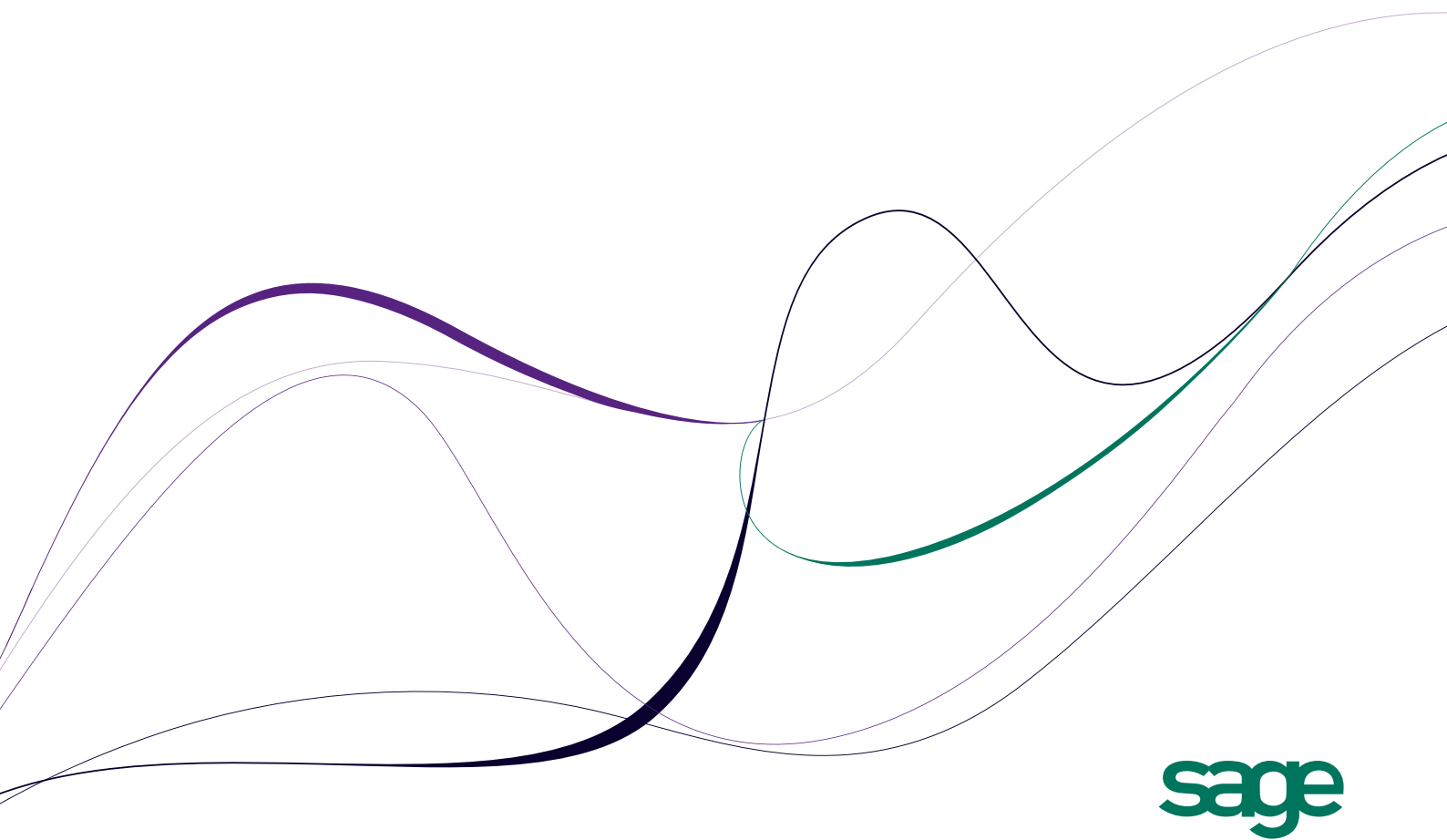


Tax pack

Sage Accountants' Division:
January 2011 Tax Pack



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Welcome to the January 2011 Tax Pack

The information in this pack has been compiled to provide you with solutions to the most common queries regarding Self Assessment, such as:

Online Filing – how to handle the most common error code responses from HMRC.

HMRC Special Cases and Exclusions for 2010 – how to deal with these when they arise when validating or finalising returns.

Common validation messages – details on resolving other common validation messages.

Hints and tips for Sage Taxation – answers to some of the most common queries received by Customer Services.

Capital Gains – Entrepreneurs' relief and guidance on how to attach capital gains schedules in the software.

Safeguarding your taxation data – a guide to using the backup tool and setting automated backups to ensure your data is safe.

Additional Help and using Ask Sage – how to access a range of articles and guides available through our website.

