

MAGIC TAX

User Guide

For Users of Keyloop Drive & Autoline

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MTD for VAT



Making Tax Digital for VAT requires all VAT-registered businesses to keep records digitally and file their VAT Returns using functional compatible software.

You can view the record-keeping requirements on the [HMRC website](#).

The software businesses use, must be capable of:

- Keeping and maintaining the records specified in the regulations.
- Preparing VAT Returns using the information maintained in those digital records.
- Communicating with HMRC digitally through their Application Programming Interface (API) platform.

You can read more on Making Tax Digital for VAT on the [HMRC website](#).

Making Tax Digital





Magic Tax has been designed and developed by [KFA Connect](#) for users of Keyloop's Drive/Autoline DMS (Dealer Management System) solution.

The solution is HMRC-recognised Making Tax Digital (VAT) Bridging Software and allows Keyloop users to file their VAT returns quickly and easily while complying with HMRC's legislation.

Magic Tax will ingest your Keyloop VAT Summary Report file in the exact format (.CSV), as extracted from the Keyloop solution.

The solution then uses the data from the file to calculate your VAT return, allowing the user to submit the return to HMRC quickly and easily with no manual manipulation of the data required – meaning no possibility of errors or omissions.

Magic Tax

About

The best bits at a glance

HMRC-Recognised

Magic Tax is an HMRC-recognised, secure, web-based solution to file VAT returns digitally and comply with MTD for VAT legislation.

Quick & Easy

Registering with Magic Tax is quick and easy. Once registered, simply upload your VAT Summary Report extract from Keyloop and Magic Tax will do the rest!

Compliant

No requirement for manual manipulation, formulas or copying & pasting data, Magic Tax works with the extract from Keyloop Drive & Autoline.

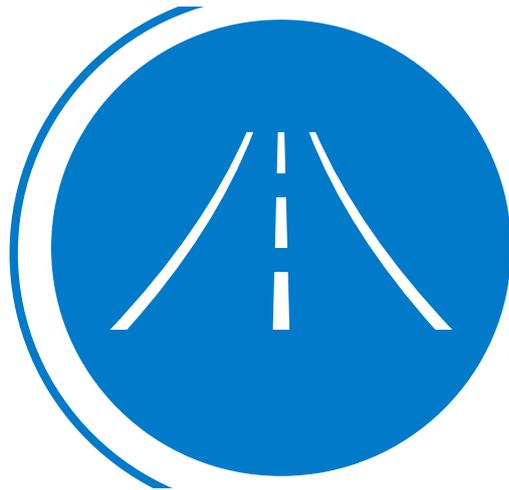
Simple Pricing

The Magic Tax annual subscription starts from just £99 per submission – based on your company turnover.



Magic Tax

Compatibility



Drive

Keyloop Drive DMS solution is all about controlling your sales pipeline, meeting customer expectations and giving a single view across departments and functions.

Magic Tax will enhance the Drive user experience, by allowing you to upload the VAT summary report to Magic Tax in the **exact format** it is downloaded from Drive.

Autoline

Magic Tax is also compatible with Keyloop's Autoline DMS solution.

If you utilise both Drive and Autoline (formerly Rev8) solutions within your business, you can also merge VAT Summary Reports from both solutions within Magic Tax to create one VAT return.



Magic Tax

Register & Free Trial

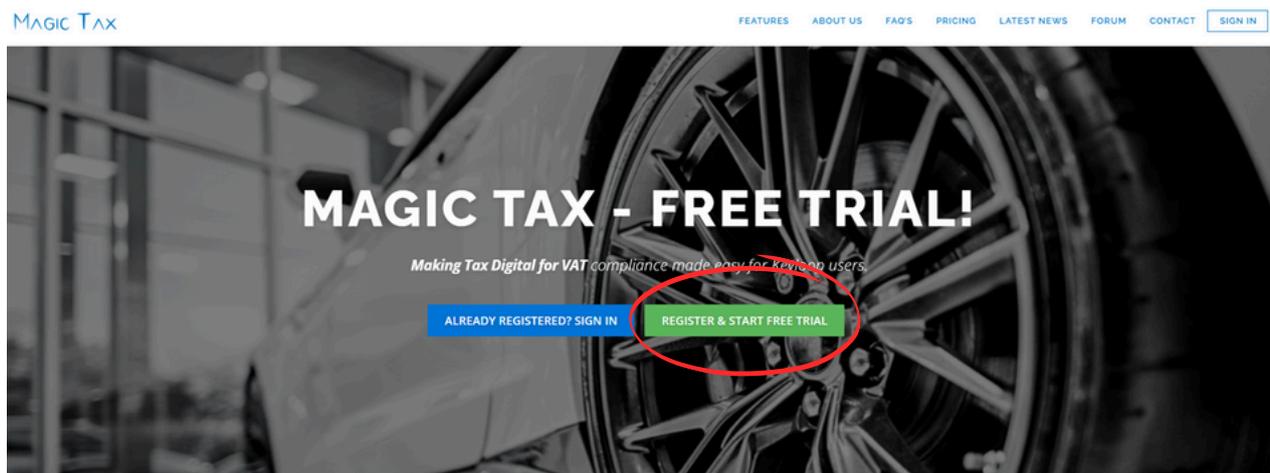
Register & Free Trial



Register

To register for a Magic Tax user account visit the [Magic Tax website](#).

Click on the green Register & Start Free Trial button.



Or click [here](#) to go directly to the Magic Tax registration page.

Free Trial

Magic Tax is available on a 3-month FREE* trial.

Once you have registered for a Magic Tax user account, you'll be able to [apply for a free trial licence](#) from the Magic Tax 'Licence' tab.

There is:

- No charge to register for a Magic Tax user account to explore the solution.
- No obligation to pay for an annual licence beyond the free trial.
- No requirement to provide credit card or payment details for a free trial or an annual licence.

*The Free trial will end after 3 months or at the point of submitting to HMRC, whichever happens first.



Your Details

Let us know who you are by completing the Register page.

- Enter your email address.
- Create a password, and re-type it to confirm it.
- Enter your First Name & Last Name.

MAGIC TAX

Register

Register

Register here for a new Magic Tax user account.
Once registered, you'll be able to apply for a **FREE** 3-month trial licence, or be added to an existing active licence by the licence owner.

Please note: You must be a user of Keyloop Drive/Autoline DMS (in the motor industry) to use Magic Tax.

Email *

Email Address

Password *

Password

Confirm Password

Confirm Password

First Name *

First Name

Last Name *

Last Name

I understand that KFA may contact me by email in connection with this service (examples may include notification of downtime or licence renewal) *

Please contact me with news and information about other KFA products and services

Cancel Register

Click Register to complete the sign-up process.

A 'Welcome to Magic Tax' email will arrive in your inbox confirming that your Magic Tax account has been set up. Please check your junk/spam folder if you do not see this welcome email arrive in your inbox.

Note:

Your password should be at least 8 characters, with at least one upper and one lower case character, one number and one non-alphanumeric character such as !"£\$%^&*() _ - + < > ? /

Fields with * are mandatory.

To utilise the Magic Tax solution, you must consent to being contacted by KFA Connect regarding solution-related matters, including HMRC system downtime and licence information.

Additionally, you have the option to opt-in to receive communications from KFA Connect about other products and services.

We will never share your details with anyone else!



SYSTEM LOG IN:

Username

Admin

Password

LOGIN

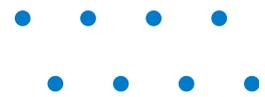
[Forgot Password?](#)



Magic Tax

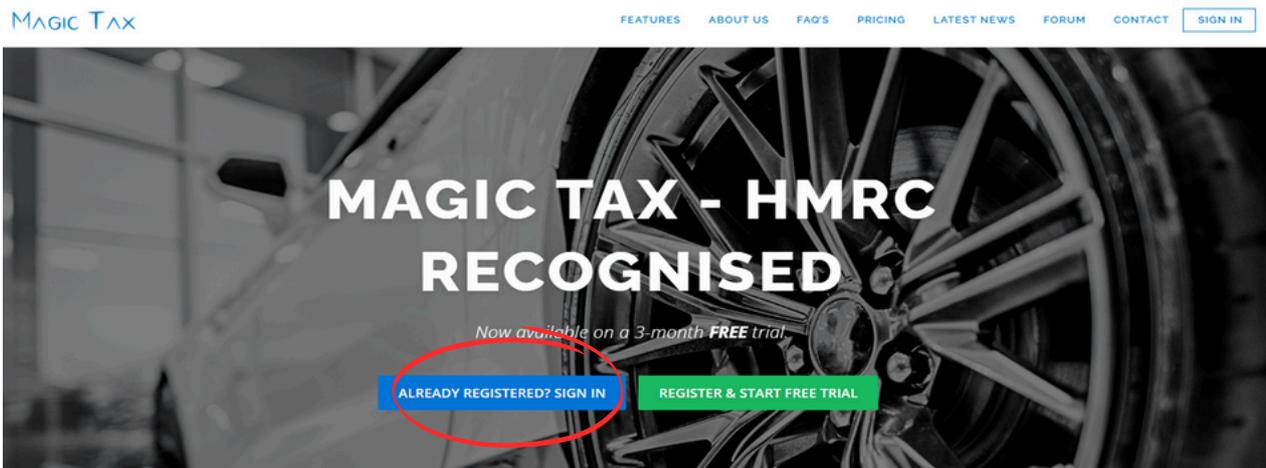
Sign In & Passwords

Sign In & Passwords

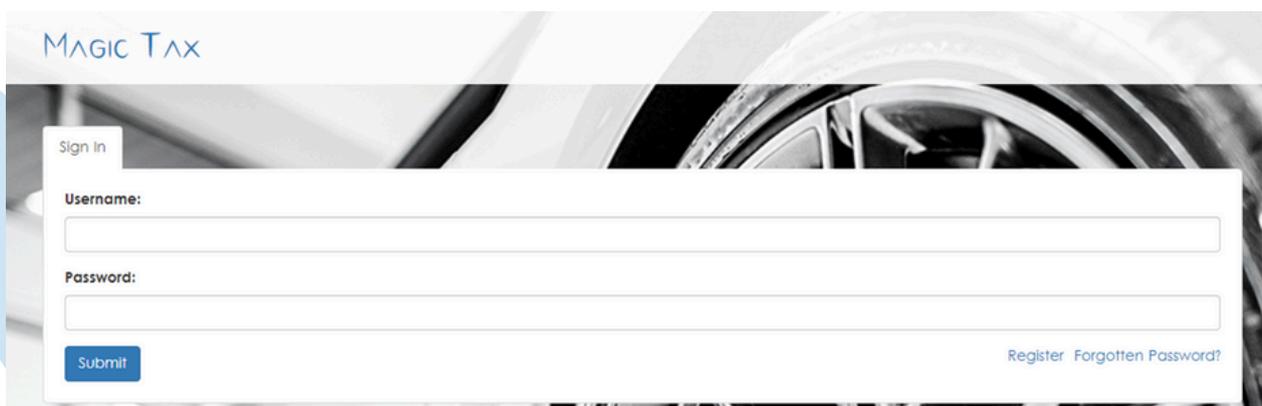


Sign In

To sign in, click on the blue [Already Registered? Sign In](#) button from the Magic Tax website.



Or click [here](#) to go directly to the Magic Tax Sign In page.



Bookmarking the sign In page: www.magictax.co.uk/mtd/#/login would be useful for next time you need Magic Tax.





Forgotten Password

If you have forgotten your password, you can reset it by clicking Forgotten Password.

The screenshot shows the MAGIC TAX login interface. It features a 'Sign In' tab, a 'Username:' field, a 'Password:' field, and a 'Submit' button. To the right of the password field are two links: 'Register' and 'Forgotten Password?'. The 'Forgotten Password?' link is circled in red.

Enter your username (email address) and click Submit.

Password Reset

The screenshot shows the MAGIC TAX Password Reset page. It has a 'Reset Password' tab and a 'Password Reset' heading. Below the heading is the instruction: 'Enter your username or email address and we will email you a link that you can use to reset your password.' There is a 'Username/Email: *' label and a text input field containing 'Username/Email Address'. A 'Submit' button is located below the input field.

An email will arrive in your inbox with a link to create a new password. The link will be valid for 24 hours, after which you will need to return to the [Reset Password](#) page and repeat the steps shown above.

The screenshot shows a confirmation message box titled 'Password Reset Email Sent'. The message text reads: 'An email has been sent to you with further instructions to enable you to reset your password. This email will be valid for 24 hours, after which you will need to return to this page and try again.' There is an 'OK' button in the bottom right corner.

Check your junk/spam folder if you do not see this email arrive in your inbox.





Magic Tax

Authorise HMRC

Authorise

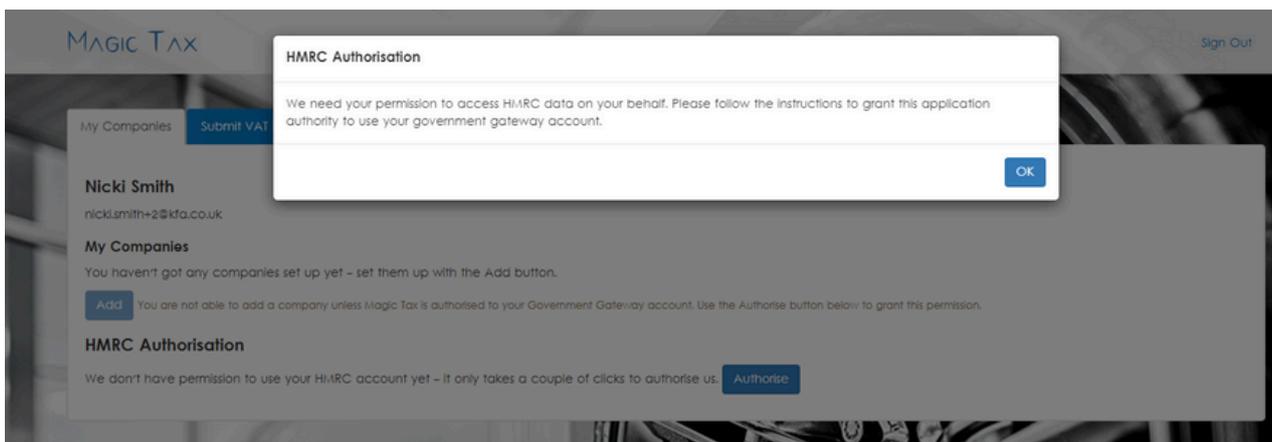
HMRC



To make a submission to HMRC using the solution, it is necessary to permit HMRC to interact with Magic Tax.

