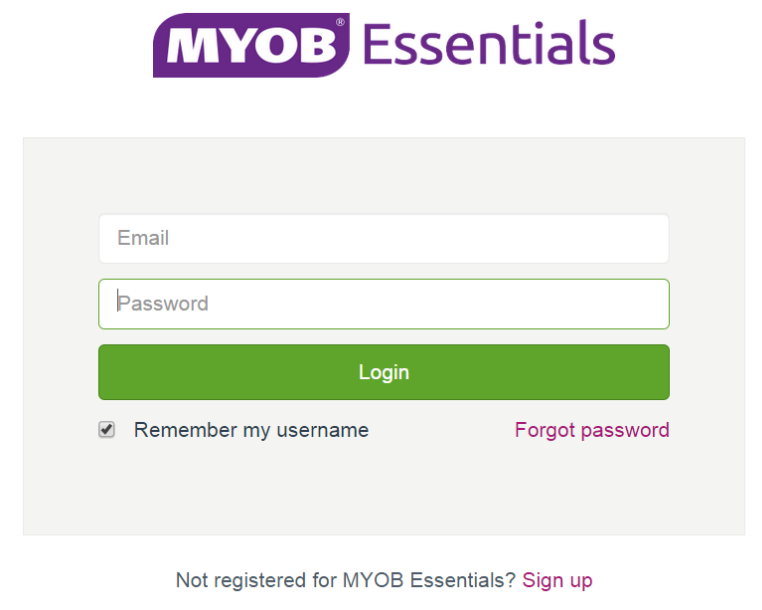


MYOB Essentials Help Documentation

How do I access Essentials?

Open a web browser and type in the address bar the following address: essentials.myob.com.au

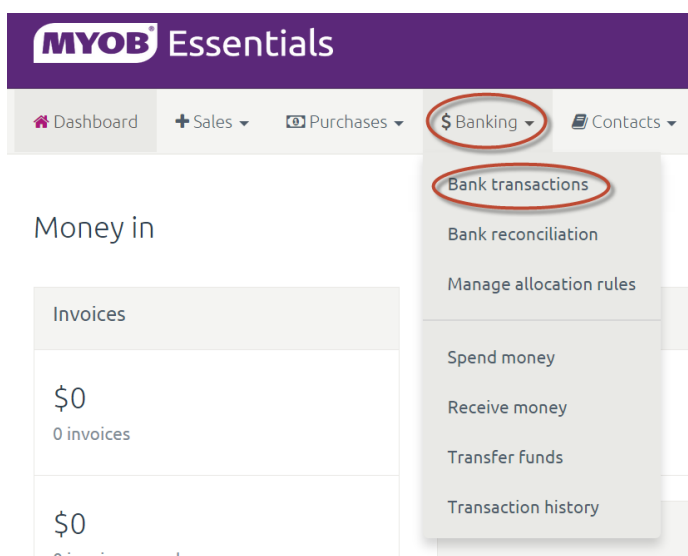
This will open the logon page. Logon using your username and password. Tick the 'Remember my username' box if you don't want to keep typing in your username every time you have to log in to Essentials.



The screenshot shows the MYOB Essentials login interface. At the top, the logo "MYOB Essentials" is displayed. Below it, there is a form with two input fields: "Email" and "Password". A green "Login" button is positioned below the password field. Underneath the button, there is a checked checkbox labeled "Remember my username" and a link labeled "Forgot password". At the bottom of the form, there is a link that says "Not registered for MYOB Essentials? Sign up".

How do I deal with bank transactions?

To allocate bank transactions go to the 'Banking' tab and then click on 'Bank transactions.'



The screenshot shows the MYOB Essentials dashboard. The top navigation bar includes "Dashboard", "Sales", "Purchases", "Banking", and "Contacts". The "Banking" menu is open, showing options: "Bank transactions", "Bank reconciliation", "Manage allocation rules", "Spend money", "Receive money", "Transfer funds", and "Transaction history". The "Bank transactions" option is circled in red. On the left side of the dashboard, there is a "Money in" section with two rows: "Invoices" showing "\$0" and "0 invoices", and another row showing "\$0" and "0 invoices overdue".

The following screen appears. The red arrows highlight some of the more regularly used features.

Home ► Bank Transaction

Bank transactions

Choose your bank account

View: Display: From: To:

Import Statements

Modify your date range here if you wish.

Transaction History Import History **Use this area to search by keyword or by dollar amount.** Find bank transaction

No bank transactions found for your search criteria.

Date ▼	Acct	Description	Allocate or Match	Withdrawal	Deposit	GST
--------	------	-------------	-------------------	------------	---------	-----

Bank transactions

Filter or transactions using this drop down box.

View: Display:

Transaction History Import H

- All transactions
- Transactions allocated by MYOB Essentials
- Transactions not allocated
- Transactions with notes

Home ► Bank Transaction

Bank transactions

Import Statements

View: Display: From: To:

Click her to allocate the transaction to more than one account. **Click here to write a note.** **Allocate the transaction to one account here.**

Transaction History Import History Find bank transaction

79 transactions, 4 to be allocated

Date ▼	Description	Allocate or Match	Withdrawal	Deposit	GST
16/11/14	POS 82602900 16 NOV 82602900	Note <input type="text" value="Allocate me"/>		\$240.95	\$0.00

How do I split a transaction?

Clicking on the description of a transaction allows you to match the transaction to an invoice or a bill or split the transaction

Withdrawal details
?

I want to: Match to an invoice, bill ... Match, split, or transfer.

Transfer between bank accounts

Date	Description	Allocate or Match	Withdrawal	Deposit	Tax
14/11/2014	MIS: Transfer to xx6088	Allocate me	\$300.00		\$0.00

Note

Choose account

Allocate to

Split by percentage or amount.

Split

Change the tax rate if needed.

Tax rate

Allocate to	Percentage	Amount (inc Tax)	Tax rate	Tax Amount	
	100%	\$300.00		\$0.00	✕
		\$0.00		\$0.00	✕

Add another allocation.

Remaining: 0% \$0.00

How do I allocate cash spent on transactions for my business?

If you pay cash for something related to the business then you will have to account for this in Essentials by performing what is called a 'spend money' transaction.

To do this go to the banking tab and click on 'Spend money'

MYOB Essentials

Dashboard
+ Sales
Purchases
\$ Banking
Contacts

Money in


Invoices


\$0

0 invoices


- Bank transactions
- Bank reconciliation
- Manage allocation rules
- Spend money
- Receive money
- Transfer funds
- Transaction history

Spend Money


Choose 'Petty cash' Pay from: 

To: 

Notes:

Date: 

Reference number:

Amounts are: 

Allocate some or all of the money to the proper account.

Enter a description and amount.

Allocate to	Description	Amount	Tax Rate	Tax Amount

Either save your transaction or click 'Save & Add' to repeat the process with a new cash payment.

Net Amount:
GST:
Total Amount: