

FormTool2010

Introduction (and Essential Information)

- Welcome
- About ...[\(1\)](#)
- About ...[\(2\)](#)
- About ...[\(3\)](#) (What's changed?)
- About ...Windows Vista
- Licensing
- ESSENTIAL READING 1 - Excel Macros
- ESSENTIAL READING 2 - Excel Add-ins
- ESSENTIAL READING 3 - DataDoc technology
- Changing the icon
- Replacing files
- Updates
- Update notifications
- Other useful software
- Disclaimer

Sections

- Letters / Forms

Forms Section

- Forms Section

Administration

- Administration-main
- Administration index
- New Client Forms
- Database Amendment Forms
- Permanent File Index Sheet
- Money Laundering ID form
- Billing instructions
- Billing text
- Client Account Cheque Request
- Client Tax Repayment Authority
- Standing order mandate
- Personal Guarantee for Directors
- Staff Induction Form
- Staff Feedback Form
- Staff Planner
- Customer Care Checklist
- CPD Records
- Course evaluation form
- Personal Development Plans
- Expenses Claim Form
- File Note
- Briefing Sheet
- Time Sheet
- Disbursements Record
- Authority to disclose information
- Fax Cover Sheet
- Telephone Message Pad
- Fit and Proper Forms
- Delegation and Action Reports

Accounts

- Accounts-main
- Accounts index
- Client Manager System
- VATTracker
- Accounts Preparation Checklist
- Working Papers Index Sheet
- Accounts Working Papers
- Pre Year End Meeting notes

- Meeting prompts
- Lead Schedules
- Notes and Queries Sheet
- Farmers Stock Sheet
- Breakeven Analysis (Graphical)
- Breakeven Analysis
- Five year summaries
- Where did the money go?
- Graphing Tool
- Sparklines (mini graphs)
- Loan Calculator
- Cash Balance Projector
- Client System Adjustments
- Period Procedures
- Computerised Work Programs
- Client Software Record
- Adding Value Checklist
- Accounts to Client
- Audit Price List

#### Taxation

- Taxation-main
- Taxation
- 20+ steps to create a tax return
- Missing information sheet
- Car Co2 Emissions Record
- Liabilities Schedule
- VAT Online Filing Information

#### Practice Assurance

- Practice Assurance - main
- Annual Compliance Review
- List of documents
- Compliance Review Areas
- DPB Compliance Review Areas

#### Miscellaneous

- Miscellaneous-main
- CheckQ - checklist software
- CheckQ - what is on this product?
- Miscellaneous
- AgendaCreator
- Business Analyst

#### Marketing

- Marketing main
- Marketing index
- Planning - the big picture
- Marketing programme
- Winning Clients
- Seminar Planning Checklist
- Reception Presentation
- Direct Mail
- Service and Product Matrix
- Personal Affairs Checklist
- Tough Times Checklist

#### Corporate Finance

- Corporate Finance
- Miscellaneous Forms
- Business Plans
- Due diligence
- Marketing
- Strategic Planning
- Valuations and Forecasts

#### Financial Services

- Financial Services
- Pension Calculator

Stakeholder Pension Calculator  
Financial Services "GreenSheet"  
State Pension Forecast (Weblink)

#### Paperless Office

Paperless Office  
Introduction  
The Paperless Office-for accountants  
Electronic distribution 1  
Electronic distribution 2  
Printing Tools  
Practical Tools

#### Word Tips Section

Word Tips Section  
Word Macros  
Word AutoCorrect  
Word Find and Replace  
AutoText  
Tables - insert a row  
Adding a Work Button  
Chunks of text  
Word Keyboard Shortcuts  
Word Online Training

#### Letters Section

Letters Section  
Introduction  
DataDoc technology  
Word Bookmarks  
Word Bookmarks  
Using the letters

#### Administration Letters

Administration-main  
Administration  
Proposal Letters  
Engagement Letters  
Engagement Letters Other  
Disengagement Letters  
Handover letters  
Other letters

#### Accounts Letters

Accounts-main  
Accounts  
Letters sending accounts  
Company accounts letters

#### Audit Letters

Audit-main  
Audit index  
Audit Letters

#### Taxation Letters

Taxation-main  
Taxation (1) - preparation  
Taxation-Client letters  
Taxation (2a) - client letters by post  
Taxation (2b) - client letters by email  
Taxation (2c) - client letters via portal  
Taxation (3) - HMRC letters  
Taxation (4) - HMRC letters  
VAT and other letters  
PAYE letters  
Taxation - WebLinks

#### Miscellaneous Letters

Miscellaneous-main  
Miscellaneous index  
Miscellaneous and Marketing Letters

HelpSheets Section

Helpsheets Section

2020 Client Helpsheet System

Institute Site - Fact Sheets

Other Fact Sheets - web based

Third Party Tools and Products

Accountants Power Tools

Tax Tips and Tools

DataDoc

Efficient Accounts Production

Feedback

Feedback

BBS Computing

2020 Membership