughout the tax year, these may contain general enhancements, new features and fixes for defects reported. The software will prompt you when an update becomes available and you will be invited to download and install it. We publish release notes with every update and these are published on Knowledge Base: <https://kb.keytime.co.uk>

INSTALLATION

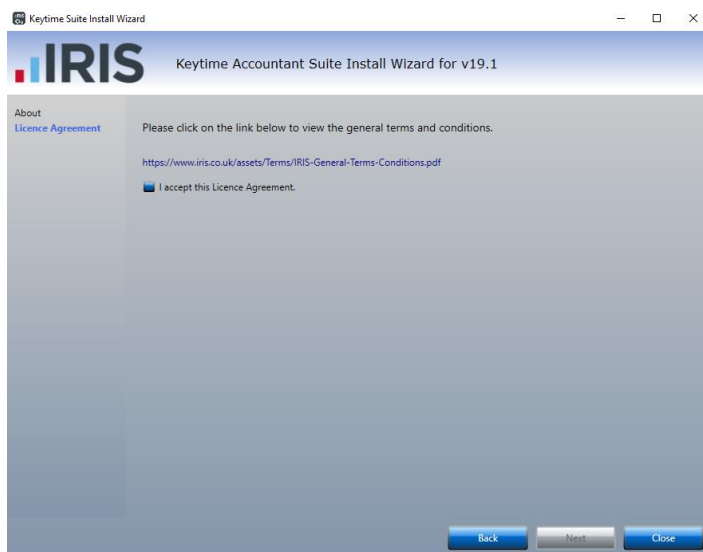
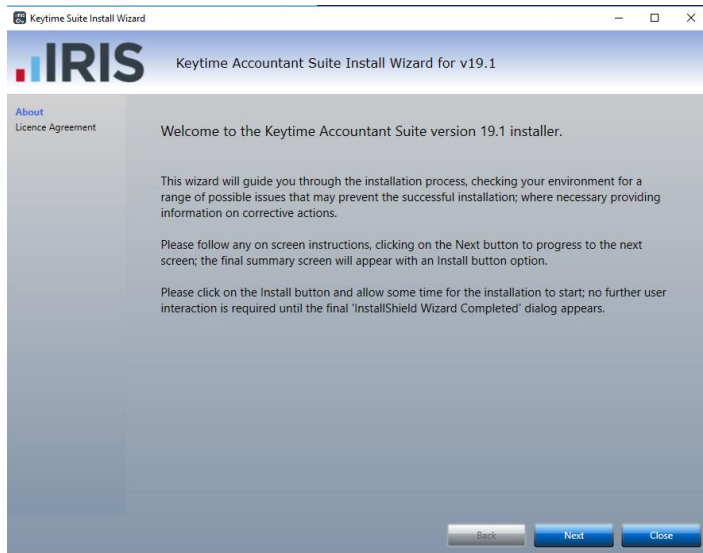
1. Once you have downloaded the installation, locate the downloaded setup.exe (normally in your Downloads folder) and run it on your PC. Click (double click) to run the downloaded file, the installation will commence:



If you see a Microsoft installation prompt, please accept this and wait for the file extraction to complete.

Multi-user installations: You must install the software on each PC needing to run it. For your convenience, download or copy the installation into a location accessible to all PCs; we recommend copying it from the central location to the individual PCs before running.

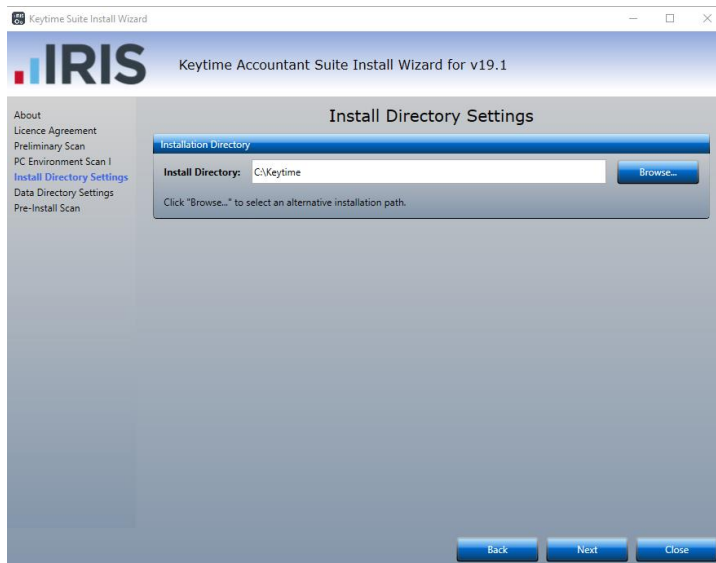
2. Accept any prompts coming from Windows, do not allow your anti-virus software to block internet access (you won't be able to file returns), press Next to start the installation process and accept our Licence Agreement on the following dialog



Note a series of tests are then run on the PC prior to the installation starting; continue through the Test dialogs. Any test failures can be saved via the *Save Results* button that appears on each page; the file can then be emailed to our Customer Services Team.

