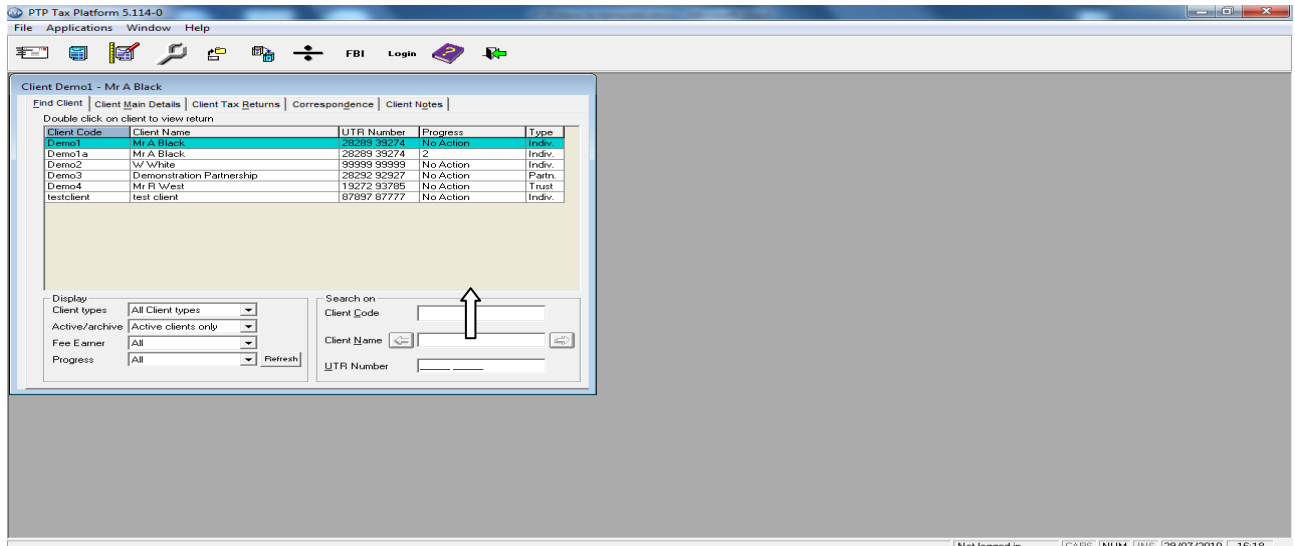


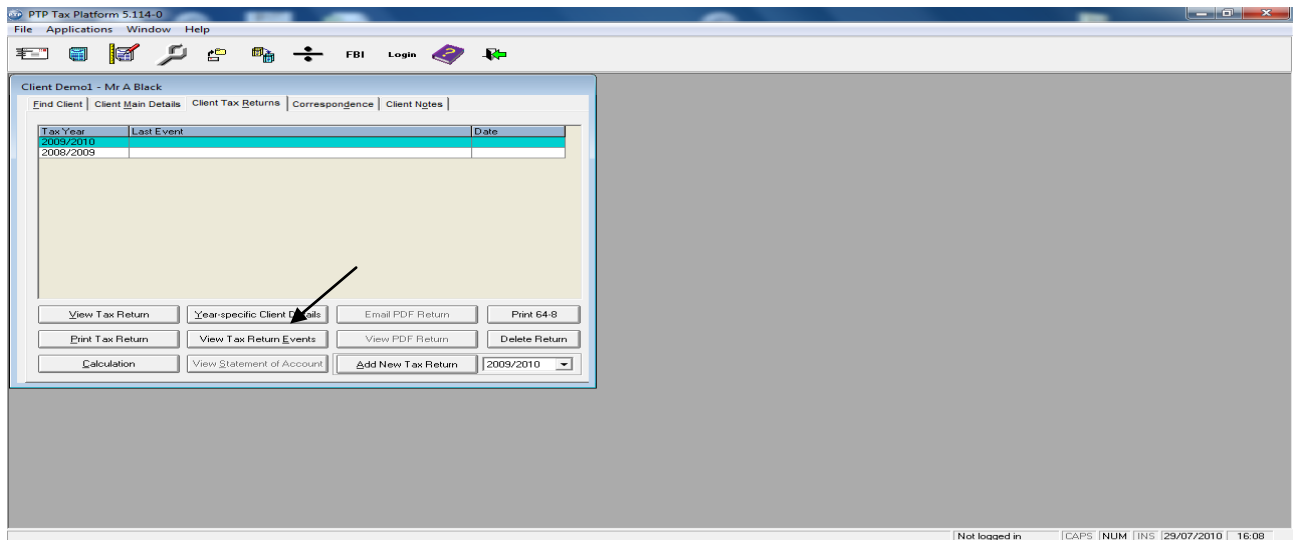
Creating progress indicators based on event dates

