

MYOB ESSENTIALS DAILY TASKS

COURSE OUTLINE



caring, flexible, professional

TARGET AUDIENCE

This half-day course is intended for people who need to know how to use MYOB Essential's Daily Tasks but are not required to set up a company file.

LEARNING OUTCOMES

The skills and knowledge covered in this course are sufficient to help you use MYOB Essentials for typical day-to-day transactions

DURATION: 1/2 day

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Overview and Orientation

Getting into MYOB Essentials
The Dashboard
The Screen layout
Things to look out for
Exiting

The Chart of Accounts

Double Entry Bookkeeping concepts
Understanding the meaning of posting
Understanding the meaning of a Chart of Accounts
Analysing the various account groups
Understanding some basic bookkeeping terminology
GST concepts you need to know
Creating new accounts
Header and Detail accounts
Modifying and deleting existing accounts
Changing default credit terms

Contacts

Entering new customers and selling details
Entering new suppliers and buying details

Purchases

Understanding the life cycle of a purchase
Entering suppliers' invoices
Viewing your invoices through the Purchases Register
Entering a Purchase Order
Emailing Purchase Orders
Converting a Purchase Order to an invoice when goods are received
Creating and using a Recurring Purchase invoice or order
Entering Quotes from Suppliers
Converting a Quote to an Order

Paying for Purchases

Seeing your Payables
Locating due dates for payments
Locating a specific order or bill
Making payment to suppliers using Pay Bills
Checking these payments through the Bank Register

Sales

Understanding the life cycle of a sale
Entering Customers Invoices
Working with different tax types
Entering Freight and Comments
Viewing your invoices through the Sales Register
Changing Credit Terms
Accepting Deposits
Printing or Emailing Invoices
Creating a Cash Customer
Entering a Cash Sale and printing the receipt
Entering a Sales Quote
Creating and using a Recurring Sales invoice or Quote
Changing a quote to an invoice

Receiving Payments from your Customers

Receivables
Receiving payments from Customers through Receive payments
Selecting a payment method
Applying the payment Applying payments to multiple invoices
Understanding bank deposits
Nominating transactions to deposit
Creating a bank deposit slip
Checking these receipts through the Bank Register Statements
Creating an Activity Statement
Understanding the Sales Analysis
Viewing Sales Performance

Banking

Viewing all current transactions on the Bank Register
Understanding the use of Spend and Receive Money
Using Spend Money
Using Receive Money
Creating and using Recurring transactions in the Banking Module
Understanding Bank Feeds

Bank Reconciliation

Understanding the Bank Statement
Bank feeds
Starting the Bank Reconciliation
Creating an ITS Tax Code for Interest earned
Entering Bank Interest and fees
Printing and understanding the Reconciliation Report
Completing the Reconciliation

Backups

Understanding Backup and Restore
Performing a backup
Performing a Restore

Reports

Selecting a report
Printing a report
Simple customisation
Saving a report

Work Smarter with Essentials - Demonstration



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