

# MYOB AE

## It's time to Take Advantage

### What is 'Take Advantage' and how will I benefit?

The Take Advantage initiative is a valuable opportunity and encompasses a special service package that will update your existing AE software to the latest technology platform, including AE Live services. The update is streamlined to ensure you and your team can get back to work quickly and efficiently.

Your practice will benefit from enhanced productivity, greater visibility and powerful reporting options. Plus you'll be able to connect and collaborate with your clients in real-time using your new MYOB Portal, without ever leaving Accountants Enterprise. Best of all, for a limited time, this streamlined service is available free to your practice right now.

### A new platform, new possibilities

Now is the ideal time to make the change, and in the process you get a more intuitive, modern look and feel to your existing Classic AE suite. The new AE platform toolbar lets you simultaneously open in one or two clicks your contacts and associated applications such as AE Tax and MAS.

Plus you'll have access to the latest AE Live features including MYOB Portal - your new powerful online collaboration tool. For more information on the MYOB Portal and how it can revolutionise the way you work, [click here](#).

### Increase productivity, improve efficiency

Quickly view the status of past and current tax returns from one central location. Useful details are available without opening the return, including assessable income and tax estimates. You can easily create or launch your client's tax return directly from the Tax Returns tab. Navigation is fast and efficient. You can easily move between a client's tax return and other tabs. The design features the familiar look and multi-tasking functionality of commonly used applications such as Internet Explorer. It lets you access multiple clients' details at once, simply by switching between active tabs.

### Improve visibility and performance

Every member of your practice has their own digital dashboard or 'Homepage' to see the information that's important to them. Updated in real-time, a single glance provides a quick overview of important performance indicators and tasks that need attention, so nothing is missed.

Tax Homepages, including the 85% lodgment view, provide easy-to-read graphs which show live snapshots of lodgment status for all form types including activity statements. Users can easily view data, filter and drill down on the page to access more information regarding specific tax returns.

**Tax Returns**

Drag a column header here to group by that column.

Tax Year	Form Type	From	To	Status	Status Date	Date Due	Date Lodged
2015	Company	1/07/2014	30/06/2015	Sent for signat.	18/08/2015	31/03/2016	
2014	Company	1/07/2013	30/06/2014	Lodged	11/09/2014	15/03/2015	11/09/2014
2013	Company	1/07/2012	30/06/2013	Lodged	11/09/2015	15/05/2014	11/09/2015
2013	Company	1/07/2012	30/06/2013	Lodged	11/09/2015	15/05/2014	11/09/2015
2012	Company	1/07/2011	30/06/2012	Lodged	11/09/2014	31/01/2013	11/09/2014
2011	Company	1/07/2010	30/06/2011	Lodged	11/09/2011	15/01/2012	11/09/2011
2010	Company	1/07/2009	30/06/2010	Lodged	11/09/2010	15/03/2011	11/09/2010
2009	Company	1/07/2008	30/06/2009	Lodged	10/09/2010	15/05/2010	10/09/2015
2008	Company	1/07/2007	30/06/2008	Lodged	10/09/2008	15/05/2009	10/09/2008

Show all  Hide activity statements  Hide income returns

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**Return Details**

Name	<b>Abbot and Rankine Pty Ltd</b>	Return Required	<b>Required</b>	Taxable Income	<b>\$120,000.00</b>
Year	<b>2015</b>	Date Due	<b>31/03/2016</b>	Tax Estimate	<b>\$36,000.00</b>
TFN	<b>112 474 082</b>	Date Completed		Date Assessment Rec'd	
ABN		Date Lodged		Date Assessment Payable	
Partner	<b>Mr Oliver Hardy</b>	Current Status	<b>Sent for signature</b>	Assessment Amount Payable	<b>\$0.00</b>
Manager	<b>Mr Gurpreet Dadwal</b>	Status Date	<b>18/08/2015</b>	PDF Password	<b>ABBOTRANK</b>
Employee	<b>Mr Graeme Garden</b>				
Contact					

# MYOB AE Fact Sheet

Below is an outline and timeline of the Take Advantage service.

Project step	Detail	Estimated time
Welcome call	We will call you to explain the implementation process and to book appropriate dates.	30 minutes
Communication audit	One of our technical consultants will call you and connect to your server to confirm your environment is acceptable for remote installation.	30 minutes
Pre-implementation workshop	Your implementation starts with a webinar session designed to explain what is going to happen to your existing AE data and highlight any steps your practice must perform to ensure a successful implementation.	1 hour
Installation, conversion and configuration	Installation of all components to your server and to one workstation. Your AE Classic CDS and 3 years of Tax data will be converted, migrated and configured to the new AE interface. MYOB products cannot be accessed by your team during this process.	3.5 hours
Training	Your MYOB Consultant will provide you and your team with the knowledge you need to get started and get you back to productive business quickly. You will learn about working with AE Tax, easy reporting with Tax Reports and Tax Homepages and how to easily share Tax forms with your clients via your new MYOB Portal.	2 hours
Post-implementation call	We will check in with you after a couple of weeks to ensure you're on track and making the most of your updated software.	2 hours

## Post implementation resources

All the support you need. Once your Take Advantage implementation is complete, your team will have access to a wide range of support and learning services which they can access at any time.

## Like more information?

To find out more about the Take Advantage service, please contact your MYOB Client Manager for advice on the right implementation process and training package for your practice.

## Further support if required

Depending on the requirements of your practice, extra time may be needed to train additional team members or to implement customised solutions. Your Client Manager can inform you of any costs associated with fulfilling your unique requirements.