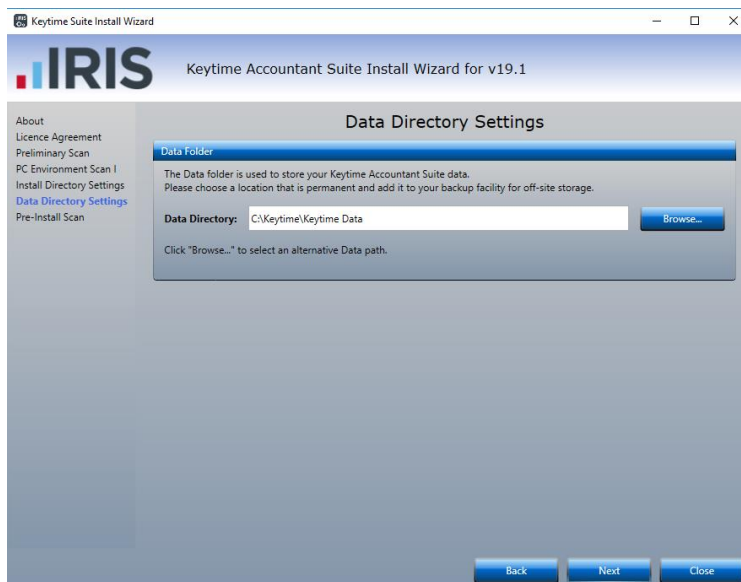
3. The software will install into the existing locations on an upgrade or default to C:\Keytime for new Workstation installations. When upgrading, click on Install button displayed on the summary screen; no further user input is required until the installation is completed.

For new Workstations, the option to select the installation directory is provided; click Next to accept the default (recommended)