Tax Platform

- Launch the PTP Tax Platform product
- On the Find Client tab there is a column labelled progress which will currently read undefined or no action – this column can then be tailored to show progress against events for each client

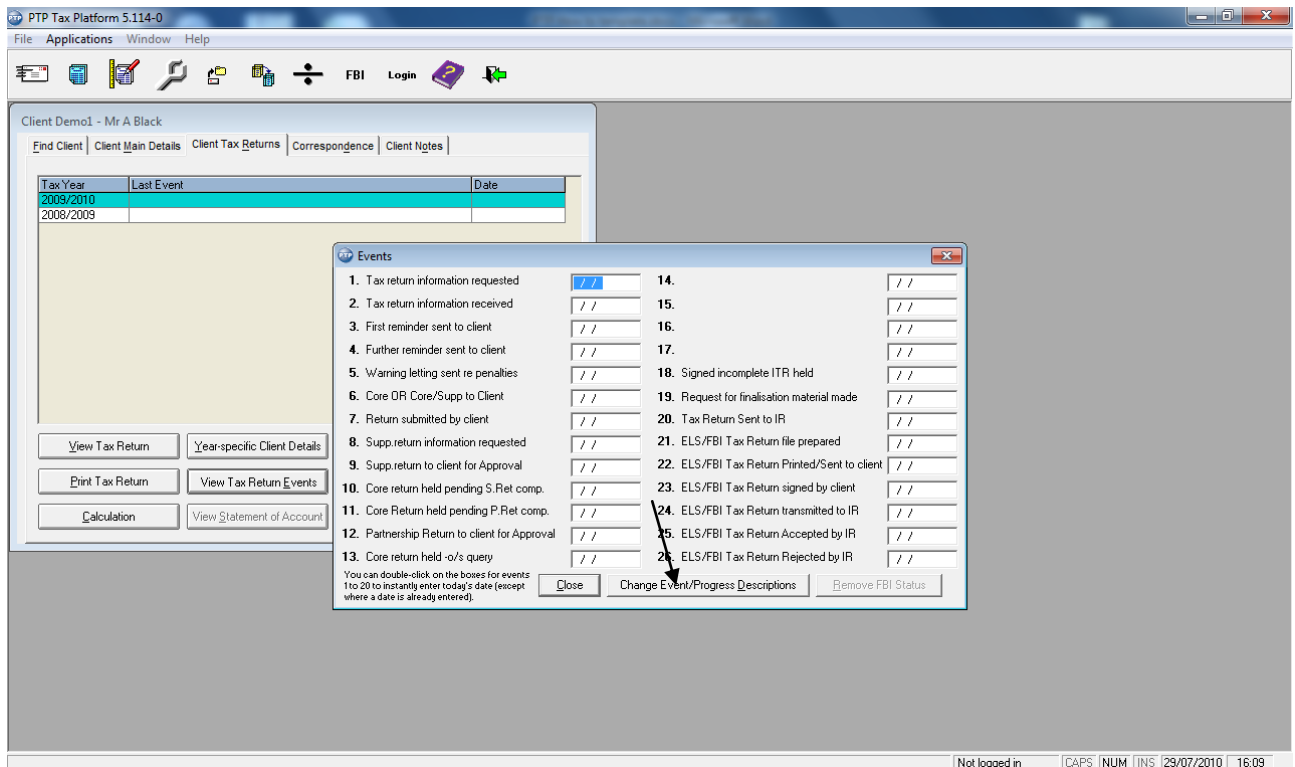


