

 **Bright**  
Simply brilliant software


**Preparing for  
Self Assessment**





 **Bright**


**BrightTax**  
**BrightAccountsProduction**  
**BrightManager**  
**BrightCoSec**  
**BrightBooks**  
**BrightPropose**  
**BrightPay**




 **Bright**

 Questions

 Handouts

 Recording

 Email

 **Bright**

**Agenda**

1. The value of time
2. Identify bottlenecks
3. Setting internal tax return deadlines
4. Tools to help you with tax season
5. Questions and answers



Dread busy season every year?  
Nothing is more valuable than **time**



25,769 SATR submitted  
over the festive period

**4,757 filed on  
Christmas Day!**



- > Clients are facing economic difficulties
- > How to help while staying on top of usual compliance tasks
- > Analyse what went well and where there is room for improvement



Set your own internal  
deadlines





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Check in with  
troublemakers



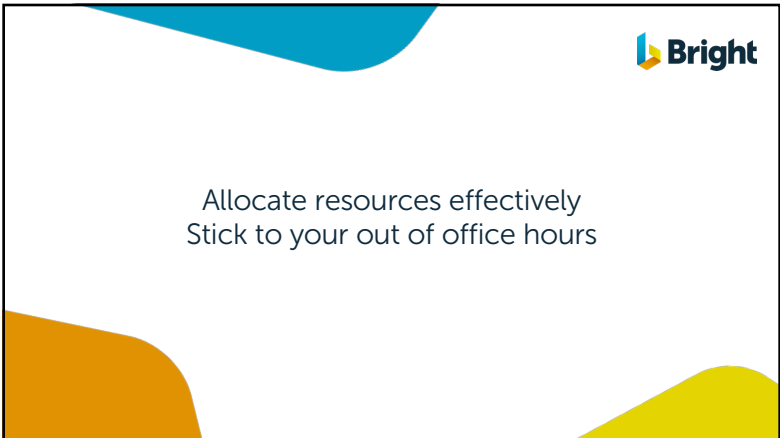
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Manage stress levels  
and have a positive  
office influence



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Employee  
engagement



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Allocate resources effectively  
Stick to your out of office hours

## Practice management software



## Practice management software

- › Set your own 'target dates'
- › Ensures clear roadmap
- › Find a process that tracks your team's progress, while they work



Identify bottlenecks with a time-tracking tool



## Time tracking

- › Track how long each person spends on a task
- › Sync to timesheets
- › See chargeable vs. non-chargeable work



Gathering client records can be incredibly time consuming



## Automated emails

- › Set up emails from compliance deadlines pulled from Companies House integration
- › Email templates with 500+ variables
- › Same stellar service – minus all the admin



Spend hours creating the perfect spreadsheet?



## Task management

- › Offers complete visibility
- › Tailored to the accounting industry
- › Cloud-based, so it updates while you and your teamwork
- › Workflow breaks down tasks into more structured subtasks



## Is your firm protected?

- › What if your emails got hacked and exposed data to unauthorised users?
- › Use a GDPR-compliant portal, and see all client activity (e-signed a document, opened an email, or sent a message)
- › Audit trails protect your firm from potential miscommunication



## Fully cloud tax software



## Tax and compliance software

- › Complete Partner Self Assessments just once
- › Consolidate multiple UK property or Capital Gains schedules
- › Keep internal notes
- › Efficient online filing to HMRC (SA100, SA302, SA800, SA900)



## All-in-one internal filing system

- › Grab any files you need, at any time, from any device
- › Rather than emailing clients their tax returns, add it to the portal (and e-sign it from there too)
- › Handy when applying for loans and mortgages
- › No more time wasted searching through cabinets or USB sticks for files



## Internal communication



- Have regular check-ins with your team
- Some of your team may have more on their plate
- It's about getting the job done across your firm
- Don't forget to celebrate once it's over!

## Integrations



 **Bright** Manager

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## Questions and answers