Throughout January our opening hours will continue to be 9am – 6pm, Monday to Friday. As we look to supporting our customers fully through the Self Assessment period, we will be reviewing our opening hours over the final weekend of January. We will send further communications regarding opening times in January.

Online Filing: HMRC error codes

Summary

When submitting a Self Assessment return, the return may fail submission with a message from HM Revenue & Customs (HMRC).

To find the HMRC error code in Sage Taxation:

Open the client for whom the submission failed.

- If you're in Sage Personal Tax, click the Return toolbar button.
- Select the relevant final return from the drop-down.
- Click the Submission toolbar button. The Submission status window will indicate that the return submission failed.
- Click the View Response link to see the HMRC error code and message

The more common submission errors are summarised below with details of any action required.

If the issue cannot be resolved in Sage Taxation, or the error code is not listed here, contact HMRC Online Services Helpdesk on 0845 60 55 999 for further assistance.

HMRC error code 1046: Authentication Failure

Ensure that:

1. You can access HMRC's website at <http://www.gateway.gov.uk/> using the user ID and password entered in Sage Control Centre.
2. You have activated your account via HMRC website.
3. You are not using the same user name and password for two different pieces of tax software.
4. Your tax reference and district number are correct and match the details HMRC hold. To check this in Sage Personal Tax select File > Practice Details > Tax Details:
 - a) If your tax district and/or tax reference have changed update the references as necessary
 - b) Ensure your tax reference is in upper case
 - c) Ensure that the Tax district box does not show your Accounts Office reference

Tip: The tax district number is often repeated in the Tax reference box. For example, the tax district is 123 and the reference is ABCDEF but the reference is entered as 123ABCDEF.

5. Your practice email address is correct and matches the one you have registered with HMRC Online Filing for Self Assessment. To do this, from Sage Personal Tax, select File > Practice Details and go to the Contact tab.

HMRC error code 3000: Transmission not complete

The transmission of the return could not be completed. HMRC's server may have been temporarily unavailable, and you will need to resubmit.

1. Check that the PC you are filing from has internet access and that a firewall is not blocking access to the internet for any Sage Taxation programs (CCentre.exe, SA100.exe, SA800.exe or SA900.exe).
2. Resubmit the return.

HMRC error code 3001: Response messages

From the response message:

1. Make a note of the ChRIS code and message details.
2. Contact HMRC (0845 60 55 999) quoting the ChRIS code and message details. HMRC will explain why you could not file online.

Tip: You may have to wait for up to one hour before re-submission.

HMRC error code 5015: A submission for the user and tax year has already been successfully made. If amendment(s) are required you will need to make an amended submission

This error may arise if a return for the tax year has already been submitted by the taxpayer or other agent.

When processing the return for the first time in Sage Taxation, select 'Yes' to "Is this an amendment to a filed return for the 2010 tax year?" in the Submission wizard.

HMRC error code 6522: If all of boxes AOI5, AOI7, AOI9 and FOR44 are absent, Box1A must be present.

This error is recognised as HMRC Exclusion 18 for 2010.

Where a taxpayer has multiple life assurance gains but no top slicing relief is due, and the return also includes a capital gain, this error may be presented on submission to HMRC.

A 2010 return can be filed on paper on or before 31 January 2011.

HMRC error code 6492: Self calculation case.

HMRC may indicate that a value in the Tax calculation summary (boxes 1 to 6) does not agree with their own calculation.

If you are unable to resolve this calculation issue please contact us.

HMRC Special Cases and Exclusions 2010

HM Revenue & Customs (HMRC) provide a list of cases where their own online filing system is unable to cater for certain taxpayers' circumstances.

HMRC Exclusions recognise circumstances where a return cannot be filed online. Where a workaround is not available or applied and a paper return is filed on or before 31st January 2011 HMRC will accept that a taxpayer has a reasonable excuse for failing to file a paper return by the normal 31st October deadline. A reasonable excuse claim should accompany the paper return:

<http://www.hmrc.gov.uk/carter/sa-reasonableexcuse.pdf>

HMRC Special Cases identify circumstances where a workaround should be applied to allow online filing.

In Sage Taxation when a return is validated any HMRC Special Cases or Exclusions will be identified and workarounds provided where possible, allowing the return to be filed online.

Most of the workarounds involve copying and manually editing the return, which should be done just before you finalise a return.

Tip

To copy the return for editing:

Select Return > In the Tasks pane, select Copy return for editing

You can now select boxes on the tax return and input directly. When the return is complete select "Generate final return" on the left hand side and it will be validated again in preparation for submission.

Personal Tax Exclusions 2010

The current list of 2010 Exclusions cases can be found at;

<http://www.hmrc.gov.uk/ebu/2010-exc-indi.pdf>

In the following section you will be able to find further information relating to the more common cases;

Exclusion 8. Self employment (full) SA103F and Partnership (full) SA104F and (short) SA104S pages

A return cannot be filed online where a taxpayer has a trading loss for the tax year and adjustment income, but where the adjustment income is to be taxed as income of the tax year instead of being offset against the trading loss.

