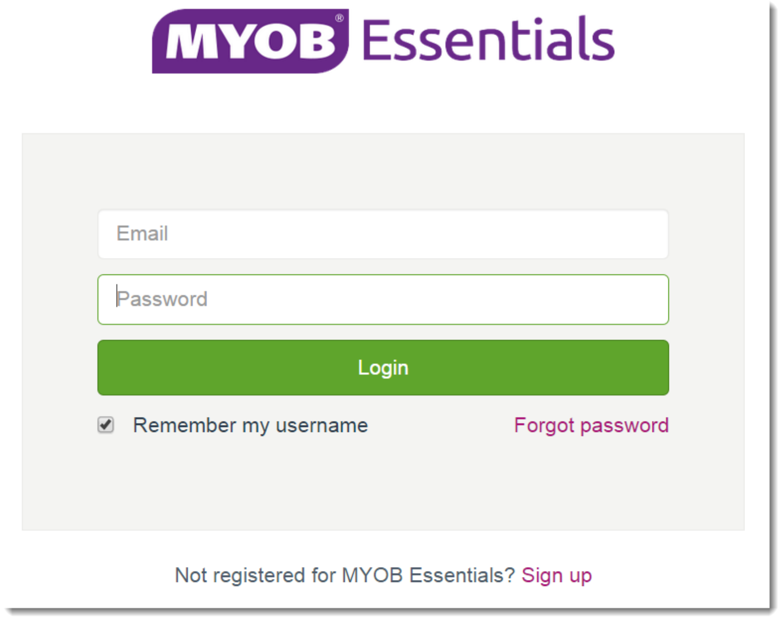
MYOB Essentials Help Documentation

How do I access Essentials?

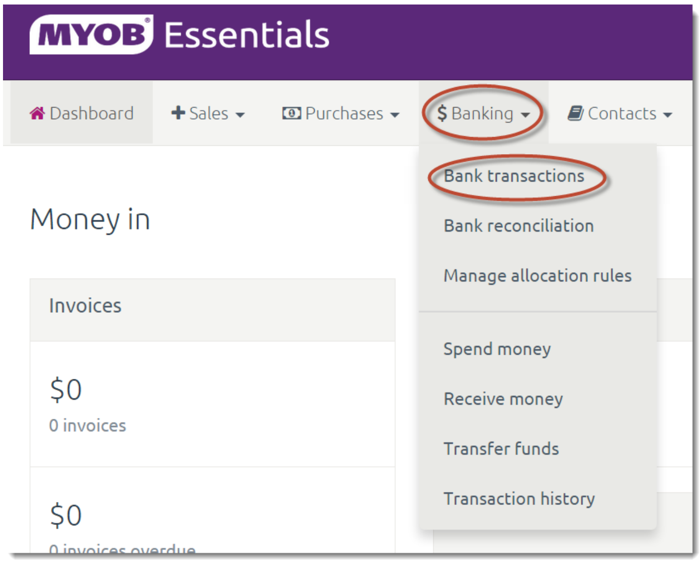
Open a web browser and type in the address bar the following address: essentials.myob.com.au

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.