- Highlight any client on the find client tab and click the client tax returns tab
- Click the “View tax return event option”

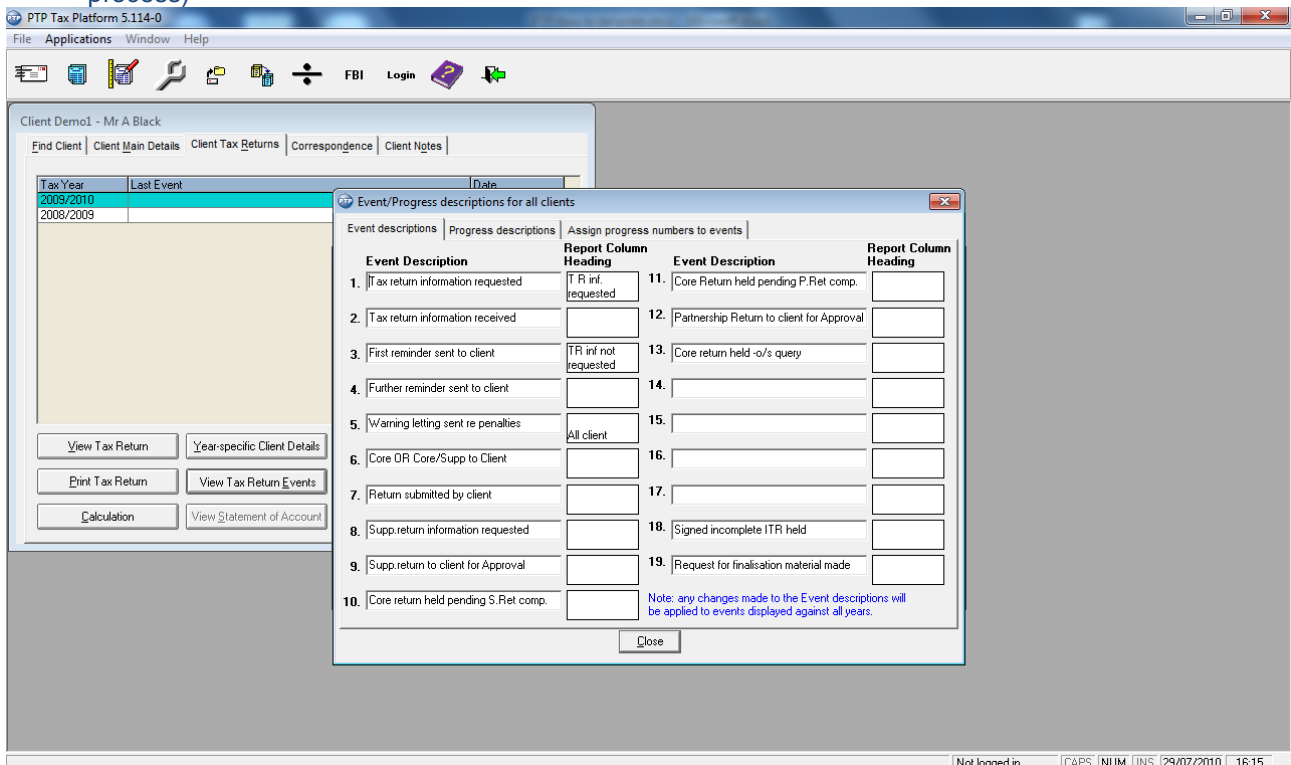


Creating progress indicators based on event dates

- This will display the events section of the program and you need to click "change event or progress descriptions"