A 2010 return can be filed on paper on or before 31 January 2011.

Exclusion 14. Capital gains summary (SA108)

If you follow HMRC guidance for the completion of Total losses (box 4 on page CG 1), the HMRC validation of Total gains after losses (box 6) is incorrect in the following cases:

1. Losses included in box 4 cannot be fully offset against gains (e.g.'clogged losses')
and
2. Income losses to be offset against gains are included in boxes 4 and 14

HMRC have agreed workarounds for these cases as follows:

1. Only the amount of clogged losses that can be offset against gains, should be included in box 4
and
2. Income losses to be offset against gains should be included only in box 4. Box 14 should be blank,
3. For both workarounds further details should be provided in Any other information (box 35 on page CG 2).

Tip

To resolve the income losses reporting in the software:

- 1) Copy the return for editing.
- 2) Remove the income losses from box 14 on page CG 1.
- 3) Include the following in Any other information (box 35 on page CG 2)::

SA108, page CG 1, box 14

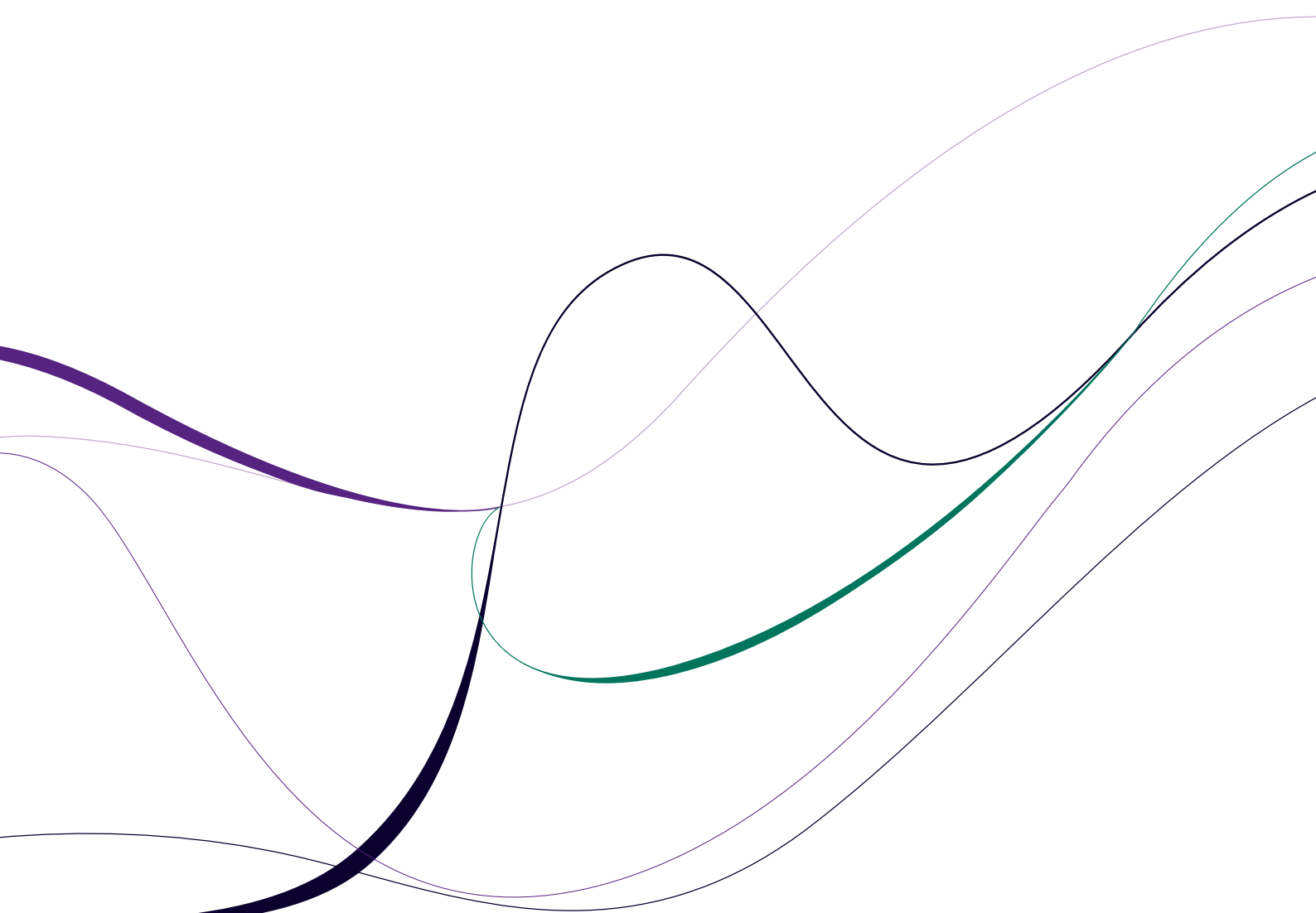
In accordance with HMRC Exclusion 14, box 14 has been left blank and the amount of income losses of 2009-10 set against gains of £x,xxx is included in box 4 only.