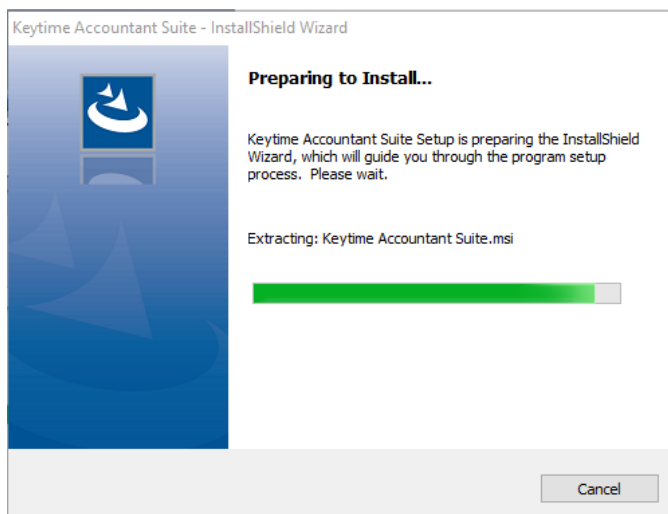


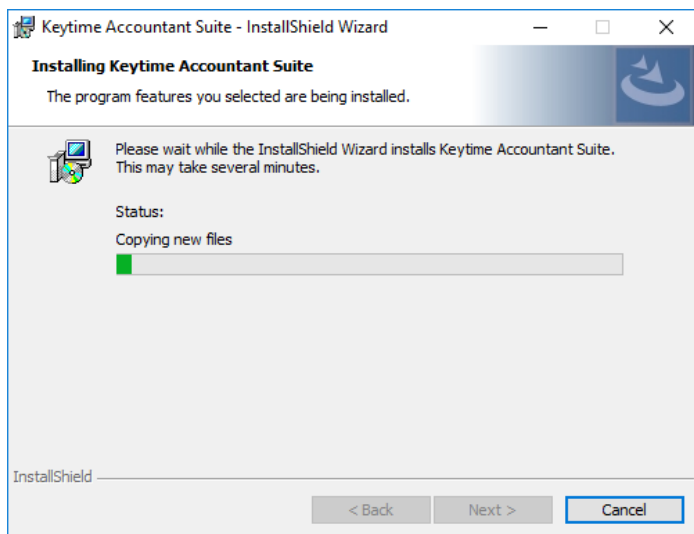
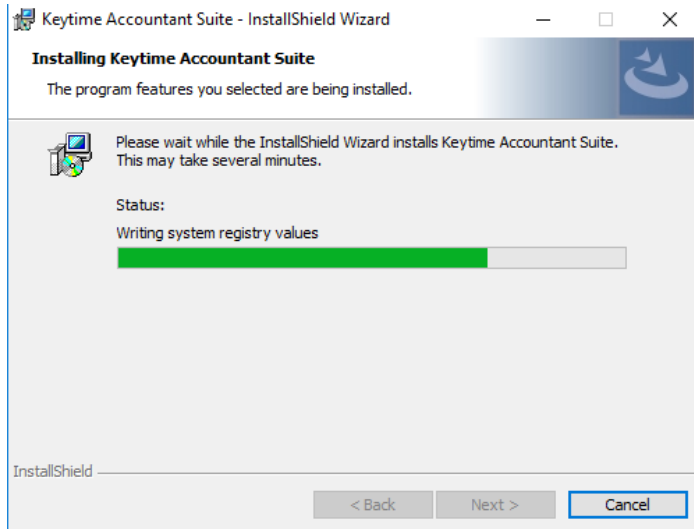
4. Single user installations: The databases are installed by default on the C drive of your PC, click **Next** and continue with the installation.

Multi-user installations: If you are installing the software for multiple users and you want to share the data, you will need to install the databases into a location that can be accessed by all users. This would normally be a location on your server with full read/write permissions for everyone. Please ensure you have a mapped drive to this location – a UNC path is unsuitable and may cause problems with the operation of the software. If you are unsure about any aspect of this step your IT administrator should be able to help. Click Browse and select a suitable location using the options provided, click **OK** and then **Next** to continue:

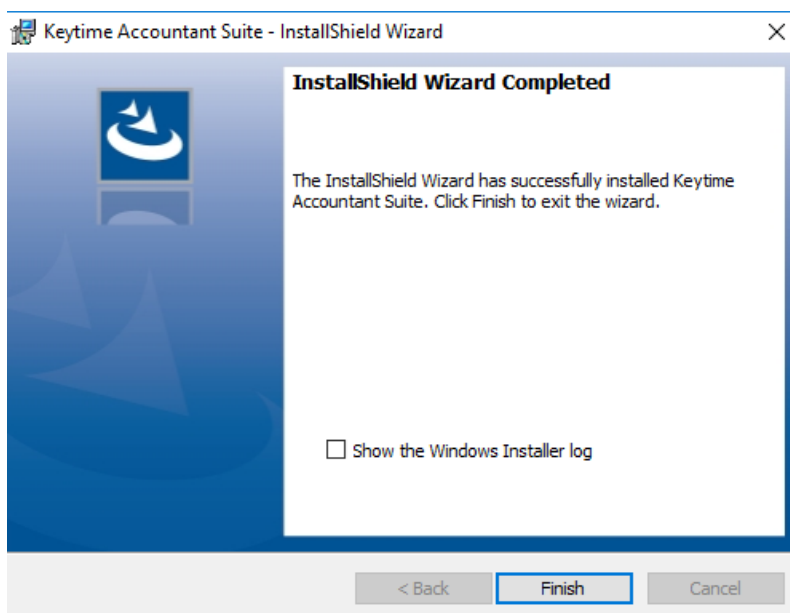


5. A further dialog ensures all paths are valid, click Next to show the Summary dialog. Click on Install after reviewing details; the software will start to install and may take a few minutes to unpack installation files and show the progress dialogs, no further user input is required until the installation is completed.





6. When the installation is complete click Finish:



REGISTRATION

The software is registered in the Practice Manager module, registration codes are made available via our on-line registration system and will be available for you to download. The software will prompt you to re-register on each anniversary, again, licence codes are made available for you to download. To register:

1. Open Practice Manager
2. Click File > Registration
3. Enter your registration user name in step 1 and your password in step 2 (both user name and password can be found in the email you were sent)
4. Click Register
5. You will see a list of registration codes available for the products you have purchased. Tick the boxes under the activation column
6. Click Save, you will see a message stating your software has been successfully registered.

