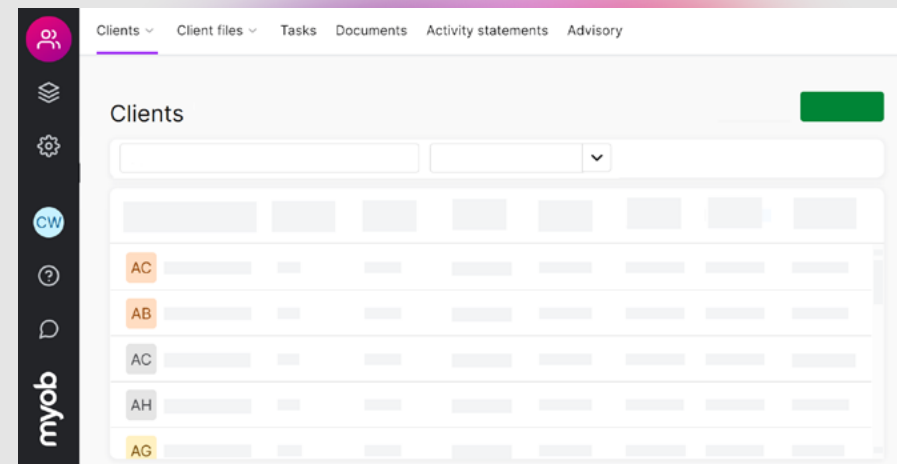
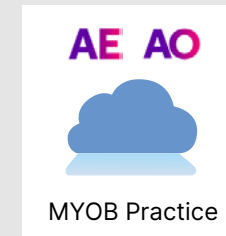


# A guide to activity statements in MYOB Practice

All you need to prepare and lodge activity statements online.



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**This guide will help you set up MYOB Practice and use it to prepare and lodge activity statements**

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To get the most up-to-date experience, we recommend moving your activity statements to MYOB Practice. It's free and takes just a few minutes to do.

Never used MYOB Practice? It's ready for you to start using now.

[See how to set it up.](#)

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# Activity statements made easy with MYOB Practice



## Eliminate manual data entry

Pre-fill activity statements with ATO and your client's MYOB data.



## Secure and modern

MYOB Practice gives you and your clients a fast, secure and modern experience.



## Lodge in bulk

Save time by lodging all your activity statements together.



## Collaborate with clients effectively

Slash turnaround times with secure client approvals.



## Automated activity statements

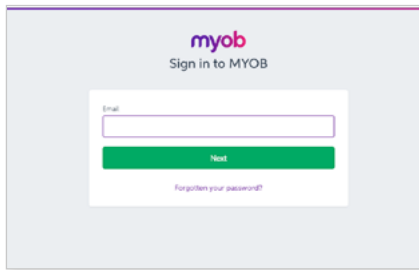
Get activity statements created for your clients.

## Compare the features

Business Activity Statement Lodgement

	Client	Partner Lodging	
	MYOB AccountRight/ MYOB Business	MYOB AE/AO	MYOB Practice
Single create	✓	✓	✓
Auto-create obligations	✗	✓	✓
Pre-fill from ATO	✓	✓	✓
Populate from ledger	✓	✗	✓
Single lodge	✓	✓	✓
Bulk lodgement	✗	✓	✓
Filter to agent obligations	✗	Partial	✓
Portal integration	✗	Partial	✓
Documents integration	✗	Partial	✓
Revisions	✓	✓	✓

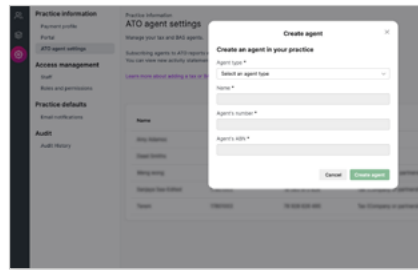
# Get your practice ready



## Log in to MYOB Practice at [partner.myob.com](https://partner.myob.com)

Use the same email and password you use to log in to MYOB AE/AO. Or select the MYOB Practice cloud icon from MYOB AE/AO.

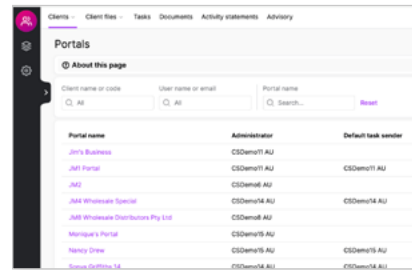
If it's your first time using MYOB Practice, you'll need to [sync your contacts](#).



## Add your agent details

Go to Settings > ATO agent to add your agent details.

