

MAKING TAX DIGITAL **THE MTD ACTION** **PLAYBOOK**

Your toolkit to prepare for MTD for Income Tax

Sage

Your MTD action plan starts now

Need support with Making Tax Digital? We're here to help you.

The next few months are critical for accountants preparing for MTD for Income Tax. This playbook provides clarity, confidence, and a practical roadmap to success. Inside, you'll find actionable steps, templates, and best practices to support you.

With Sage Accounting, MTD for Income Tax Agent, and Sage Copilot, you'll do more than just meet deadlines—you'll transform how your firm works.

Let's build a smarter, more connected future for your practice.

Why MTD for Income Tax matters now

Within months, MTD for Income Tax will reshape how sole traders and landlords report to HMRC.

It's not just about submissions. It's about creating smoother, faster, more accurate workflows for every client.

Key points

- **April 2026:** Mandatory for sole traders and landlords with gross income over £50,000.
- **April 2027:** Mandatory for sole traders and landlords with gross income over £30,000.
- **April 2028:** Mandatory for sole traders and landlords with gross income over £20,000.
- **Quarterly digital updates** instead of one annual tax return.
- **Digital records** kept in compatible software.
- First step towards **real-time tax**.



"Confidence comes from clarity, and clarity starts here."



List three reasons why your practice can benefit from MTD now

1.

2.

3.



Name one client who will need early support


1.

Your MTD mindset

A clear, repeatable plan is enough to help set you up for MTD success. Whether you're preparing five clients or 50, the goal is the same: build a process that removes stress, not adds to it.


Each step you take now brings you closer to smooth, confident MTD submissions in 2026. Break the journey into four clear phases: Plan it → Prove it → Deliver it → Perfect it → Evolve it (Automate and accelerate | streamline your workflows).

Each day invested now saves time later and helps you future-proof your workflows. The firms that start early won't just comply; they'll perform better, price better, and sleep better.




Who will lead training for colleagues and clients?

.....



Which week can you start client segmentation?

.....



What's one bottleneck to fix before April 2026?

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Phase	Plan it	Prove it	Deliver it	Perfect it
Focus	Segment clients Assign roles	Build and test workflows	On board clients and run live updates	Refine, review and repeat
Outcome	Roadmap	Confidence	Process in place	Efficiency
Solution	Sage for Accountants - Client Management	Sage Accounting, Sage Sole Trader, and AccountsPrep	Sage MTD for Income Tax Agent	Learn and repeat

MTD at a glance

Who: Sole traders and landlords with **gross income over £50,000** from April 2026; £30,000 from April 2027; £20,000 from April 2028.

When: The first quarterly update period begins from **6 April 2026**, with the first submissions due by **7 August 2026**.

What: Digital record-keeping and quarterly updates submitted via **MTD-compatible software**, followed by a single MTD Tax Return at year-end, replacing the Self Assessment tax return.

How: Maintain and update digital records through MTD-compatible software such as **Sage Accounting**. Review, adjust, and finalise your client's figures with new **MTD Tax Return** software.

Why it matters: MTD changes how you work, **not just how you file**. Firms that plan early can avoid the rush, reprice confidently, and strengthen client relationships. Digital record-keeping opens the door to automation, accuracy, and time-saving insights.



"Start with the basics: Who is in scope and when must they report?"



List the number of clients you believe will be in scope by year

2026

2027

2028

Questions to reflect on

- Which of your clients are already keeping full digital records?
- Who will need the most support to transition?
- Are there clients with multiple income sources (property and self-employment)?

The 5-phase action plan

This playbook follows five practical phases designed to turn planning into action and confidence into delivery.

Every firm's journey will look slightly different. But the key is to **keep moving forward**, one phase at a time.

Each stage builds on the last, helping you develop repeatable workflows, trained teams, and consistent client outcomes.



Tip: Don't wait until one phase is 100% complete to start the next. Most practices progress in parallel across different client groups



What phase is your firm currently in?



.....



What's holding you back from moving to the next?



.....

1. Plan it

Segment,
organise, price

Identify your in-scope clients, structure your plan, and align your team around one clear goal.

Solution to use: Sage for Accountants Client Management

2. Prove it

Test with
clients

Trial MTD tools and processes on a small group to build confidence and refine your workflows.

Solution to use: Sage Accounting Sole Trader & AccountsPrep

3. Deliver it

Run live
submissions

Move from theory to reality - onboard clients and submit real quarterly updates using Sage.

