MYOB Portal - Help for Clients

Invitation to use MYOB Portal

You will have received an email from us inviting you to join the MYOB Online Portal. This is an online secure portal that is for sending through your tax documents and other various correspondence from us.

Once you have received the email, you will need to set up a login. It is helpful to note that sometimes these emails can go through to your junk mail. Please be aware that if the email address being used is already being used with another MYOB product, you will need to use the **same password**.

If this is the first instance of the email address being used with a MYOB product, you will be prompted to set up a password. You do not need to have a previous MYOB login to use this platform.

If for any reason you are struggling, please try these other options:

- Try using a different browser

- Clear cookies and try again

- Try to login using the Saward Dawson website (https://sawarddawson.com.au/client-log-in/)

If this still does not work, please let us know and we can try to set up your portal using a different email.
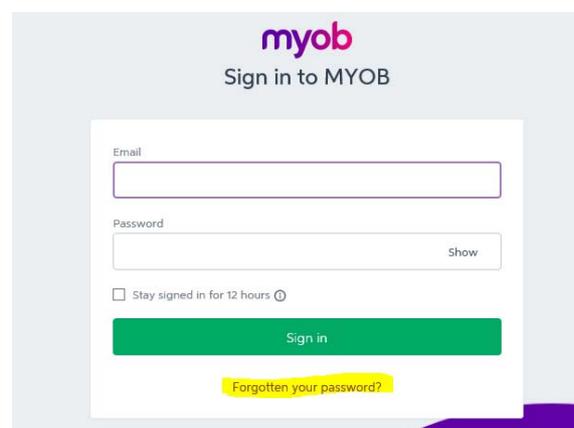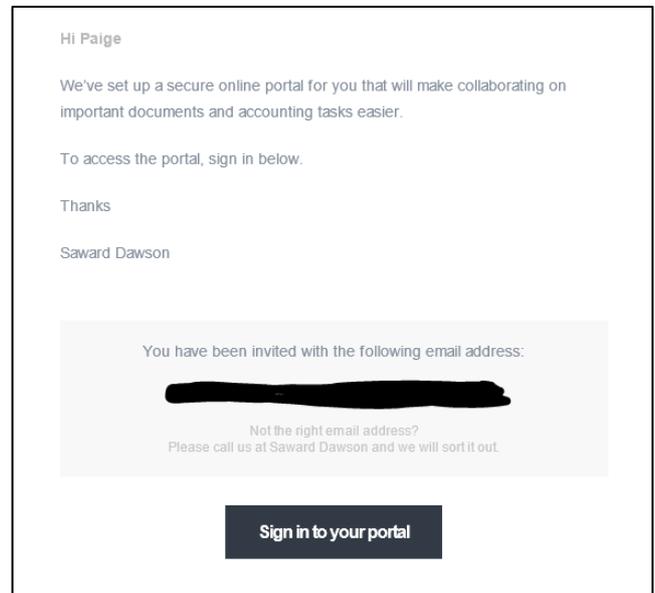

If you have previously set up a login, but cannot remember the password that you created, there is an option to reset your password.

Click 'Forgotten your password?' and follow the prompts.

If you have not accessed your portal in a while, there is a chance that it may have become inactive. This means that your attempts to log in or reset your password will be unsuccessful.

If this is the case, please follow the steps to 'Sign Up' again. This will reset your login and allow you to access your portal again.

*if this still does not work, please contact us.

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Documents sent through as a task

If you have elected to receive your tax returns electronically, these will be sent to you via the MYOB portal. Here you can view everything that has been uploaded to you and you then have the option to 'approve' the documents. This is in place of physically signing a piece of paper.
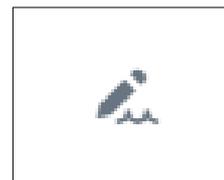
Once we have uploaded the documents to you, you will receive an email notifying you.

