



Serving the Central Coast

Your local MYOB expert

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Tips for the MYOB User

Tip 1: Use the Company Data Auditor

Go to the Accounts Command Centre and select “Company Data Auditor.” This provides sections for Company File Overview, Account Reconciliation and Data Exception Review, so that you can quickly see areas of your file that may need attention. This feature was introduced in Accounting version 15 and Premier 9.

Tip 2: Track Changes

Turn on Audit Trail Tracking (in Setup ... Preferences ... Security). Also introduced in Accounting version 15 and Premier 9, it allows you to report on significant changes to your file that can affect your data.

Tip 3: Display Report Customisation options

Turn on this option under Setup ... Preferences. If you don't do this, when you click “Display” the report will be generated for the current month with the default settings. If this is not what you want, you will need to re-run the report with the correct settings.

Tip 4: Customise your Invoices

Add a logo, use larger fonts, add a remittance section and eliminate unused information. This can give a more professional image and help your invoice stand out when your customer receives it.

Tip 5: Backup Regularly

The easy way to do this is to go to Setup...Preferences...Security. Tick the third option – “Prompt for Data Backup When Closing.” When you close MYOB and are prompted select YES and follow the prompts. NOTE: you should always backup to removable media (CD, USB Drive, etc).

Tip 6: Check your backups can be restored

Every month or so, try to restore your latest backup. Before doing so, rename or move your MYO and BOX files so that you do not overwrite your current data.

Tip 7: Secure your environment

Ensure that you have installed software to protect your computer against viruses and other threats. It is essential that virus definitions or signatures are kept up to date. This is important for other computer records, and CRUCIAL for your financial records.

If you would like assistance with these or other functions, please contact us.

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