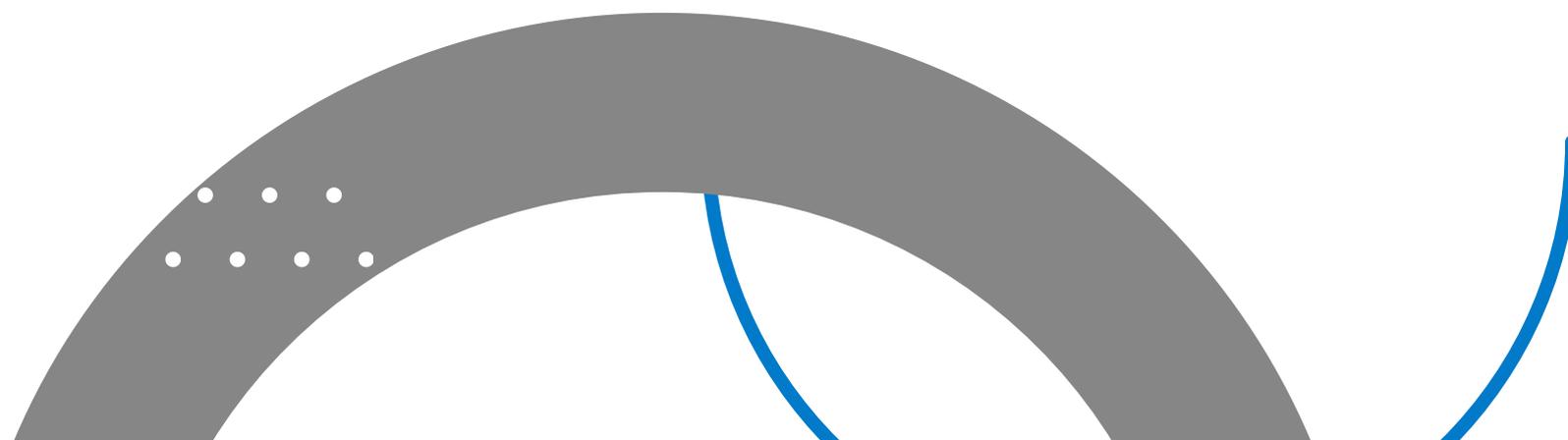
This authorisation allows Magic Tax to retrieve details directly from HMRC's system (e.g. your organisation's open obligation period) and for Magic Tax to send the 9-box data for your VAT return.

Once you have registered as a Magic Tax user, you will see an HMRC Authorisation pop-up box (see below).



Click OK

Magic Tax will direct you to HMRC's Gateway / GOV.UK One Login page.





Authorise HMRC

Allow your tax software to interact with HMRC

Use this service to give **Magic Tax** permission to:

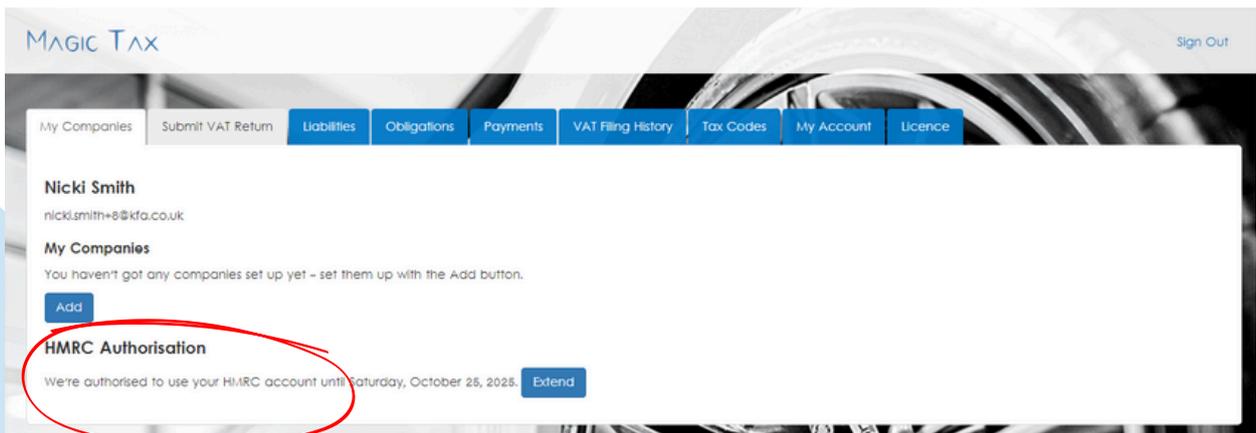
- View your VAT information
- Change your VAT information

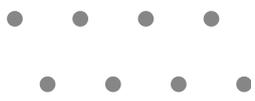
[Continue](#)

Click **Continue** and follow the instructions on the HMRC website.

Once the authorisation steps have been completed on HMRC's website, Magic Tax will be authorised to interact with HMRC's system for 18 months.

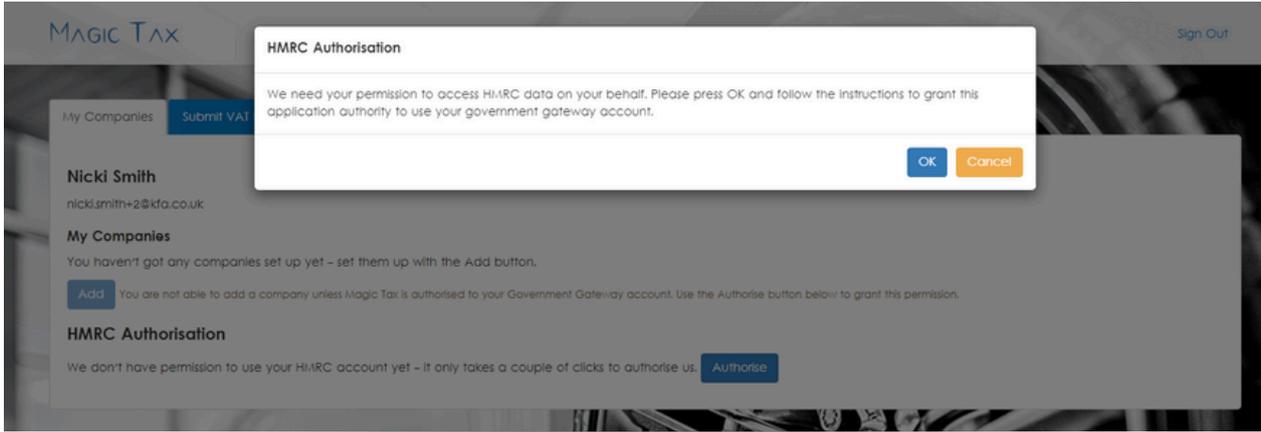
The Magic Tax dashboard will display the date the authorisation will expire (see below).





Authorise HMRC

If you choose not to authorise HMRC during the initial registration process, each time you log in to Magic Tax, the solution will remind you that this step needs to be completed in order to use the solution to file a VAT return (see below).



Each time you login, you can choose to complete the authorisation process or click on the Cancel button to return to this step later.

Note:

It is possible to authorise HMRC to interact with multiple software solutions, so authorising Magic Tax will not affect authorisation you have already granted to other MTD (VAT) solutions.

HMRC's system does not send a notification to Magic Tax if the authorisation is revoked in your account on their system.

This means that if HMRC unauthorises your account, or you revoke authorisation from HMRC's system yourself - Magic Tax will still appear to be authorised, even if it isn't.

If you are unsure, you can either;

- Follow this link to: [Manage your Permissions](#) in HMRC's system and check that Magic Tax is still authorised or;
- Click the Extend button from the 'My Companies' page of the Magic Tax dashboard and simply repeat the authorisation process.





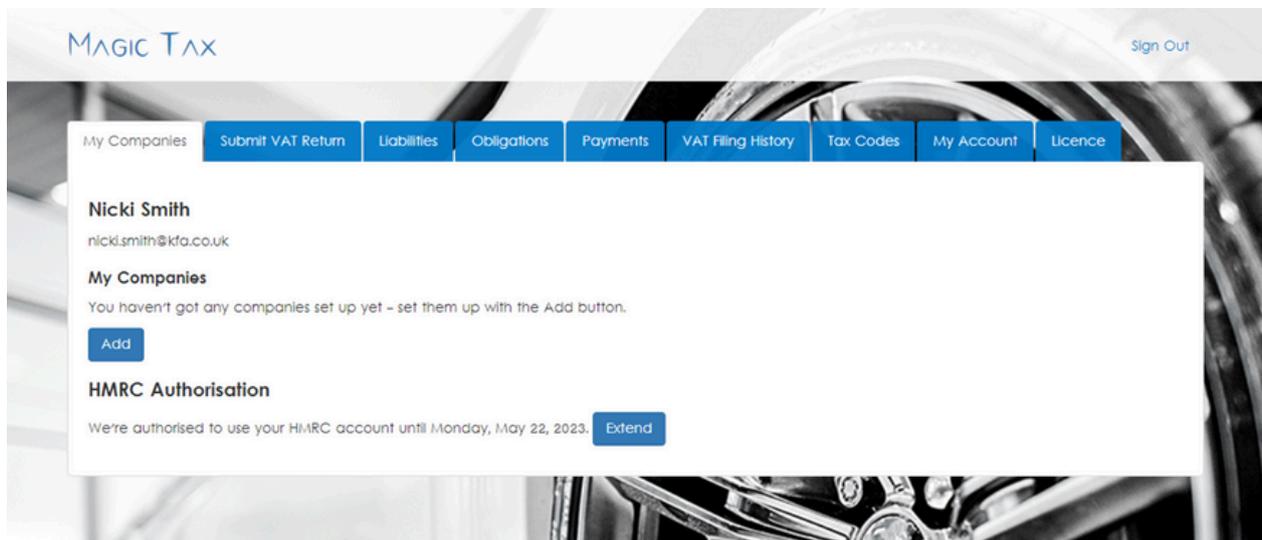
Magic Tax

Add a Company

Add Company

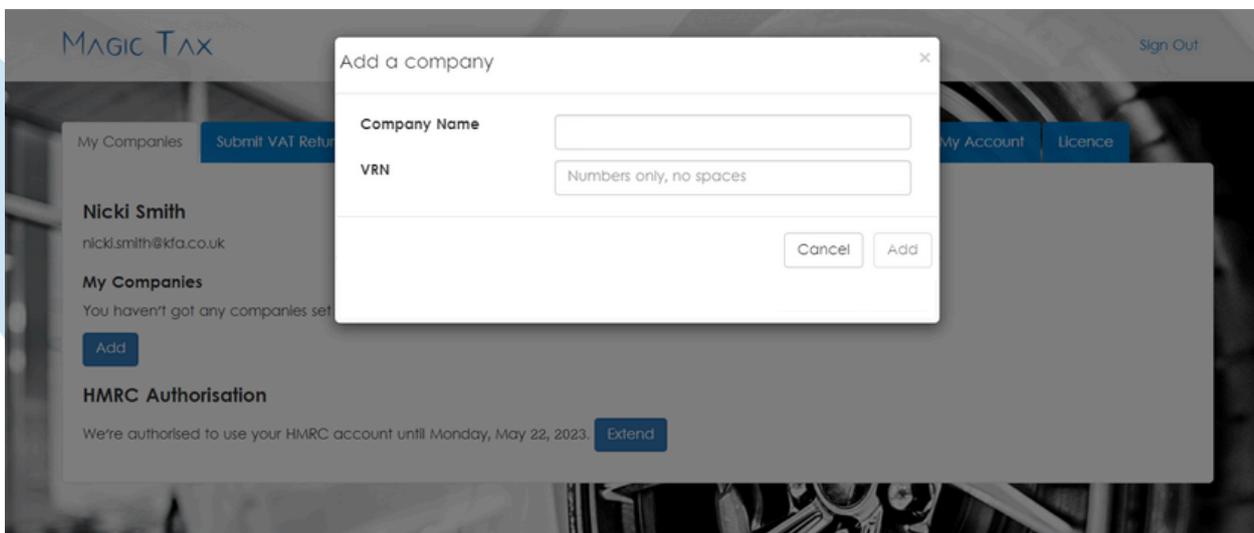
Add a Company

To add a company, click on the blue Add button from the My Companies Tab on the dashboard.



Enter the following information:

- Company Name
- VRN (VAT Registration Number) - numbers only, no spaces.

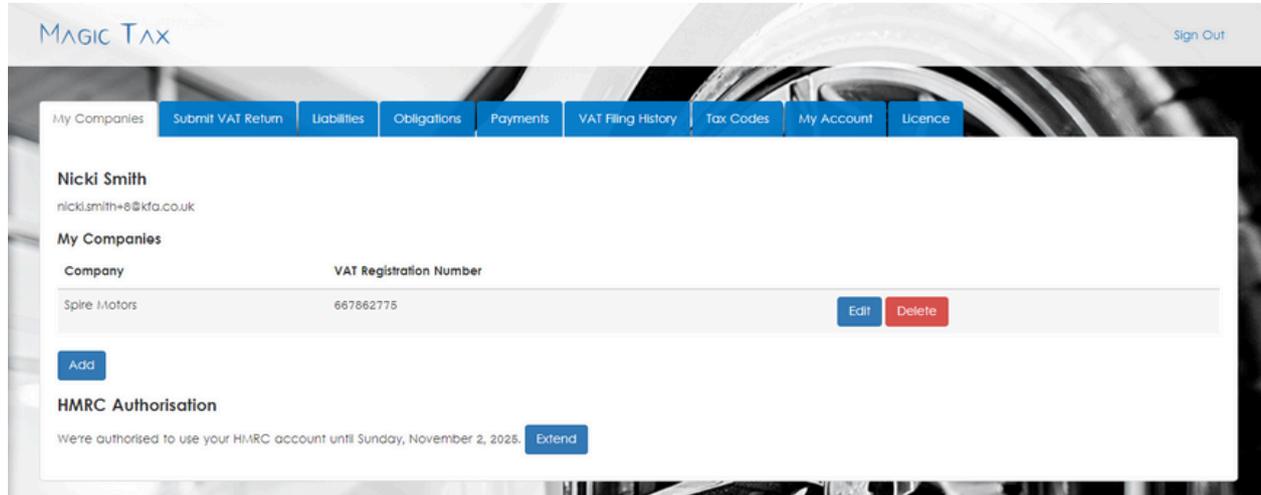


Click Add.