Follow the prompts to sign into your account. You will then be taken to your home screen.
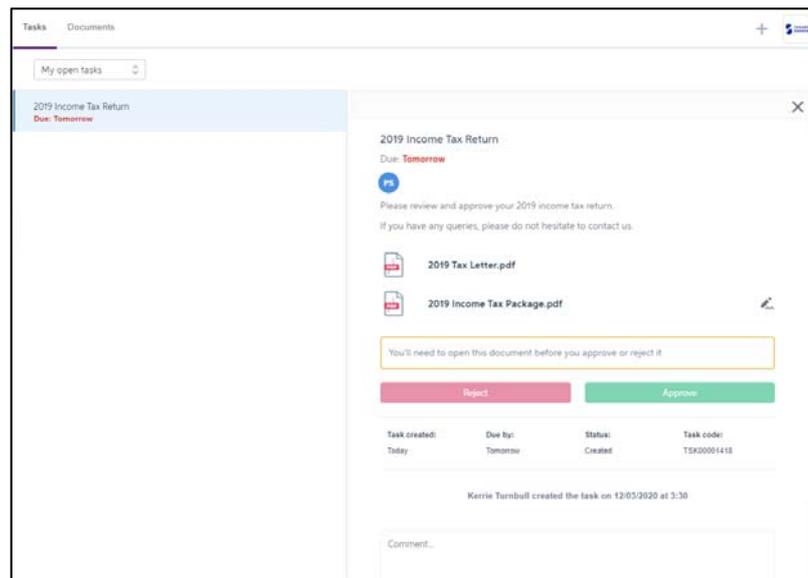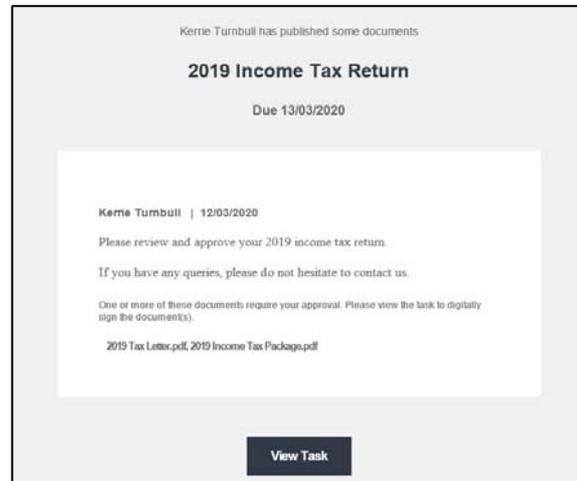

Documents that need to be approved, can be identified by this image.

If there is more than one document that needs approval, you will need to open each of them before the option to either 'approve' or 'reject' becomes available.

Once you have opened everything that has been uploaded to you, you can now approve or reject the documents.

Once you have approved/rejected, a notification email will be sent to Saward Dawson, alerting us that you have completed the task.
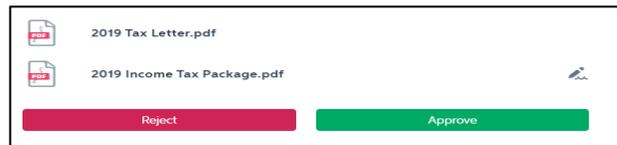
*if a task has 2 or people assigned to approve, all parties must approve the documents before we will receive the notification that the task has been completed.

Should you wish to add in a comment about the task, or upload the documents back to us if you prefer to print and then sign, you can find this option at the bottom of your screen.
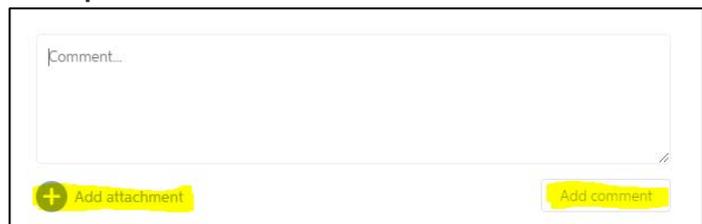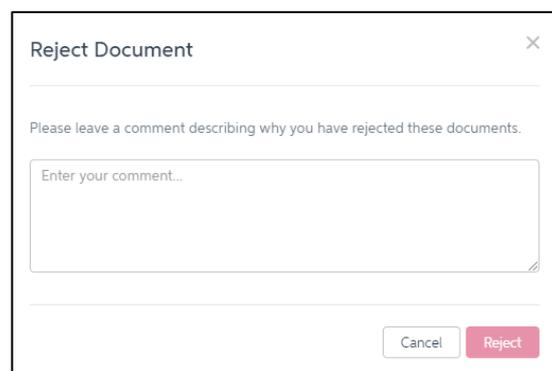

If you select approve, you will see this pop-up.

If you agree with the statement, select 'Approve'
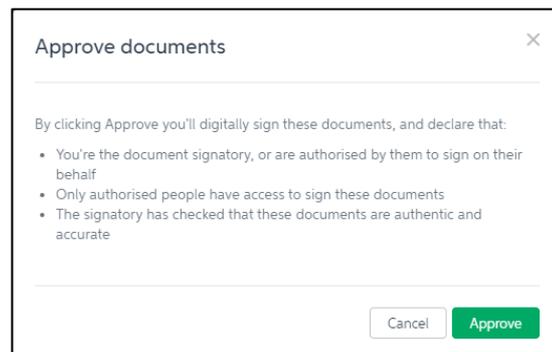
If you select reject, you will see this pop-up. The comment box allows you to inform us as to why the document was rejected. We can then fix the error and re-upload an updated copy of the documents to you.