Solution to use: Sage MTD for Income Tax Agent

4. Perfect it

Refine processes
and pricing

Review what worked, fix what didn't, and strengthen your service model for long-term success.

Solution to use: MTD for Income Tax Agent & GoProposal

5. Evolve it

Automate and
accelerate

Introduce automation, streamline your workflows, and use insights to scale your MTD service.

Solution to use: All of the above

Phase 1. Plan it

Every strong MTD plan starts with clarity. Knowing who is affected, what you will offer, and how you'll deliver it.

This phase is about laying the groundwork: defining scope, segmenting clients, assigning team roles, and building a pricing structure that's sustainable for both you and your clients.

By taking time to plan now, you'll avoid last-minute pressure later, freeing your team to focus on what matters most: supporting clients, not chasing deadlines.



Questions to reflect on

- Which clients are already keeping full digital records?
- Who will need the most support to transition?
- Are there clients with multiple income sources (property + self-employment)?

Key objectives

1. Identify which clients are in scope

Use your client list and income data to determine who crosses the MTD thresholds. Prioritise based on digital readiness, engagement, and income complexity.

2. Decide your service model

Will you offer full-service compliance, quarterly review-only, or a hybrid model?
Align service levels to client segments - not every client needs the same support.

3. Assign responsibility in your team

Define clear ownership for client communication, onboarding, and submissions. Make one person accountable for tracking overall MTD readiness.

4. Create your MTD pricing framework

Build pricing around client needs, service scope, and complexity. Include clear boundaries: what's included, what's not, and what's chargeable.


**How Sage helps:
Segment your client base with organised tags and assign to team members with Sage for Accountants Client Management.**

Client segmentation worksheet


Not all clients will face the same MTD challenges—or be ready at the same pace.

Segmenting your client base helps you:

- **Prioritise** early adopters and higher-risk clients
- **Focus** your time where it will have the most impact
- **Plan** pricing, communications, and onboarding around readiness.



Tip: Easily filter clients on Sage for Accountants by tagging the clients by their digital readiness under segment names (such as Digital-Ready, Partially Digital, and Landlord)



Which segment is largest for you? ?





Which segment is highest risk for you? ?

Segment	Typical profile	Client count	Readiness	Priority	Key risks per segment	Target conversion per month	Solutions to use
Digital-Ready	Uses cloud software, engaged clients	<input type="text"/>	High	Medium	Expect smoother transition but may need re-pricing discussions	Convert 100% by Feb 2026	GoProposal for repricing conversation
Partially Digital	Some systems in place	<input type="text"/>	Medium	Medium	Inconsistent data, incomplete capture, possible software mismatch	Convert 50% by Jan 2026	AutoEntry + Bank Feeds → Sage Accounting Start/Standard
Manual	Paper/spreadsheet	<input type="text"/>	Low	High	Needs education, setup, and process change	2–3 per month from now	Sage for Accountants + AccountsPrep
Landlords	Some systems in place	<input type="text"/>	Variable	Medium	Complex ownership splits, joint filings, software unfamiliarity	3–5 per quarter	AccountsPrep, Sage Sole Trader, Sage Accounting Standard/Plus, Copilot

Internal planning and roles

Assign ownership for each stage of your MTD journey, from segmentation to submissions. When everyone knows their role, duplication is reduced, deadlines are met, and accountability becomes part of your culture.

 **Who is your MTD champion?**
?

 **Who else in your team will take client comms or tech set up?**
?

Questions to reflect on

- Have you defined who owns MTD communication with clients?
- Have you assigned who tracks MTD quarterly update test progress?
- Have you scheduled internal progress reviews?

Segment	Owner	Deadline	Status
Client Segmentation complete			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
Pricing model drafted			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
Team training complete			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
Software connections checked			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
Client communication templates created			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
MTD testing clients selected			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done
Automation tools reviewed (AutoEntry, Bank Feeds Sage Copilot)			<input type="radio"/> To do <input type="radio"/> In Progress <input type="radio"/> Done

Workflow mapping

Before introducing new software or processes, map what you already do.

Understanding your current workflow helps you:

- Segmenting your client base helps you:
- Spot manual bottlenecks and duplication.
- Identify automation opportunities.
- Clarify where Sage tools can save time and reduce risk.



Tip: A clear, mapped workflow reduces risk, speeds up onboarding, and makes training easier - especially as new team members join.