My Companies

The company you have added will now feature on the dashboard (as shown below).



You can manage multiple companies from your Magic Tax dashboard providing they are managed using the same Government Gateway / One Login credentials.

Repeat the [Add Company](#) process to add any additional companies to your Magic Tax dashboard.

Additional Companies

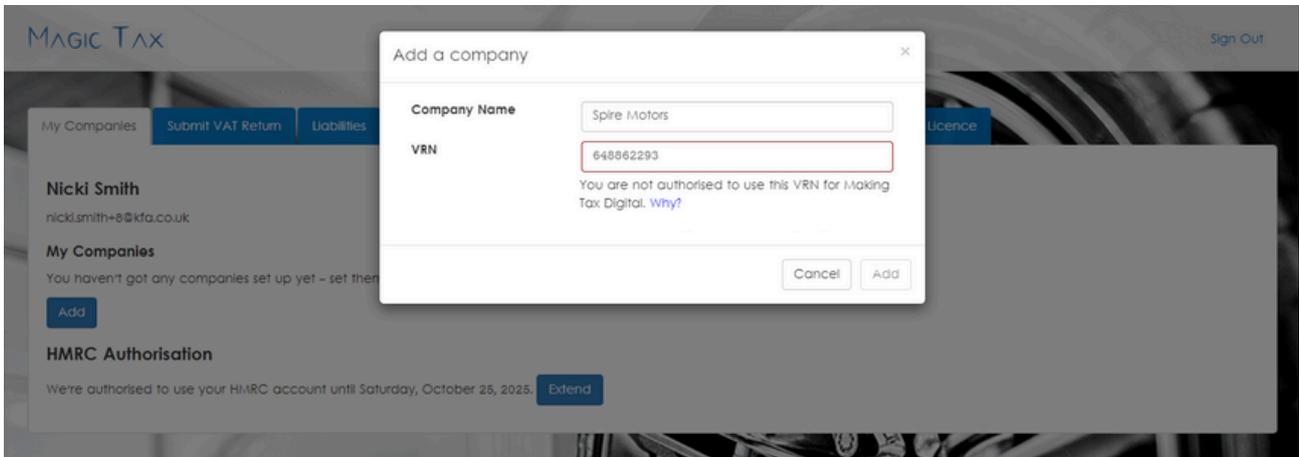
If you need to file VAT returns for multiple companies (which are managed using different Government Gateway / One Login credentials to the company you have already added to Magic Tax, you can do so by registering for additional Magic Tax user accounts.

See [Filing for Multiple Companies](#) for more information on how to do this.

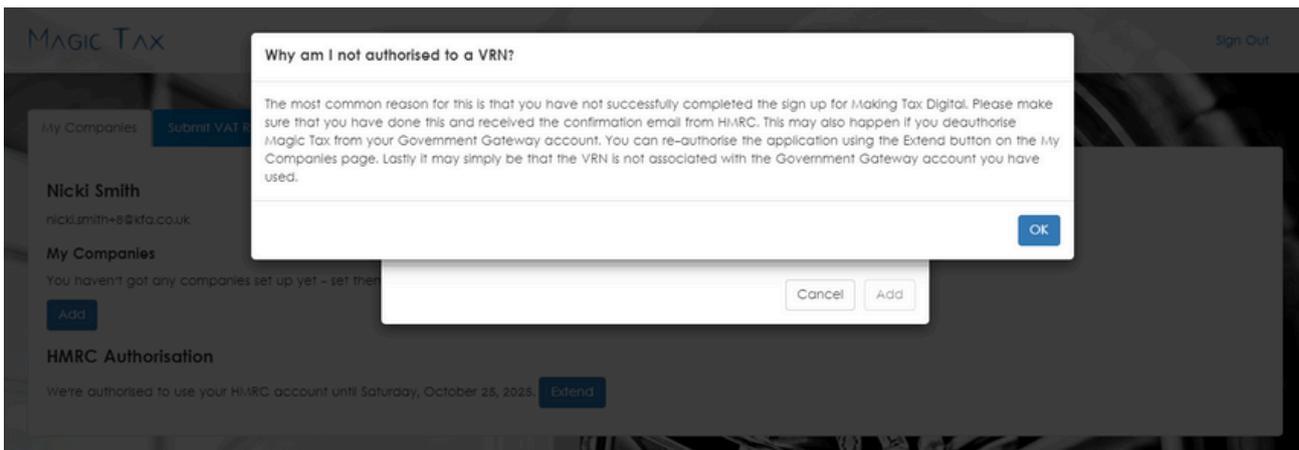
Once additional users have registered with Magic Tax, it is possible to add them to your existing licence, using the [Add](#) button.

During the [Add a Company](#) process, if you are shown the following message:

'You are not authorised to use this VRN for Making Tax Digital. Why?'



Click on [Why?](#) for more information on the error message and the possible reasons why will appear in a pop-up box.



All companies should now be signed up to Making Tax Digital (VAT), so this is unlikely to be the issue.

It is more likely to relate to your Government Gateway/One Login account at HMRC either:

- Not being authorised to that VRN (VAT Registration Number) or;
- HMRC authorisation for Magic Tax to interact with HMRC's system has been revoked (this can be done by either the user themselves or HMRC).

To be sure that Magic Tax is still authorised with HMRC, you can perform the following checks:

- Log into your company's VAT account on [HMRC's system](#) directly to check that Magic Tax is authorised and for any relevant notifications regarding this.
- Click [EXTEND](#) from the My Companies page of the Magic Tax dashboard and repeat the HMRC Authorisation process, making sure to use the Gateway/One Login account authorised to make submissions for the company you are attempting to add.





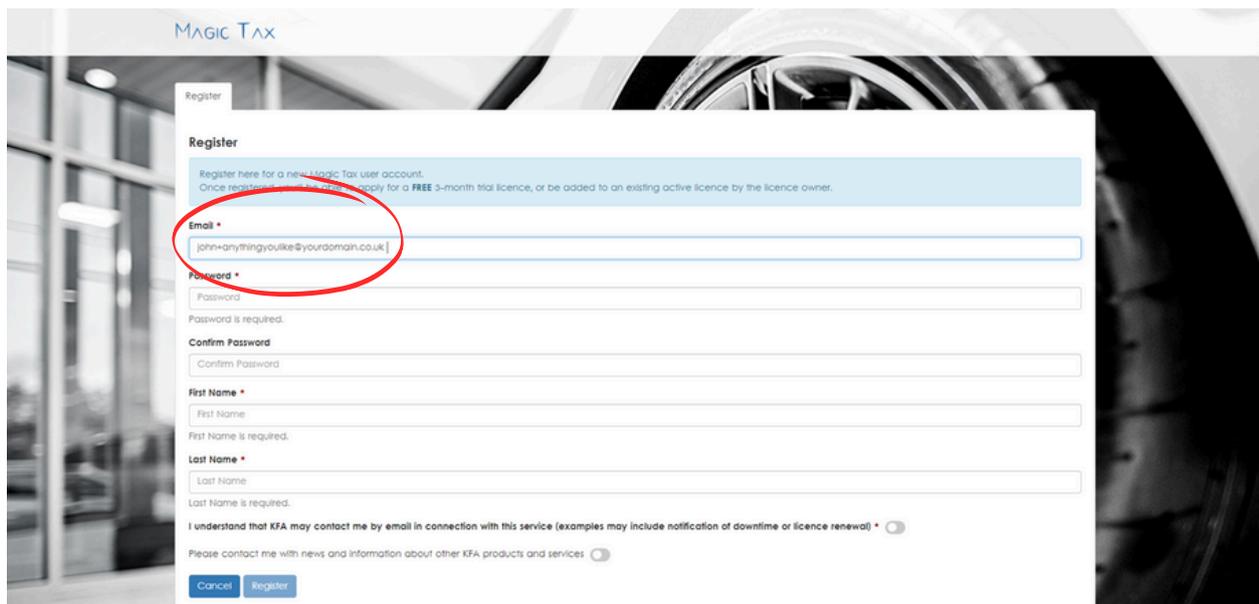
Magic Tax

Filing for Multiple Companies

Filing for Multiple Companies

It's possible to file VAT submissions for multiple companies using one Magic Tax licence (providing you have HMRC authority to do so using your Government Gateway/One Login credentials).

A separate Magic Tax user account will be required for each set of HMRC login credentials, and a unique email address for each.



The screenshot shows the 'Register' form for a Magic Tax user account. The form is titled 'Register' and includes the following fields and options:

- Email ***: A text input field containing 'john+anythingyoulike@yourdomain.co.uk', which is circled in red.
- Password ***: A text input field with the label 'Password' and the requirement 'Password is required.' below it.
- Confirm Password**: A text input field with the label 'Confirm Password'.
- First Name ***: A text input field with the label 'First Name' and the requirement 'First Name is required.' below it.
- Last Name ***: A text input field with the label 'Last Name' and the requirement 'Last Name is required.' below it.
- Consent**: A checkbox labeled 'I understand that KFA may contact me by email in connection with this service (examples may include notification of downtime or licence renewal) *'.
- Footer**: A link 'Please contact me with news and information about other KFA products and services'.
- Buttons**: 'Cancel' and 'Register' buttons at the bottom.

If you require multiple user accounts in Magic Tax for this purpose, but do not have unique email addresses, you could consider using 'plus addressing' (also known as 'sub addressing').

For example, if your email address is `j.smith@yourdomain.co.uk`, you can use `j.smith+1@yourdomain.co.uk` or `j.smith+anythinghere@yourdomain.co.uk` and the email addresses will be treated as unique.

It is advisable to check before setting up your Magic Tax account that your email provider supports this by sending a test email.

Note:

To utilise the Magic Tax solution, you must consent to being contacted by KFA Connect regarding solution-related matters, including HMRC system downtime and licence information.

Additionally, you can opt-in to receive communications from KFA Connect about other products and services.

We will never share your details with anyone else.



Free

Trial



Magic Tax

Free Trial

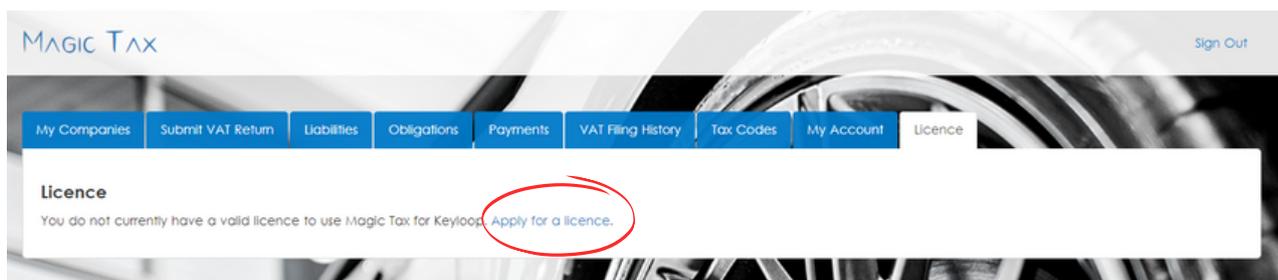
Apply for a Free Trial Licence

Apply for a Free Trial Licence

Magic Tax is available on a 3-month FREE* trial.

Once you have registered for a Magic Tax user account, you'll be able to apply for the trial licence from the Magic Tax 'Licence' tab.

To apply, click on the Licence tab from the dashboard.



Click Apply for a licence.

Note:

*The Free trial will end after 3 months or at the point of submitting to HMRC, whichever happens first.

There is:

- No charge to register for a Magic Tax user account to explore the solution.
- No obligation to pay for an annual licence beyond the free trial.
- No requirement to provide credit card or payment details for a free trial or an annual licence.

The Magic Tax user account that applies for the licence will become the 'Admin' user of the licence for your organisation.





Complete the information required on this screen, which will prompt you to:

- Select the turnover band* for the company you will be filing for.
- If you are eligible for a free trial** you will be offered the option to 'Request a free trial'.

The cost shown will be the relevant fee after the free trial period, should you opt to continue using the solution on an annual licence.

The screenshot shows the 'Apply For A Licence' form in the Magic Tax system. The form includes a navigation bar with links for 'My Companies', 'Submit VAT Return', 'Liabilities', 'Obligations', 'Payments', 'VAT Filing History', 'Tax Codes', 'My Account', and 'Licence'. The main content area is titled 'Apply For A Licence' and contains the following sections:

- Select Turnover Band ***: A dropdown menu with '£0 to £5,000,000' selected.
- Free Trial**: A section with a toggle switch for 'Request a Free Trial' which is currently turned on. Below it, text states: 'An annual licence will cost £396.00 per year (£99.00 per submission) following the FREE trial period.'
- Invoice Name ***: Text input field containing 'Finance Director'.
- Invoice Company ***: Text input field containing 'Company A'.
- Invoice Address ***: Multiple text input fields for address details, including 'Endeavour Business Park', 'Crow Arch Lane', 'Ringwood', and 'Invoice Address Line 4'.
- Invoice Postcode ***: Text input field containing 'BH24 1HP'.
- Contact Telephone ***: Text input field containing '0800 1670844'.
- Enter Password ***: Password input field with masked characters.

At the bottom of the form, there is a red button labeled 'Submit Application' and a note: 'Once your application has been processed, you will receive an email confirming that your free trial has been activated'.

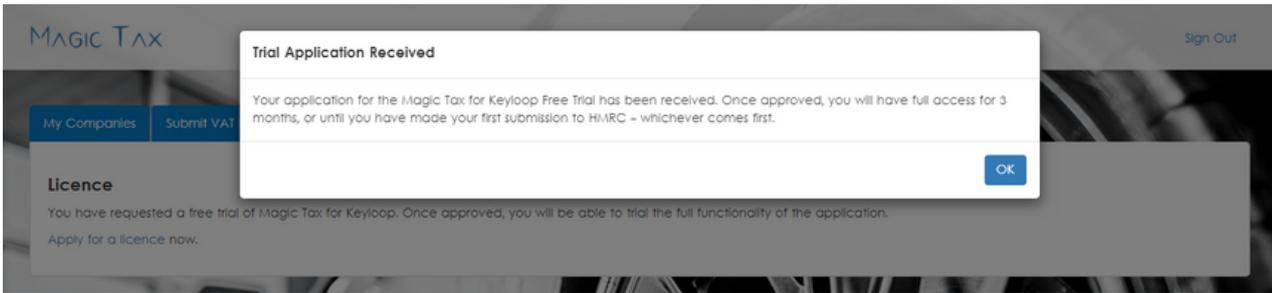
*Include ALL companies you will need to use the licence to file for.