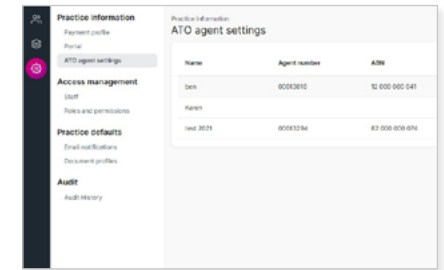
If you've already added your agents, check they're up to date.



## Link to your clients' MYOB files (Recommended only)

To pre-fill activity statement data, [link files to your clients](#). Go to Client Files and select the file you want to link.

You'll also be able to send completed activity statements to your clients through their own [secure portal](#). To create a portal, go to Clients > Portal list > Create portal.



## Auto-create activity statements (Recommended only)

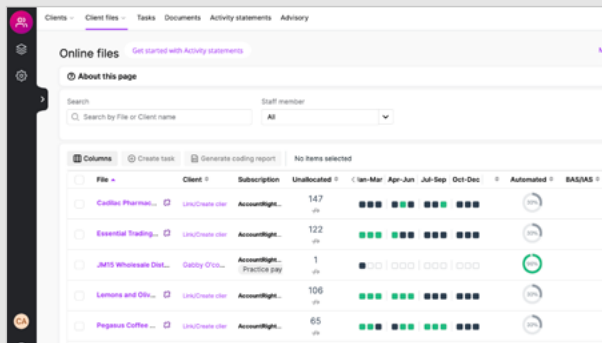
To get [auto-created activity statements](#) for the clients and periods you need, go to each client's settings and select their reporting periods.

Then subscribe to ATO reports in your ATO agent settings.

Auto-created activity statements appear in Activity Statements or Tax every morning.

# Your activity statement workflow

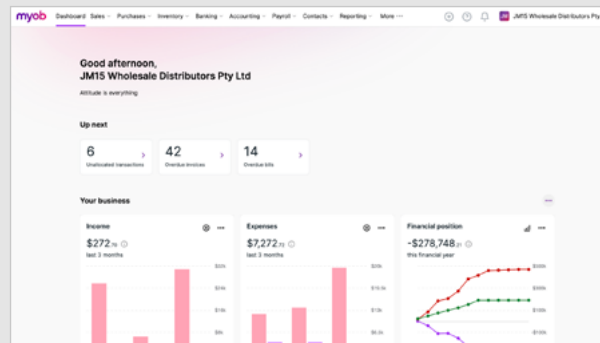
## 1 Reconcile



Go to the Unallocated column on the Client Files page to check if your client has allocated and reconciled their transactions.

Finalise the client's accounts for the period in their MYOB file.

## 2 Prepare

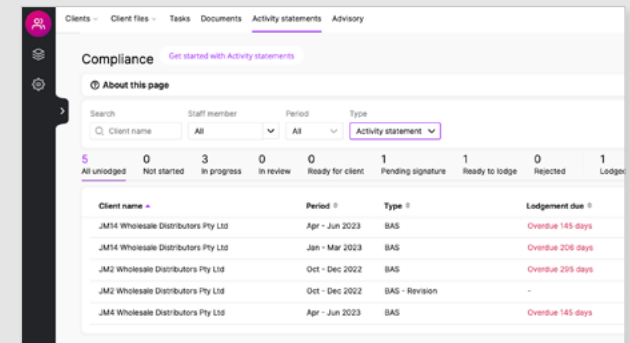


Go to MYOB Practice > Activity Statements or Tax to prepare your clients' activity statement.

Import your client's GST and PAYG data from their MYOB file.

Add other details like fuel tax credits.

## 3 Lodge



Use your client's portal to send the activity statement. They can digitally sign the activity statement from the portal.

Lodge the activity statement individually or in bulk. Import your client's GST and wages data from their MYOB ledger, saving time on manual data entry.

# Tips to transition your practice to online activity statements

1

## Choose your champion

Your change champion can set up MYOB Practice and help everyone to use it.

Your champion can set up MYOB practice so you're ready to lodge activity statements.

These training programs will give them everything they need:

- [MYOB Practice Certification course \(1.5 hours\)](#)
- [Move your activity statements to the cloud course \(1.5 hours\)](#)

2

## Plan

The start of a new BAS period is the ideal time to start.

Decide when you'll start using MYOB Practice and create a plan to train your team.

Your champion can lead demonstrations or group training sessions.

Suggested training:

- [Interactive walk-through \(5 minutes\)](#)
- [Automate your activity statements workflow webinar \(30 minutes\)](#)
- [Getting started with activity statements course \(1.5 hours\)](#)

3

## Get ready

Select up to 5 clients to start with.