Exclusion 18: Top Slicing Relief and Capital Gains

HMRC have identified that returns are failing submission (error code 6522) where a taxpayer has:

- more than one UK and/or foreign life insurance gain, **and**
- the boxes for the number of years of the policy is left blank, **and**
- top slicing relief is not due, and
- the return also includes a capital gain.

The return cannot be filed online. A 2010 return can be filed on paper on or before 31 January 2011.



Personal Tax Special Cases 2010

The current list of 2010 Special Cases can be found at:

<http://www.hmrc.gov.uk/ebu/2010-spec-indi.pdf>

In the following section you will be able to find further information relating to the more common cases;

Case 5. Tax repayment by cheque to nominee

Where a claim is to be made for a tax repayment to be issued by cheque to a nominee, the repayment section on page TR 5 of the Tax Return 2010 should be left blank.

To enable online filing, you must copy the return and remove any information from boxes 4 to 14 on page 5 of the Tax Return 2010.

A claim for repayment should be made directly to the tax office after filing the return.

Case 7. Life Assurance Gains

To ensure the top slicing relief calculation is correct, please select "Review life insurance gains" and check all relevant gains are listed **and the totals agree with the totals on the return.**

Tip Workaround 1

Manually amend the return as follows:

- From the left-hand pane, click Copy return for editing
- Enter a name for the copy and click OK
- From the left-hand pane, click Review life insurance gains
- On the Life Insurance Gains window, click Add Row, then OK
- Revalidate the return.

If this does not solve the issue please follow Workaround 2.

Workaround 2

- From the left-hand pane, click Review life insurance gains
- Note the total figure for column A and click OK
- Browse to box 4 on page Ai 1 of the Additional information pages and/or page 6 of the Foreign pages
- Ensure the total of boxes 4, 6 and 8 on page Ai1 and box 43 on page 6 equals the total value in column A
- If the totals differ amend the details in the Life Insurance Gains window so the totals agree.
- Select OK and re-validate the return.

Case 10. Class 4 NIC and multiple businesses

Where a taxpayer has multiple business and Class 4 NIC is due e.g. Self-employment, Lloyd's underwriters or Partnership, HMRC requires that the Class 4 NIC boxes should be completed on only one schedule.

When generating current working figures Sage Personal Tax will complete one section as required. However, if you have completed more than one Class 4 section by copying the return and adding or amending schedules, the submission may be incorrect.

HMRC provides the following advice:

1. The total of all Class 4 NIC adjustments to be made in any of:-

- Self-employment (full) box 101 pages
- Lloyd's underwriters box 67, or
- Partnership (short) or Partnership (full) box 25

should be completed only on the first schedule submitted with a profit.

2. Where only one of the businesses is exempt from NIC, enter the amount of profits exempt from NIC in the Adjustment to profits chargeable to Class 4 NICs box (e.g. box 101 on the Self-employment (full) pages). Do not select to claim exemption as that will apply:- for all businesses.

Case 20. Provisional self-employment income

Where a return is to be filed with provisional figures, HMRC guidance notes detail the boxes you should complete on the form. However, if you complete a return following this guidance, HMRC validations mean that the return cannot be filed online.

You should apply the following workaround for online filing:

Complete all mandatory boxes:

a) Self-employment (short) pages (SA103S):

Complete box 1, enter estimated turnover in box 8, and enter either an estimated profit in boxes 20, 27 and 30, or an estimated loss in boxes 21 and 31.

b) Self-employment (full) pages (SA103F):

Complete boxes 2, 8 and 9, enter estimated turnover in box 14, and then enter either an estimated profit in boxes 46, 63, 72 and 75, or an estimated loss in boxes 47, 64 and 76.

Partnership Tax Special Cases and Exclusions 2010

The current list of 2010 Special Cases and Exclusions can be found at:-

<http://www.hmrc.gov.uk/ebu/2010-se-partner.pdf>

Examples of common cases are:

Case 5. Tax deducted from trading income

A Partnership Return (SA800) cannot be submitted online with an amount in 'Tax taken off trading income' (box 3.98 on page 5).

To file the return online, you can apply the following workaround:

- Leave box 3.98 blank
- Include any amount from box 3.98 in box 3.97
- Enter details of the amendment in Additional information (box 3.116 on page 3)

Case 7. Taxed Investment income on Partnership Tax Return (SA800)

Any information in boxes 7.7A, 7.8A and 7.9A on page 8 of the Partnership Tax Return cannot be submitted online.