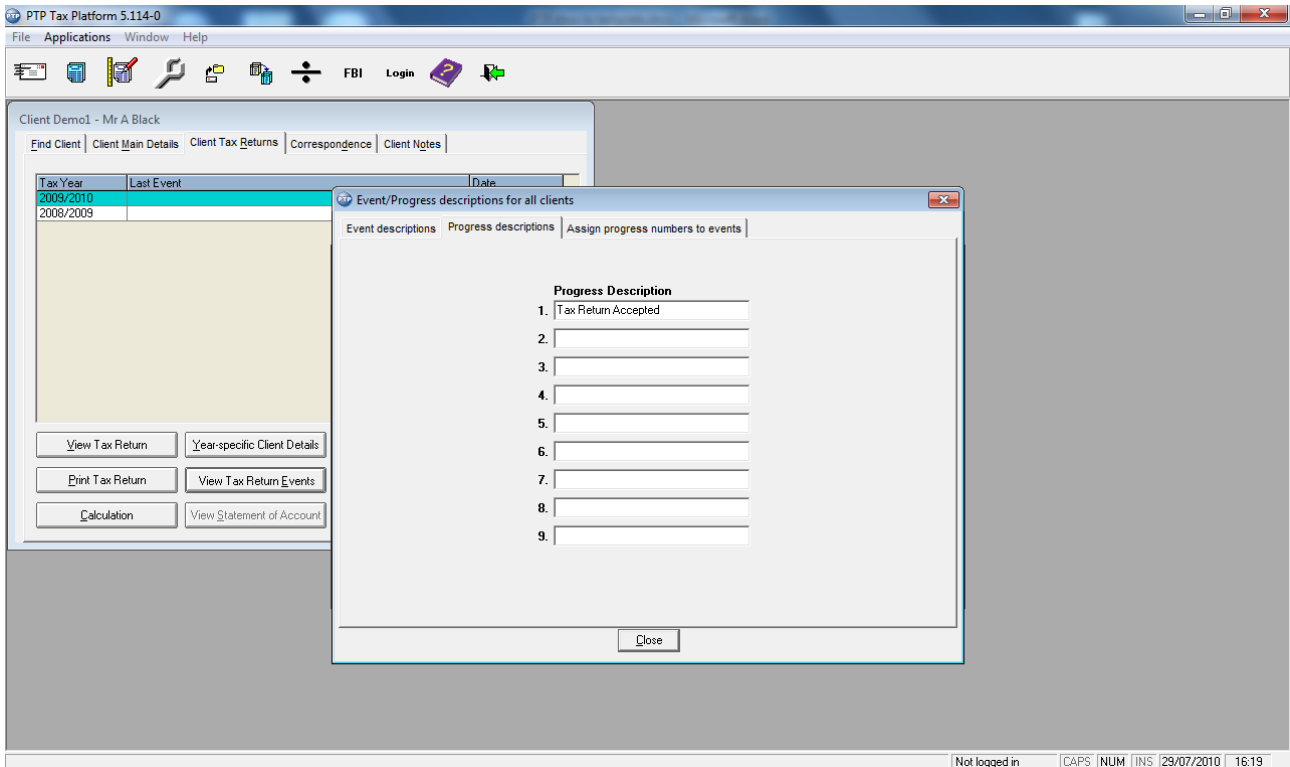


- This will then display a screen showing the event descriptions for events 1 to 19 which can be altered to suit your practice (N.B. events 20 to 26 cannot be changed as these are pre-defined by the FBI process)

