Sage

Control Centre

Getting Started Guide

sage

Sage (UK) Limited
North Park
Newcastle upon Tyne NE13 9AA
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Acknowledgement

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Chapter 1

Welcome

Control Centre is the administrative hub of Sage Taxation. There are certain tasks you will need to carry out in Control Centre before you can start using the other Taxation programs, such as creating a Dataset and setting up your users.

You can carry out all of the following functions in Control Centre. However, if you are using Sage Practice Solution, there are some activities that would be better carried out in that program rather than Control Centre. These are marked with an asterisk.

Workflow for Setting up Sage Control Centre:

1. Log on to Control Centre. See Starting Control Centre on page 1.
2. Create a Dataset (you'll need the Administrator password to do this). See To create a new dataset on page 3.
3. *Create your Practice client. Some practice information will be required by Control Centre but your main practice details will be stored in Sage Practice Solution. See What is the Practice Client? on page 3
4. Set up your staff members. See Setting up your staff members on page 4

Control Centre is also used to:

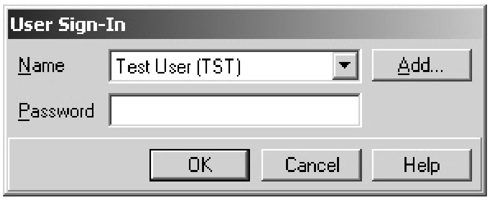
- *Add, amend and delete client information
- *Access all of the Sage Taxation programs from one location
- Create letters
- *Produce reports. Some reports will be available in Sage Practice Solution but tax orientated reports will only be available in Control Centre
- *Record tasks and their status
- *Link clients to other products
- File returns by Internet (FBI)
- Configure Annual Data Questionnaire (ADQ) templates
- Perform batch ADQ creation
- Update your client limits
- *Administer links to other Sage programs.

Starting Control Centre

Double-click the Sage Compliance shortcut on the Windows Desktop. Alternatively you can use the shortcut that was added to the Start Menu in Programs > Sage > Sage Taxation > Control Centre.

Signing in

When you start Control Centre you will be prompted to select a username and password. The first time you sign in use Test User as the Name and leave the Password blank.



You can then create your own set of users with unique usernames and passwords. You should also create your own administrator password. We will cover this later in this guide.

In Help, look for: Staff

Administrator password

To maintain the security of your data you will be prompted to enter an Administrator Password to perform certain functions, such as:

- deleting client
- changing users' access rights.

The default administrator password is **egas**. When using the program, you can prevent being asked for the Administrator password for your current session by selecting the Do not ask for this password again check box when it appears.

In Help, look for: Key concepts of Control Centre > Administrator > Changing the Administrator Password

Datasets

A Dataset is a way of grouping clients together into different categories. The way in which these categories are defined is entirely up to you. You give the dataset any name you choose and you can create as many datasets as you need. In this way you can group your clients in a way which mirrors any method of dividing up clients which already exists in your practice. When you run Control Centre you are asked to select a dataset (unless you have made a particular dataset the default one) in the Open Dataset window. Only the details of the clients in the dataset that you choose are then accessible in Control Centre.

The first time that you open Control Centre after installing Sage Taxation you will be prompted to create your first dataset. You cannot create clients or enter data in any Sage Taxation system without doing so. For example, if you try to access Personal Tax before creating your first dataset in Control Centre, you will be informed that you must do this before you can proceed.

In the Client Navigator, the name of the currently selected dataset is displayed above the Client List in the drop-down list - in this example it is Default dataset.

Datasets are always created and maintained by an Administrator using Control Centre.

To create a new dataset

1. After signing in to Control Centre you will see a message advising you to create a Dataset. Click Yes.
2. You will be prompted to enter the Administrator password. Enter the password (this will be **egas** unless you have changed it.)

   Click OK.
3. The New Dataset Wizard appears. Click Next.
4. Enter a name for your dataset. For example, you may want to name it after your regional office. Click Next.
5. Click Next. A summary of the dataset you are about to create is displayed. Click Back to change the settings or Next to create the Dataset.
6. When the Dataset has been created, the Practice Client Wizard appears.

What is the Practice Client?

The Practice Client is a special client in Taxation that stored simple information about your practice. This information is used to automatically populate the tax returns, and other reports and letters in Control Centre. It is also used when you file online.

If you are using Sage Practice Solution, you will use that program to store fuller details about your practice.

A practice client is created in the same way as a standard client and appears within your system in the same way as a normal tax client. You can choose to hide this client from reports.

To create the Practice Client

1. The New Practice Client Wizard will have started automatically after the New Dataset Wizard finished. Click Next.
2. To help keep the Practice Client separate from the rest of your clients, choose Other as the business type. Click Next.
3. A summary page appears. Click Next.
4. The New Other Wizard appears.

