

Managing client mail subscriptions and alerts – Tax agents

myIR has client subscription services you can use to help manage your clients. Once you've set up subscriptions for up to 1,250 client accounts or customer master, you can see:

- alerts telling you about important tasks to do
- email notifications when clients have new letters from us.

This guide shows you what subscription services there are and how to use them.

Subscriptions

To start getting alerts and email notifications for letters we've sent to clients you'll need to subscribe to them.

There are 2 areas of myIR that let you manage client subscriptions. The difference is one is for you to manage your own subscriptions, and the other is for managing employees' subscriptions.

Managing your own subscriptions

Your own subscriptions are managed here: **Intermediary centre > Manage subscriptions**

< Intermediary centre

Client subscriptions

Subscribe to up to 1,250 client accounts or customer master and you'll:

- get emails when clients have new letters in myIR
- see client alerts on the Alerts tab in the Intermediary centre.

Type names, IRD numbers or accounts (tax types) into the filter to see specific clients or their accounts.

▼ Type to filter

CLIENT 10 - 000-000-010

Customer master		Unsubscribed
Payroll	000-000-010-EMP004	Subscribed
GST	000-000-010-GST003	Unsubscribed
Income tax	000-000-010-INC002	Subscribed

Managing employees' subscriptions

Your myIR role needs to be either 'owner', 'administrator' or 'restricted administrator' to manage subscriptions for employee web logons: **Manage agency > By logons tab > [select logon 'Staff access'] > Client mail subscriptions**

Client lists Client mail subscriptions

Client subscriptions

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GST	000-000-010-GST003	Subscribed
Income tax	000-000-010-INC002	Unsubscribed

How to unsubscribe and subscribe

To subscribe or unsubscribe to a linked client:

1. Search or filter on the client subscriptions screen and use 'Subscribed' or 'Unsubscribed'.
2. Select 'Unsubscribed' to subscribe or 'Subscribed' to unsubscribe to the customer's account.

For example, using either of the above client subscription screen shots, you would subscribe to all clients with GST accounts using these steps:

1. Filter by key word 'GST'.
2. You'll return a list of all the GST accounts linked to the client list you have access to.
3. From the list select 'Unsubscribed' next to the GST accounts you want to subscribe to.

Alerts

After you've set up client subscriptions, you'll get to see the alerts for them. You'll then know which clients have:

- unread letters and messages
- payments due or overdue
- upcoming and outstanding returns to file.

How to view alerts

When you've set up client subscriptions, their alerts are available in the **Intermediary centre**:



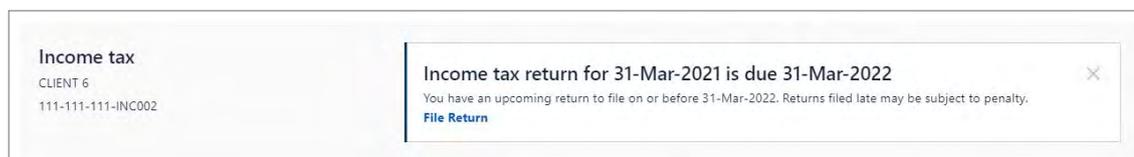
Each alert has a title, short description, and a link to what needs doing.

How to dismiss alerts

You can dismiss alerts from your alert list by clicking the 'x'. You may want to do this if you've:

- already set up reminders for tasks in your own system
- completed an alert's action and you're waiting before submitting it to us.

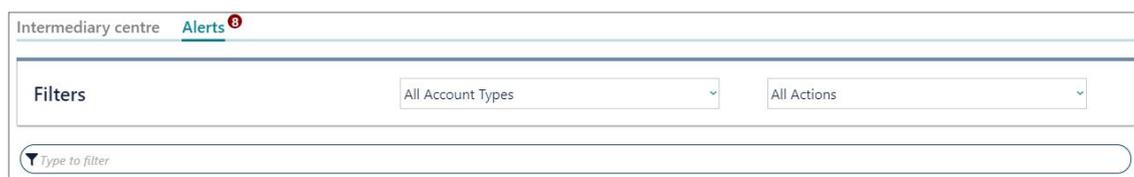
You can see alerts you've dismissed by restoring them. Once a task is completed for an alert it's deleted.



Filtering to find alerts

Filtering lists all of your clients' alerts either by account type or what needs doing (All actions). This can be helpful if you're working on one account type, such as GST.

You can also use the free text filter to search for a client's name or key word on the screen:



Note: You can view alerts for non-subscribed clients from within the client's account.

Redirected mail

Letters will be sent to you or your client, based on the mail direction for a particular account e.g. income tax.

Sent to your client

If the mail is not redirected to you, your client will either receive:

- a notification email, or
- a paper copy of the letter.

Sent to you

If the mail is redirected to you – and there's at least one person in your agency with a myIR logon – they will receive notification emails for clients and accounts they've subscribed to. You can subscribe to notifications even when mail is going to the client (not redirected).