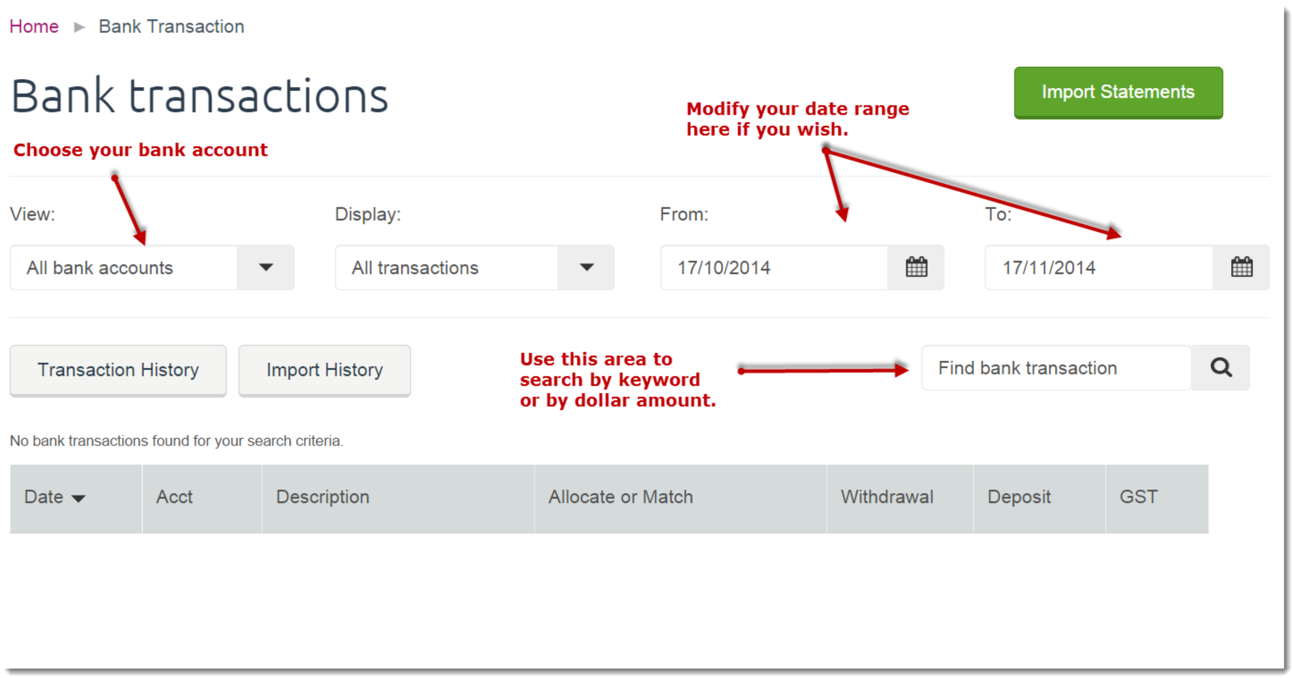


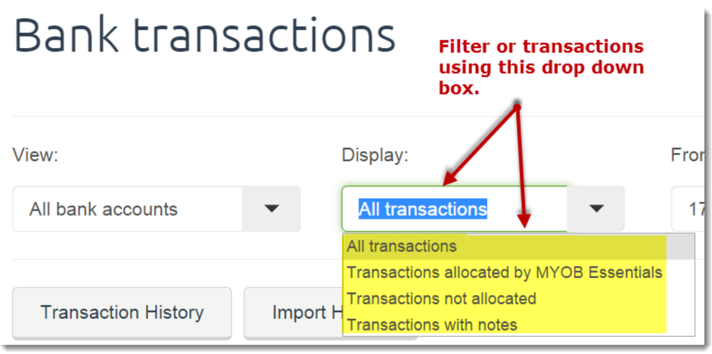
How do I deal with bank transactions?