Use this quick diagnosis to assess your current process

- Does your software support each step in this workflow?
- Where are manual data handovers still happening?
- What could be automated with Sage Copilot or AutoEntry?
- Do your clients understand what happens at each step?



Capture client data

Digital receipts, invoices, or bank feeds imported via AutoEntry or direct sync.

AutoEntry or Sage Sole Trader



Review

Ensure data is categorised correctly and reconciled in Sage Accounting.

AutoEntry or Sage Sole Trader



Ledger approval

Prepare management summaries or draft reports.

Sage Accounting



Quarterly update

File quarterly data via Sage MTD for Income Tax Agent.

MTD for Income Tax Agent



Review and adjust

Apply year-end adjustments, depreciation, or corrections.

Sage Copilot Insights



MTD for Income Tax Agent

What tasks could be automated with the Sage MTD for Income Tax Agent or AutoEntry?

Sage Copilot



MTD Tax Return

Submit the annual MTD Tax Return.

MTD tax return

Pricing your MTD services

Build your firm's MTD service menu and create a transparent, repeatable pricing framework. Define what's included, what's excluded, and where you add value, so clients understand what they're paying for.

Tips for value conversations

- Lead with benefits.
- Be transparent on scope.
- Bundle compliance and advisory options.



List three clients to pilot new pricing with

1.
2.
3.

Service	Primary pricing driver(s)	Standard inclusions	Common exclusions	Add-ons
Setup and training	Conversion depth	Initial set-up + 1 session	Historic data beyond setup scope	Extra training session, backlog catch up
Quarterly updates	Turnover + record quality	Review, reconcile, and submit quarterly updates	Late data handling, missing records	Priority turnaround, late data recovery
Data processing	Transaction volume	Automated capture and bank feed review	Manual re-entry or paper records	Extra transaction band, custom rule building
Bank reconciliation	# Accounts + frequency	Monthly reconciliation	Daily reconciliation, multi-currency	Additional accounts, weekly/daily reconciliation
Bookkeeping	Adjustments per period	Prepayments, accruals, depreciation	Complex stock or CIS rework	Additional adjustments or custom journals
Tax return	Income complexity	Filing + final review	Historic corrections or late filing	Amended returns, additional schedules
Tax planning	Frequency + scope	Annual review and forecast	Ad-hoc advice outside scope	Quarterly review meetings, scenario modelling

Phase 2. Prove it

This phase turns planning into proof. Your processes, technology, and pricing structure only become meaningful once tested in real conditions.

By testing with a small number of clients, you can identify what works, fix what doesn't, and refine workflows before full rollout. Early pilots build confidence across your team and client base.



List three clients to pilot new pricing with

1.
2.
3.

Key objectives

1. Test end-to-end

Run your full MTD workflow with pilot clients. Include a mix of digital-ready and manual clients. File at least one quarterly update or practice submission. Observe how long each step takes, from data capture to client approval.

2. Record learnings

Capture pain points, timing issues, and communication gaps from every submission. Note which automation tools or integrations saved the most time.

3. Refine before scaling

Update pricing, scope, and communications based on feedback. Document new best practices and training needs that are required for the wider team.

4. Outcome

By the end of this phase, you should have a confident, tested workflow that's ready to roll out to all in-scope clients.

How Sage helps:

Test workflows using Sage Accounting, Sage Sole Trader, and AccountsPrep, then submit through the MTD Agent to validate your full process.

MTD testing workflow

Guide your team through a clear and repeatable workflow for MTD testing.

Testing isn't just about proving software works. It's about validating how well your firm's people, processes, and data interact under live conditions.

By testing early and often, you can:

- Build familiarity with new tools like the Sage MTD Agent.
- Detect workflow gaps before April 2026.
- Reduce the risk of rejected submissions.



Checklist



Tested sole trader and landlord workflows?



Has your team debriefed after each test?



Have you verified that automation (AutoEntry), bank feeds perform as expected?



Tip: If something breaks, that's progress. Every error you fix now saves time later.

