

Whilst every effort has been made to make this questionnaire as user friendly as possible, we are aware that there may be some questions you are uncertain of, some questions you may wish to change your answer to, or simply that you would like some help to complete it.

If the following information does not answer your questions, please contact us by phone on (06) 876 8124 or email us at [admin@pkfcs.co.nz](mailto:admin@pkfcs.co.nz). We are only too happy to help make this as easy as possible for you.

## **1. HOW DO I OPEN THE QUESTIONNAIRE?**

To start working on your questionnaire(s), just click on the underlined questionnaire link (being the type and period, such as 'Annual March 2011') you want to work on.

## **2. WHAT DO I PUT FOR MY BUSINESS ACTIVITY?**

Selecting the correct business activity/activities is very important, as this will determine the questions applicable to you. So, if you have a couple of domestic rental properties and also have some money held on a term deposit, you would select both activities. If you are at all unsure whether an activity applies to you, please feel free to contact us. But don't worry if you select an extra activity that does not apply - this will just mean that you get some additional questions that you will answer 'no' to (We would much rather you select too many activities and hence additional information, rather than not providing information that may be needed to complete your accounts/tax returns).

## **3. HOW DO I NAVIGATE THE QUESTIONNAIRE?**

Moving around the questionnaire may not be familiar, especially if you are used to moving around in programs such as Microsoft's Excel or Word. The ENTER key does not work in the questionnaire.

### **3a. To move between questions**

You can use your TAB key, or your mouse to move from one question to the next.

### **3b. To move between pages**

Use the 'Previous' and 'Next' buttons at the bottom of every page.

### **3c. To enter data into a table**

Firstly, click on the 'Add Row' button. You will see this inserts a row into the table for you to complete.

You can move along each row using the TAB key or your mouse.

To enter a second, third, or further row click on the 'Add Row' button again after completing each row.

If you make a mistake in a row of the table, you can simply edit the rows, just like the questions.

If you accidentally add too many rows, or add a row that needs to be deleted, that's Okay too, just select the row and click the 'Remove' button.

When you have completed the table you can either TAB through, or use your mouse to select the next question.

## **4. HOW DO I EDIT QUESTIONS?**

All of the questions are editable by you, up until you click the 'Finalise' button at the end. This means that before you finalise the questionnaire (that is when it is returned to us), you can go back into the questionnaire at any time and edit any of the answers you have given to any of the questions.

## **5. WHAT IF I DON'T HAVE ALL THE INFORMATION I NEED RIGHT NOW?**

As you can go back into the questionnaire any time before you finalise it, you may complete the questionnaire at your convenience. If you do not have all of the information you need to complete the questionnaire in one sitting, you can complete the questions you do have the answers to and come back to it at a later time to finalise.

## **6. PAPER BASED DETAILS/COMPUTERISED INFORMATION**

As you go through the questionnaire you will note that a number of questions ask if you will be providing us with paper-based or computerised records of transactions. If you answer 'No', you will be prompted to add the information we need into tables.

So for example, if you use a computer program that records your Accounts Payable, you would select 'Yes' to the question that you will be providing paper-based details/computer records. You would also select 'Yes' if you keep a written record of your accounts payable. The checklist generated when you finalise the questionnaire would ask you to provide us with either a copy of your backup file or paper-based (printed out from your system or hand written list) of the accounts payable. However if you select 'No', you will be prompted to enter the details of your Accounts Payable in a table.

## **7. ATTACHING RELEVANT ELECTRONIC FILES**

If you wish to attach files from your computer to the questionnaire (this includes files that you scan and save to your computer, backup of your computerised accounting system, and any other relevant computer files) you can do so by clicking the 'Add/Remove Job Attachments" button at the top right of the screen.

Use the 'Browse' button to locate the file(s) on your computer, and the 'Start Upload' button to attach them to the questionnaire.

If you upload the wrong file, select the file from the Current Job Documents and click 'Delete Selected Files'.

## **8. CHECKLIST**

Once you have finalised the questionnaire, you will be prompted to print the checklist. This checklist is specific to you. If you do not have a print facility at the time you finalise the questionnaire you can print it later. Also if you misplace the original checklist, don't worry, you can re-print it.

To reprint the checklist, log in, tick the box next to the questionnaire and select 'Print Checklist'.

## **9. PRINTING THE QUESTIONNAIRE**

Once you have finalised the questionnaire you can print a copy of it for your records. To do this, go to the jobs page and click on the underlined link of the completed job you wish to print (this is the same link you initially clicked to open the questionnaire).

You will see that as the questionnaire is now completed the link takes you to a read only version of the questionnaire, which you are able to print.

## **10. CHANGING YOUR LOG IN PASSWORD/FORGOTTEN PASSWORD**

If you wish to change your password, go to the PROFILE page and do so there. The password will be reset for the next time you log in.

Should you forget your password please use the 'Forgotten your password' link on the login page. You will be emailed a new password to use to log in. Once you have logged in you may change your password as per above.

## **11. FURTHER ASSISTANCE**

If you have any queries, please contact us by phone on (06) 876 8124 or email us at [admin@pkfcs.co.nz](mailto:admin@pkfcs.co.nz).