

## How to create & access the Tax Year-end Instance

Every tax country is required to submit payroll data and/or tax certificates to their Revenue Authority at various times in the year.

In order to generate your tax certificates and year-end data, while continuing with your live payroll, a tax year-end copy of your payroll is required.

For Sage Business Cloud Payroll Professional users, this will create automatically when a Start New Period into the *new* tax year is selected. This tax year-end instance is where the year-end reports and tax certificates must be generated from.

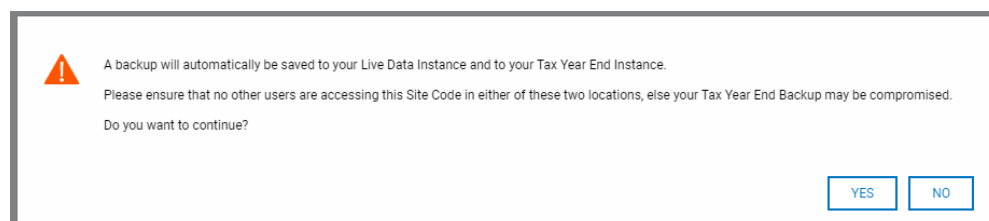
The tax year-end copy payroll will then be accessible as a separate instance, allowing you to extract your year-end data at any time convenient to you.

### How to create a Tax Year-end Instance

The Tax Year-end Instance is automatically created during the Start New Period process when starting a new tax year - no additional steps are required by users.

From the main menu:

- Select Utilities, Start New Period

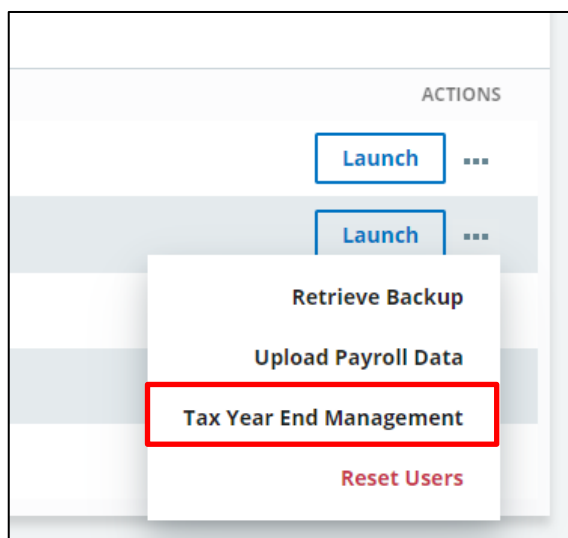


- The message indicates that the backup will be saved to your Live Data Instance, as well as to the Tax Year End Instance. (Backups may be retrieved under "Actions" on the launch page)
- Complete the Start New Period to enter the new tax year
- If a Tax Year End instance was created previously in another company when starting the new tax year, the current company data will now be added to that Tax Year End Instance

**Note:** Please ensure that no other users are accessing the Live Payroll Data nor Tax Year-End Instance for the same Site Code subscription (if it was previously created), as this could compromise the copy process and corrupt the Tax Year-end Copy Instance.

### How to access your Tax Year-end Instance

- Under Actions (...) on the subscription landing page. Select *Tax Year End Management*



Should you do not see the above option, press F5 to refresh your browser.

**M90020 - Software Sales Solutions TYE Instances**
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Manage your Tax Year End instances here. This will not have any impact on your live data.

**Tax Year End Management**

2020

| MONTH    | ACTIONS                          |
|----------|----------------------------------|
| February | <div>Launch</div> <div>...</div> |

### Tax Year End Management

- The Tax Year-End Instance menu will display all tax years where year-end instances have been copied/created, and the months in which companies had year-ends will be listed as individual instances.
- You can access the instance by clicking on the *Launch* button.

If you have multiple tax countries in your Live Payroll, multiple instances for specific months (as at year-end) will become available within specific tax years, when copied. These instances will only contain the specific companies as at year-end.