Service	Focus	Key questions	Response	Tick
1. Select clients	Choose simple, cooperative clients	Who best represents your client mix?	<input type="text"/>	<input type="checkbox"/>
2. Prepare data	Confirm ASA linked; ledgers up to date	Are ledgers reconciled?	<input type="text"/>	<input type="checkbox"/>
3. Run mock update	Use Sage Accounting test data	Any permission errors?	<input type="text"/>	<input type="checkbox"/>
4. Submit test update	Live test via Sage MTD for Income Tax Agent	Did submission complete successfully?	<input type="text"/>	<input type="checkbox"/>
5. Review results	Record time, queries, confidence score	Where did issues occur?	<input type="text"/>	<input type="checkbox"/>
6. Document learnings	Log what worked and what to refine	What's your key takeaway?	<input type="text"/>	<input type="checkbox"/>

Phase 3. Deliver it


Move from testing to live delivery. This is where planning turns into real client outcomes. You're now submitting live quarterly updates and building team confidence.

Why this phase matters

Each live submission is proof that your systems, pricing, and workflows are ready. It's also where clients start to experience the benefits of digital record-keeping and consistent reporting.

Key objectives

- 1. Execute** your first live quarterly updates.
- 2. Align** roles and ensure accountability across your team.
- 3. Monitor** timing, quality and data accuracy.
- 4. Communicate** progress - highlight wins and learnings.

 **Tip:** Consistency is success. If every submission follows the same pattern, that means you're ready to scale.

Pre-submission checklist

Task	Key focus	Tick
Client records complete	All data captured and reconciled	<input type="checkbox"/>
Bank and ledger reconciliation	System balances match statements	<input type="checkbox"/>
Client authorisation confirmed	Agent Services Account (ASA) linked	<input type="checkbox"/>
Quarterly period reviewed	Correct dates selected	<input type="checkbox"/>
Adjustments posted	Accruals, prepayments, stock, journals	<input type="checkbox"/>
Review report generated	All figured validated	<input type="checkbox"/>

Submission workflow

Task	Key focus	Tick
Update submitted via Sage	Confirmation received	<input type="checkbox"/>
Submission checked by MTD for Income Tax Agent	Status verified	<input type="checkbox"/>
Client notified of success	Summary shared	<input type="checkbox"/>
Feedback recorded	Lessons and timing notes	<input type="checkbox"/>

Your live MTD workflow

Sage tools connect end-to-end, whether clients keep their own records or rely on you.

Clients working in **Sage Sole Trader** or **Sage Accounting**

Do it with me

Clients record income and expenses directly using connected bank feeds.

Data capture

Sage Copilot suggests categories for client expenses, ready for you to review.

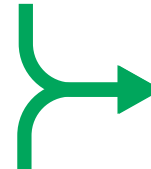
Automation

Accountant checks ledger health, VAT accuracy, and readiness for quarterly updates.

Review



Tip: One connected workflow. Two routes to success. Whether clients collaborate in real time or rely on you to manage everything.



Do it for me

Clients who send documents or spreadsheets

Data capture

AutoEntry captures receipts, invoices, and statements

Ledger build

Data syncs to **AccountsPrep**, automatically matching to the chart of accounts.

Review

Accountants validates, reconciles, and prepares for submission.

Quarterly update

Filed directly through MTD for Income Tax Agent, with Sage Copilot supporting review and anomaly checks.

Team roles and responsibilities

Confirm who owns each part of your MTD process, so nothing is missed, duplicated, or delayed.

Review the table regularly so everyone knows who steps in when someone's unavailable.



Tip: Defined roles create accountability and confidence when deadlines get close.



Who steps in if your MTD champion is on leave?



.....



What training does each role need?



.....

Name	Role	Key responsibilities	Tools used	Tick
<input type="text"/>	MTD champion	Oversee full process; liaise with Sage	Sage MTD Hub, Teams	<input type="checkbox"/>
<input type="text"/>	Preparer	Data capture & reconciliation	AutoEntry, Bank Feeds	<input type="checkbox"/>
<input type="text"/>	Reviewer	Review updates & file submissions	Sage MTD for Income Tax Agent	<input type="checkbox"/>
<input type="text"/>	Client liaison	Communicate updates & reminders	Email templates, Client Portal	<input type="checkbox"/>
<input type="text"/>	Administration	Maintains agent links and client records	Sage for Accountants	<input type="checkbox"/>

Client comms framework

Create a consistent approach for communicating with clients during each MTD quarter. Clear communication prevents stress and builds trust.

Why this matters:

When clients know what to expect and when, updates run smoothly. A consistent rhythm also helps your team manage reminders, approvals, and sign offs without chasing.



List one communication improvement for the next quarter.



.....



