

## PTP Platform - incorporating PTP Tax, PTP Partnership and PTP Trust Return, PTP Accounts and PTP CT Platform

The PTP Platform suite consists of:

- PTP Tax Return
- PTP Partnership Return
- PTP Trust Return
- PTP Accounts
- PTP CT Platform

Please note: You do not need to have purchased all five programs as each will run independently of the others.

### Quick guide

- Visit our download webpage [www.ptpsoftware.co.uk/getmysoftware](http://www.ptpsoftware.co.uk/getmysoftware)
- Select the “**PTP Platform**” link on the Software Downloads webpage
- Select the “**PTP Platform Installation**” link and follow the installation wizard
- After the installation open the program(s) and enter your registration details
- Existing users of PTP Tax, PTP Partnership or PTP Trust transfer forward your existing clients' return data

### Detailed guide

**Please note** the installation will differ depending on whether any PTP Platform products have been installed on the workstation before. The following notes have therefore been split into All Users, Existing PTP Platform users and New PTP Platform users as appropriate.



**Important note:** You must have administrative access rights to install the PTP Platform suite. If you do not have the necessary access rights you will need to seek assistance from your own IT support.

### All Users

Having programs open during installation can cause problems. Please ensure that all PTP programs are closed on all workstations before you start.

PTP Platform programs are supplied via a download page on the PTP Software website, [www.ptpsoftware.co.uk/getmysoftware](http://www.ptpsoftware.co.uk/getmysoftware). From the list of programs on the page choose **PTP Platform** consisting of PTP Tax Return, PTP Partnership Return, PTP Trust Return, PTP Accounts and PTP CT Platform. Then select the “**PTP Platform Installation**” link.

The PTP Platform installation installs all five of the PTP Platform products, it therefore installs programs that share information and databases with each other. Because of this, the installation differs depending on whether any PTP Platform programs are already installed on the machine (including previous years).

**Please note:** As well as installing the current PTP Tax Platform - Tax, Partnership and Trust, the installation also includes a demonstration copy of the previous year programs.

## Existing PTP Platform users (machines with any PTP Platform products installed)

During the installation you will not be asked to select the destination folder to install the program and databases. These will be installed into the same holding directory as the existing PTP Platform installation. The default installation will install PTP Tax, PTP Partnership, and PTP Trust Return and PTP CT Platform for the current year, PTP Accounts and the previous year PTP Tax Platform software. The default installation will install a demonstration copy of the current year programs you have not purchased.

After installation, the first time you open the PTP Platform programs they will automatically recognise that new software has been loaded onto your system and install it. You will only need to install from the download on one workstation in a network, the new software will then automatically update each workstation as the user runs the PTP Platform programs. After installing, please register your software from one workstation.

**Please note:** Each user in a network installation must have administrative access rights on the machine for the installation to complete successfully.

## Registration

To start any of the PTP Platform products click Start, All Programs, PTP Software and select the product name from the list (alternatively you could use the desktop shortcuts). Click the Spanner icon in the main toolbar, select the Registration tab and enter the details from your registration document(s).



**Important note:** All PTP Platform products are registered separately so the registration process needs to be performed for each product purchased. (PTP Tax, PTP Partnership and PTP Trust are contained within the PTP Tax Platform so are all registered together). It is important that you keep the registration document.

## Transferring earlier year's return data

Once you have successfully installed and registered the program, you must transfer forward your existing (2008/2009) client data. To do this, click the Transfer Clients from a Previous Tax Year button. A message box asking if you have taken a backup will be displayed. It is important to take a backup at this stage. Please ensure that you have done so before you continue. When you confirm you have taken a backup, a screen allowing you to select the 2009 programs that you used will be displayed. You can simply tick the program(s) and click the Transfer button.



**Important note:** If you are a PTP Partnership Return user that does not use PTP Tax Return, you must transfer the PTP Tax Return data as well as the Partnership Return data as it is this that holds the individual partners' details.

## New PTP Platform users (machines that DO NOT have any PTP Platform products installed)

The Installation Wizard will ask you for the destination folder in which to install the program and then a database folder for the database files. We strongly recommend that you install to the default location. If you are installing the network level software please see the notes below. The default installation will install PTP Tax, PTP Partnership and PTP Trust Return and PTP CT Platform for the current year as well as PTP

Accounts and the previous year PTP Tax Platform software. The default installation will install a demonstration copy of the current year programs you have not purchased.

**Please note:** Depending on what files your system already contains, Microsoft Windows may require you to re-boot. Once the installation is complete please register your software from one workstation. See registration instructions above.

## Installing on a network - Machines that DO NOT have any PTP Platform products installed (existing PTP Platform users see above)

### Quick guide

- The program needs to be installed on each workstation
- The database files need to be installed to a shared area on the server
- The program needs to be registered on one workstation

### Detailed guide

PTP Platform programs work on both Peer to Peer and dedicated file server networks. Whatever system is in use all users must have permanent **READ** and **WRITE** access to the folder that will contain the data files. When running the Installation Wizard, you will be asked for the destination folder in which to install the program(s). We recommend that this be left as the default as the program(s) should be on the local drive of each workstation.

You will then be asked for the path to the database folder for the database files. Enter the path to the folder on the server where you wish the database files to be located. **If you use any other PTP Platform products this should be the same location that they use for the data as it will add fields to the existing platform.mdb database.** We would recommend **F:\PTPData** where F is the drive letter assigned to the server.

If you are running a Peer to Peer network you will need to map a drive letter (F in our example) to **\\Example\C\Program Files\PTP** (assuming the database files have been installed to the default location on the acting server)\*. Here, **Example** is the name of the computer on the network acting as a server. The path to the database folder from the client workstations would then be **F:\PTPData**.

The path to the database folder must always end in PTPData as the installation adds the necessary subfolder(s) to this, and it is here that the database files are installed. The program requires a particular directory structure. Once installed it is important that you do not change the default structure.

You will need to install the program on each workstation within a network system, however you only need to register the software from one workstation. When the products have been successfully installed and registered you can perform a 'transfer earlier year's return data' as appropriate. This need only be done from one machine (see notes above).

**\*Microsoft Windows VISTA and Windows 7: Please note:** when installing the PTP Platform Suite on to a Vista or Windows 7 machine or peer to peer network (where the server is a Vista or Windows 7 machine) the default program and data locations will be C:\PTP as the program location and C:\PTP\PTPDATA as the data location. This is down to Microsoft's Virtualisation system and increased security surrounding "**Program Files**".