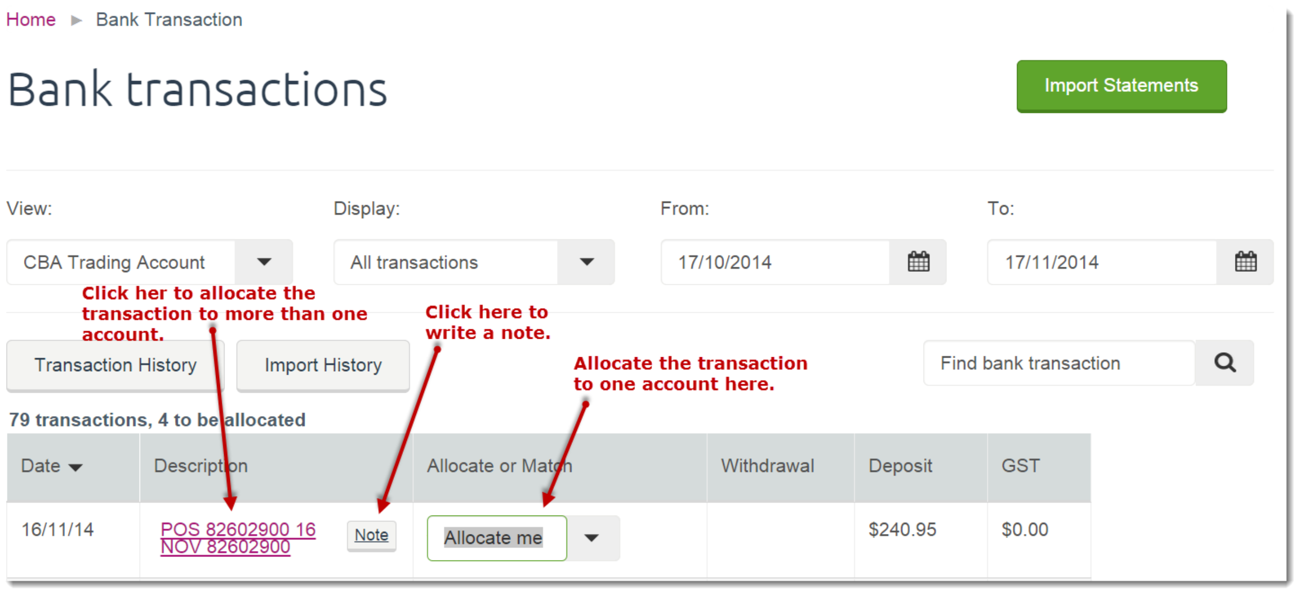
To allocate bank transactions go to the 'Banking' tab and then click on 'Bank transactions.'