**If you or another user in your organisation have not already taken advantage of a free trial or had a paid-for licence.

Click Submit Application.



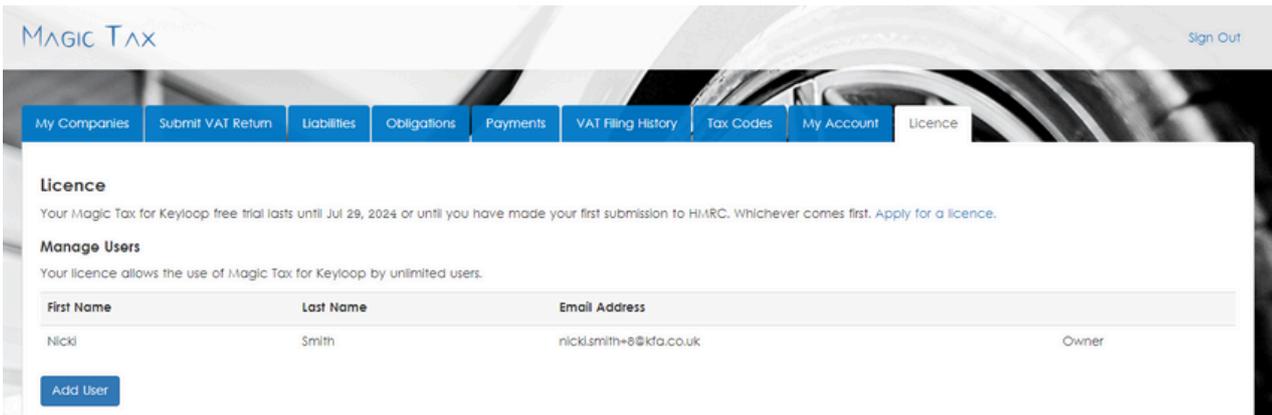
A pop-up box will appear to confirm your application (see below).



Once your application has been processed (usually the same working day) you will receive an email confirming the free trial has been activated.

You will have use of the solution for 3 months, or until you have made your first submission, whichever happens sooner.

The licence tab from the Magic Tax dashboard will now show your active licence details (see below).





Magic Tax

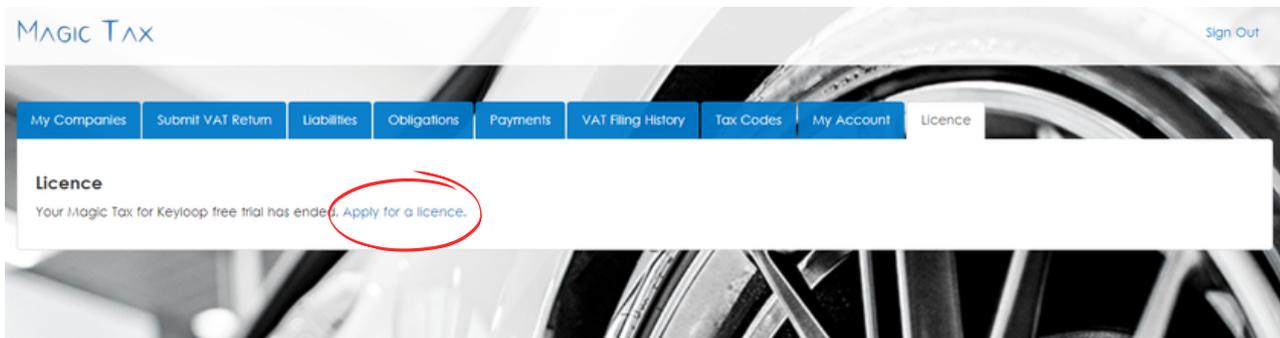
Annual Licence

Apply for an Annual Licence

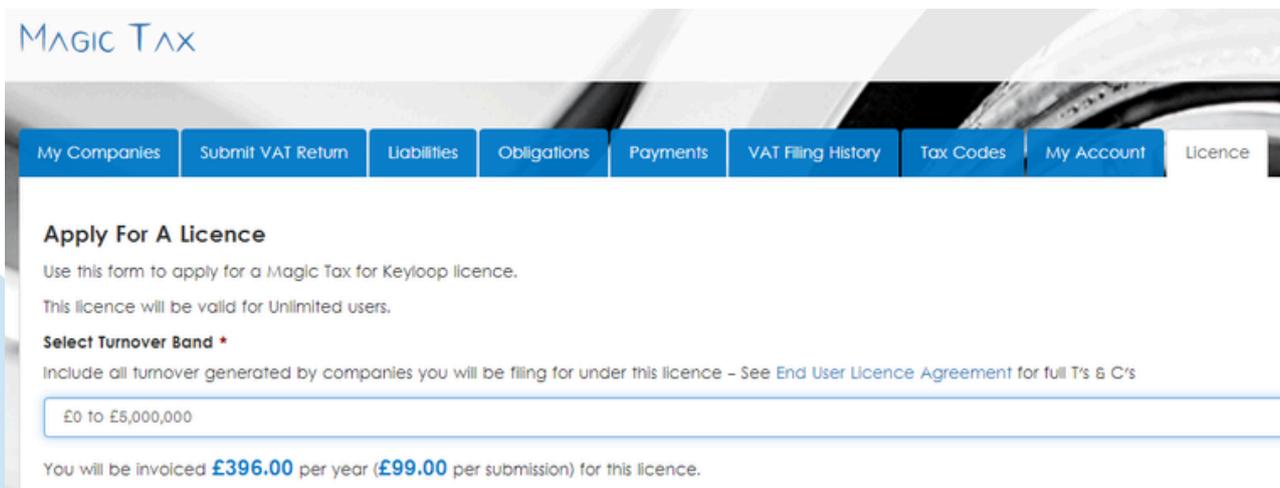
Apply for an Annual Licence

Following your free trial, you will have the opportunity to apply for an annual licence.

Click on the 'Licence' tab from the dashboard.



Click Apply for a licence.



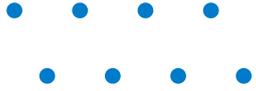
From the next screen, select the turnover band (for all companies you wish to use the licence to make submissions for).

Your company details will be pre-populated (make changes here as needed) and enter your password to confirm.

Once your application has been processed, you will receive an invoice for your annual licence by email.

Upon receipt of cleared payment, you will receive an email confirming your licence has been activated.





Magic Tax

Tax Groups & Codes

Tax

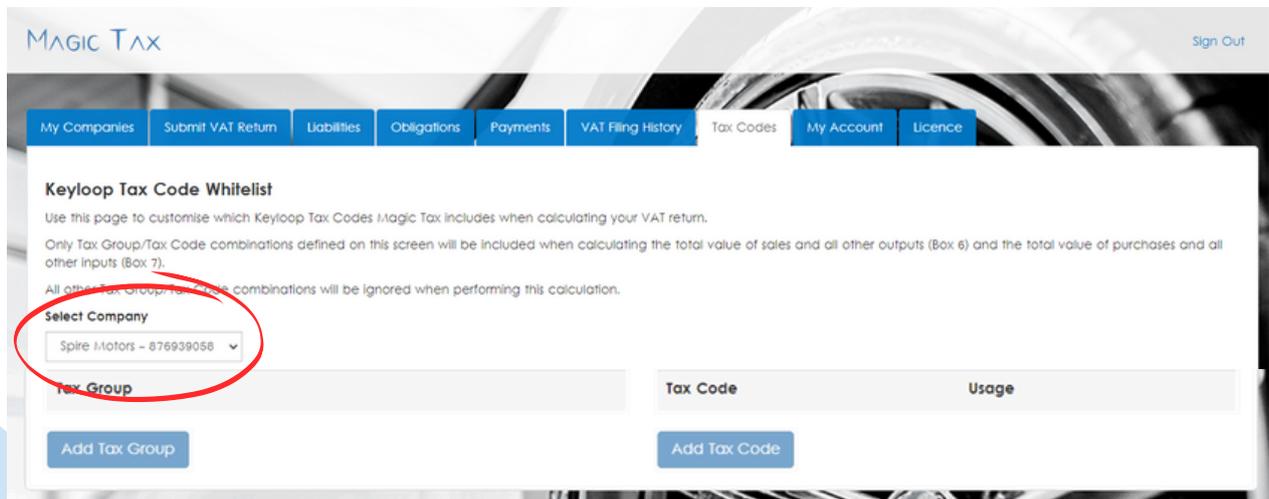
Set Up Tax Groups & Codes

Set up Tax Groups & Codes

As part of the Magic Tax setup process, the Keyloop tax groups and tax codes must be defined in a 'Keyloop Tax Code Whitelist'.

This only needs to be completed once as part of the setup process (and revisited if you make any subsequent changes to these settings in Keyloop)

Click on the Tax Codes tab, from the Magic Tax dashboard.



MAGIC TAX Sign Out

My Companies Submit VAT Return Liabilities Obligations Payments VAT Filing History **Tax Codes** My Account Licence

Keyloop Tax Code Whitelist

Use this page to customise which Keyloop Tax Codes Magic Tax includes when calculating your VAT return.

Only Tax Group/Tax Code combinations defined on this screen will be included when calculating the total value of sales and all other outputs (Box 6) and the total value of purchases and all other inputs (Box 7).

All other Tax Group/Tax Code combinations will be ignored when performing this calculation.

Select Company

Spire Motors - 876939058

Tax Group	Tax Code	Usage
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Add Tax Group Add Tax Code

Note:

Only Tax Group and Tax Code combinations defined on this screen will be included when Magic Tax calculates the total value of sales and all other outputs (Box 6) and the total value and all other inputs (Box 7).

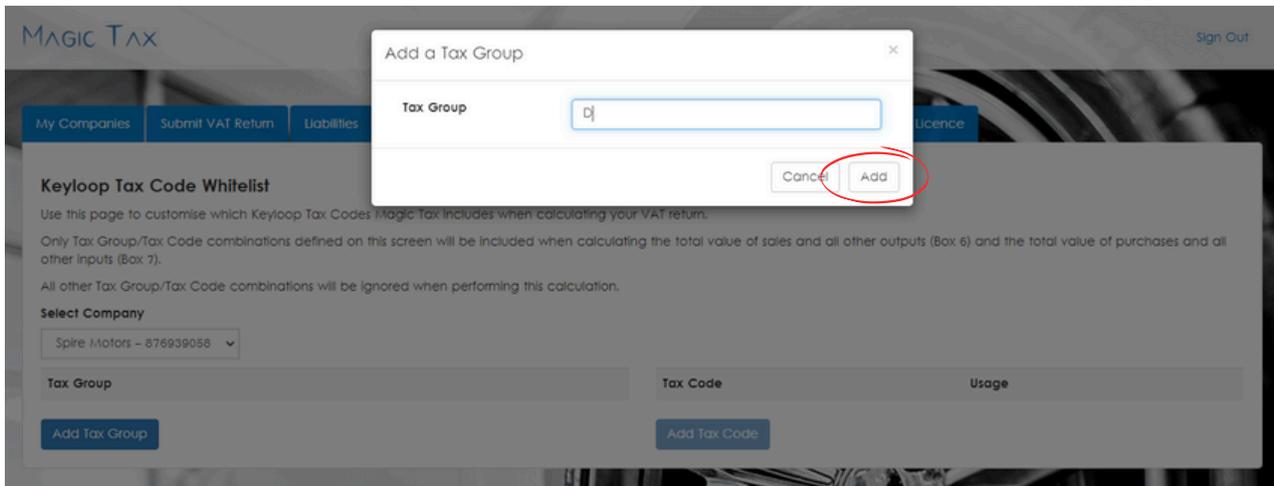
All other Tax Group/Tax code combinations that feature on your VAT Summary Report extract (from Keyloop Drive/Autoline) will be ignored by Magic Tax when performing this calculation.



Add Tax Groups

Select the company from the dropdown list.

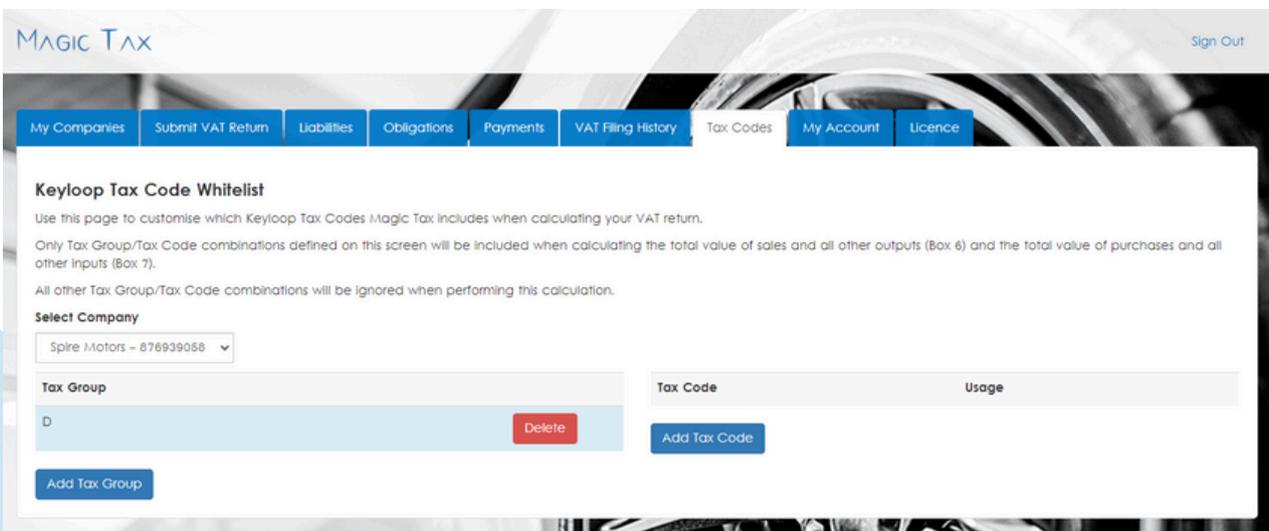
Then, click the Add Tax Group button.



The screenshot shows the 'Add a Tax Group' pop-up window. The window has a title bar with 'Add a Tax Group' and a close button. Below the title bar is a text input field labeled 'Tax Group' containing the character 'd'. To the right of the input field are two buttons: 'Cancel' and 'Add'. The 'Add' button is circled in red. In the background, the main interface is dimmed, showing a 'Select Company' dropdown menu with 'Spire Motors - 876939058' selected, and a table with columns 'Tax Group', 'Tax Code', and 'Usage'. There are 'Add Tax Group' and 'Add Tax Code' buttons below the table.

