

MYOB Accountants Office



Tax Manager

Make tax less taxing. Tax Manager makes it easy to stay on top of your clients' tax obligations. Through paperless workflows and links to up-to-date IRD data, Tax Manager gives you the peace of mind that client payments are accurate and on time – every time.

Tax Manager makes the tax notice process much easier – no more large paper reports, no more endless checking and re-checking and no more worrying about missed notices or last minute changes.

Paperless tax management

Tax Manager has digital dashboards to make it easy to view your tax management data. Using drag and drop functionality you can sort, filter and group at the click of a button. You can also view data by partner, manager, agency, family group or any other column in the dashboard. This means you can work entirely on screen – no need to print your working documents ever again.

You can easily drill down on a client to amend figures, change provisional tax, update losses, add comments or flag a tax notice which you can assign to a specific employee for review. With no need to continually re-check data for IRD discrepancies, missed notices, or last minute changes to draft notices – your practice is one step closer to being completely paperless.

Tax Manager alerts

Tax Manager features alerts to ensure you keep your clients' tax data accurate and up-to-date. By matching the data in Tax Manager with that held by the IRD, these alerts ensure your client's tax payments are accurate and paid on time.

With Tax Manager alerts, you can stay on top of:

- + Balance date and account balance discrepancies
- + Previous payments still unconfirmed
- + Accounts 'on hold' at the IRD
- + Transactions on unfinished returns.

Tax Manager also flags payable amounts that may have changed before the due date, so you can be 100% sure your tax notices are accurate before sending them.

Automatic data transfer

Built to match the latest IRD transactions and specifications, Tax Manager links directly to the IRD so you know your data will always be up to date. This allows simple, automated reconciliations and vastly reduces data entry – but you still maintain control of your data.

Tax Manager pulls daily feeds of tax transactions and balances directly from an online service, so you can keep on top of outstanding balances and pro-actively minimise your clients' interest and the risk of penalties.

Accurate assessment

Tax Manager handles your assessment process seamlessly. For clients with a data match to the IRD, assessments are automatically accepted, which means no need to re-key data. It highlights IRD assessments that are inconsistent with the filed amounts which you can then accept or reject with a single click, or attach a note.

Filing statistics

Tax Manager makes it simple to review the progress of your compliance work. With the click of a button you can see:

- + Exactly what your filing percentages are at any time during the year
- + Which agency list a client belongs to
- + The clients not required to file this tax year
- + Clients that have exemptions such as deferral and late notices.

MYOB Accountants Office Fact Sheet

Streamlined Tax Notice processing

Gone is the need to print Tax Payment Calculation Reports as you can check, update and approve figures directly in the system. When you're finished, there's no need to file any reports as all your comments, amendments and approvals are automatically stored in the system and searchable for future reporting.

Whenever you open a client file or the Tax Notices dashboard all amounts due, balance months and tax account balances are checked. This means you can be sure that changes made anywhere in the system are taken into account and everything is always up to date.

You can process by family group or partner, assign tasks to staff members or work collaboratively inside the product. You can print final notices either individually or in bulk – the choice is yours.

MYOB Accountants Office integration

Tax Manager integrates seamlessly with Practice Manager to provide you with everything you need in one or two clicks. Built on the latest Microsoft™ technology, the system is compatible with all Accountants Office Classic products. Whether you choose to upgrade to Tax Manager alone, or bundle with the implementation of Practice Manager, you'll get the benefit of integration with Accountants Office Classic Tax Preparation and the General Ledger you use today.

MYOB Help Centre

The help centre is built into the MYOB Accountants Office suite. This gives you immediate access to information on common workflow matters and quick links to the MYOB Knowledgebase, online training and much more. You can even log a request for support directly from your desktop.

About Accountants Office

Ideal for a sole practitioner or smaller practice, MYOB Accountants Office suite pulls together the most common tools you need and links them seamlessly. Standardised configuration, reporting and simplified workflows mean you can spend more time focused on your clients. Accountants Office gets the job done – faster, easier and smarter.

More information

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

myob.co.nz/ao-tm

How Tax Manager will revolutionise the way you manage tax

Current process	With Tax Manager
Manually check IRD balances	Automatic
Print the Tax Payment Calculation Report	Review on-screen with the tax notices dashboard
Check and manually mark up the Tax Payment Calculation Reports	Drill down and amend directly in the system
Batch print IR901D forms	Print IR901D forms individually or in batches when they're ready
Manually correct and post work files	Automatic
Print and file paper reports	All reports are retained in Tax Manager