

BOOKKEEPING SOFTWARE USER GUIDE

For first time user

The screenshot shows the Basetax website's registration page. At the top, there is a navigation bar with links for 'About', 'Pricing', 'Email', 'Password', 'Login', 'Register', and 'Forgot your password?'. Below the navigation bar is the Basetax logo, which includes a green location pin icon and the text 'BASETAX Easy tax returns'. To the right of the logo are four service categories: 'Free Software (Track Income & Expenses)', 'Tax Return (File Self Assessment)', 'Accountant (Get Specialist Advice)', and 'Financial Services (Insurance & Mortgages)'. The main content area features a background image of a calculator with the text 'SEE HOW EASY BASETAX REALLY IS'. Below this text are three bullet points with green checkmarks: 'Track your income and expenses in seconds', 'File tax return online in minutes', and 'Save hours of your time'. Underneath is the heading 'JOIN THOUSANDS OF OTHER HAPPY USERS!' and a registration form. The form contains four input fields: 'Full name', 'Email address', 'Password', and 'Confirm password', each with a small icon to its right. Below the form is a green 'Sign Up' button. At the bottom of the form, there is a line of text: 'By signing up, I agree to Basetax Terms of Service, Privacy Policy, Guest Refund Policy, and Host Guarantee Terms.' Below the button, there is a link: 'Already an BasetaxAccountant member? Login'.

Basetax Bookkeeping Software User Guide

For first time user

HOW TO SET UP BUSINESS DETAIL

Step 1: Select your tax status

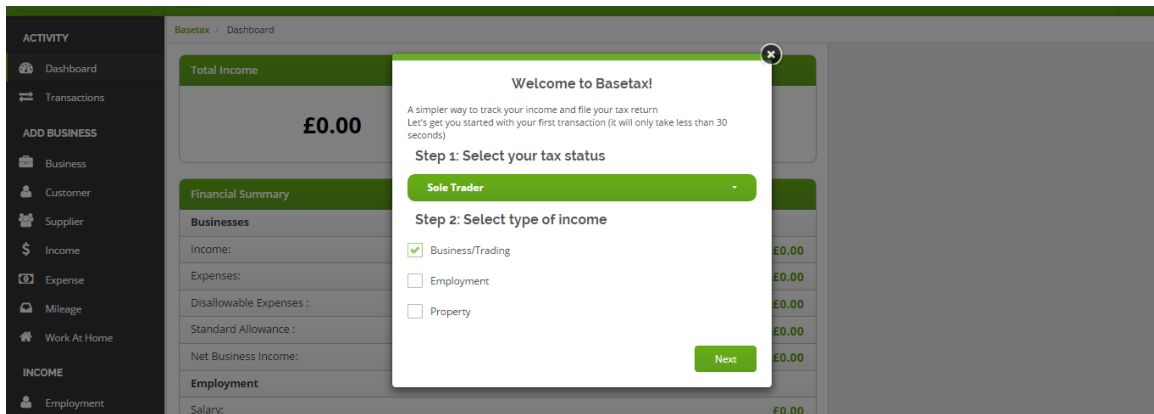
- Limited Company
- Sole Trader
- Partnership
- Private Individual

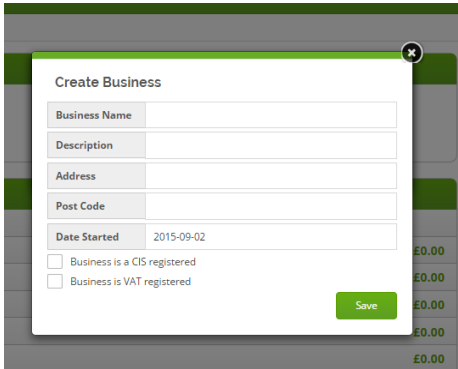
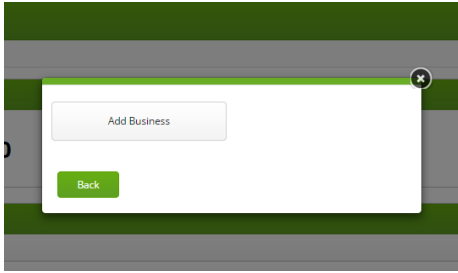
Step 2: Select main type of income

- Business/Trading
- Employment
- Property

Step 3: Fill in your business detail

Fill in your business information form shown up after 'Add Business'. Business Name, description and postcode are mandatory fields. The rest of the form can be added later by clicking on 'Business' under the 'Add Business' section on the left side menu.





Click Save after adding the business detail. Your business is set up.

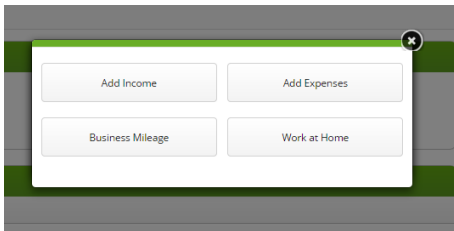
Next: Create a transaction

CREATE TRANSACTION |

HOW TO CREATE A TRANSACTION

Step 1: Select type of transaction

Add Income
Add Expense
Business mileage
Work at home



Option 1: Add Income

Fill in income detail form shown up after 'Add Income'. Amount, date and customer name are mandatory fields. Select one of the income types in the dropdown option within Record Type field. If the customer name is not within the dropdown option please 'Add New Customer' detail.

Important note: Please note that only the date within the range of the selected tax year will be accepted (i.e. 2015/16 covers from 6th April 2015 to 5th April 2016). You will not be able to save the transaction if the date is outside of the selected tax year. Please change the tax year at the top right corner.