A pop-up window will appear.

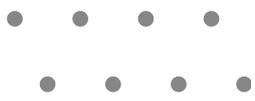
Enter the Tax Group exactly as it appears in your Keyloop system (case-sensitive).



The screenshot shows the 'Keyloop Tax Code Whitelist' page. The page title is 'Keyloop Tax Code Whitelist'. Below the title is a dropdown menu for 'Select Company' with 'Spire Motors - 876939058' selected. Below the dropdown is a table with columns 'Tax Group', 'Tax Code', and 'Usage'. The 'Tax Group' column contains the value 'D'. To the right of the 'D' is a red 'Delete' button. Below the table is an 'Add Tax Group' button. To the right of the table is an 'Add Tax Code' button. The page also has a navigation bar with buttons for 'My Companies', 'Submit VAT Return', 'Liabilities', 'Obligations', 'Payments', 'VAT Filing History', 'Tax Codes', 'My Account', and 'Licence'. A 'Sign Out' button is in the top right corner.

The Tax Group will now show in the whitelist.

Repeat this step to add all relevant Tax Groups to the whitelist.

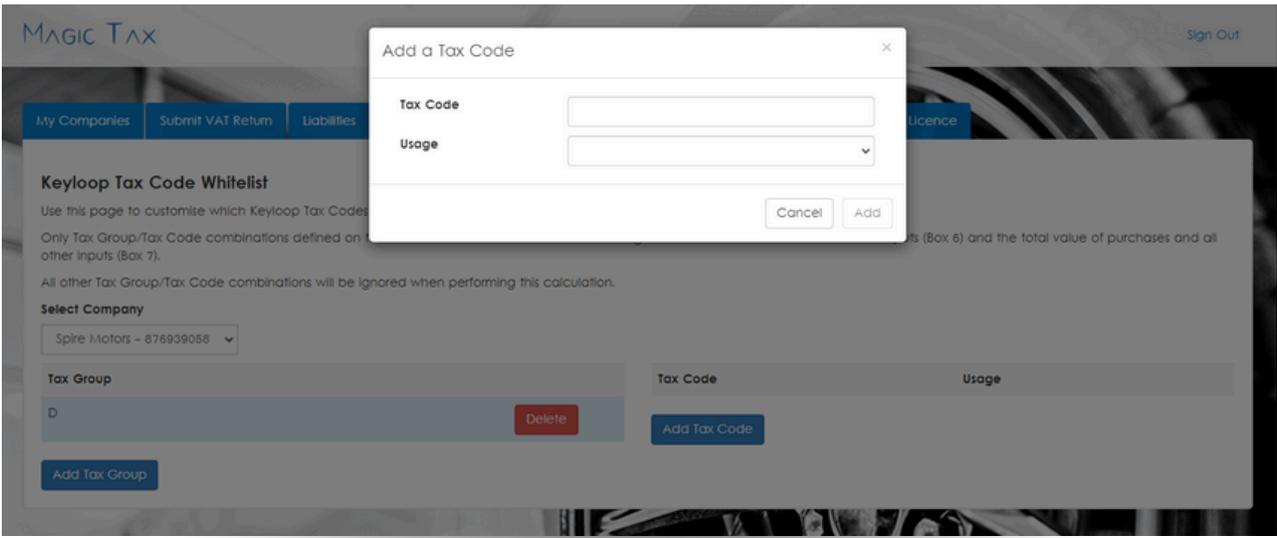


Add Tax Codes

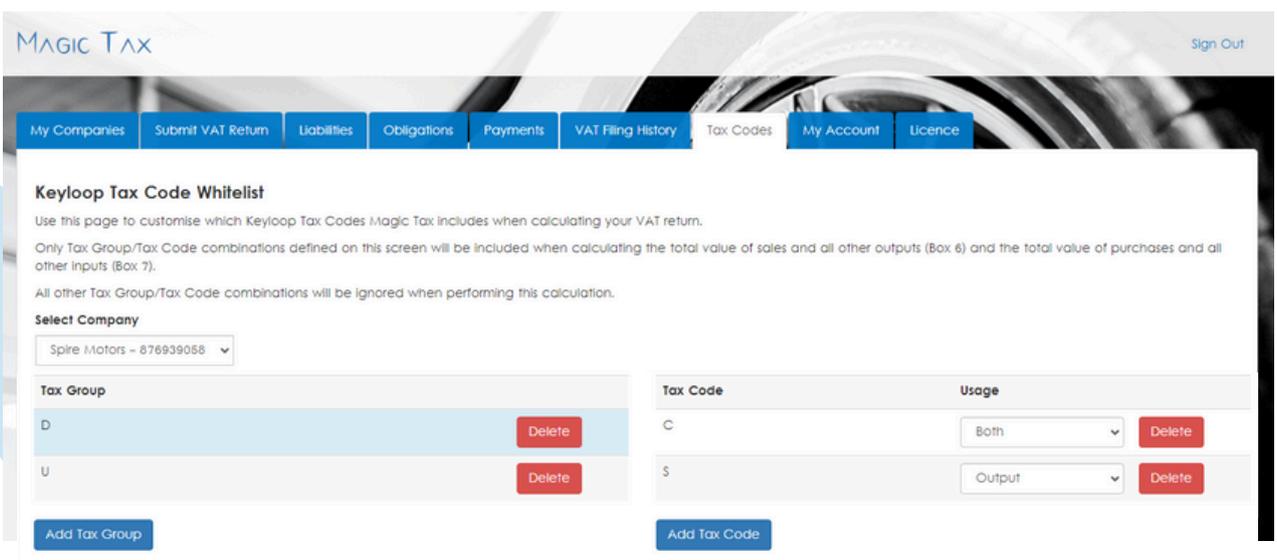
To define the whitelist of Tax Codes for each Tax Group, Click on the Tax Group you wish to add a Tax Code so that it is highlighted in blue.

Then, click the Add Tax Code button.

A pop-up window will appear.



Enter the Tax Code exactly as it appears in your Keyloop system (case-sensitive). In the dropdown, choose whether you require Magic Tax to include Inputs, Outputs or both Inputs & Outputs in the vat return calculation.



Repeat the steps to add more Tax Groups and Tax Codes until you have added all the relevant groups and codes. You can revisit this list to add, remove or amend at any time to match your Keyloop system.



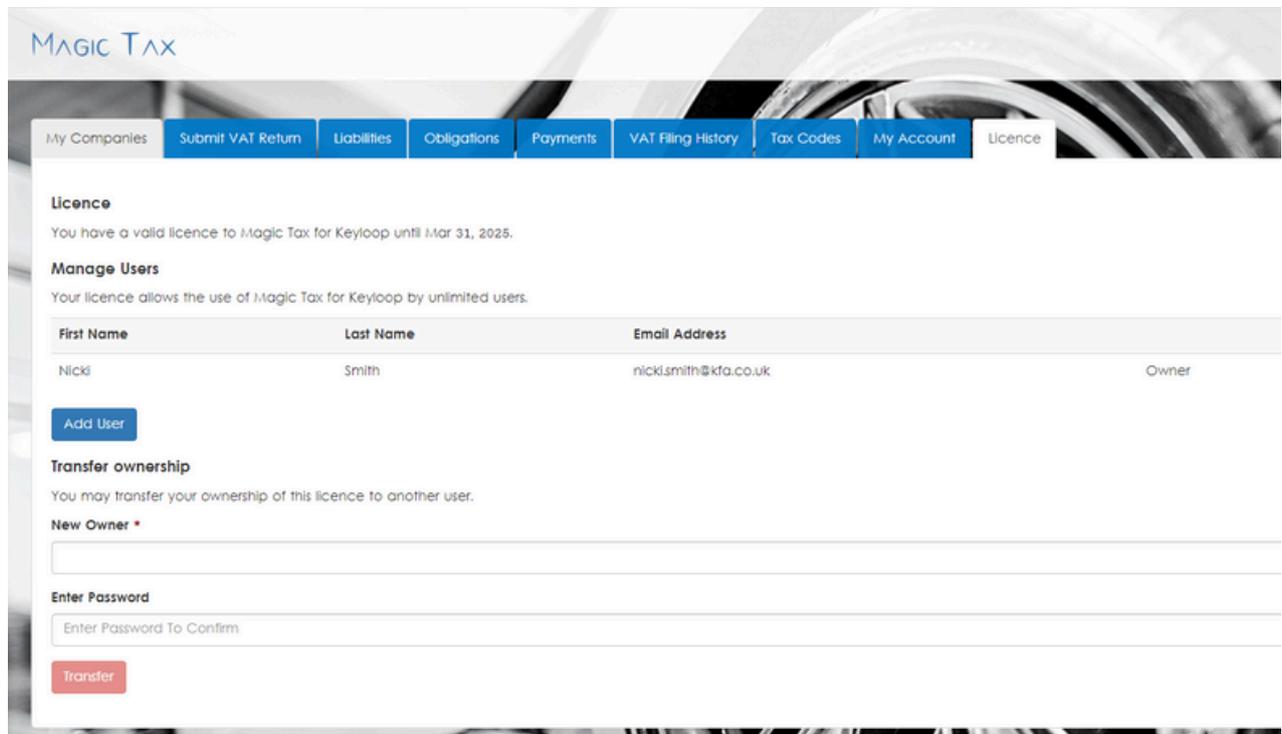
Magic Tax

Licence Management

Licence Management

Licence

From the Licence tab, you can [apply for a Free trial](#) or a licence, view details of your current licence status, and (from 90 days before the expiry date) apply to renew an existing licence.



The screenshot shows the Magic Tax web interface. At the top, there is a navigation bar with the following tabs: My Companies, Submit VAT Return, Liabilities, Obligations, Payments, VAT Filing History, Tax Codes, My Account, and Licence. The Licence tab is currently selected. Below the navigation bar, the page content is as follows:

Licence
You have a valid licence to Magic Tax for Keyloop until Mar 31, 2025.

Manage Users
Your licence allows the use of Magic Tax for Keyloop by unlimited users.

First Name	Last Name	Email Address	
Nicki	Smith	nicki.smith@kfa.co.uk	Owner

[Add User](#)

Transfer ownership
You may transfer your ownership of this licence to another user.

New Owner *

Enter Password
Enter Password To Confirm

[Transfer](#)

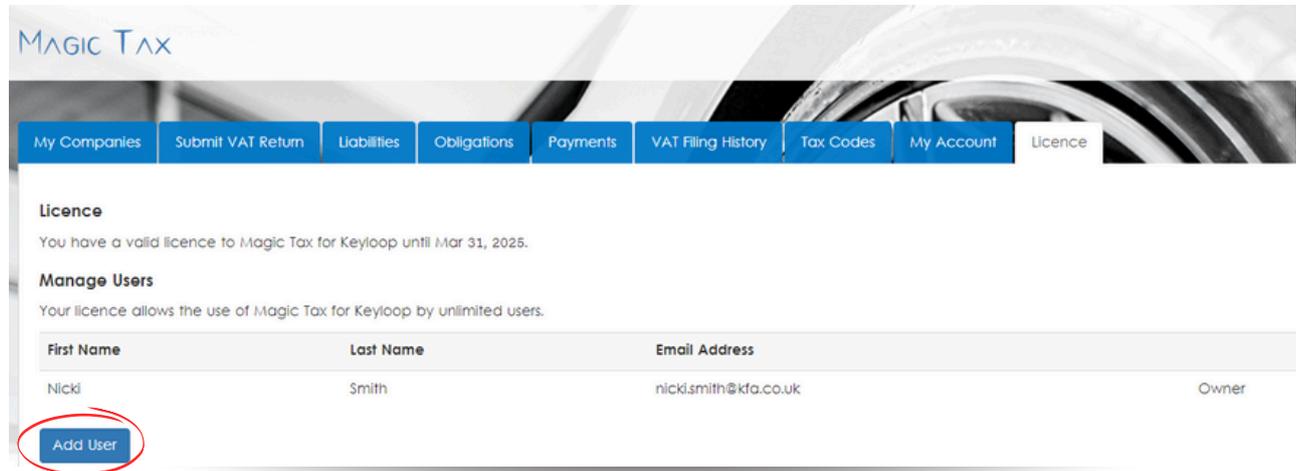
If you are the Licence owner, you can also manage the licence, add/remove users to the licence and transfer the licence to another user from this page.





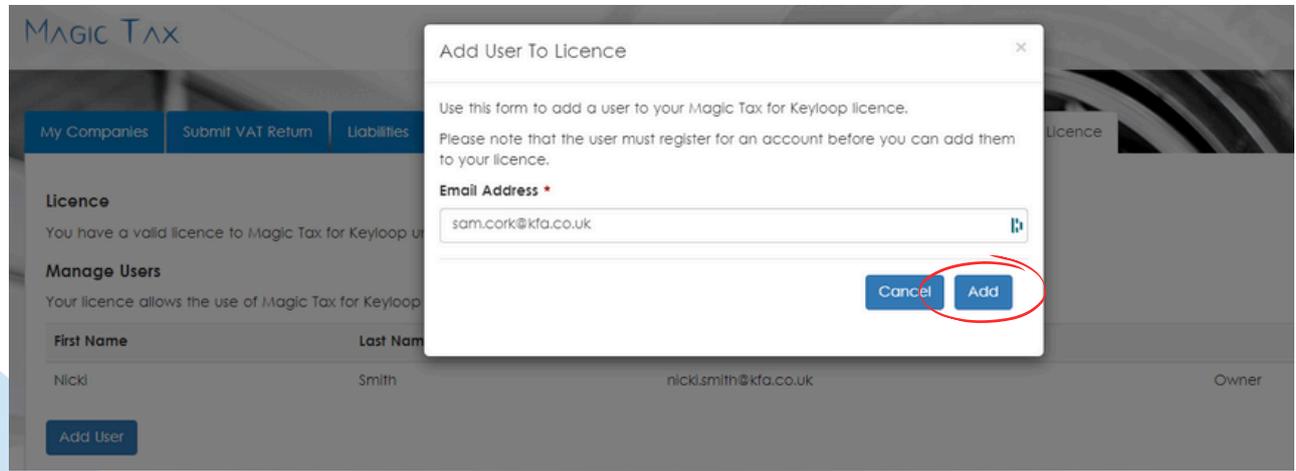
Add User (Licence owner only)

The owner of the Magic Tax licence can add Magic Tax users to their licence. To add a user to your licence, click Add User.