Click Next.

5. Enter the Primary name, Correspondence name and Report name then click Next.
6. Enter the Practice Client's contact and tax details. Click Next.
7. Enter PRACTICE as the Client Code for the practice. This will make it easier for you to find your client. Enter a Billing Code and click Next.
8. Select whether to set a password for the Practice Client and whether to exclude it from reports. Click Next.
9. A summary page appears. If you want to make any changes, click Back otherwise click Finish.

Your Dataset and Practice Client have now been created and you will see the Control Centre interface.

Setting up your staff members

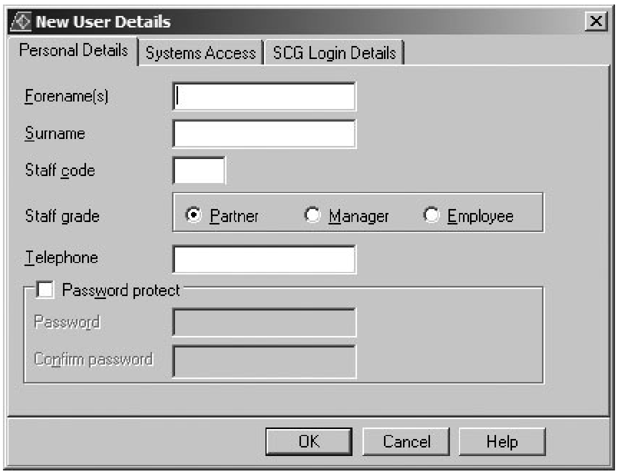
A staff member is a person within your practice who will have access to Sage Taxation. You should create a user profile for each staff member, which allows you to control their access to the software, allowing varying levels of security and access to the system.

If you want to get started quickly using Taxation, you may choose to create only some of the users. You can create others later.

Note: If you are using Sage Practice Solution you should already have set up your Staff in that program. However, you still need to create users in Taxation.

To create a user profile

1. Within Control Centre, from the Tools menu choose User List. The Staff Lookup window appears.
2. Click Add. The New User Details window appears.



What do I do?	Why?
Enter the user's forename, surname and telephone number.	These details will be used throughout Sage Taxation.
Enter a staff code for the user. If you do not enter a staff code, one will be created automatically using the user's initials.	The staff code can be used as a shortcut to select the staff member within Sage Taxation.
Enter password details for the user. Tick the Password protect box if you wish to set a password for this user.	Using a password adds security.

3. The System Access tab allows you to determine how much access each user has to each of the programs within Sage Taxation.

What do I do?	Why?
Set the options for each system. Choose from the following:	If no changes are made to this tab, then the default selections are to set 'Delete, Add and Modify' for Control Centre, and No Access for all other programs.

What do I do?	Why?
■ No Access	The user will not be able to access the program.
■ View Only	The user will be able to open the program and view information, but will not be able to add or amend any data.
■ Modify Only	The user can access the program and make changes to existing information, but cannot add records or delete existing records.
■ Add and Modify	The user can access the program, make changes to existing records and add new records, but does not have permission to delete data.
■ Delete, Add and Modify	This is full access for the user who will be able to add new records, make changes to existing records and delete records. Certain restricted functions will however, still require the administrator password.

4. Once all information has been entered, click OK. The new username will appear in the list of users on the Staff Lookup window.
5. You may change a user’s profile details at any time by selecting the username from the list and clicking Edit.