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

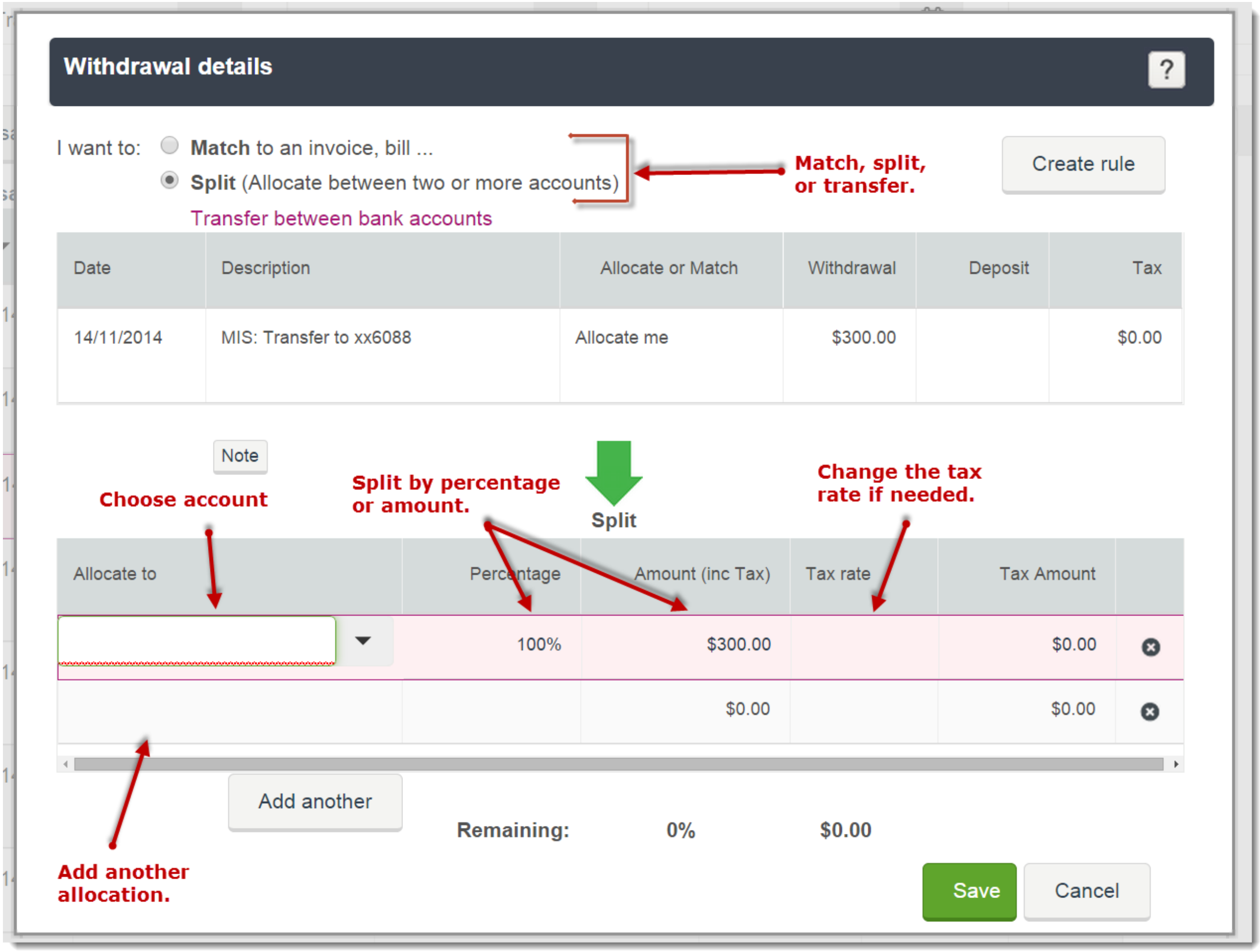






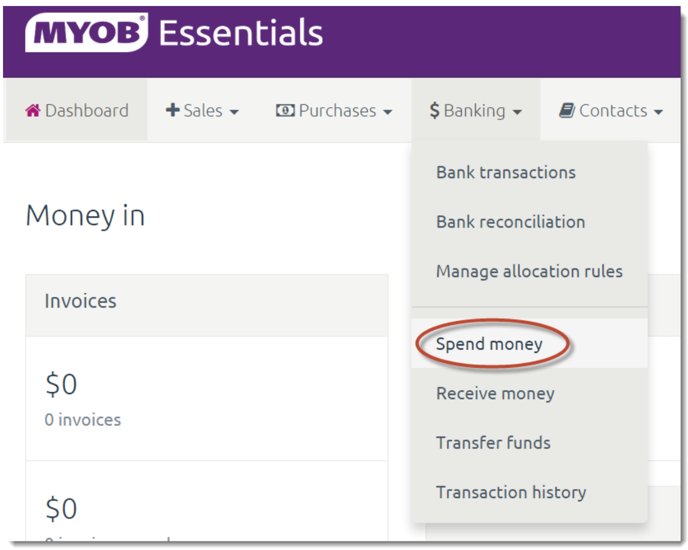
How do I split a transaction?