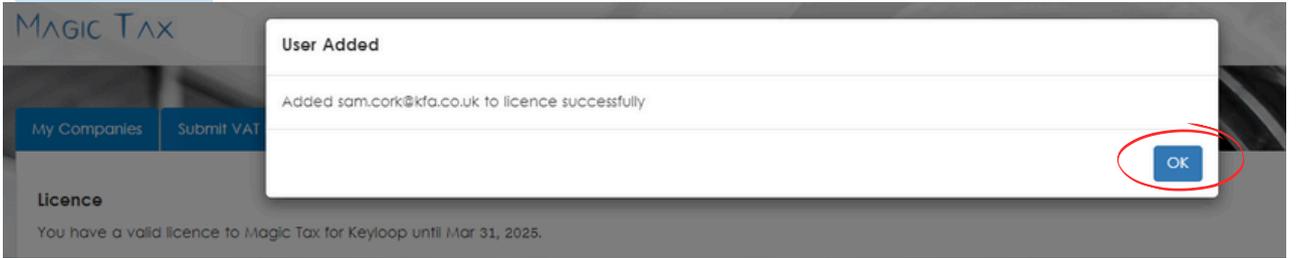
A pop-up box will appear, prompting you to enter the email address for the user you wish to add.

Click Add and repeat for any other users you need to add to your licence.



A pop-up box will confirm that the user has been added.

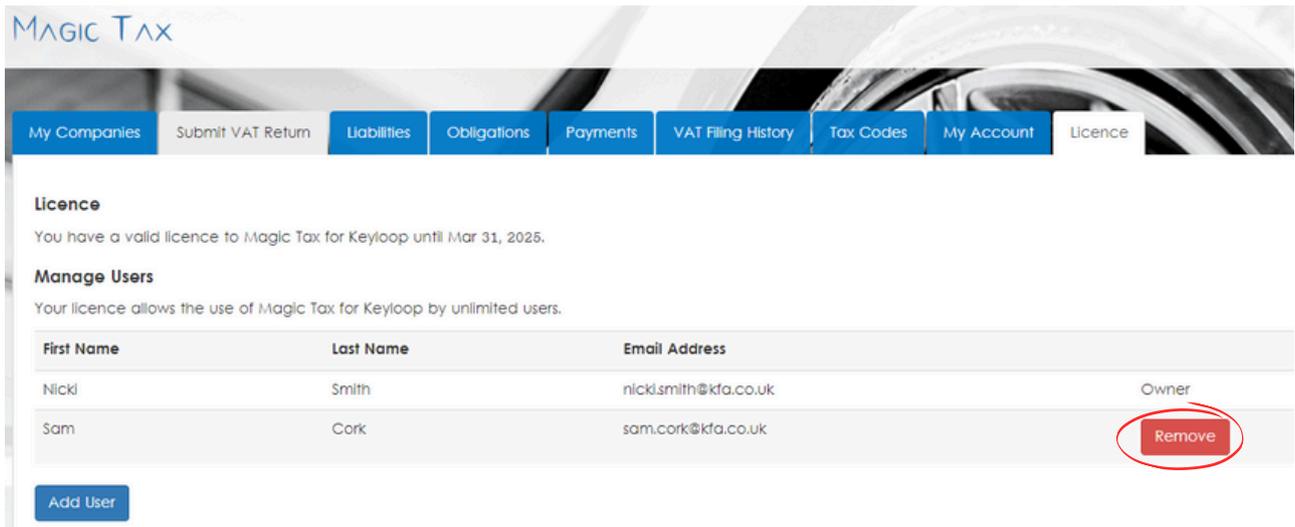
Click OK.



Remove Users (Licence owner only)

The owner of the Magic Tax licence can remove users from the licence from this page.

To remove a user from the licence, click Remove next to the relevant user.



The screenshot shows the Magic Tax interface. At the top, there is a navigation bar with the following tabs: My Companies, Submit VAT Return, Liabilities, Obligations, Payments, VAT Filing History, Tax Codes, My Account, and Licence. Below the navigation bar, the 'Licence' section is displayed. It states: 'You have a valid licence to Magic Tax for Keyloop until Mar 31, 2025.' Underneath, there is a 'Manage Users' section with the text: 'Your licence allows the use of Magic Tax for Keyloop by unlimited users.' A table lists the users:

First Name	Last Name	Email Address	
Nicki	Smith	nicki.smith@kfa.co.uk	Owner
Sam	Cork	sam.cork@kfa.co.uk	Remove

Below the table is an 'Add User' button. The 'Remove' button for Sam is circled in red.

The user will no longer show in the list of users for your licence.

Note:

Users must be signed up for a Magic Tax account before attempting to add them to a licence.

Removing users from your licence does not delete their Magic Tax user account, it just prevents the user from being able to make any further submissions for your company using that Magic Tax licence.

If you would like to request a user account be deleted, please [contact support](#).

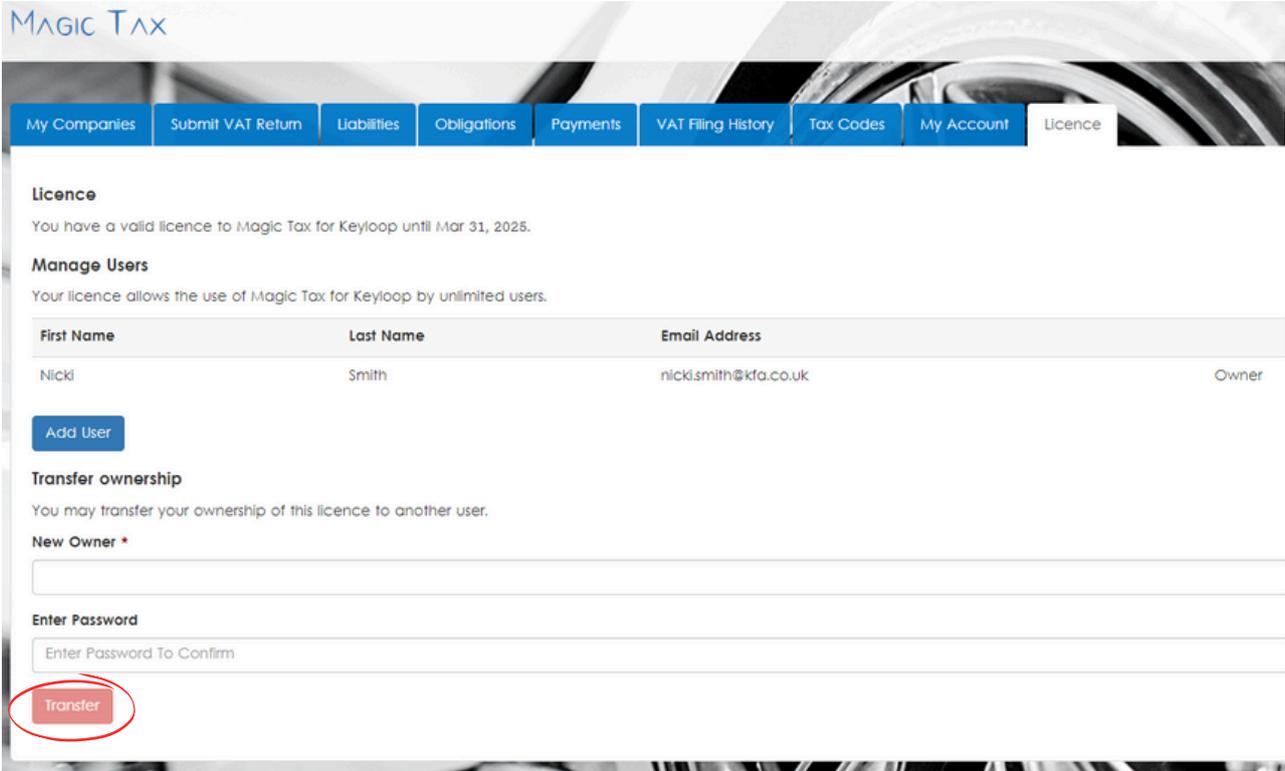
Magic Tax user accounts can only be deleted if no submissions have been made to HMRC (filing history must be made available in Magic Tax for a period of 6 years).

Transfer Ownership (Licence owner only)

The owner of the Magic Tax licence can also transfer the ownership of the licence to another Magic Tax user.

To transfer the ownership of the licence to another Magic Tax user, visit the 'Licence' page.

Enter the email address of the new owner* and enter your password to confirm.



The screenshot shows the Magic Tax user interface. At the top, there is a navigation bar with buttons for 'My Companies', 'Submit VAT Return', 'Liabilities', 'Obligations', 'Payments', 'VAT Filing History', 'Tax Codes', 'My Account', and 'Licence'. The 'Licence' page displays the following information:

- Licence:** You have a valid licence to Magic Tax for Keyloop until Mar 31, 2025.
- Manage Users:** Your licence allows the use of Magic Tax for Keyloop by unlimited users.
- User Table:** A table with columns for First Name, Last Name, Email Address, and Owner. One user is listed: Nick Smith, nick.smith@kfa.co.uk, Owner.
- Add User:** A button to add a new user.
- Transfer ownership:** A section with the text 'You may transfer your ownership of this licence to another user.'
- New Owner *:** A text input field for the new owner's email address.
- Enter Password:** A text input field for the current owner's password to confirm the transfer.
- Transfer:** A red button to execute the transfer, which is circled in red in the screenshot.

Click Transfer.

Note:

*The user you are transferring the licence to must already have a Magic Tax account and have been added to the licence before attempting to transfer the ownership of the licence.

The new owner of the licence will not have access to the filing history made from the original licence owner's Magic Tax account, since the filing history is linked to the individual Magic Tax account, not the licence itself.

However, all filing history for a company can be accessed from HMRC's system if you need to retrieve details of submissions made for your company by another Magic Tax user.



Magic Tax

Adjustments

Motor Industry

Adjustments

Making Adjustments

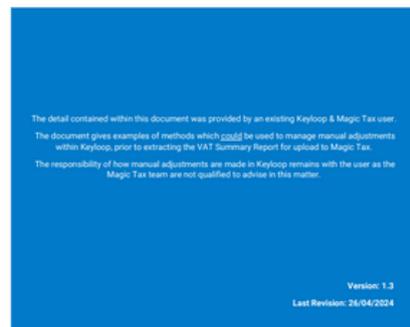
Most companies in the motor industry need to make adjustments when compiling VAT returns.

Examples of these adjustments include (but not limited to):

- Fuel scale charges
- Partial VAT exemption
- Demo vehicles
- Deposit movements
- Refunds on exports
- Postponed import VAT accounting



PROCESSING QUARTERLY VAT ADJUSTMENTS IN KEYLOOP DRIVE / AUTOLINE



Manual adjustments should be made within the Keyloop Drive/Autoline system **before** extracting the VAT Summary Report file.

This means the extracted data will not be manipulated outside of the Keyloop solution, ensuring compliance with HMRC's regulations regarding digital links, digital record-keeping, and eliminating the copy/paste or manual manipulation of data methods.

Magic Tax does not offer instructions on how to handle the necessary manual adjustments for Keyloop users.

However, current Magic Tax users have shared suggestions as to how you could manage manual adjustments within Keyloop which we have put together in a document you might wish to review [here](#)*

Note:

*This document contains suggested methods (provided by existing Keyloop & Magic Tax users) that could be used to manage manual adjustments within Keyloop, before extracting the VAT Summary Report for upload to Magic Tax.

The responsibility of how the manual adjustments are made in Keyloop remains with the user as the Magic Tax team are not qualified to advise in this matter.

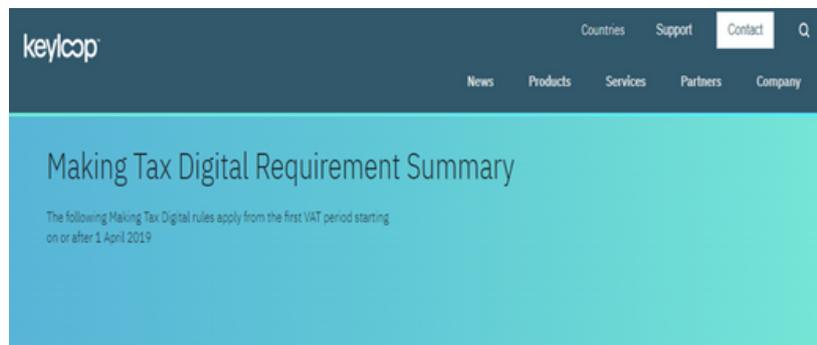


Keyloop

VAT Summary Report

Extract Keyloop VAT Summary Report

Once you are satisfied that you have made the relevant adjustments in your Keyloop DMS environment, export the VAT Summary Report from your Keyloop system ready for upload to Magic Tax.



Record and preserve financial records digitally

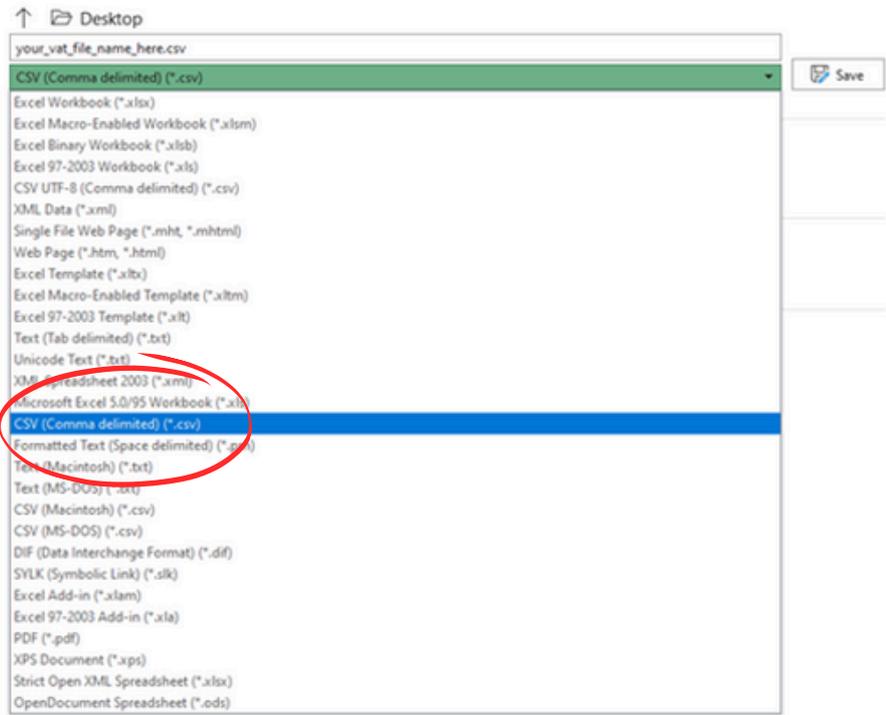
Keyloop Autoline (Revision 8) and Keyloop Drive DMS users are able to record and preserve financial records digitally.