To file a return online, include details of the income from boxes 7.7A, 7.8A and 7.9A on the Partnership Savings, Investments and Other Income (SA804) pages instead.

Tip

Select Return > Add Schedule > Savings, Investments and Other Income from the menu at the top of the screen.

If the 'Add Schedule' menu item is greyed out, then copy the return for editing by selecting

Return > Copy Figures.

Exclusion 5: Mixed Partnerships

The return cannot be filed online where partnership members include individuals and corporate and/or non-resident partners and where two sets of computations are required.

A 2010 return can be filed on paper on or before 31 January 2011.

Trust Tax Special Cases 2010

The current list of 2010 Special Cases can be found at:

<http://www.hmrc.gov.uk/ebu/2010-se-trust.pdf>

Case 3. Trust Trade: basis period with more than one accounting period

HMRC systems only accept one set of Trust and Estate Trade (SA901) pages for each business.

When there is more than one set of accounts for the basis period for a business, separate Trust and Estate Trade pages should be completed for each set of accounts.

To file online, the Trust and Estate Trade pages for the latest accounting period can be submitted online. Additional Trust and Estate Trade pages should be submitted as attachments.

To complete this process, follow the guidance at:

“Self-Employment Validation 6211: “Box 72 must be zero...”

Common Validation Issues

HMRC provide validation rules for online filing, which we include in Sage Taxation. These validations are applied to a return during processing to make sure that the tax return isn't rejected by HMRC and any validation issues need to be cleared before the return can be submitted. These are in addition to the HMRC Special Cases and Exclusions referred to above.

Some of the more common validation messages include:

Self-Employment Validation 6211: "Box 72 must be zero..."

Summary

This validation may be presented where there is a self-employment with more than one accounting period forming the basis period for a tax year:

The validation message displayed is:

"Box 72 must be zero if box 71 is blank or zero and sum of boxes 63, 67 and 70 minus the sum of boxes 64 and 68 if negative or zero (6211)"

Resolution

To clear this validation and file online for a business with more than one accounting period in the tax year, you must include the Self-employment pages for all but the latest accounting period as PDF attachments.

To do this:

1. Open the return, select Return > Copy Figures and click OK.
2. Open the Self-employment (full) pages for the earliest accounting period of the business..
3. Click the Save As PDF toolbar button, select the Self-employment (full) option from the Print range box, and click Save.
4. Enter a unique filename for the PDF and click Save.
5. Click the Attachments toolbar button and click Add. Select the PDF you just saved and click Open, then OK.
6. Repeat steps 2 to 5 for any other Self-employment (full) pages for this business except the one for the latest accounting period.
7. Select Return > Delete Schedule > Self-employment (full) and delete the Self-employment (full) pages you have saved and added as PDF attachments so that only the pages for the latest accounting period remain.
8. You can now validate and finalise the return as normal.

Foreign Property Losses: HMRC validation SA106 Page F4 Box (F) “The value must be equal to or greater than £0.00”

Summary

This validation message may occur where you have a foreign property loss.

Resolution

If the property/properties make a loss:

1. Copy the return by selecting Return > Copy Figures.
2. On page F 4 of the Foreign pages, click on box 14.
3. Amend the Taxable amount figure at the bottom right to £0 and click OK.

If there is a mixture of properties making profit and losses:

1. Copy the return by selecting Return > Copy Figures.
2. On page F 4 of the Foreign pages, click on box 14.
3. Use the losses from the loss-making properties to reduce the Taxable amount for the profit-making properties by editing the Taxable amount figure at the bottom right of each profit-making property as appropriate.
4. For each loss-making property, amend the Taxable amount figure at the bottom right to £0.
5. Click OK. If there is an overall profit from foreign property, box 30 should show the net profit after all the losses have been used. If there is an overall loss, box 30 should be zero.

Residence, Remittance basis etc: HMRC Validation SA109 RR1, box 12, 13 and/or 14 “The value must be greater than or equal to 1”

Summary

This HMRC validation message will occur if any of boxes 10 to 14 on page RR 1 of the Residence, remittance basis etc (SA109) pages have been entered as zero.

Resolution

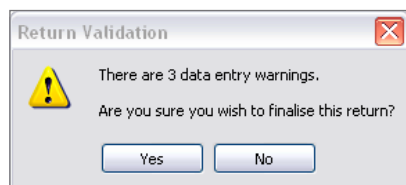
1. Copy the return by selecting Return > Copy Figures.
2. On page RR 1 of the SA109, delete any zero amounts from boxes 10 to 14 and leave these box(es) blank

General hints and tips

There are data entry warnings. Are you sure you wish to finalise this return?

