Clients and contacts

Do not delete this page - MYOB Practice navigates to it from within the product

In MYOB Practice you can store information about your clients and other contacts. This gives you easy access to their details, even when you're on the road.

A client can be an individual, a business or another organisation.

To view your client records, click **Clients** in the side navigation bar. The Contacts page displays all the clients in your database and the Portals page lists the portals you've set up for them.

> Have a long list of clients, but working on just a few at the moment? Add the clients you're working on to My List.

Editing client details

What you can edit depends on whether you use MYOB AE/AO desktop software in your practice.

- **If you use MYOB AE/AO desktop software in your practice**: Each client's phone number, address and tax information you entered in MYOB AE/AO will appear automatically in MYOB Practice. To edit the information that appears in MYOB Practice, you'll need to make the changes in your desktop software.
- **If you don't use MYOB AE/AO**: You can add clients directly in MYOB Practice by clicking **Create client** on the Contact list page. To edit a client, select them in the Contact list, and then click **Edit** to add or makes changes to their information.

Related topics

Create clients

My List

Sync your contacts

Portals

Troubleshooting contacts