Send documents from MYOB AE/AO

This section is only relevant if you're using MYOB AE or MYOB AO in your practice.

You can send documents to a client by publishing them to the client's portal, straight from MYOB AO/AE. Your client can view, download, and print the documents.

If you want to send a document that requires a digital signature, see Send documents for digital approval .

To publish a document

1. In MYOB AO/AE, select a document you want to publish to the client portal.

   There are several ways you can do this - see Select a document to publish for details.
2. Click **Publish to Portal**.

   If you've already created your client portal, the **Publish to...** page appears.

   If you haven't created a portal for your client, you'll be prompted to either:
   - **create a portal for your client**. You'll be directed to the **Create Portal** page to create your client portals.
   - **add the client to an existing portal**. Select the relevant portal and click **Add**.
3. In the **Publish to … Portal** page, you can tag (classify) each document into an appropriate category. Tagging documents makes it easier for you to find them later.
4. Select the appropriate year that the document relates to from the drop-down.
5. You can reorder the document list if you want. Click in front of the document you wish to reorder and drag it to the position where you want it.
6. Select your notification preference for these documents:
   - If you don't want to notify the portal users via email about the document you're publishing, select **Don't notify anyone**, and then click **Publish**.
   - If you do want to email portal users to notify them that you've sent them a document:
     a. Select the **Notify people** option and click **Next**.
     b. Select the users who you want to notify. You need to select at least one full-access user.
     c. If someone who needs to review and give their approval isn't already a contributor, you can add them by clicking **+ Add other contributors**.
     d. If someone else usually deals with this client, you can choose to show them as the sender of the email. Click the x next to your name in the **Send as** section, and then click **+ Add sender** to choose the name that should appear on the email.

e. Enter the subject of the email.

f. Enter the email message.

7. Click **Publish and notify.**

How to access the published documents

- An email will be sent to each user you've published a document for, notifying them that you have shared documents with them. When they sign in to their portal, they'll see the documents you've shared in the **Documents > Received** page of their portal.
- You'll see the documents listed in the **Documents > Sent** page in MYOB Practice.
- In MYOB AO/AE, if you have Document Manager, you'll see an icon next to the documents you have published in the **Clients > Documents** tab and the **Versioning** page of Document Manager. A icon appears if an earlier version of the same document has been published to the client portal. If you don't have Document Manager, and you're publishing documents from your **Clients > Documents** tab, there is no visual indicator to let you know which documents you have published to the portal.

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