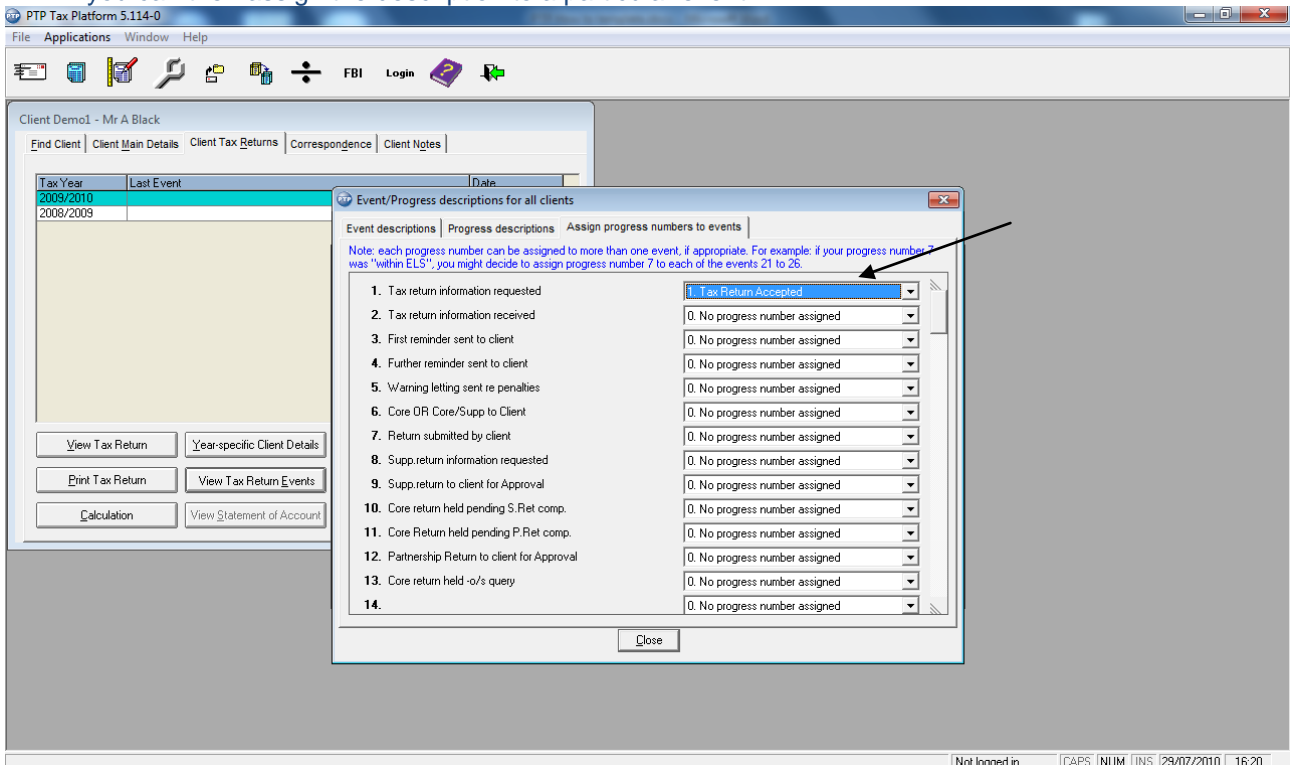


Creating progress indicators based on event dates

- To set up the progress descriptions you click the middle tab “progress descriptions” which then enables you to enter up to 9 different descriptions to track the clients progress

