Fact Sheet

MYOB Accountants Enterprise

Tax Manager

If you need an easier way to stay on top of your clients' tax obligations, you need Tax Manager.

Tax Manager makes the whole process paperless and links up seamlessly with the latest IRD data, so you can be sure your client payments are always accurate and on time.

Paperless tax management

Digital dashboards make it easy to view your tax management data. Use drag and drop functionality to sort, filter, and group information. View data by partner, manager, agency, family group or any other column in the dashboard.

Tax Manager lets you work faster by easily drilling-down on client records 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 alerts

Handy alerts help 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 clients' tax payments are paid on time.

Tax Manager alerts keep you 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 their due date to give you certainty that your tax notices are accurate before sending them.

Key features and benefits

+ Seamlessly cross-references IRD balances
+ Review tax payment figures on screen via tax notices dashboard
+ Drill-down and amend calculations directly in the system
+ Print IR901D forms individually or in batches
+ Store and retain all tax notices in the system.

Automatic data transfer

Tax Manager is built to match the latest IRD transactions and specifications. This allows simple, automated reconciliations to vastly reduce your data entry. You still maintain control of your data.

Daily feeds of tax transactions and balances flow directly from an IRD online service to help you stay in control of outstanding balances, plus pro-actively minimise the risk of penalties.

Accurate assessment

Tax Manager handles the assessment process seamlessly. If client details match with IRD records, there's no need to rekey any data and assessments are automatically accepted. It also highlights IRD assessments that are inconsistent with filed amounts, which you can accept or reject with a single click.

Filing statistics

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

+ The exact figure of your filing percentages at any time
+ The agency list your clients are listed under
+ The clients that do not need to file in the tax year
+ Which clients that have exemptions such as deferral and late notices.

Streamlined tax notice processing

There's no need to print Payments Due Report as you can check, update and approve figures directly in Tax Manager. All 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.

Process by family group or partner, assign tasks to staff members or work collaboratively inside the system. Print final notices either individually or in bulk – the choice is yours.

MYOB Help Centre

The help centre is built into the MYOB Accountants Enterprise 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 Enterprise

The MYOB 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.

For more information

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

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