Summary

When finalising a return in Personal Tax, you may occasionally see this message regarding data entry warnings.



These warnings are triggered as a reminder where data you have entered is marked as estimated or incomplete. They are different from the Online filing validations and will not stop you from filing online.

Resolution

To clear data entry warnings, close the tax return and review any items in the Personal Tax navigator that are marked as incomplete (with red crosses) or estimated (with an e symbol). Open the relevant data entry windows and either tick the Complete box or untick the Estimated box as applicable, then click OK.

Plain Paper Calculation not showing full profit details in Personal Tax where there are two sets of accounts for the year.

Summary

Where there are two accounting periods in one tax year for a self-employment, Sage Personal Tax will correctly produce two sets of Self-employment pages. However, the plain paper calculation may only include the profit for the latest period.

Resolution

Open the Computation details data entry window for the relevant self-employment..

Amend the basis period dates to reflect the full period covered by the two accounting periods

Ensure the "Accounting date has changed" box is ticked.

On the Adjustment Details page, amend the "Profit/loss from accounts" to show the result of the second accounting period.

In "Less adjustment for this basis period", enter the profit for the first accounting period (as a negative amount).

The "Net profit/loss" will then show the correct total for the tax year.

Two sets of Self-employment pages will be completed correctly and the plain paper calculation will show the correct assessable profit.

Why is the Plain Paper Calculation not showing the manual changes I have made to the tax return?

Summary

If you have made manual adjustments to the tax return (for example to clear a validation issue), it may seem that the plain paper calculation has not been updated.

Resolution

Ensure that you have selected “View plain paper calculation” from the left hand pane whilst viewing the tax return rather than from “Calculation” toolbar button on the main screen.

Why are my foreign dividends being grossed up?

Summary

The Foreign dividends on the plain paper calculation differ from the amount of Foreign dividends entered on the return. For example, if you enter a Foreign dividend of £900 on the return, it appears as £1,000 on the PPC.

Reason

Under prescribed circumstances, foreign dividends will qualify for a 10% UK tax credit.

All foreign dividends received are included in the Foreign pages, page F 3, box 6 with the total of any non qualifying dividends in box 7.

The total from box 6 minus any amount in box 7 will be grossed up in the tax calculation to reflect the 10% UK tax credit.

To reflect this in Sage Personal Tax:

1. Select Foreign > Foreign Dividends in the Personal Tax navigator.
2. For each dividend, open the data entry window, go to the Dividend Details page and set the Dividend Type to either Qualifying or Non-qualifying

Capital Gains 2010

Entrepreneurs' Relief

There were substantial changes to Capital Gains Tax from 6 April 2008, including the introduction of Entrepreneurs' Relief.

To claim Entrepreneurs' Relief for a disposal make sure that you have ticked "Qualifying business disposal (QBD)" on the Main Details page of the Capital Gains Disposal data entry window.

Details for Year to 5th April 2010 Estimated Complete

Main Details | **Capital Gain**

Description of asset:

Asset type:

Date of disposal:

	Acquisition	Enhancement		Total
Date(s) of first acquisition(s)	<input type="text" value="12/02/1983"/>	<input type="text"/>	<input type="text"/>	
Cost / Value at 31/03/1982 ^	<input type="text" value="£20,000.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£20,000.00"/>
Incidental costs of acquisition ^	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>
Disposal proceeds ^	<input type="text" value="£125,000.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£0.00"/>	<input type="text" value="£125,000.00"/>
Incidental costs of disposal ^				<input type="text" value="£0.00"/>

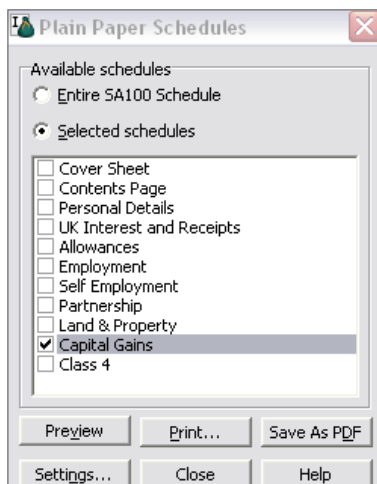
Claim reliefs
 Foreign tax
 Qualifying business disposal (QBD)

Valuation used
 Additional supporting details added
 QBD - Associated disposal

^ The Capital Gains Summary (SA108) requires disposal proceeds and costs of acquisition/enhancement to be entered gross. Incidental costs of acquisition/enhancement and incidental costs of disposal should be entered in the separate fields.