Transitioning a small number of clients will allow team members to get used to the online workflow.

Their feedback can help your champion to plan for transitioning the rest of your clients.

4

## Do

Start preparing and lodging activity statements.

Do your first activity statement as a team.

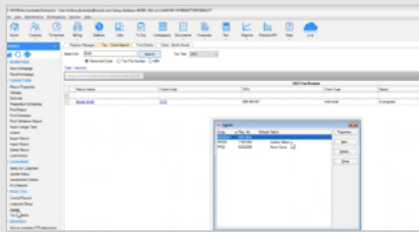
Your champion can lead everyone through the workflow together.

# Navigating activity statements in MYOB Practice

This page shows where you can find the activity statement steps in MYOB Practice compared to MYOB AE/AO.

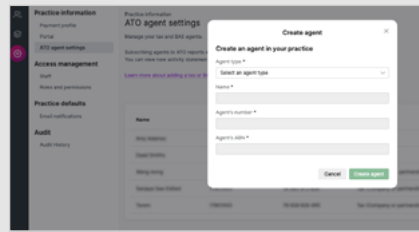
## Add an ATO agent

MYOB AE/AO



Tax homepage > Agents on the task bar. (Year specific)

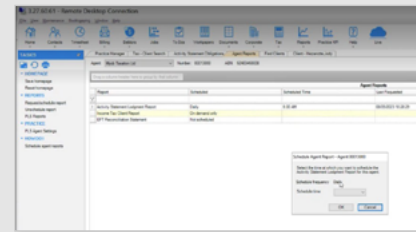
MYOB Practice



Settings (cog on the left) > ATO agent settings. See [how to add an ATO agent](#).

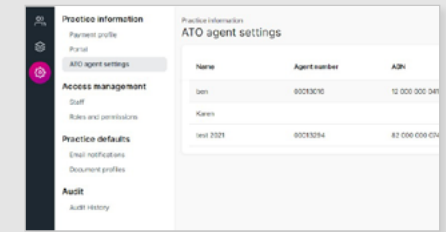
## Schedule and prefill from ATO reports

MYOB AE/AO



Scheduled in Agent reports homepage.

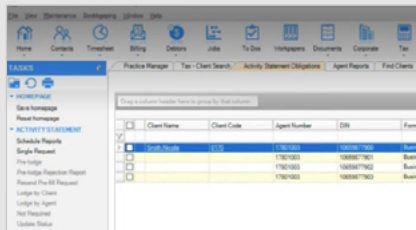
MYOB Practice



Subscribe to ATO reports in ATO agent settings. See [how to subscribe to ATO reports](#).

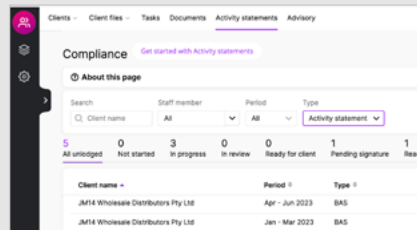
## Activity statements list

MYOB AE/AO



Activity statements obligations homepage.

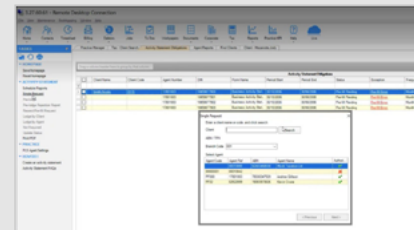
MYOB Practice



Activity Statements or Tax page (Filter by activity statements).  
[View more about the Activity Statements or Tax page.](#)

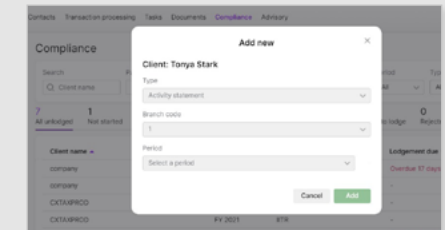
## Create activity statement

MYOB AE/AO



Single request or create from ATO reports from ASO homepage.

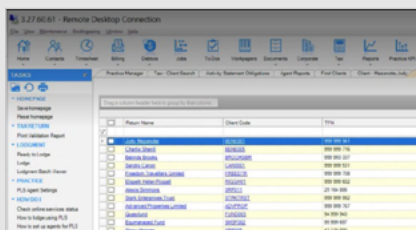
MYOB Practice



Auto-created activity statements: Compliance > Not started status.  
 To add a new activity statement manually: Compliance > Add new.