If a document has been sent through and 2 or more people have been assigned to the one task, you will need to ensure that each user logs out of the system after they have approved their task if they are using the same computer.

To sign out, click on the gear cog symbol and select logout.
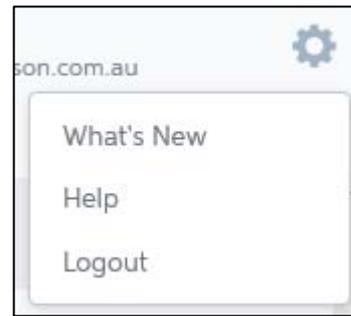

Once you have either approved or rejected the task, your homepage will now look like this.

If you wish to view previous tasks that have been sent to you, simply click on the drop down menu and select 'My Completed Tasks'

Here you can see everything that has been sent to you.

'All Open Tasks' will show you what still needs to be actioned. If you have not actioned the documents within the timeframe, Saward Dawson will send through a reminder.
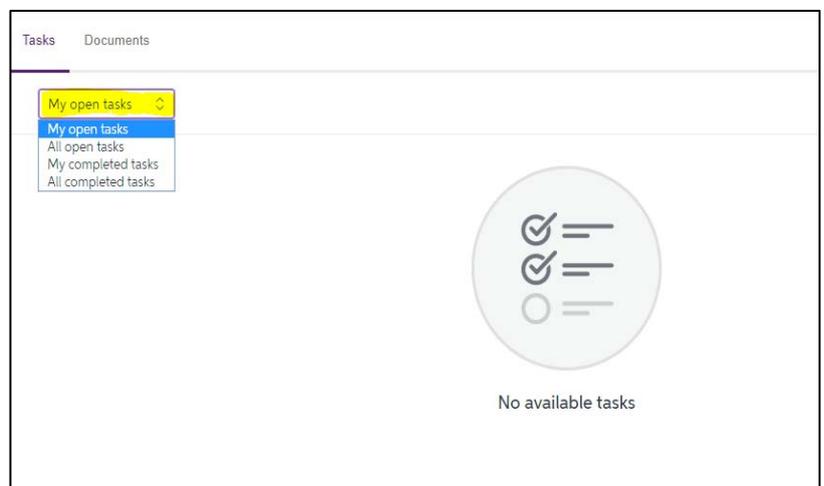
Documents – Files that do not need to be actioned

The MYOB Portal also allows Saward Dawson to send through various documents that do not need to be actions. Most commonly, this will be correspondence from the Australian Taxation Office.

Once Saward Dawson has published the document to your MYOB portal, you will receive an email notifying you of this. If you have not yet set up your login, please see above to set that up.
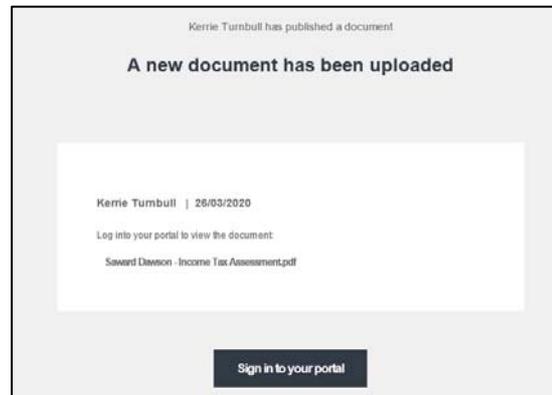
Please note that when you sign into your profile, it will not take you to the document straight away. You will need to select 'DOCUMENTS' which can be found on the top left of your screen. The most recent document will be listed at the top
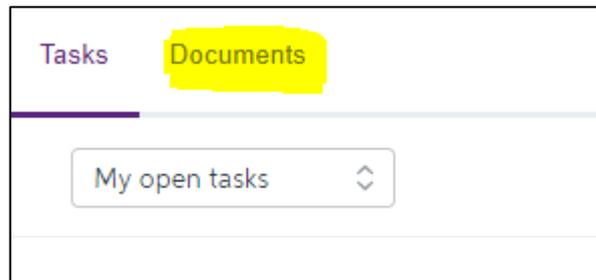
You can also filter your search if you are trying to look for something in particular.

If you wish to send a document back to Saward Dawson, you can do so by the

✚ icon in top right hand corner of your screen. This will open a new window and allow you to select your documents.
* Please note that there is a file size limit of 18mb

If you are sending multiple documents, it is best to do this by sending them through as a zip file.

However, if you have a large number of files that you wish to send us, please contact our office for an alternative option.

If you have any queries or concerns, please do not hesitate to contact us.

Saward Dawson Chartered Accountants