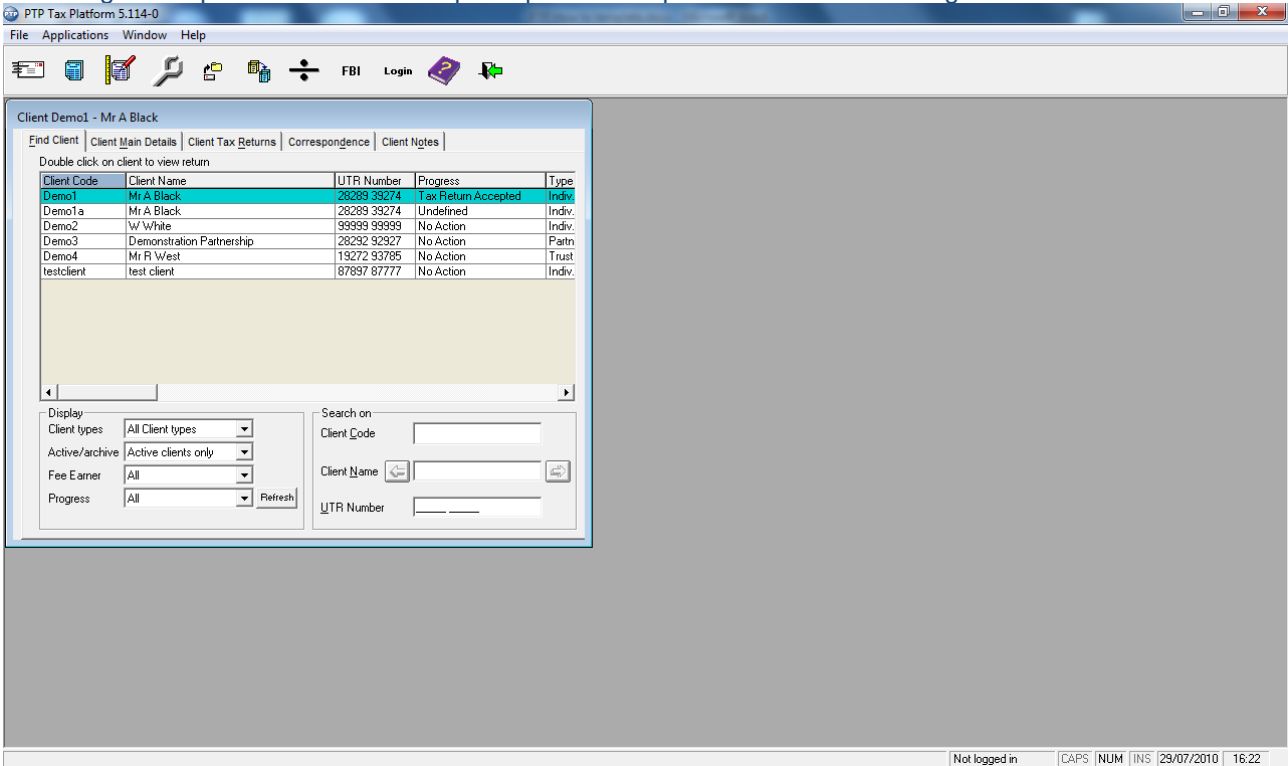


- Once the description has been entered, click the third tab “assign progress numbers to events” and you can then assign the description to a particular event



Creating progress indicators based on event dates

- Once this has been done, if you close the window, it now means for any client when you enter a date against a particular event it will pick up the description that has been assigned to that event



The screenshot shows the PTP Tax Platform 5.114-0 interface. A window titled "Client Demo1 - Mr A Black" is open, displaying a table of client information. The table has columns for Client Code, Client Name, UTR Number, Progress, and Type. The first row, "Demo1 Mr A Black", is highlighted in blue and shows a progress of "Tax Return Accepted". Below the table are search filters for Client types, Active/archive, Fee Earner, and Progress, along with search fields for Client Code, Client Name, and UTR Number.

Client Code	Client Name	UTR Number	Progress	Type
Demo1	Mr A Black	28289 39274	Tax Return Accepted	Indiv
Demo1a	Mr A Black	28289 39274	Undefined	Indiv
Demo2	W/ White	99999 99999	No Action	Indiv
Demo3	Demonstration Partnership	28292 92927	No Action	Partn
Demo4	Mr R West	19272 93785	No Action	Trust
testclient	test client	87897 87777	No Action	Indiv