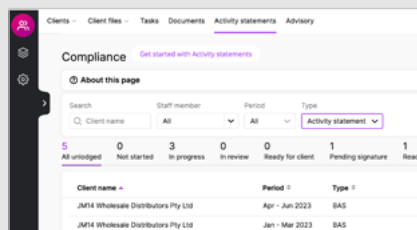
## Bulk lodge

MYOB AE/AO



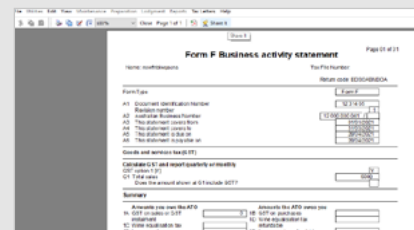
Move to a separate homepage to view returns ready for lodgment via Tax > Lodgment Manager.

MYOB Practice



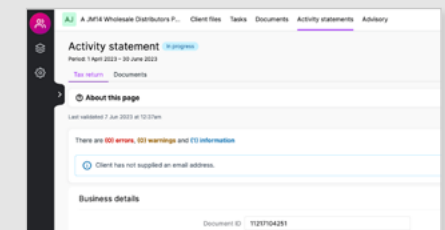
View the returns ready to be lodged by filtering the status, then tick the returns and click lodge.

MYOB AE/AO



In MYOB AE/AO go to Print preview > Share. Manually update status once client signs.

MYOB Practice



Select Send to client from the activity statement.

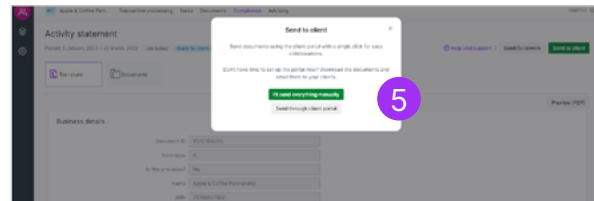
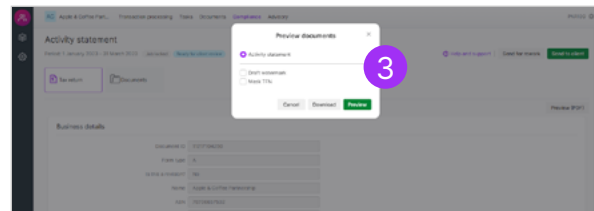
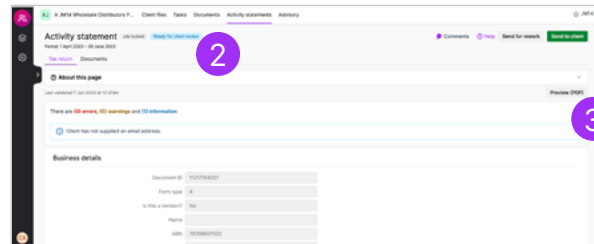
The status will update when the client signs the document.



# How to download activity statements

It's easy to download activity statements to store them in Document Manager or your own document storage system.

1. Complete and review the activity statement.
2. Move the return to Ready for client review.
3. Click Preview, and then click Download. The file will save to your default browser download folder.
4. Upload the file from your download folder into your document management software.
5. In MYOB Practice, click Send to client and choose the option I'll send everything manually.
6. Use your document management process to send the activity statement pdf to your client manually.



## Store activity statements in MYOB Practice

Storing documents in MYOB Practice is a powerful way to keep client documents together. Keeping documents in MYOB Practice also makes it easy to publish them to client portals.

You can also view all documents related to a period from each completed activity statement.

[Learn more about document storage in MYOB Practice](#)

# Helpful resources



## Interactive walkthrough

This is a short video that allows you and your team to interact with the BAS workflow before doing it yourself.

- [Take the Interactive walkthrough \(5 mins\)](#)



## MYOB Academy courses

These are 1-2 hour courses that deep dive into the best ways to use the MYOB Practice BAS experience. Great for people in your team who love to be the absolute expert.

- [MYOB Practice Certification course \(1.5 hours\)](#)
- [Move your activity statements to the cloud course \(1.5 hours\)](#)
- [Getting started with activity statements course \(1.5 hours\)](#)
- [Automate your activity statements workflow webinar \(30 mins\)](#)



## Help articles

If you need support for a specific part of the activity statement processes, you can use help articles to take you through each step.

- [Auto-create activity statements](#)
- [Sending an activity statement for client review](#)
- [Lodging an activity statement](#)
- [Security](#)
- [Import from ledger](#)

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[myob.com](http://myob.com)

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