Transaction processing

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

Manage all your clients

Improve efficiency

Create files

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.

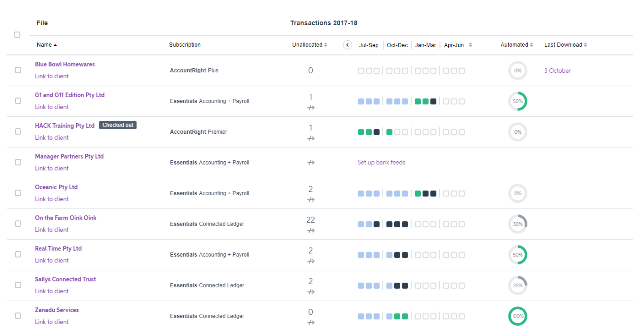
Having trouble logging in? Maybe you haven't been given access by your practice administrator. The Manage your staff help page has information on how they can give you access.

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



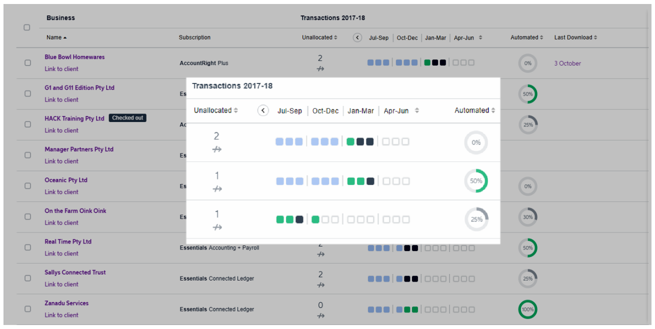
The **Transaction processing** page is where you **create, manage and work** on your clients' business files.

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.

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 **Cashbook, 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.