Control Account	V	G	Description	Rate	Goods		VAT	
					Invoices	Credits	Invoices	Credits
9642	C	U	Vehicle Input/Output UKL Vat Invoices	20	227778.56		44330.64	
9642	I	U	System Use Only UKL Vat Invoices	0	-25.00		0.00	
9642	O	U	System Outside Scope UKL Vat Invoices	0	2675.15		0.00	
9642	S	U	Standard Rate UKL Vat Invoices	20	30979.94		6195.99	
9642	Z	U	Zero Rated UKL Vat Invoices		-32483.78		0.00	
9642	C	U	Vehicle Input/Output UKL Vat Credits	20		121843.36		24368.64
9642	I	U	System Use Only UKL Vat Credits	0		-10.00		0.00
9642	O	U	System Outside Scope UKL Vat Credits	0		968.50		0.00
9642	Z	U	Zero Rated UKL Vat Credits	0		-18373.35		0.00
					228934.87	104418.51	50470.03	24368.64
9643	F	U	Used Veh Margin Car UKL Vat Invoices	0	440601.00		61350.18	
9643	F	U	Used Veh Margin Car UKL Vat Credits	0		214000.00		30833.35
					440601.00	214000.00	61350.18	30833.35
9649	S	U	Standard Rate UKL Vat Credits	20		11236.34		2169.04
					0.00	11236.34	0.00	2169.04

If you need assistance to access this feature in your Keyloop system, please raise a support request via the usual channels with Keyloop.

Save the .CSV File

Once the VAT Summary Report has been exported, save the file (or files) locally as .CSV, or add the file extension .csv to the name of the file (as shown below).

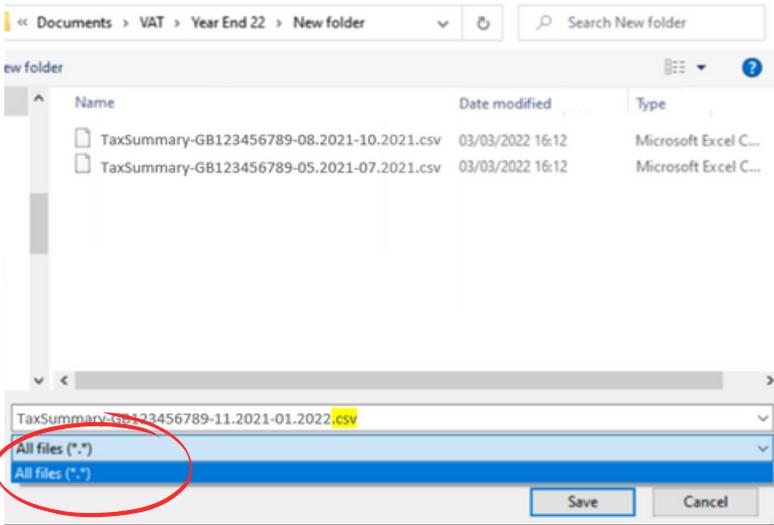


Magic Tax needs the file to be in this format (.csv) to find your data during the file upload process.

Saving a Plain/Text File

If you are offered: All files (*.*) for the file type as shown here, this means you can save the file in any format.

Simply add .csv to the end of the file name – as per the example here and you will be able to use the file to upload in Magic Tax.



Note:

DO NOT rename any column headers in the file, or add any new columns. Magic Tax needs them just as they are!



Magic Tax

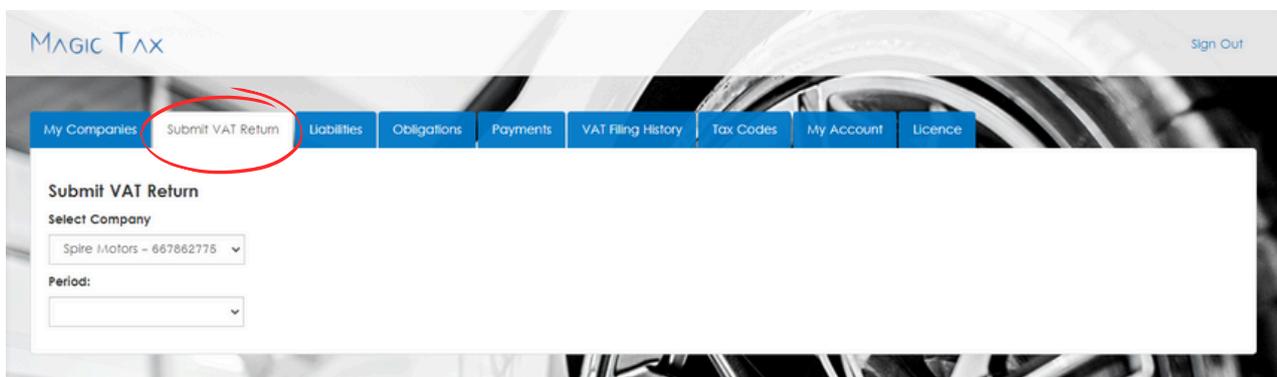
Submit a VAT Return

VAT Return

Submit to HMRC

Submit a VAT Return to HMRC

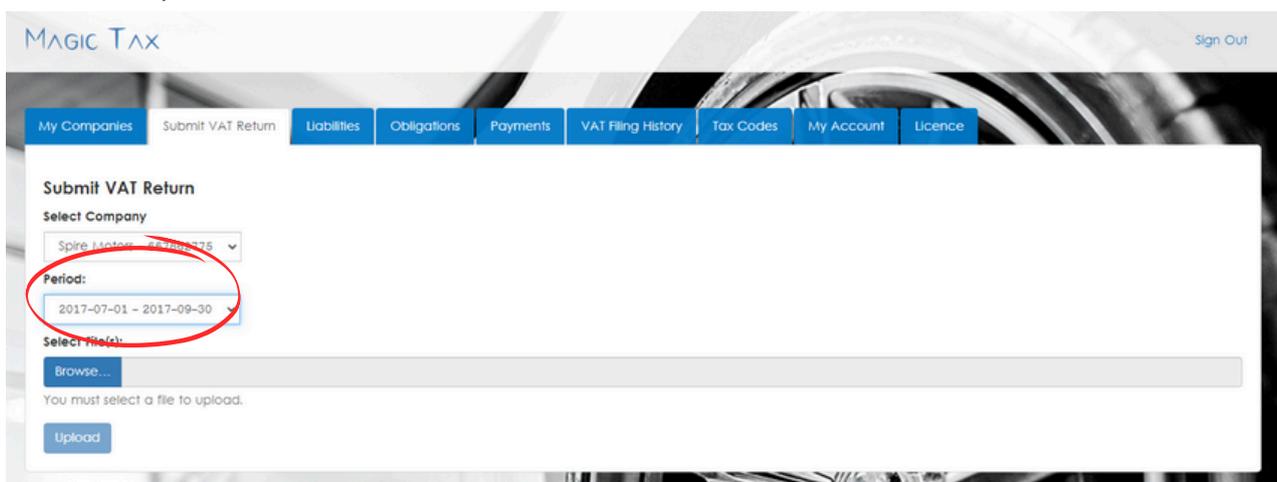
To submit a VAT return to HMRC using Magic Tax, select Submit VAT Return from the Magic Tax Dashboard.



The screenshot shows the Magic Tax dashboard with a navigation menu. The 'Submit VAT Return' option is circled in red. Below the menu, the 'Submit VAT Return' form is visible, featuring a 'Select Company' dropdown menu with 'Spire Motors - 667862775' selected and a 'Period:' dropdown menu.

If you use Magic Tax to file for one company, that company will appear in the drop-down box. If you use Magic Tax to file for multiple companies select the relevant company from the drop-down list.

Now select the period (only obligation periods that are open in HMRC's system will show here).



The screenshot shows the Magic Tax dashboard with the 'Submit VAT Return' form. The 'Period:' dropdown menu is circled in red, showing the selected period '2017-07-01 - 2017-09-30'. Below the form, there is a 'Select file(s):' section with a 'Browse...' button and an 'Upload' button. A message states 'You must select a file to upload.'

Select File/s

Browse for the .CSV file on your computer.

MAGIC TAX Sign Out

My Companies Submit VAT Return Liabilities Obligations Payments VAT Filing History Tax Codes My Account Licence

Submit VAT Return

Select Company
Spire Motors - 667862775

Period:
2017-07-01 - 2017-09-30

Select File(s):
Browse...

You must select a file to upload.

Upload

If the VAT return is calculated based on more than one Keyloop system, you can upload multiple files here and Magic Tax will merge them into one VAT Return. To select multiple files, hold down the Ctrl button when selecting the files.

Click Upload.

MAGIC TAX Sign Out

My Companies Submit VAT Return Liabilities Obligations Payments VAT Filing History Tax Codes My Account Licence

Submit VAT Return

Period: 2017-07-01 - 2017-09-30 VAT Scheme:

Display in traditional box sequence

Box 1	VAT due on sales	3,976,053.12
Box 2	VAT due on acquisitions	0.00
Box 3	Total VAT due	3,976,053.12
Box 4	VAT reclaimed	2,867,158.29
Box 5	Net VAT due/reclaimed	1,108,894.83
Box 6	Total value of sales excluding VAT	30,816,329
Box 7	Total value of purchases excluding VAT	30,899,805
Box 8	Total value of goods supplied excluding VAT	0
Box 9	Total value of acquisitions excluding VAT	0

I accept

Company JJOI2C - 123659273

Period:
2017-07-01 - 2017-09-30

Select File(s):
Browse... Tax summary for 10 a

Upload

A summary box will appear showing the calculations for the VAT return. Check that the figures are as expected and click the 'I accept' tickbox.

Click Submit to HMRC.

Note:

As soon as this button is clicked, the VAT return is sent to HMRC and it cannot be reversed.

Files must be saved as a .CSV (or with the file extension .csv) and in the exact format as extracted from the Keyloop system.

See [Keyloop VAT Summary Report Extract](#) for more information on how to save the file.

The responsibility remains with the user to ensure that the VAT return figures are as expected/correct before the return is submitted.



HMRC Confirmation

Once you have made the submission to HMRC, an automated email will arrive in your inbox.

The email will be sent from:

Magic Tax - Making Tax Digital for Keyloop Users <donotreply@kfa.co.uk>

It is advisable to add this address to your email address book/safe senders list.

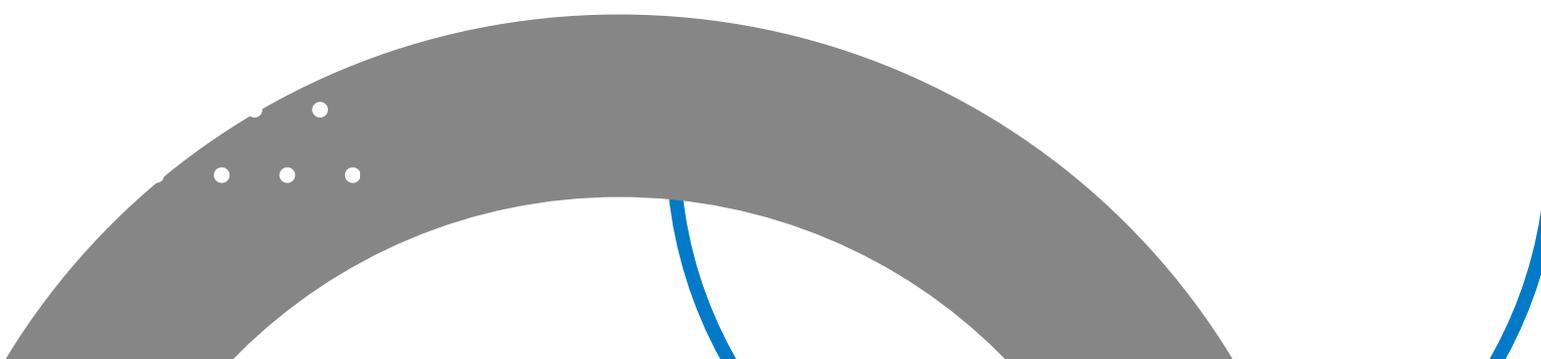
If you do not see the email arrive in your inbox, please check your spam/junk folder.

The title of the email will be:

Magic Tax VAT Return Confirmation YYYY-MM-DD - YYYY-MM-DD

The Form Bundle Number contained within the email originates from HMRC's system - and is passed through Magic Tax.

That reference is proof that the submission has been successfully received by HMRC's system.





Reports

**VAT Liabilities, Obligations,
Payments & Filing History**

Reports

VAT Liabilities

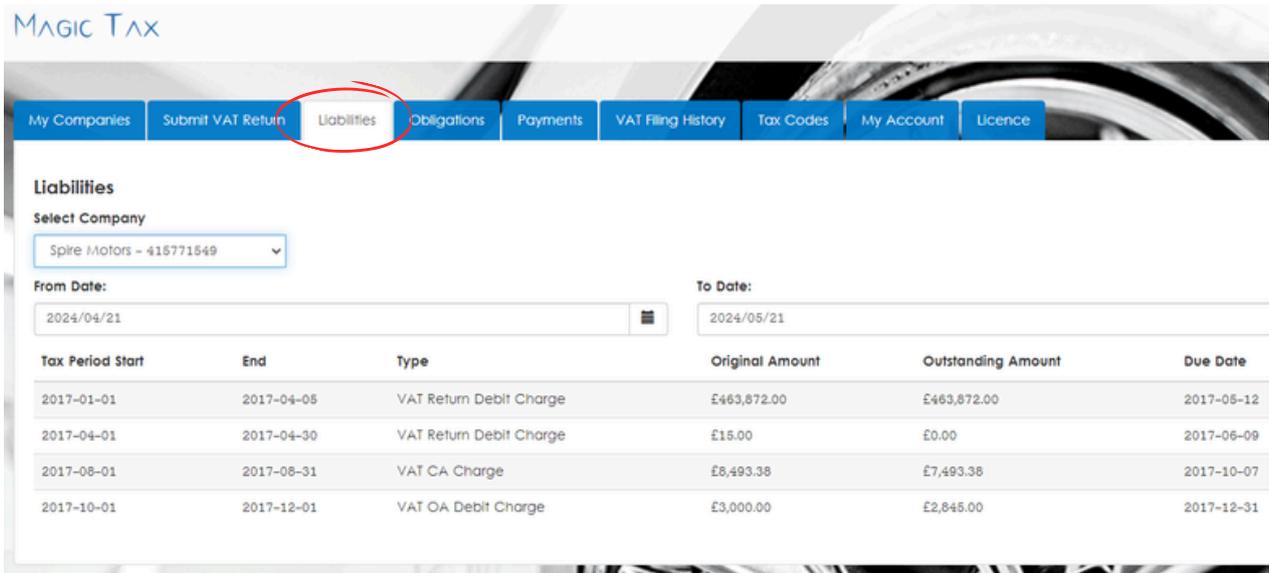
View VAT Liabilities

You can view your company's VAT obligation periods from the Magic Tax solution.

