

Documents

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

In MYOB Practice you can see all documents that your practice has shared with clients, and the documents your clients have sent to the practice.

Documents can be published:

- **using MYOB Practice:** See [Create a general task](#)
- **using MYOB AO/AE:** See [Send documents from MYOB AE/AO](#)

Track documents sent and received

You can view a list of all published and received files by clicking the **Documents** option in the top menu bar.

If you want to:

- **View a document:** Click on a document name to view it, or click the Action button associated with a document and select **Preview**.
- **Download a document:** Click the Action button associated with a document and select **Download**. The document can then be saved and/or opened in your PDF viewer.
- **Filter your documents:** You can filter the list to show by document tag, client, or person who uploaded the document. The document count will refresh based on the filters you select.
- **View the associated task:** If a document is associated with a task, you'll be able to view the details of a task from the Documents page. Simply click the Action button associated with the document and select **View task**. Or you can click the task icon associated with the document.
- **Delete a document:** Click the Action button associated with a document and select **Delete Document**. See [Delete a document](#) for more information.
- **Share a document:** To share a document with a contributor, click the Action button associated with a document and select **Share with contributor**. See [Share a document](#) for more info.

Document counts

The **Documents** page shows you how many files have been sent and received, based on the filters that have been applied on the page (Client, Uploaded by or Tag). If you're viewing documents for a client selected in **My List**, the count will show how many documents have been sent to them in tasks or published via MYOB AE/AO, and how many they've sent your practice.

Icons

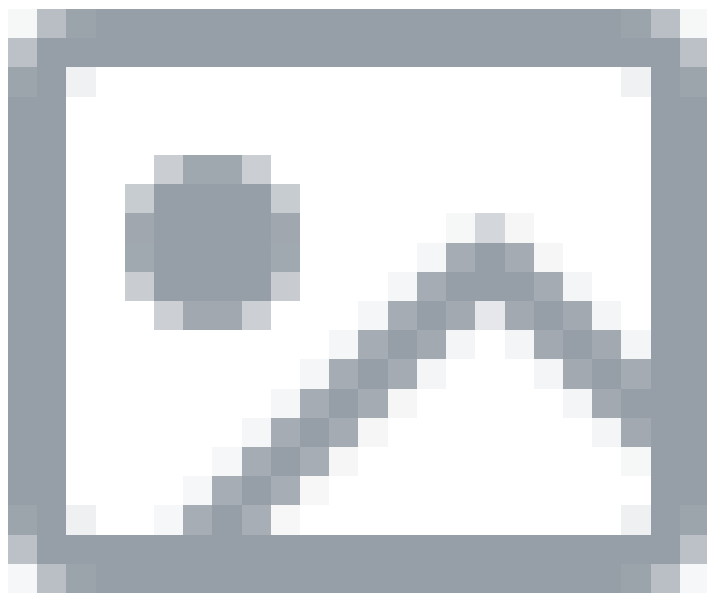
Here's a guide to the icons you'll see in the **Documents** page:

Associated icons

Icons before the document name



identifies the document as a PDF



identifies the document as an image file



identifies the document as a text file

Icons before the Action button



a task is associated with the document



this document has been shared with a contributor

no icon

the document has no associated tasks

Related topics

[Documents you can publish](#)

[Send documents from MYOB Practice](#)

[Send documents from MYOB AE/AO](#)

[Share a document](#)

[Delete a document](#)