

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

COURSE OUTLINE

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
- Entering new suppliers

Purchases

- Understanding the life cycle of a purchase
- Entering suppliers' bills
- Viewing your bills
- 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
- Migrating Orders to Bills

Paying for Purchases

- Viewing your Payables
- Locating due dates for payments
- Locating a specific order or bill
- Making payment to suppliers

Sales

- Understanding the life cycle of a sale
- Entering Customers Invoices
- Working with different tax types
- Entering Comments
- Viewing your invoices list
- Changing Credit Terms
- Accepting Deposits
- Emailing Invoices
- 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 list
- Receiving payments from Customers through Receive payments
- Selecting a payment method
- Applying the payment
- Understanding the Sales Analysis
- Viewing Sales Performance on the dashboard

Banking

- Viewing all transactions
- Understanding the use of Spend and Receive Money
- Using Spend Money
- Using Receive Money
- Creating and using Recurring transactions
- Understanding Bank Feeds

Bank Reconciliation

- Understanding the Bank Statement
- Starting the Bank Reconciliation
- Entering Bank Interest and fees
- Printing and understanding the Reconciliation Report
- Completing the Reconciliation

Reports

- Selecting a report
- Printing a report
- Simple customisation
- Saving a report

Work Smarter with Essentials - Demonstration



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