

CCH Software Training Quarter 1 - 2010



Information

Fee Protection

Software

Magazines

Professional Development

...clear thinking



Training? We had that when the system was first installed.

Linda's just come back from maternity leave, Sunil has agreed to take on more work and David is struggling with disclosure requirements.

People change. Regulations change. Software changes. That's why training – just like professional development – should be a continual process.

- **Improve productivity** Make sure everyone in your practice is getting the most out of your CCH software.
- **Save chargeable time** Let your fee earners get on with their own work and let us do the training.
- **Learn from the experts** No one knows our software better than we do.
- **Stay ahead of the game** Stay abreast of software upgrades, new legislation and changing client expectations.
- **Go beyond the basics** Learn about your software in depth from the people who know most about it.

To find out more about CCH training and consultancy, including dates for public training courses:

phone: 0844 56 18181

email: cchprofessionalservices@wolterskluwer.co.uk

www.cch.co.uk/software/support/CCHTraining

Does that mean sitting in a classroom?

Not necessarily. Whoever you are and whatever you want, there's a training option to suit. We can even build an entire training programme just for you.

Webinars

These combine a live presentation of CCH software, using the popular WebEx internet conferencing system, with audio via a teleconference call. All you need is an internet connection and a phone.

Ideal for... learning about a single topic in a cost effective format

More information

visit www.cch.co.uk/software/support/CCHWebinar or see the current course details and booking form printed in this document

CCH eLearning

Professionally prepared multimedia training presentations which have been recorded and stored on our website. Available 24/7 via a personal logon. Full tracking and measurement with comprehensive management reporting.

Ideal for... self-paced, personalised learning that fits around existing work commitments

More information...

www.cch.co.uk/software/support/CCHeLearning

Face to Face training

Courses are between half a day and two days and cover all aspects of the software from initial setup to advanced functions. Choose standard or bespoke courses, run in our own training facility or at your offices.

Ideal for... training a group of staff together at the same time

More information...

www.cch.co.uk/software/support/CCHFaceToFace

Consultancy

Need to customise the software? Want to integrate it with existing systems or work practices? Need bespoke reports? Our consultants can work with you on any issue relating to your use of IT.

Ideal for... exploring issues that are particular to your business

Current CCH Webinar courses

The Quarter 1 Webinars cover topics of interest to any practice that uses CCH Personal Tax.

You can book a place on a single course for £75 or £175 for all three (prices exclude VAT). Just complete the attached booking form.

If you have any suggestion for future course topics, please email them to cchprofessionalservices@wolterskluwer.co.uk

Successful Contact Management using CCH Central - 16th February

CCH Personal Tax uses the contact management functions built into CCH Central. This avoids duplicate data entry and improves the presentation of client facing documents by ensuring consistency across all communication.

Course contents

- Monitoring contact creation
- Best practice for contact creation to avoid unnecessary duplication
- Identifying and merging existing duplicate contacts
- Dealing with duplicate tax contacts, for example banks
- Associating contact records
- Using the draft contacts facility
- Sharing address details
- Identifying duplicate addresses
- Tidying the address file

This course is aimed at practice managers and database administrators.

Current CCH Webinar courses

Editing and using CCH Aide Memoire - 4th March and 29th March

CCH Aide-Mémoire allows practices to send out questionnaires at the end of the tax year outlining the information they will need to complete the following year's return. The Aide-Mémoire template draws existing client information from the database so that the questionnaire can be personalised.

Course contents

- Running CCH Aide-Mémoire to produce information requests for the 2010 tax return season
- Template types and the underlying template structure
- Customising the Aide-Mémoire template
- Using the mail merge utility in CCH Central
- Using search and sort criteria within CCH Central

This course is aimed at practice managers and database administrators.

To amend the template you will need some proficiency in Microsoft Word.

Best practice and year end procedures for personal tax - 24th February

From collecting data to submitting finished returns, tax work follows a regular annual cycle. CCH Personal Tax includes a number of tools to improve the efficiency of this cycle and the accuracy of the work that's produced. Whether your tax department is two or 100 strong, knowing how to use these tools will help make next tax year easier for everyone.