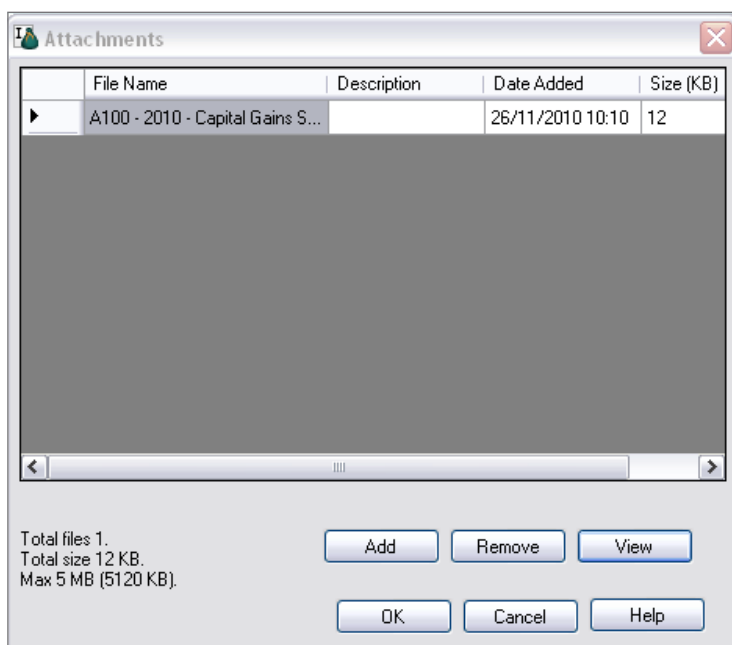
Attaching a capital gains schedule in Personal Tax

In the main section, select the “Schedule” icon



The Plain Paper Schedules window is displayed. Select Capital Gains and click “Save As PDF”. Select the folder in which to save the PDF. Note: If you accept the default folder, you can access the folder by selecting PDF Folder from the View menu.

- Click the Return toolbar button to view the tax return.
- Select “Copy return for editing” in the Tasks pane.
- Enter a name for the return and click OK.
- Click the Attachments toolbar button. The Attachments window is displayed.



Click “Add” and select the capital gains schedule(s) saved earlier. The default PDF folder is displayed or you can browse to the relevant file. You can view the document, to make sure it is correct, and remove any incorrect documents. Once you are satisfied it is all correct, select OK and the selected files will be attached to the tax return. You can see Attachments to the return in the PDF Attachments pane at the bottom left of the window.

You can then finalise and validate the return, ready for submission.

Safeguarding your Sage Taxation data

Your data keeps your practice running, and keeping it safe is vital at any time of the year, but more so during the run-up to the Self Assessment filing deadline. Our experience shows that many customers may not be backing up the correct data, or not backing it up regularly enough. Should the worst happen and your computer or server crashes, this can result in extended periods of downtime whilst our Customer Service Technicians assist with the repair of your data (whilst we always endeavour to return your data as quickly as possible, this may take up to 5 working days).

Tip

Backing up your 'SageData' folder is not the correct way to take a backup. Since V9.0 no client data has been stored here. This folder holds utilities, configuration settings and your Control Centre custom letters only.

In addition to this, many third party backup utilities cannot back up SQL server data directly. Our easy to use Backup and Restore utility puts the data into a single file that can be picked up by any third party server backup solutions that you use.

By correctly backing up with our 'Backup and Restore' utility, you will have the peace of mind that if something should go wrong, you can get your Taxation data back up and running within a matter of minutes with one phone call to our Customer Services team.

To check if you are backing up correctly

1. Close all Sage Taxation programs (including Control Centre) on all workstations.
2. From the Windows Start menu, select All Programs > Sage > Sage Taxation > Sage Toolbox > Installation Checker.
3. A confirmation dialog about data scanning appears. Click No.
4. If you receive a warning that you have not taken a backup for over a week, it may indicate that the incorrect files have been backed up and you should take a backup as outlined below as soon as possible.

How to take a backup of your Sage Taxation data

1. Close all Sage Taxation programs (including Control Centre and the Practice Suite menu) on all workstations.
2. From the Windows Start menu, select All Programs > Sage > Sage Taxation > Sage Toolbox > Backup and Restore.
3. The Sage Taxation Backup & Restore window appears. Click Backup.
4. A confirmation dialog about database checks appears. Click Yes.
5. You will be advised of the location that your data is being backed up to. Click Yes.
6. You will receive a confirmation message after the backup has been taken. Click OK.

Tip: The backup file will normally be saved on the same hard drive as your SQL database. To mitigate the risk of hard drive failure corrupting your backup files, we recommend keeping a copy of the backup files in another location.

Please remember to take regular backups. We strongly recommend that you take a Sage backup at the end of every working day, especially during the Self Assessment deadline period.

Automating the backup procedure

Automating the backup process means you don't have to remember to back up your Sage Taxation data and that you will always have a recent backup should anything go wrong.