Which clients need extra guidance or support?



.....



Tip: Repetition builds trust. The more predictable your messages, the smoother each quarter becomes. Easily draft consistent messages with Sage Copilot each quarter



Pre-quarter reminder

Send a checklist of what clients must upload.



During quarter

Encourage weekly capture checks with AutoEntry.



Before submission

Confirm data is complete and accurate



After submission

Send confirmation summary and next steps.



Status check in MTD for Income Tax Agent



Template snippets

"Your next MTD update is due on [date]. Please ensure all bank and invoice data is uploaded by [cut-off date]."

"We've successfully filed your quarterly update. Your records are now fully digital. Thank you for staying compliant."

Automation efficiency checklist

Encourage your team to identify and adopt automation tools that save time, reduce errors, and create capacity for higher-value work.



Tip: Each automation you adopt compounds time savings; even five minutes saved per task adds up.



"Automate the predictable so you can focus on the valuable."



What one manual task could automation remove this quarter?



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Estimate the number of hours that could be saved each month



.....

Area	Manual task	Automation option	Tick
Data capture	Manual invoice entry	AutoEntry rules	<input type="checkbox"/>
Bank reconciliation	Spreadsheet imports	Bank feed matching	<input type="checkbox"/>
Client reminders	Email follow-ups	Sage Copilot prompt	<input type="checkbox"/>
Review	Manual variance check	Sage Copilot flagged alerts	<input type="checkbox"/>
Filing	Manual sign-off	Scheduled submission	<input type="checkbox"/>

Phase 4. Perfect it

Refine and strengthen your MTD process after your first live submissions. This is where insight turns into improvement and consistency becomes confidence.

Why this phase matters

Every quarterly update reveals how your systems, teams, and clients behave under real conditions. By analysing those results, you can refine workflows, improve turnaround times, and future-proof your service model.

Key objectives

- 1. Review** what worked and where bottlenecks appeared.
- 2. Identify** automation and training opportunities to reduce effort.
- 3. Strengthen** profitability via better pricing, efficiency, and delegation



Tip: Every refinement compounds; small tweaks now save hours later



What part of the process took longest, and why?

?

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What could you automate next quarter?

?

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Checklist

- Review your team debrief after each filing
- Update your client communication plan
- Adjust pricing where effort exceeds scope

Continuous improvement review

Create a simple, repeatable reflection process to capture lessons, improvements, and next actions.

Every quarter provides valuable insight into how your systems, clients, and team perform. Reviewing results regularly helps you refine processes, boost accuracy, and strengthen efficiency over time.



Tip: Defined roles create accountability, and confidence when deadlines get close.



List three clients to pilot new pricing with

1.
2.
3.




"MTD success is built on rhythm: the more consistent the cycle, the smoother every quarter becomes."


Area	Manual task	Automation option	Tick
Data Capture	Manual invoice entry	AutoEntry rules	<input type="checkbox"/>
Bank Reconciliation	Spreadsheet imports	Bank feed matching	<input type="checkbox"/>
Client Reminders	Email follow-ups	Sage Copilot prompt	<input type="checkbox"/>
Review	Manual variance check	Sage Copilot flagged alerts	<input type="checkbox"/>
Filings	Manual sign-off	Scheduled submission	<input type="checkbox"/>


Pricing and profitability

Ensure your MTD services are priced for long-term sustainability and profitability.

Quarterly updates bring regular workload and new opportunities to refine pricing. By tracking time, effort, and margin per service, you can make sure fees stay fair, consistent, and commercially viable.

 **Tip:** Small adjustments per service compound into stronger profitability across your MTD client base.

 Which service takes the most time to deliver?
?

 Which client segment delivers the lowest return?
?

Service	Current fee	Hours	Effective rate	Target margin	Notes
Quarterly update					
Data processing					
Bank reconciliation					
Review and filing					

Turn compliance into advisory

MTD isn't just about compliance. It's your gateway to real-time insight.

Every quarterly update provides a snapshot of client performance, allowing you to highlight trends, guide decisions, and uncover opportunities before year-end.

With accurate data at your fingertips, you can move from reactive reporting to proactive advice, deepening client trust and demonstrating measurable value.



Tip: Every quarterly update is an opportunity to advise, not just submit.



List one client ready for an advisory conversation



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What new insight did this quarter's data reveal?