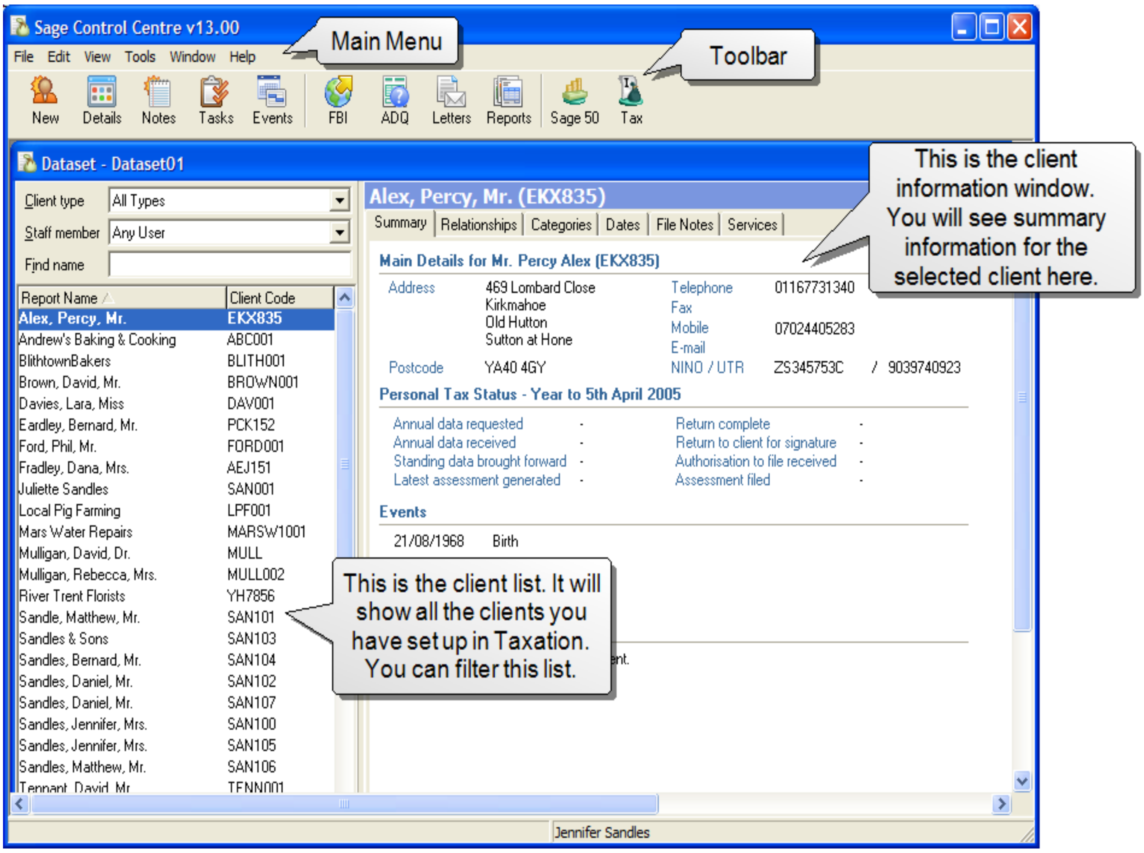
Setting up your employees, partners and managers as users allows you to assign tasks and pass information between users within the system through the use of the Tasks functionality.

Note: As it is not possible to delete users from Taxation, we recommend editing the details of Test User with the details of a partner or staff member.

Chapter 2

Finding your way around Control Centre

The main Control Centre window is made up for the following areas:



- Main Menu and Toolbar: From here you can access all the functions in Control Centre. For example, this is where you open the Annual Data Questionnaire. All the functions can be found in the main menu, but some frequently used functions are also available on the toolbar for easy access.
- Client List: The client list shows all of the clients that you have set up in Sage Taxation. Use the drop-down boxes at the top of the list to filter the results shown. You can also choose which client details to show in the list, by right-clicking on the client list, choosing Add/Remove column, and then selecting the details you want to see in the list. You can remove items by simply repeating this process and clicking on the detail you wish to remove.
- Client information window: This will show the details for the client that is currently selected in the client list. The first tab shows a summary of the clients details. You can see other information by clicking the tabs at the top of the window.

Chapter 3

Connecting your Sage programs

With Practice Solution you can share your client data between Sage products for practice.

Connected programs:

- Sage Accounts Production
- Sage Accounts Production Advanced
- Sage Corporation Tax (powered by Abacus)
- Sage Taxation

When you install Practice Solution, or any of the products listed above, the connections will not be enabled. This is to make sure that you are comfortable with your new software before you begin sharing your client data.

Note: Sage 50 Accounts is used by Practice Solution for billing. This integration is available in Practice Solution after the billing system has been configured in Sage Practice Solution Control Panel.

Connecting with Sage Practice Solution

Sage Practice Solution allows you to manage your clients' details, link to other Sage products for practice, record time against work carried out for them and create invoices based on that time.

The software comprises two elements:

- Practice Hub
- Time recording and invoicing

Your licence agreement with Sage will determine which elements are available.

Sage Practice Hub is the central store for your client data. You can use Sage Practice Hub to connect your Sage Programs, for tasks, communications, reporting, letter writing etc.

We refer to Sage Practice Hub with Time recording and invoicing as Sage Practice Solution.

More information

For more information about connecting your Sage programs with Sage Practice Solution, start Sage Practice Solution (v1.5 or above) and from the Help menu choose Contents. When the Help system appears, use the table of contents to find the book Connecting your Sage Programs.

Chapter 4

Creating a client

You can add a new client to the current dataset in any of the following ways:

- Click the New button on toolbar.
- From the File menu choose New Client.
- Right-click on the Client List and choose New Client from the menu.

Either of these methods will cause the New Client Wizard to appear. For more assistance at any stage of creating a client, click Help on the wizard.

Note: If you use Sage Practice Solution and have client integration enabled, clients created in Sage Taxation will automatically be available in Sage Practice Solution. For more information see Connecting with Sage Practice Solution on page 9.

