

# MYOB Accountants Enterprise

## Document Manager

Make your practice a 'less paper' office. An integral part of the Accountants Enterprise suite, Document Manager enables you to store all our client communications in one organised, searchable and secure space. This includes your emails and scanned documents, and the financial statements, workpapers and tax returns generated from your Accountants Enterprise suite. You can create, file, retrieve and approve documents – even collaborate on them with your staff – all without leaving your desk.

### Less paper, more productivity

#### Document Manager lets you:

- Store, retrieve and collaborate on documents in one central location
- Find documents quickly with full text search, filtering and grouping
- Improve productivity and reduce costs with quick filing and electronic storage
- Securely store and manage emails
- Improve client service through fast access to information
- Easily create electronic workpapers by scanning all source documents
- Add audit trails and maintain version control on documents
- Create standard letters, best practice checklists and procedures for everyone to follow
- Store your critical practice information via a searchable intranet
- Meet deadlines with smart document workflow tools.

### Create, store, retrieve and collaborate on documents with ease

With Document Manager, you can manage all your documents and communications in a single location – this includes faxes, phone calls, file notes and paper files. You can work on and electronically review the documents and tasks you create, using a filing structure which was designed for the accounting profession.

It also lets you control all your revisions and changes to documents. The audit trail feature offers additional peace of mind and keeps track of anyone who amended, printed or even viewed a document.

### Keep work moving faster

Document Manager helps you to manage and track work through the practice, making it easier to meet deadlines.

Any document you create within Document Manager can be used to initiate or track a task. You can send by internal email document links and associated information to anyone in the practice for review. Recipients can then forward the information or delegate a task.

The online approval system allows work to be routed around the practice quickly and efficiently. This also assists with quality control and ensures sensitive documents do not leave the practice without approval.

#### Automate the flow of work



## MYOB Accountants Enterprise Fact Sheet

### Client information at your fingertips

---

Document Manager gives you fast access to a full client history – which lets your firm become more responsive to your clients' needs. You can easily access information, including all correspondence and file notes. And because you do not need to re-key client data for each correspondence, you benefit from accurate and consistent records.

### Work with scanned documents

---

Working with scanned documents help you to save on office space, storage, paper and photocopying costs. Document Manager allows you to:

- Easily and quickly create secure, transportable PDF documents and collate client files, including tax returns, letters and financial statements
- Attach tasks to scanned documents and email to relevant employees
- Create and maintain links between workpapers and scanned source documents, making online review and approvals a reality.

### Seamless integration with MYOB Portal and PDF Manager

---

Improve workflow efficiency with tightly integrated Portal and Document Manager solutions. Publish to MYOB Portal direct from MYOB Document Manager allowing you to keep work flowing and improve quality control. MYOB Portal is an online collaboration platform where you can securely share documents and accept digital signature approvals from your clients, even when they're mobile.

MYOB PDF Manager makes the workflow of storing documents simple and efficient and it integrates perfectly with Document Manager. MYOB PDF Manager lets you make PDFs from documents created in any software program. It also allows you to easily collate multiple documents into a single PDF file.

### View information the easy way

---

With its multiple viewing options for information and documents, Document Manager lets you see exactly what has happened, how and when.

You can view and sort documents according to:

- The individual who created them
- The person next responsible for a follow-up
- The delegator.

You can also view documents by date, so you can see at a glance which documents were sent on any particular day. This means you no longer need to keep a paper or spread sheet-based mail registry. And if a client has a query about a specific document, you can easily drill down to see the details.

### Take control of your email

---

With most practices conducting much of their business online, it's getting harder to keep track of emails and control the information they contain.

Document Manager allows your emails to be at the core of your firm's interactions with clients. It allows you to quickly and easily search and review emails and manage them like any other secure document.

### Instant access to information

---

The full text search function reduces the time you spend searching for documents and gives you instant access to practice information. You can search by author, date range, type of work or year. Or you can simply search by any word within a document or email.

### Build an intranet for your practice

---

Document Manager has a powerful intranet creation tool for sharing practice knowledge among all staff. You can store information on a searchable intranet, and build a library that everyone can use. You can use your intranet for:

- News and announcements
- Storing practice templates
- Policy and procedure documents
- General knowledge base – to keep all technical bulletins and newsletters in the one place.

## MYOB Accountants Enterprise Fact Sheet

### Keep your standards high

---

Document Manager ensures all your documents comply with practice standards, so that work is produced faster, and with consistently high quality. By using standard practice templates to create documents, client information populates automatically from the client database. It gives you greater control over letters, faxes, email and reports and will ensure only standardised, accurate information leaves your practice.

### About Accountants Enterprise

---

The Accountants Enterprise suite is purpose-built for today's multi-partner accounting practice. The suite delivers extended functionality that can be customised to suit your unique workflows and reporting needs. Through tight integration, key information such as contacts, employees, security and reporting are accessible across the suite. Enter data once and it's automatically shared.

### More information

---

To find out more about Document Manager, please contact your MYOB Client Manager for advice specific to your practice needs.

[myob.co.nz/ae-dm](https://myob.co.nz/ae-dm)