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Service	Current fee	Automation option	Solution for you
Sole trader	Income stability	"Let's review your income patterns. Where can we smooth cash flow?"	Use Sage Accounting dashboards and Sage Copilot insights for advisory talking points for all client types. Tip: If a client's advisory needs become more complex, use Futrli and Sage Copilot insights for a deeper analysis and more tailored support.
Landlord	Property returns	"Would selling or refinancing one property improve profitability?"	
Contractor	Expense control	"Could better tracking improve your net margin?"	
Retailer	Seasonal trends	"What does your sales pattern tell us about stock management?"	

Continuous improvement log

Monitor and record ongoing improvements to your firm's processes, pricing, and performance.

Every MTD quarter is a chance to refine how you work, from tightening workflows to enhancing communication and improving margins. Tracking these changes ensures that progress is visible, measurable, and repeatable across the firm.



Tip: Continuous improvement is what turns compliance into growth. Each small win compounds into efficiency, confidence, and stronger client relationships.



Record one improvement to implement next quarter



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Which client segment remains least profitable, and why?



.....

Quarter	Focus area	Change made	Impact	Owner	Next step
Q1 2026	Workflow timing	Introduced pre-deadline reminders	20% faster turnaround		
Q2 2026	Pricing model	Added quarterly fee tiers	+10% margin		
Q3 2026	Communication	Standardised email templates	Better client response		
Q4 2026	Advisory	Added insight summary to updates	Higher retention		

Phase 5. Evolve it

MTD is the starting point for a more connected, automated practice.

Once digital record-keeping and quarterly updates are embedded, your next opportunity is to evolve your firm: integrating systems, automating repetitive work, and creating more time for insight, strategy, and client conversations.

With tools like **Sage Copilot, AutoEntry, and Sage Accounting**, automation becomes your growth engine.

Every connected process, from transaction capture to quarterly review, compounds efficiency and strengthens your advisory potential.

Key objectives

1. **Connect** more clients to digital systems and workflows.
2. **Automate** repeatable tasks using Sage Copilot and in-product AI.
3. **Focus** team time on insight, not input, using data to guide client decisions.
4. **Expand** your service offering with insights from quarterly MTD data.



Where could automation save the most time?

1.
2.



Which clients could move to a higher-tier or advisory service?

1.
2.



Checklist: Are you (or your clients) using the following...



Bank Feeds



Sage Accounting Bank Rules



AutoEntry Rules



Supporting mobile apps



Products & Services in invoices




Tip: Let automation handle the admin so you can focus on what matters most.

Your 360° readiness checklist


Reaching full readiness means your clients, systems, and team are fully aligned, ready to deliver quarterly updates with confidence and consistency.

This is the final stage of your 100-day plan: confirming everything works together before you move into live MTD delivery.

Your goal here isn't just to check boxes, it's to make sure your processes are stable, repeatable, and scalable. Use this page to bring together everything you've planned, tested, and perfected so far.



Tip: Defined roles create accountability, and confidence when deadlines get close.



Where could automation save the most time?

-
-

Area	Manual task	Status
Clients	All in-scope clients identified and pricing agreed	<input type="checkbox"/>
Systems	Sage Accounting, AutoEntry, AccountsPrep, and MTD for Income Tax Agent connected and tested	<input type="checkbox"/>
Team	Training complete; responsibilities assigned; fallback cover in place	<input type="checkbox"/>
Data	Ledgers reconciled and error-free; opening balances reviewed	<input type="checkbox"/>
Client ready	All client communications sent; cut-off dates confirmed	<input type="checkbox"/>
Quarterly cycle	Submission calendar finalised; internal review schedule booked	<input type="checkbox"/>

Confidently deliver your MTD plan

You've built the plan, proven your process, and prepared your clients. Now it's time to deliver with confidence and evolve with Sage.