Click on the Liabilities tab from the Magic Tax dashboard.

Select your company from the dropdown (if you have only added one company to Magic Tax, that company will be pre-selected here).

If you'd like to view the data in a specific date range, you can also specify the 'from' and 'to' dates here.



The screenshot shows the Magic Tax dashboard with the 'Liabilities' tab selected. Below the navigation bar, there is a 'Select Company' dropdown menu showing 'Spire Motors - 415771549'. There are also 'From Date' and 'To Date' input fields, both set to '2024/04/21'. The main content area displays a table of VAT liabilities.

Tax Period Start	End	Type	Original Amount	Outstanding Amount	Due Date
2017-01-01	2017-04-05	VAT Return Debit Charge	£463,872.00	£463,872.00	2017-05-12
2017-04-01	2017-04-30	VAT Return Debit Charge	£15.00	£0.00	2017-06-09
2017-08-01	2017-08-31	VAT CA Charge	£8,493.38	£7,493.38	2017-10-07
2017-10-01	2017-12-01	VAT OA Debit Charge	£3,000.00	£2,845.00	2017-12-31

The information displayed on this screen is retrieved directly from HMRC's system.

Reports

VAT Obligations

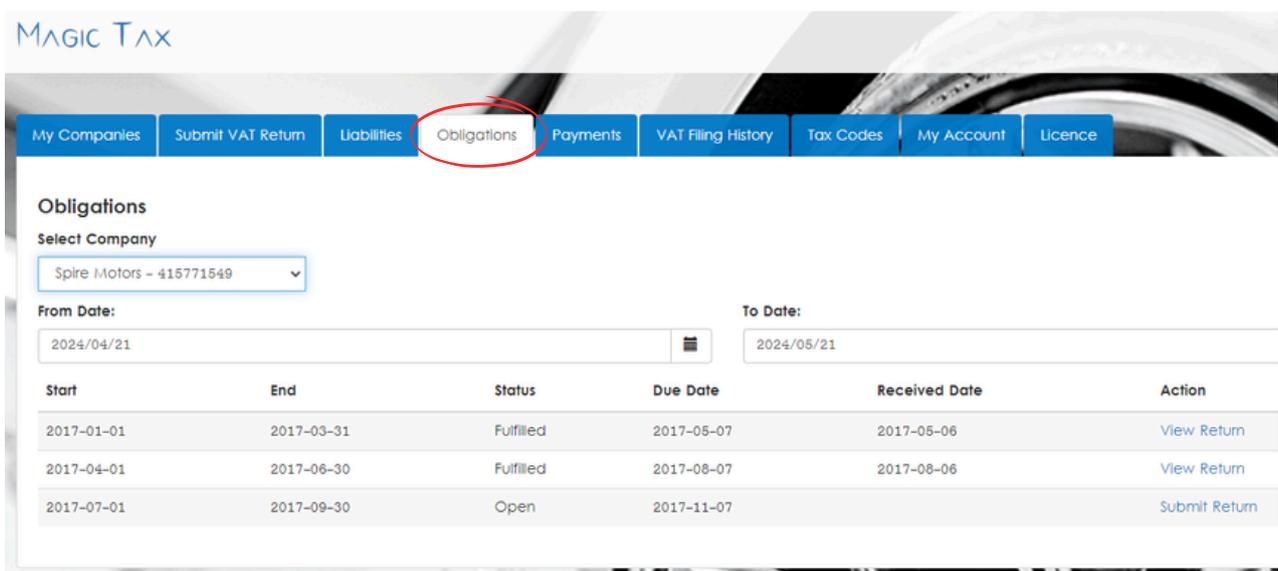
View VAT Obligations

You can view your company's VAT obligation periods from the Magic Tax solution.

Click on the Obligations tab from the Magic Tax dashboard.

Select your company from the dropdown (if you have only added one company to Magic Tax, that company will be pre-selected here).

It is possible to specify the 'from' and 'to' dates if you'd like to view the data in a specific date range.



Start	End	Status	Due Date	Received Date	Action
2017-01-01	2017-03-31	Fulfilled	2017-05-07	2017-05-06	View Return
2017-04-01	2017-06-30	Fulfilled	2017-08-07	2017-08-06	View Return
2017-07-01	2017-09-30	Open	2017-11-07		Submit Return

The information displayed on this screen is retrieved directly from HMRC's system.

From the Action column on the right-hand side of this page, it is also possible to:

- **View Return** - which will display the 9-box data from the return in a pop-up box or;
- **Submit a Return** - for any open obligation period.

Reports

VAT Payments

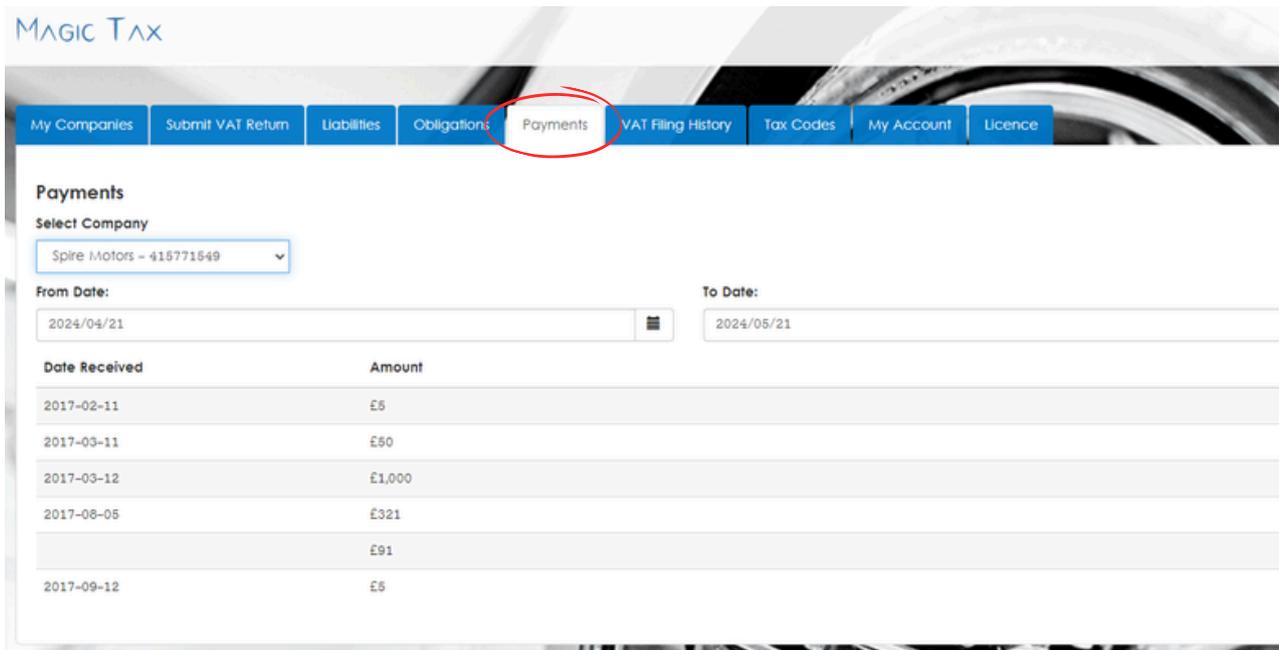
View VAT Payments

You can view payments made to HMRC for your company from the Magic Tax solution.

Click on the Payments tab from the Magic Tax dashboard.

Select your company from the dropdown (if you have only added one company to Magic Tax, that company will be pre-selected here).

If you'd like to view the data in a specific date range, it is possible to specify the 'from' and 'to' dates here.



The screenshot shows the Magic Tax dashboard with the 'Payments' tab selected. The dashboard includes a navigation bar with tabs for 'My Companies', 'Submit VAT Return', 'Liabilities', 'Obligations', 'Payments', 'VAT Filing History', 'Tax Codes', 'My Account', and 'Licence'. The 'Payments' tab is highlighted with a red circle. Below the navigation bar, the 'Payments' section is displayed, featuring a 'Select Company' dropdown menu with 'Spire Motors - 415771549' selected. There are also 'From Date' and 'To Date' input fields, both set to '2024/04/21'. The main content area shows a table of VAT payments with columns for 'Date Received' and 'Amount'.

Date Received	Amount
2017-02-11	£5
2017-03-11	£50
2017-03-12	£1,000
2017-08-05	£321
	£91
2017-09-12	£5

The information displayed on this screen is retrieved directly from HMRC's system.

Reports

VAT Filing History

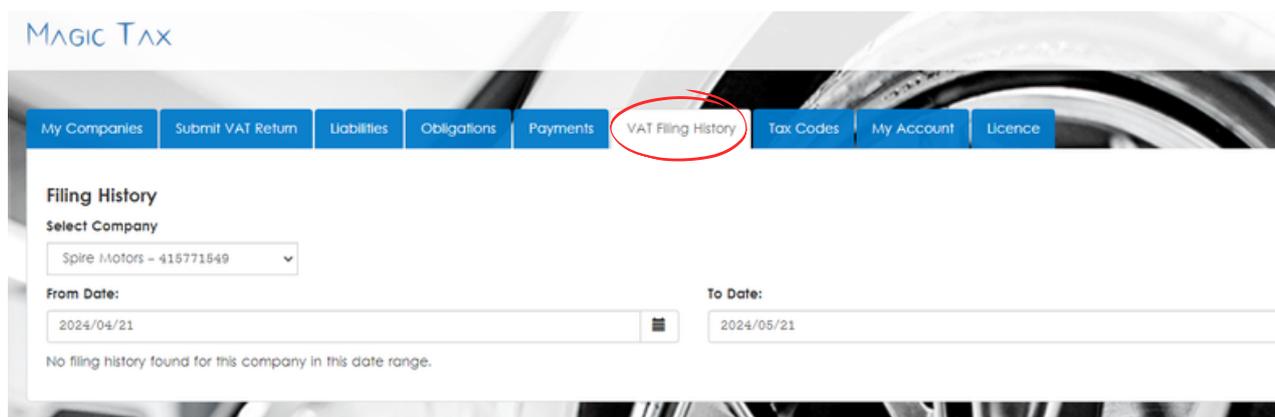
View VAT Filing History

You can view VAT return filing history (for submissions made using the Magic Tax solution) from the Magic Tax solution.

Click on the VAT Filing History tab from the Magic Tax dashboard.

Select your company from the dropdown.

If you'd like to view the data in a specific date range, it is possible to specify the 'from' and 'to' dates here.



The screenshot shows the Magic Tax dashboard interface. At the top, there is a navigation bar with several tabs: 'My Companies', 'Submit VAT Return', 'Liabilities', 'Obligations', 'Payments', 'VAT Filing History' (which is circled in red), 'Tax Codes', 'My Account', and 'Licence'. Below the navigation bar, the 'VAT Filing History' section is displayed. It features a 'Select Company' dropdown menu with 'Spire Motors - 415771549' selected. Below this, there are two date input fields: 'From Date' with the value '2024/04/21' and 'To Date' with the value '2024/05/21'. A small calendar icon is visible between the two date fields. At the bottom of the section, a message states: 'No filing history found for this company in this date range.'

The information displayed on this screen will only include information relating to VAT Returns that have been submitted to HMRC using the Magic Tax solution.

For filing history relating to VAT Returns submitted using other MTD-compatible software, please log in to your [HMRC VAT Account](#) using your Government Gateway / One Login credentials.

A large circular graphic with a blue border. Inside the circle, a close-up photograph of a grey concrete wall is shown. The wall has the text "HM REVENUE & CUSTOMS" printed on it in a dark, sans-serif font. The text is partially cut off by the right edge of the circle.

HM REVENUE & CUSTOMS

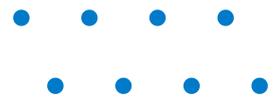


HMRC

Updates

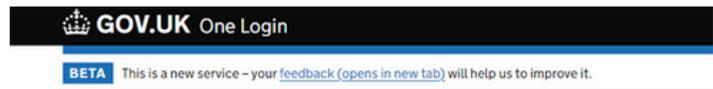
GOV.UK

2024 Changes



Starting from the end of February 2024, HMRC will begin the process of migrating existing Government Gateway users to a GOV.UK 'One Login' from their existing Government Gateway user account.

One Login Information



Contact GOV.UK One Login

Before you contact us

Read our guidance if you're having a problem with:

- [Using the GOV.UK ID Check app](#)
- [Proving your identity with GOV.UK One Login by answering security questions](#)
- [Changing the sign in details for your GOV.UK One Login](#)
- [Getting a security code for GOV.UK One Login](#)
- [Deleting your GOV.UK One Login](#)

How will this affect Magic Tax Users?

Over time, HMRC customers will be able to access all government services via GOV.UK One Login.

In the future, the page that you will be redirected to '[Authorise Magic Tax to Connect to HMRC](#)' will change.

This user guide will be updated accordingly once HMRC has implemented these changes.

Need more info?

Should you require assistance with your GOV.UK One Login in the future, you should contact [Government Digital Service \(GDS\)](#) who manages the service on behalf of HMRC.

Contact

Get in touch

More Information

Have a Question? Email Us

Request a Demo

Call Us - 0800 167 0844

Technical Support

Request Support (Free Trial)

Request Support (Existing Customers)

Call Us - 0800 167 0844

MAGIC TAX

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Suite 9 Endeavour House,
Crow Arch Lane, Ringwood,
Hampshire, BH24 1HP

v 2.1 August 2024

kfa
CONNECT