If the mail is redirected to you, and your client has myIR:

- they won't receive a notification email
- the letter will show as a read item in their myIR
- they won't receive a paper copy of the letter, and
- they can still log in to myIR and read the letter at any time.

All client mail service

The All client mail service is another way of managing mail instead of using subscriptions. To access the service, go to: **Intermediary centre > My clients > All client mail**

With this service you can create a report that:

- includes all your clients, not only those you're subscribed to, so you never miss mail
- shows extra information, such as mail direction to the agent or sent to the client.
- lets you export letter PDFs in bulk, saving you time

Exporting letters using the All client mail service

You'll need to have a myIR role of at least 'restricted administrator' to use all of the All client mail service export options.

Exporting letters to your desktop can help with record keeping. It's also useful if you need to see which letters are 'read' or 'unread':

1. Enter the date range into the 'sent from' and 'sent to' fields in the All client mail screen:

Search

Review client mail

Enter a date range to view all client letters for that period. If the selected period contains too many letters, you will need to refine your search to a smaller period. You do not need to be subscribed to the client to see their mail.

Date criteria: Filter by account:

Sent from: Filter by mail direction:

Sent to:

Letters

Date sent	Title	Letter ID	Client name	ID	Client list ID	Direction
02-Jun-2021	Bank account details ...	L1328686720	CLIENT 6	000-000-001	111-111-111	Sent to client
02-Jun-2021	Combined overdue d...	L1196672640	CLIENT 6	000-000-001	111-111-111	Sent to client
02-Jun-2021	Request for KiwiSave...	L1592206976	CLIENT 10	000-000-002-EMP004	111-111-111	Sent to client

2. Export the letters as PDFs to an 'unread mail' folder on your desktop.

Select letters you want to export to a .zip folder. Any letters you cannot select must be opened and saved individually.

Export letters

Date sent	Title	Letter ID	Client name	ID	Client list ID	Direction	
<input checked="" type="checkbox"/>	02-Jun-2021	Bank account details...	L1328686720	CLIENT 6	000-000-001	111-111-111	Sent to client
<input type="checkbox"/>	02-Jun-2021	Combined overdue ...	L1196672640	CLIENT 6	000-000-001	111-111-111	Sent to client
<input checked="" type="checkbox"/>	02-Jun-2021	Request for KiwiSav...	L1592206976	CLIENT 10	000-000-002-EMP004	111-111-111	Sent to client
<input checked="" type="checkbox"/>	02-Jun-2021	Notice of assessment	L1348478592	CLIENT 6	000-000-001-DWT003	111-111-111	Sent to client

3. Open your unread mail folder then review, delete, or save the letter to your client management system:

Name	Type
 000-000-001_cL0009_L0858512976_Client, 6	Microsoft Edge P...
 000-000-001-DWT003_bL0069_L0503045712_Client, 6	Microsoft Edge P...
 000-000-002-EMP004_rL0036_L0535593296_31-03-2021_Client, 10	Microsoft Edge P...

We've added extra information into the PDF file name. Your PDF file name now includes:

- IRD number or account ID
- Letter type code
- Unique letter ID
- Period (if it exists)
- Client name.

You may have to update your client management system so it can handle the extra information. This is usually the case if your agency uses automated processes to file client letters.

Note: To assist with identifying what each letter is about go to: <https://www.ird.govt.nz/topics/intermediaries/getting-authority-to-act/managing-client-mail/mail-type-code-reference-list>

'User' access to the All client mail service

There is a version of the All client mail service you can use if your myIR role is 'user'. With this version your report:

- can be run for any client list you have access to
- has a default date range using the date you run the report and the last day a letter was sent (in most cases this will be the previous day)
- does not give you the option to open the letters or export them.

Review client mail

Enter a date range to view all client letters for that period. If the selected period contains too many letters, you will need to refine your search to a smaller period. You do not need to be subscribed to the client to see their mail.

Date criteria: Date sent

Sent from: 01-Jun-2021

Sent to: 02-Jun-2021

Filter by account: [Dropdown]

Filter by mail direction: All

View letters

Letters Type to filter

Date sent	Title	Letter ID	Client name	ID	Client list ID	Direction
02-Jun-2021	Bank account details ...	L1328686720	CLIENT 6	000-000-001	111-111-111	Sent to client
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Using this service only for managing client mail

If you choose to only use the All client mail service to manage client mail. You can:

- unsubscribe to all client mail subscriptions to stop getting notification emails
- leave 'Mail subscriptions' unchecked when running the Agency activity report. This stops you getting what can be a large amount of client account data you do not need.

 [ird.govt.nz](https://www.ird.govt.nz)

Go to our website for information and to use our services and tools.

- **Log in or register for myIR** - manage your tax and entitlements online.
- **Calculators and tools** - use our calculators, worksheets and tools, for example, to check your tax code, find filing and payment dates, calculate your student loan repayment.
- **Forms and guides** - download our forms and guides.