Next steps:

- 1. Visit the Sage MTD Personal Consultation** page by scanning the QR code.
- 2. Book a MTD Personal Consultation** for a check-in on your MTD Readiness and how Sage can support you.
- 3. Explore the MTD Hub** and other resources and range of tools to help you prepare your clients

Scan the QR code and book your
MTD Support Call

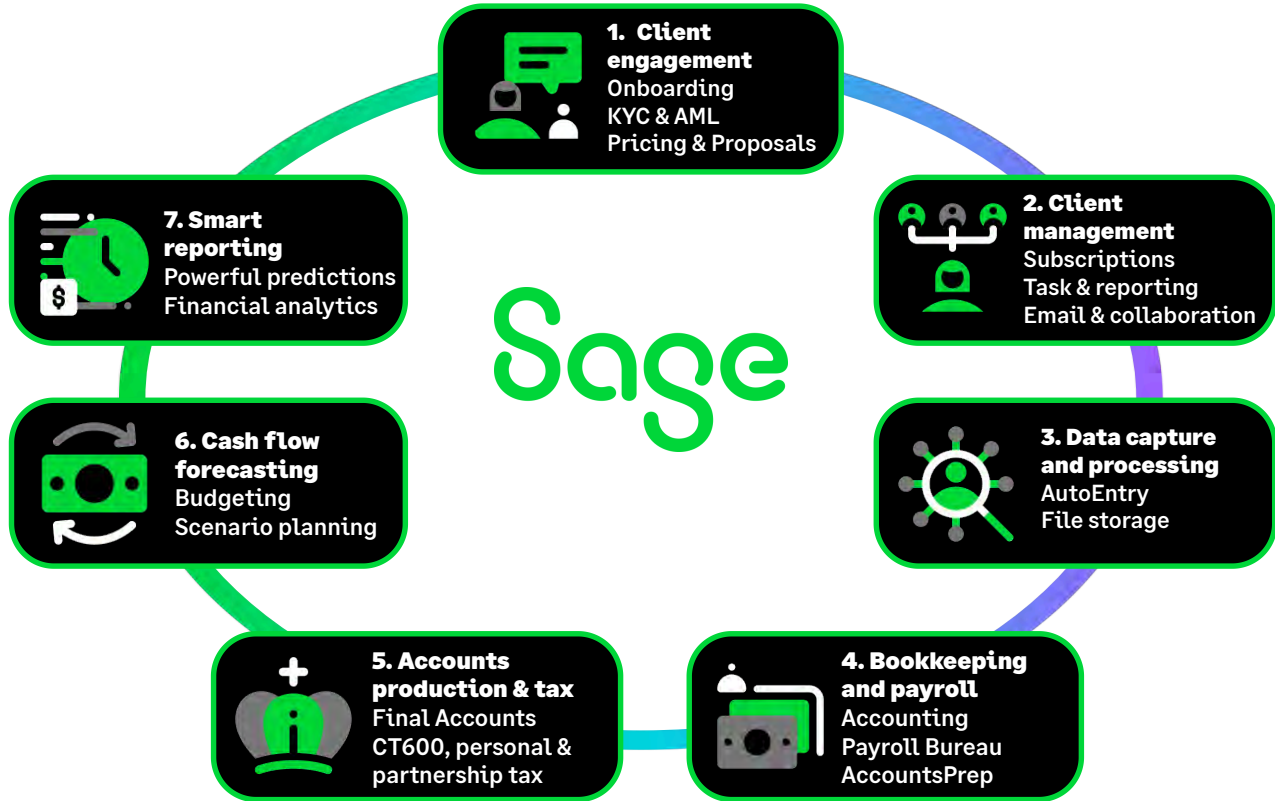


[www.sage.com/en-gb/cp/
mtdpersonalconsultation/](https://www.sage.com/en-gb/cp/mtdpersonalconsultation/)

MTD solution map

	AccountsPrep	Sage Sole Trader (Free)	Sage Sole Trader (Paid)	Start	Standard	Plus	Sage50
MTD Dashboard for clients	✓	✓	✓	✓	✓	✓	✓
Sage Copilot	✗	✗	Ai	Ai	Ai	Ai	Ai
Sales invoicing	✗	5 per month	✓	✓	✓	✓	✓
Tap to Pay on mobile	✗	✗	✓	✓	✓	✓	✓
Send quotes & estimates	✗	✗	✗	✗	✓	✓	✓
Sales ledger	✗	✗	✗	✓	✓	✓	✓
Purchase ledger	✗	✗	✗	✗	✓	✓	✓
Scan bank statements	✓	✗	✓	✓	✓	✓	✓
Bank feeds	✗	✓	✓	✓	✓	✓	✓
Import CSV files	✓	✓	✓	✓	✓	✓	✓
Snap & scan receipts	✓	✗	✓	✓	✓	✓	✓
Manage & submit CIS	✗	✗	✗	✓	✓	✓	✓
Manage & submit VAT	✗	✗	✗	✓	✓	✓	✓

Sage end-to-end solutions



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