PRACTICE MANAGER

Every installation of Keytime software includes a free to use version of Practice Manager that contains the basic features as well as being a launch point for VAT Filer. A host of additional features such as workflow and deadline tracking, time sheets, data mining and communications is available to purchase along with Company Secretarial functionality. See the brochure or speak to your account manager for details.

Your Practice Details

Enter your practice details in Practice Manager:

1. Click File
2. Click Practice Details
3. Enter your practice details, name and address etc. and click Save

Setting up Staff, Passwords and Permissions

You can setup staff records and apply permissions. If you don't have staff you can skip this step, but you might want to consider adding a password to the system. First a look at security groups. The software installs with a basic user security group, any staff added will be automatically assigned to this group. To create security groups and review settings:

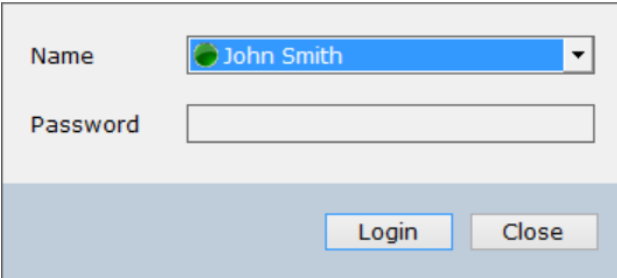
1. Click File, click Options, click Security Groups
2. To create new group click Maintenance, click Add, enter a name for the group
3. Review the permissions in the group; tick/untick as required
4. You can prevent/allow on-line submissions by ticking/unticking Disable e-filing
5. Prevent/allow access to Company Secretarial functionality by ticking/unticking Company Secretary full access
6. Click Save to create the security group

To setup staff:

1. Click File, click Options, click Staff, click the Staff button
2. Click Add Staff
3. Enter the name and a code (the system uses this to identify a staff member)
4. Click the Level field: Supervisor has access to all areas of the system including the system setup. Choose a type.
5. Select a security group
6. Click Save

Passwords

Once you create user profiles, the system will ask for a user name and password. If you don't set passwords for users you will be prompted to select a user name, but the password field is disabled. Click Login:



The image shows a login dialog box with a light blue header and a white body. The 'Name' field is a dropdown menu with a blue highlight and a small downward arrow, showing 'John Smith'. The 'Password' field is a simple text input box. At the bottom, there are two buttons: 'Login' and 'Close'.

Passwords can be set for each member of staff, you set a password whilst logged in as a particular user:

1. Click File, click My Settings
2. Scroll down to Password, click Change
3. Enter the password, enter again to confirm

Creating Clients

Practice Manager is the hub of your practice, it allows you to manage staff, jobs and clients; it stores your client records and distributes client data to the other modules. For example, you create a client record in Practice Manager and add a Tax job, the tax return complete with all static data from the client record will be created for you in the Tax module. If you change client details, e.g. name or address in the Tax module the client record in the Practice Manager module is also changed.

To create a client record in Practice Manager:

1. In the main Client grid, click the Add button in the top left corner, select the appropriate client type (individual, partnership, limited company etc.)
2. Fill in the required information, the fields marked with * are mandatory
3. Click Save to create the client. If you have registered the Company Secretarial module you may be prompted to add a Company Secretarial job
4. Basic company and LLP data can be downloaded from Companies House without registering the Company Secretarial module – all you need is the company registration number. Click Data Check to download data into the client record, the fields populated will be highlighted in yellow, click Save.

Once you have your client created you can add jobs, which will create returns etc. in the modules. Proceed as follows:

1. Double click the client record in the main client grid to open the record
2. Click the Jobs tab
3. Click Add, select the job you require
4. SA100, SA800 and SA900 jobs will prompt you to select the tax year. CT600 and Accounts Production jobs will prompt you for accounting period start and end dates
5. Click Start to add the job
6. You can access any of the Keytime programs from Practice Manager, highlight (click) a client record on the main client grid and then click the module which contains the client job, the module will open and you will land on the client record. Alternatively, from the client record click the Jobs tab, click the job you want to open and click Launch

CONTACT US

- Call us on 0344 815 5560
- Visit our website for more information - www.keytime.co.uk
- Browse <https://kb.keytime.co.uk/keytime/keytime> or email support@keytime.co.uk
- Tweet us - @KeytimeTweets
- Write to us at our office: Keytime Limited

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