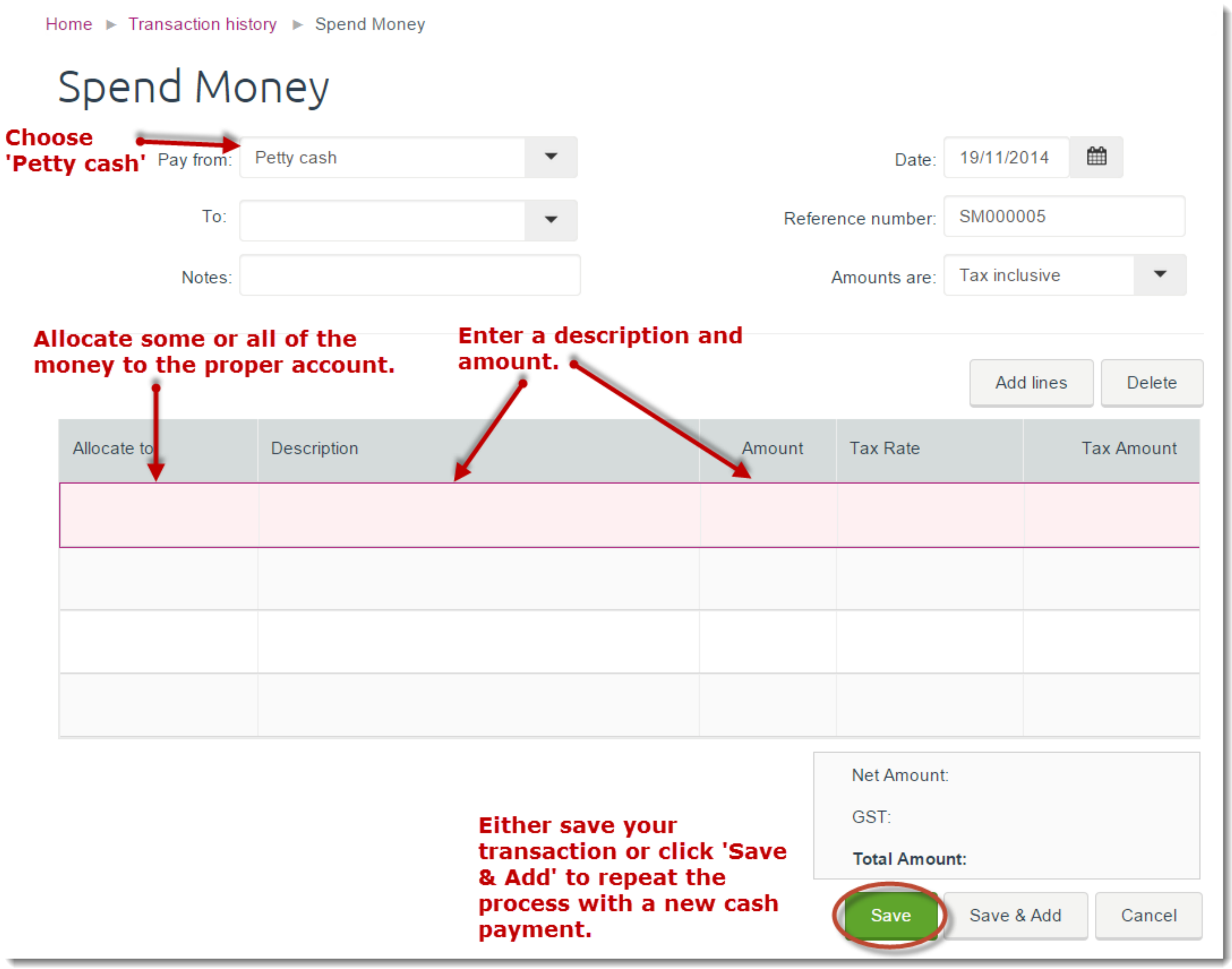
Clicking on the description of a transaction allows you to match the transaction to an invoice or a bill or split the transaction



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'




Home ▸ Transaction history ▸ Spend Money
Spend Money
Choose 'Petty cash'
Pay from: Petty cash
Date: 19/11/2014
To:
Reference number: SM000005
Notes:
Amounts are: Tax inclusive
Allocate some or all of the money to the proper account.
Enter a description and amount.
Add lines
Delete
Allocate to
Description
Amount
Tax Rate
Tax Amount
Net Amount:
GST:
Total Amount:
Either save your transaction or click 'Save & Add' to repeat the process with a new cash payment.
Save
Save & Add
Cancel