Course contents

- Reviewing progress of the previous tax return season
- Reviewing the numbers of returns submitted
- Analysing the workflow data using MS Excel pivot tables
- Using the global roll forward utility
- Updating and amending workflow templates ready for next year
- Globally attaching workflow templates to clients
- Archiving or deleting clients for whom you no longer act
- Updating responsibilities
- Removing tax users from the system
- Using Tax Explorer to identify specific client categories, for example CGT losses

This course is aimed at tax managers and tax seniors.

Booking your training

Firm

Telephone

Your Name

Email

Postcode

Courses interested in:

Webinars

- Successful contact management using CCH Central
- Editing and using CCH Aide-Mémoire
- Best practice and year end procedures for personal tax

eLearning

- CCH Central
- CCH Practice Management
- CCH Personal TAX
- CCH PerTAX
- CCH Accounts Production
- CCH CorTAX

Face to Face Training

- Accounts Production
- Taxation
- Trust Accounts
- Practice Management
- Document/Singleview
- Central
- Insolvency

Consultancy

Bespoke training based on your requirements

Email your completed form to cchprofessionalservices@wolterskluwer.co.uk
or fax back on 0208 799 0040

To view the full list of courses visit www.cch.co.uk/software/support/CCHTraining
or contact us on 0844 56 18181 (option 1)

About CCH

CCH enjoys a unique position within the tax and accounting communities, having provided them with first class business solutions for more than 100 years. In April 2008 Wolters Kluwer added MYOB UK Accountants Division to the CCH family. CCH now services more than 3,000 professional firms of all sizes, from sole practitioners to most of the UK's top 100 accounting practices.

A wide variety of products and services are available – from software, professional development programmes and fee protection services to training and consultancy, reference books, CDs and online information.

Whether you're looking to build client relationships, improve your firm's profitability, develop new revenue streams or reinvigorate your business processes, CCH has solutions that can help.

The CCH ProSystem Suite

Central

The core products in the CCH ProSystem Suite work within CCH Central.

CCH Central provides a single point of entry for data, and enables cross-product reporting and data mining. Personalised home pages allow individuals to bring together all the information they need on a single screen.

Practice Management

CCH Practice Management helps partners and practice managers organise staff resources and maximise chargeable time. The software supports multiple offices and remote access and data entry for staff working offsite.

Document Management

CCH Document Management stores and manages the full range of documents used by an accounting practice, giving 24/7 remote access to client files. Sophisticated search options and integration with Microsoft Outlook make it easy to find and use any item of client correspondence.

Audit Automation

CCH Audit Automation automates the process of conducting an audit, minimising risk, enforcing standards and reducing costs. Paperless working allows tasks to be divided easily between staff.

Accounts Production

CCH Accounts Production turns raw accounting data into finished statutory accounts quickly and cost effectively. Regularly updated accounts formats are available for a wide range of entities, including charities, partnerships, pension funds, farms and group accounts.

Tax

CCH provides a comprehensive suite of applications to handle tax administration and planning for a wide range of taxpayers, including individuals, companies and other entities.

- CCH Personal Tax
- CCH Partnership Tax
- CCH PKF P11D
- CCH Trust Tax
- CCH CGT & Dividend Scheduling
- CCH Corporation Tax

Trust Accounts

CCH Trust Accounts supports the specialist accounting requirements of trusts, estates, charities, pension funds and similar entities. It also supports the investment management needs of high net work individuals and links to CCH Tax.

Insolvency

CCH Insolvency handles personal and corporate cases, both trading and non-trading, and is particularly suited to deployment in multi-office environments.

Want to know more?

For more information about CCH training and consultancy or any of the other CCH products and services:

- Call us on 0844 56 18181
- Send an email to cchsoftware@wolterskluwer.co.uk
- Visit www.cch.co.uk/softwareproducts