We recommend that you follow this procedure at the Sage Taxation server PC, as this PC is more likely to be switched on at all times.

Note: You must have a Windows password set up for the account that is going to run this task, otherwise the task will not run. You can set this up in the User Accounts section of the Windows > Control Panel.

Tip

The Backup and Restore option does not run if someone is logged into Sage Taxation or if any software is using the SQL on the server PC, such as Backup Exec. You should try to avoid scheduling your task at times when this could be an issue.

You can schedule backups of your data through Sage Taxation using the Task Scheduler in Windows.

Information on how to do this is provided within the software. To access this:

1. Access Control Centre
2. Press F1 to access F1 Help
3. Click the Search tab
4. Type in backup
5. Click on Scheduled Backup on the search results.

Additional Help: Ask Sage

Ask Sage is a database of over 10,000 articles designed to answer your technical support queries. SageCover customers can escalate unsuccessful searches directly to Sage Customer Services, request an automatic notification when the information is updated, and supply feedback about each answer given, ensuring we can maintain the most relevant answers to you.

To obtain a Sage login

Note: The Sage Support Site requires you to log in before you can download updates and support material. This means that we can proactively contact you about critical updates and display only the updates relevant to you by linking your login to your registered software version.

1. Open your Internet browser and enter support.sage.co.uk in the address bar.

The Sage Support site homepage appears.

Tip: If you are already at the Sage website, from the homepage, click Support & Training then from the bottom of the page, click Take me to the support site.

2. On the Sage Support site homepage click Create one now at the bottom of the Log In panel on the right.

The Create a Sage Login page appears.

3. Follow the on-screen prompts for required details then click Finish.
4. A confirmation email is sent to you containing a link. When it arrives, to activate your login, click the link.

Note: The email is sent from support@sage.com and the subject is My Sage Login.

The Activate your login page appears.

5. Enter the password set up during the login creation process then click Activate.

You have now successfully created and activated a login for the Sage Support Site.

To use Ask Sage

Note: When you log in to the Sage Support site, an Ask Sage search box appears in the top left-hand corner of the page. You can use this box to search and access Ask Sage. You do not need to return to this box to conduct a further search.

1. To access Ask Sage, in your browser, enter the web address www.sage.co.uk/taxupdate
2. In the Search Text (this is optional) box, enter the details relating to your query. This can be a full question or a key word for your query. For example, to find more information relating to HMRC error code 3001, enter **3001 error**
3. You can select a product (for example, Personal Tax) from the drop down to refine the search or leave as "All Subs" to search across all products.

4. The following screen provides further search refinements.

Ask Sage search tips

- To search through a wider range of words by using word stemming choose the Complex Expression option from the Search By drop down then enter the initial letters of the word followed by an asterisk to cover all possible extensions. For example, if you enter: 'Navigat*' Ask Sage searches for: Navigate, Navigation and Navigator.
- To exclude articles that contain a certain word, before that word, enter a minus sign. For example, enter **Trust -Return** to find all articles that include the word Trust but not the word Return.
- To search for documents that include specific words, add a plus sign before the word. For example, to search for words that include Trust and Return, in the Search Text box, enter +Trust +Return.
- To search for articles that include, for example, the word Corporation but not necessarily the word Tax, in the Search Text box, enter +Corporation Tax.
- For more focussed results, you should enter the most uncommon words in the Search Text box.

5. To search Ask Sage for an answer to your query, click Search.

A list of articles that may answer your query appears..

6. To view the content of an article, click the title.

The article opens in a new window.

Tip

At the bottom of each answer, in the "Did this answer your question?" section, you can submit a rating to let us know whether the article answered your question, and supply feedback about the article. You can also choose to be notified by email when the answer is updated. If you select this option, the article appears on the Notifications tab.

Note: This option is designed to give feedback about the article. If you use it to submit a technical query this may result in a delayed response to your query.

You have now used Ask Sage to search for answers to your query and can continue viewing the answers found, or if required, carry out additional searches.

To contact us through Ask Sage

If you have a technical query, use the Email Us tab on the search results page to submit your query directly to Customer Services.

1. From Ask Sage, click the Email Us tab.

Complete the Subject and Question boxes.

2. From the Product drop-down list, choose the product and sub-product to which your question relates.
3. To attach a file to your question, for example a report displaying figures you are querying, click Browse, locate the file and click Open.

The path to your chosen file appears in the box.

Tip

If you want to attach another file, click Add Another Attachment and repeat this step.

4. To submit your question, click Submit Question.

Ask Sage searches our database for answers to your question and a list of related articles appear.

5. If none of the articles listed answers your question, click Finish Submitting Question.

Your question is submitted to our Customer Services team.

You have now contacted us through Ask Sage.



For further information,
visit sage.co.uk/support,
email us at
accountants.support@sage.com
or call us on **0845 111 1111**

