

Using Taxfiler for success

Taxfiler is a cloud solution for preparing and filing accounts, tax and MTD VAT returns.

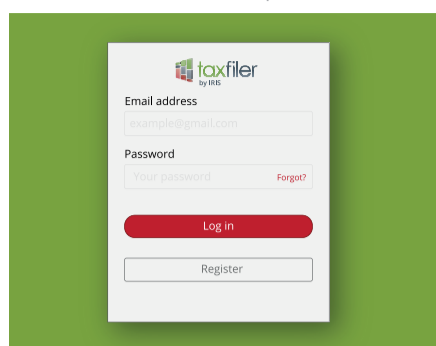
A single monthly subscription enables accountants to submit statutory accounts and tax returns for companies, partnerships, individuals, and trusts.

I want to sign-up for a free trial – what happens next?

Trial Process

STEP 1

It takes just a few minutes to register for the 30-day free trial from the main [Taxfiler website](#). You only need your company name, your name, email address and a secure password



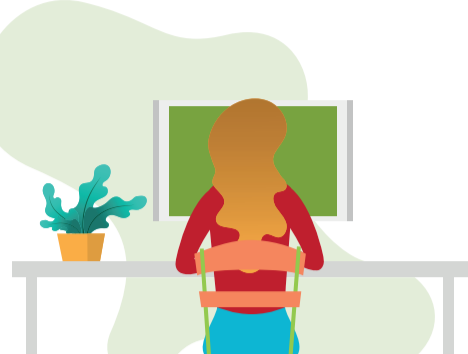
STEP 2

Familiarise yourself using the Resources available on the Taxfiler website or from the ? icon once you've logged in. There is a comprehensive knowledge database complete with [videos](#) and [webinars](#) to help you get up and running quickly



STEP 3

Setup a client and play with the system trying various options



STEP 4

If you require additional help, ask the Support Team by sending them an email to support@taxfiler.co.uk

STEP 5

Ready to register as a Taxfiler customer? You can do this in two ways: During the trial, the system will require you to register when you try and file a return or download documents, or at the end of the trial you'll be prompted to select a subscription. However you sign up, you won't lose any data you've already loaded and can continue the work you were doing.

Is support included in the package?



STEP 1

Taxfiler's website offers a thorough user guide, [help videos](#), and [webinars](#) to ensure you make full use of the software

STEP 2

If the self-service resources don't solve your query, we're here to help; simply email support@taxfiler.co.uk, and we'll respond within 24 working hours

What is included in the package?

Essential compliance toolkit

- Accounts preparation
- Self Assessment
- Corporation tax
- Partnerships
- MTD for VAT
- Trusts & Estates
- Deadline diary
- FTSE350 dividend feed

Import data from spreadsheets or bookkeeping software such as:

- QuickBooks online
- Xero
- Sage
- Kashflow
- FreeAgent
- VT

User access rights (multi-user system)

Single fee, no hidden extras

I want to register as a Taxfiler customer?

Registration Process

STEP 1

When trialling the software the system will require you to register when you try and file a return or download documents, or at the end of the trial you'll be prompted to select a subscription. OR



STEP 2

From the main Taxfiler website, click the [sign-up](#) button, complete the details and select the package that suits your requirements. You can upgrade your licence at any time



STEP 3

Quickly set up a direct debit mandate or make a one-off payment online



STEP 4

If you require additional help making payments, ask the Billing Team by sending an email to billing@taxfiler.co.uk



STEP 5

Once registered you will receive a confirmation welcome email



STEP 6

It won't take you long to configure your company settings and begin to load your clients into Taxfiler



STEP 7

Congratulations you're good to go! You can start filing directly to HMRC and Companies House for your clients today

Simple Billing

STEP 1

You will receive an Invoice by email confirming your subscription



STEP 2

You can choose to setup a direct debit mandate or pay manually each time.



STEP 3

If you sign up for an annual package you will receive a reminder email 90 days prior to auto-renewal



STEP 4

If you require additional help, ask the Billing Team by sending an email to billing@taxfiler.co.uk.

