

SA2000 – TAX SOFTWARE

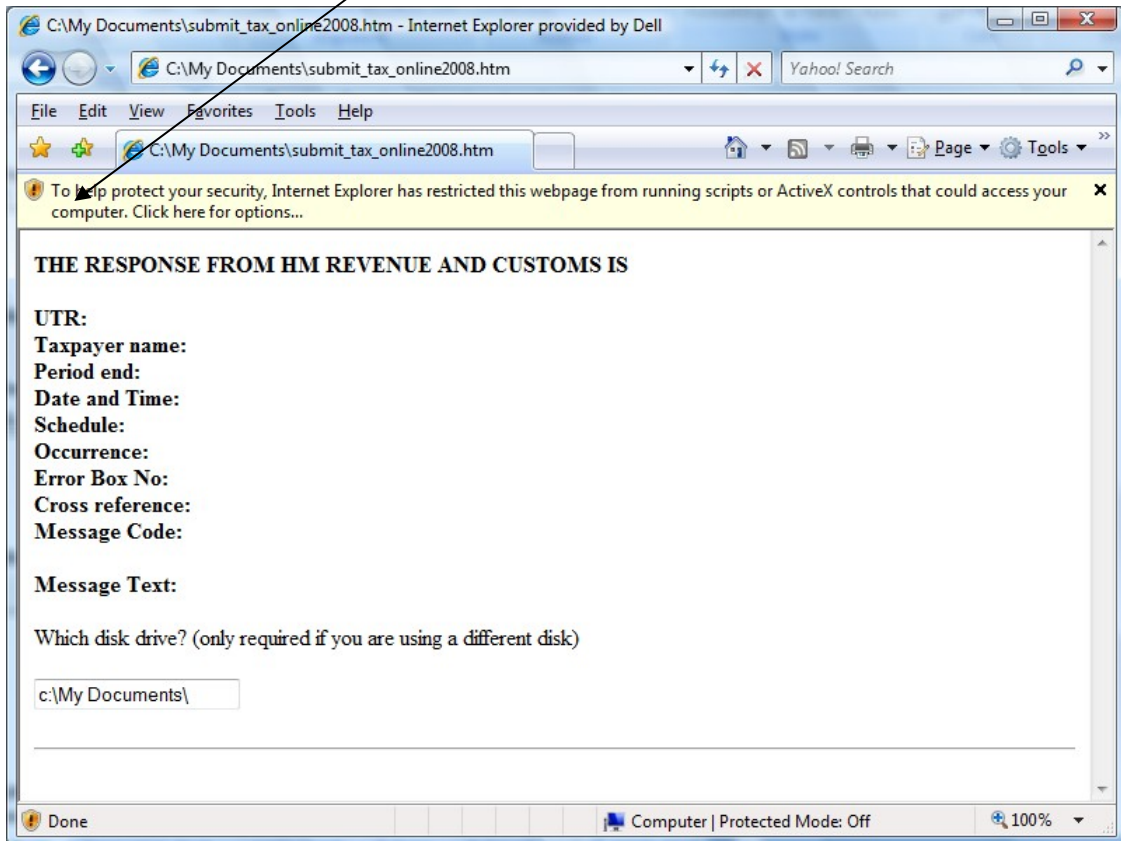
Please note that HM Revenue and Customs no longer approves computer printouts as “substitutes”. Our software is designed to submit tax returns by the internet. The print options are for your own records.

Instructions for filing online with SA2009-10ol

1. Download the sa2009-10ol file from our web site www.sa2000.co.uk
2. Buy the Special Code from our web site (you will need it in step 16 below);
3. (May be necessary for some versions of Excel) Start Excel and make sure Tools/Macro/Security is set to Medium;
4. Open the SA2009-10ol file with Excel;
5. (For some versions of Excel) you may get a prompt about “macros” – please choose “enable”;
6. Enter personal information on page 1, including your UTR, **but see the next page of these instructions if you used our software last year;**
7. Use the questions on page 2 of the tax return to answer Yes for the supplementary sections you need and then use the “Fill in” buttons to go to the section;
8. There are “Supporting List” buttons on page 3 for each type of interest and dividend;
9. Complete the rest of the tax return where appropriate;
10. If you are due a repayment remember to complete the banking details on page 5;
11. Return to the Introductory page (the page before page 1 of the tax return);
12. Use the “Print options” button to print the tax return for your own reference;
13. Click the "Prepare SA Online" button to start the filing by Internet process;
14. Enter your userid and password (from HM Revenue & Customs);
15. Choose "Test" or "Live" mode ("Test" will give you a message if everything is correct, **you must choose “Live” to send the final version to HM Revenue & Customs**);
16. Enter the Special Code (from step 2 above) only if you selected “Live”;
17. This prepares a file called “tax_return” - **please do not move the file**;
18. Save the SA2009-10ol file, you may get a prompt about “overwriting the current version” - you can choose to overwrite;
19. Click the "Submit SA Online" button in order to open the "submit_tax_online2010" file with Internet Explorer;

You may get a screen like this with a warning:

Please click on the warning line and choose Allow Blocked Content and then Yes



20. This will connect you to the Internet and submit your tax return;
21. HM Revenue & Customs' acceptance or rejection will be displayed on the screen;
22. You should also receive an email from the Revenue.

Or

- 20A Connect to the Internet and open Internet Explorer;
- 21A Use File/Open and Browse and find the "submit_tax_online2010" file, in the folder C:\My Tax\;
- 22A Click OK to open the file which submits your tax return;
- 23A HM Revenue & Customs' acceptance or rejection will be displayed on the screen;
- 24A You should also receive an email from the Revenue.

Some extra guidance

Please use Copy & Paste not Cut & Paste, Cut can sometimes upset formulas.

Please don't use accents on letters (such as café), the Revenue's technology does not accept them.

If you are copying information from somewhere else (such as a set of accounts) please watch out for rounding problems – the monetary amounts must be £ and p, not fractions of a p.

The Yes/No questions are generally set to No by default, select the Yes box if required, to unselect Yes, please select the Yes box again.

Capital Gains

Please see an extra section on our website for more information about using the Capital Gains section, www.sa2000.co.uk/saol.htm

Using Internet Explorer and Blocked content

You may get an audible warning if the sound is turned on.

Choose Tools/Internet Options/Advanced

Near the bottom of the list the option “Allow active content to run in files on My Computer” – this must be ticked and applied before you send the tax return to HM Revenue & Customs.

Alternatively:

There may be a line across the top of the screen with a message about Blocked content. Click on the line and choose to allow blocked content, then Yes for Are you sure?

For users of our tax software last year:

You can transfer some of the information from last year's tax software to this year. This saves you having to re-enter information such as your name and address. Please follow these steps:

1. Start last year's tax software which you saved with your tax details;
2. Go to page 1 of the tax return;
3. Select the “Prepare for Taxlink (this is not SA online)” button to start the transfer;
4. Open up the new year's tax software;
5. Go to page 1 of the tax return;
6. Enter your UTR in the utr box;
7. Select the “Read Taxlink (this is not SA online)” button to complete the transfer.

We would like to thank users who have helped us with comments and suggestions to improve the software.

Note: You may wish to delete a file called "tax_return.xml" (probably in your c:\My Tax\ folder after you have finished and you have received acknowledgement from the HM Revenue & Customs. We prepare and send this file to the Revenue, once the Revenue has processed it you do not need the file.

Prepared by QMS Ltd

Our telephone number is 01453 761956

Our web site is www.sa2000.co.uk