



How do I populate a specific box on the tax return?

To help you navigate to the correct area of Sage Personal Tax, we have produced an Excel spreadsheet which will look up these values for you. This is included in your Tax Pack as "Return Lookup"

When you launch this document, you may receive a security warning regarding macros. This is normal so please select "OK" or "Enable Macros" (Depending on your version of Excel).

When using this document, please enter the form number as shown on the spreadsheet and omit the letters before the page number.

For example, to find how to populate box 19 on page TR6 of the main SA100 form, you would enter the following into the spreadsheet

Form	Page	Box
SA100	6	19

This spreadsheet contains all the data entry sections within Personal Tax. Some areas are however manual entry and you will receive the Navigator Item listed as "No Data Entry". For these occasions, please open up Tax Return and Computations > Current Working Figures.

Once the return is in front of you, please select "Copy return for editing" from the list of tasks on the left hand side and navigate to the required box and enter the data directly onto the actual tax return.

If a schedule is not listed on the spreadsheet, then the entire schedule is manual entry (Eg Ministers of Religion or Lloyds Underwriters) Again, please open up Tax Return and Computations > Current Working Figures.

Once the return is in front of you, please select "Copy return for editing" from the list of tasks on the left hand side and right click on the list of forms on the left and Select 'Add Schedule' followed by the schedule you require and then enter the data directly onto the actual tax return.