

**Registered bookkeeper**

	Owner	Admin	Restricted admin	User	Restricted user
<b>Home</b>					
Favourites	Yes	Yes	Yes	Yes	Yes
Search - IRD number/Customer identifier/Name	Yes	Yes	Yes	Yes	Yes
History	Yes	Yes	Yes	Yes	Yes
<b>My activity</b>					
Search submissions	Yes	Yes	Yes	Yes	Yes
<b>Communicating with IR</b>					
View messages	Yes	Yes	Yes	Yes	Yes
View letters	Yes	Yes	Yes	Yes	Yes
<b>My business</b>					
Agency reports	Yes	Yes	Yes	Yes	Yes
Client list report	Yes	Yes	Yes	No	No
Agency activity report	Yes	Yes	Yes	No	No
Web logon activity report	Yes	No	No	No	No
All client transactions	Yes	Yes	Yes	Yes	Yes
GST return summary report	Yes	Yes	Yes	Yes	Yes
PAYE return summary report	Yes	Yes	Yes	Yes	Yes
Manage agency	Yes	Yes	Yes	No	No
Update key office holders	Yes	Yes	Yes	No	No
<b>My clients</b>					
Client maintenance	Yes	Yes	Yes	Yes	No
Link a new client	Yes	Yes	Yes	Yes	No
Delink or manage clients	Yes	Yes	Yes	Yes	No
All client mail	Yes	Yes	Yes	Yes*	No
Manage Subscriptions	Yes	Yes	Yes	Yes	Yes
Submit a short-process ruling	Yes	Yes	Yes	Yes	No
Client registration	Yes	Yes	Yes	Yes	No
Register client for new tax account	Yes	Yes	Yes	Yes	No
Register client for donations tax credits	Yes	Yes	Yes	Yes	No
Register client for unclaimed monies	Yes	Yes	Yes	Yes	No
Register client as a NZ foreign trust	Yes	Yes	Yes	Yes	No
Register client for Income Equalisation	Yes	Yes	Yes	Yes	No
Register client for R&D Tax Incentive	Yes	Yes	Yes	Yes	No
Register client for Working for Families	Yes	Yes	Yes	Yes	No
Donation tax credit claim	Yes	Yes	Yes	Yes	Yes
<b>Payroll</b>					
Client employee details	Yes	Yes	Yes	Yes	Yes
Employer information schedule	Yes	Yes	Yes	Yes	Yes
Amend employment information	Yes	Yes	Yes	Yes	Yes
Employer monthly schedule	Yes	Yes	Yes	Yes	Yes
Amend employer schedules	Yes	Yes	Yes	Yes	Yes
Single employer	Yes	Yes	Yes	Yes	Yes
Multiple employers	Yes	Yes	Yes	Yes	Yes

\*User access to All client mail is limited to viewing the letter list only. Users cannot open letter PDFs or export the letters

**Administrators vs Restricted administrators**

Restricted administrators are able to action all of the features and functionality available to an Administrator.

**But cannot view any customer level mail that has been issued for the Bookkeeper's own tax affairs.**

This will not affect access to account level mail that they have been given specific access to.

For example, a Restricted administrator who has been delegated to access to the Bookkeepers GST account.

Bookkeepers cannot see anything relating to extension of time for income tax.

Bookkeepers cannot use Financial transfers or the transfer credit calculator.

Bookkeepers get automatic access to clients once they've linked. They cannot add a 'Customer master' link.

If a bookkeeper uses any of the account registration forms under Client registration they will be linked for those accounts once they've been created.

Bookkeepers cannot redirect client mail, redirect client refunds or have a bulk mailing address.