

Transaction processing

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



Were you previously using the MYOB Essentials Partner Dashboard?

We hope you enjoy using this enhanced **Transaction processing** dashboard (click here to access it now). Note that the **Users** and **My profile** pages in MYOB Essentials are still available, so if you need to add or remove staff access to the dashboard you can still do so from the usual place.

Having trouble logging in? Maybe you haven't been given access by your practice administrator. The Manage your staff help page has information on how they can give you access.

This page contains macros or features from a plugin which requires a valid license.

You will need to contact your administrator.

Go to the dashboard

All your clients, all in one place

The **Transaction processing** page is where you **create, manage and work** on your clients' business files.

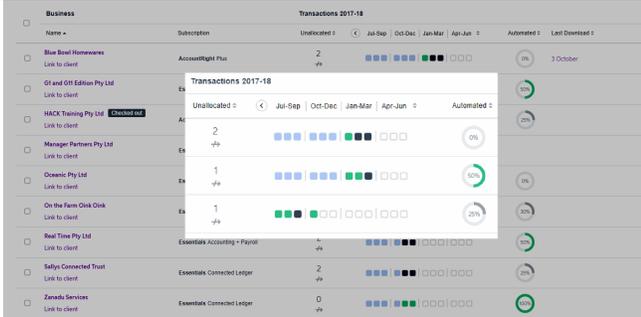
To access this page, go to partner.myob.com and click **Transaction processing** in the top menu bar.

You can see every MYOB Essentials, MYOB AccountRight and MYOB Cashbook file you've created for your clients, or have been invited to access, and then sort them to see who's up to date with allocating and reconciling transactions, and who needs attention.

You can also [create tasks](#) and [generate coding reports](#) for one or many clients in one go - great for when you need to start work on their tax returns or end of year work.

File		Transactions 2017-18						
Name	Subscription	Unallocated	Jan-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Automated	Last Download
<input type="checkbox"/> Blue Soul Homecare Link to client	AccountRight Plus	0	□□□□□□□□□□				on	3 October
<input type="checkbox"/> GI and GIH Edition Pty Ltd Link to client	Essentia Accounting - Payroll	1	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> HAKK Training Pty Ltd Checked out Link to client	AccountRight Premier	1	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> Manager Partners Pty Ltd Link to client	Essentia Accounting - Payroll	>9					Set-up bank feeds	
<input type="checkbox"/> Okeanic Pty Ltd Link to client	Essentia Accounting - Payroll	2	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> On the Farm Dink Dink Link to client	Essentia Connected Ledger	22	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> Real Time Pty Ltd Link to client	Essentia Accounting - Payroll	2	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> Salys Connected Trust Link to client	Essentia Connected Ledger	2	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	
<input type="checkbox"/> Zaxado Services Link to client	Essentia Connected Ledger	0	■ ■ ■ ■ ■ ■ ■ ■ ■ ■	■ ■ ■ ■ ■ ■ ■ ■ ■ ■			on	

Learn what else you can do with your clients' online files and desktop files.



Improve your efficiency

At a glance you can quickly analyse the urgency of work to be done, and prioritise your tasks for the day.

For each MYOB Essentials file and online AccountRight file, you can see:

- how many transactions remain to be allocated
- which months have been allocated and reconciled for the current and previous financial years
- the percentage of transactions that have been automatically allocated based on allocation rules in MYOB Essentials over the last 2 months
- whether they're taking advantage of bank feeds to minimise data-entry work
- see when their next activity statement is due, and its status (Australia only).

And by clicking the indicators you can go straight into the MYOB Essentials or AccountRight file and finish off the work that's to be done.

It doesn't get easier than that.

Create and upgrade files

When you bring new clients on board, you can create and set up **Caashbook**, **MYOB Essentials** or **AccountRight** files for them straight from the **Transaction processing** page.

If you have clients who still use **previous-generation AccountRight software** (known as classic files, version 19 or earlier), you can **upgrade their files** to the new AccountRight in just a few steps.

Create a client file

Select your client

Search Select...

Enter client file details

These details will be entered into the software you're creating on behalf of your client.

Client file name

Primary contact

First name

Last name

Phone number

Email address

johnsmith@example.com

Who will pay the subscription fees? **First month free**

- My client
- My practice [Add a payment method to use this option](#)