The rest of the form can be added later from Transaction page.

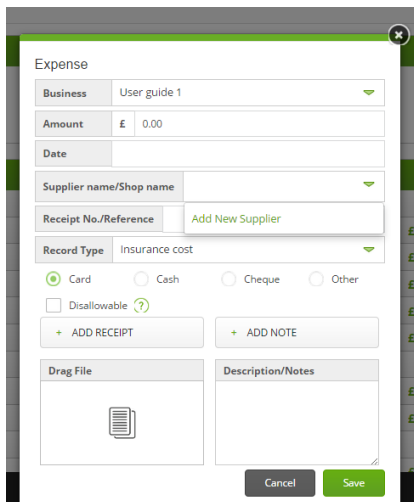
A screenshot of the 'Income' form in a software application. The form is titled 'Income' and contains several fields: 'Business' (User guide 1), 'Amount' (£ 0.00), 'Date', 'Customer Name', 'Invoice No./Ref' (Add New Customer), and 'Record Type' (Sales). Below these fields are radio buttons for 'Card', 'Cash', 'Cheque', and 'Other'. There are also buttons for '+ ADD RECEIPT' and '+ ADD NOTE'. At the bottom, there is a 'Drag File' section with a document icon and a 'Description/Notes' text area. The form has 'Cancel' and 'Save' buttons at the bottom right. The background shows a list of transactions with amounts of £0.00.

Option 2: Add Expense

Fill in income detail form shown up after 'Add Expense'. Amount, date and supplier name are mandatory fields. Select one of the expenses types in the dropdown option within Record Type field. If the supplier name is not within the dropdown option please 'Add New Supplier' detail.

Important note: Please note that only the date within the range of the selected tax year will be accepted (i.e. 2015/16 covers from 6th April 2015 to 5th April 2016). You will not be able to save the transaction if the date is outside of the selected tax year. Please change the tax year at the top right corner.

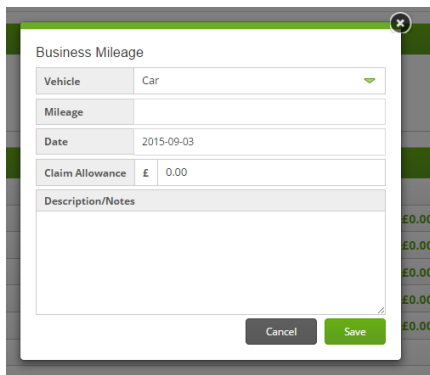
The rest of the form can be added later from Transaction page.



Tips: Full list of expenses that you can claim - [Link to Expenses for Sole Trader Guide](#)

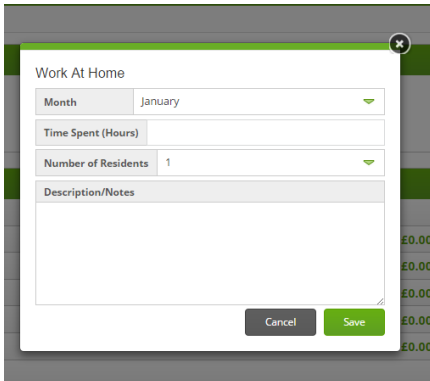
Option 3: Business mileage

Record your business mileage for the week/month. The claim allowance will automatically calculate for you based on the type of vehicle you selected. It is advisable to include full detail of the business trip that you have made.



Option 4: Business mileage

Record the work at home hour for the month. The claim allowance will automatically calculate for you based on the number of hour you entered. It is advisable to include full detail of the works done at home.



The image shows a software interface for recording work at home hours. The form is titled "Work At Home" and includes the following fields:

- Month:** A dropdown menu currently showing "January".
- Time Spent (Hours):** An empty text input field.
- Number of Residents:** A dropdown menu currently showing "1".
- Description/Notes:** A large, empty text area for providing details.

At the bottom of the form, there are two buttons: "Cancel" and "Save". The form is overlaid on a background that shows a table with a column of "E0.00" values.

HOW TO VIEW BUSINESS SUMMARY/TRANSACTIONS

View 1: Dashboard

Overview of your financial summary
 Estimate tax (for self-employed only)
 Breakdown of business expenses

The screenshot shows the BaseTax Dashboard. At the top, there are two key metrics: Total Income (£47,600.00) and Estimated Tax (£11,833.51). Below these is a 'Financial Summary' table.

Financial Summary	
Businesses	
Income:	£50,000.00
Expenses:	£2,400.00
Phone, fax, stationery and other office costs:	£400.00
Car, van and travel expenses:	£2,000.00
Disallowable Expenses:	£0.00
Standard Allowance:	£0.00
Net Income:	£47,600.00
Employment	
Salary:	£0.00
Benefits and Expenses:	£0.00

The dashboard also includes a sidebar with navigation options like 'Dashboard', 'Transactions', 'ADD BUSINESS', 'INCOME', and 'ESTIMATE TAX'. A footer contains copyright information and an 'Online - Chat with us' button.

View 2: Transactions

List of all your transactions
 Edit/Delete a specific transaction under 'Action'

The screenshot shows the BaseTax Transactions page. It features a table of transactions with columns for Action, Type, Name, Amount, and Date. The 'Action' column has a dropdown menu with options for 'Action', 'Edit', and 'Delete'.

Action	Type	Name	Amount	Date
Action	Expense	rrrrr	£400.00	3rd Sep 2015
Edit	Expense	rrrrr	£2,000.00	3rd Sep 2015
Delete	Income	ttt	£50,000.00	3rd Sep 2015

The page includes a sidebar with navigation options, a search bar, and a footer with copyright information and an 'Online - Chat with us' button.