Create a client

This procedure illustrates how to create a partnership in Control Centre. Other client types are similar.

1. From the File menu, choose New Client. The New Client Wizard appears. Click Next.
2. Select Partnership as the Client Type. Click Next.
3. Select the tax products to use with the client. Select both Partnership Tax and Business Tax. Click Next.
4. The wizard displays a summary of your selections. Click Back to change any of your previous choices or Next to continue.
5. In this example we are creating a partnership, so the New Partnership Wizard appears. Click Next.
6. Enter the Trading Name, Correspondence Name, and Report Name. Click Next.
7. Enter the contact details and UTR for the partnership. Click Next.
8. Click Add to start adding partners to the partnership. The Client Lookup window appears.
    - To add a partner that already exists in Sage Taxation, choose the client from the list then click Select.
    - To create a partner, click New on the Client Lookup window and work through the New Client Wizard. When the wizard completes, your new client will be available in the Client Lookup list; choose the client from the list then click Select.

    Once you've added all the partners, click Close on the Client Lookup window to return to the New Partnership Wizardthen click Next.

9. Enter the reference codes you want to use for the client.
    - The client code is automatically generated from the first three letters of the client name followed by 100 - or the next available number (i.e. if BIG100 already exists, then the client code will default to BIG101). You may want to change this code to tie in with an existing scheme in your practice.
    - The Billing code is the code of the client to whom any work will be charged. If charges will be billed to the client you are currently creating, then you should set this code to Default; which will set it to the same as the client code. However, if all charges are to be billed to another client, then you can select their client code here. Click on the magnifying glass button to see a list of clients within this dataset that you can choose as the billing client.

    You may also record which staff member introduced the client to the business.

    Click Next.
10. Enter the commencement date of the business. This is necessary to determine the basis period rules. In cases where you do not know the date of commencement (it may have been many years ago), we recommend that you select an agreed 'practice date' that staff working on the case will recognise.

    You can enter tax data for a year other than the current tax year. Change the tax year using the up and down arrows next to the box. If you make no changes, the system will default to the current tax year for entry of tax details. Click Next.
11. Optional: Assign staff members to the client by clicking on the magnifying glass button. This page is only displayed if you chose to set the client up for a tax product at the beginning of this wizard. Click Next.
12. Optional: Apply levels of security to your client.

    If you apply a password to the client, you will need to enter the password in order to enter any tax programs for this client, and in order to view the Main Details for the client.

    You can also exclude clients from reports. This is especially useful when the business or individual is part of your own practice.

    Note: The administrator password can be used to override these security passwords.

    Click Next.
13. The final page of the New Partnership Wizard shows a summary of the details you have entered for this client. Click Back to change any of your previous choices or Next to continue.
14. Partnerships must have an accounting period set up in order to open the client in Business Tax.

    You can choose to create an accounting period now, by leaving the option Enter an accounting period for this client now selected and clicking Continue.

    Clicking Finish will create the client, and the client and any new linked individuals will appear in the client list.

In Help, look for: Users and Clients > Creating a New Client then read the topics in the books beginning with 'Add New'

Chapter 5

Other Features

Control Centre has some very useful additional features.

Report Generator

A comprehensive report generator that supports a wide range of predefined reports and facilitates the design of your own reports. This includes fully customisable report layouts, with many predefined and unlimited user-definable data types.

In Help, look for: Reports > What are Reports?

Letter Generator

As well as supporting predefined letter types, the generator also provides the facility for the user to design their own custom letters via integration with Microsoft® Office. Custom letters can be created from scratch or be based on any existing letter template and may include a wide range of predefined Control Centre and Personal Tax data types, as well as unlimited user-definable data types.

The letter and report generator can combine to provide a very powerful mail merge facility that allows you to easily produce large numbers of letters based on the data in your reports.

In Help, look for: Letters > Letters in Control Centre

Tasks

It is possible to create a list of tasks to be carried out. Tasks created can be assigned to users and/or clients. It is also possible to configure Control Centre to show your task list each time you enter the software by ticking the 'Show tasks at startup' option on the main Tasks screen.

In Help, look for: Getting to know Control Centre > Tasks > General Information

Services

The Services tab allows you to identify which services are provided for each client, with the choice of services available being relevant to the client type. You may also enter your own custom service information. You can enter dates between which you provided each service.

In Help, look for: Client Information > Client Navigator > Services > What is a Service?

Acknowledgement

The Letters of Engagement supplied with the Letter Generator are based on example letters produced by, and reproduced with the permission of, the Chartered Institute of Taxation (Registered Charity number 1037771), the Association of Taxation Technicians (Registered Charity number 803480) and the Institute of Chartered Accountants in England and Wales.

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