

MYOB v. 18.5 Introduction



Sutherland
Computer
Services

Course code: **MY17L1**

Learning outcomes

The skills and knowledge covered in this course are sufficient to help you set up and use a set of accounts using MYOB for day-to-day transactions

Target audience

This course is intended for people who need to know how to use MYOB Basics

This course will cover the following topics:

<p>MYOB Overview</p> <ul style="list-style-type: none"> • Getting into MYOB and understanding the screen • Using Clearwater accounts to move around and familiarise with MYOB layouts • Exiting MYOB <p>Creating a new Accounts file</p> <ul style="list-style-type: none"> • Creating a new accounts file • Selecting a chart of accounts • Running through the setup procedure • Opening and closing this new set of accounts <p>The Accounts List and Opening Balances</p> <ul style="list-style-type: none"> • Understanding the meaning of a Chart of Accounts • Analysing the various account groups • Understanding some basic bookkeeping terminology • Creating new accounts • Editing existing accounts • Deleting accounts • Understanding Header and Detail Accounts • The Trial balance • Entering opening balances <p>The Card file</p> <ul style="list-style-type: none"> • Entering new customers • Entering new suppliers • Entering customer opening balances <ul style="list-style-type: none"> • Entering supplier opening balances 	<p>Working with the Purchases module</p> <ul style="list-style-type: none"> • Understanding the life-cycle of a purchase • Entering suppliers invoices • Viewing your invoices through the Purchases Register • Entering a Purchase Order • Creating and using a Recurring Purchase invoice or order • Changing an order to an invoice • Making payment to suppliers using Pay Bills • Checking these payments through the Bank Register • Using the Purchase Register to determine Open and Closed Bills <p>Working with the Sales module</p> <ul style="list-style-type: none"> • Understanding the life-cycle of a sale • Entering Customers invoices • Working with different tax types • Viewing your invoices through the Sales Register • Entering a Sales Quote • Creating and using a Recurring Sales invoice or Quote • Changing quote to an invoice • Receiving payments from Customers through Receive payments • Checking these receipts through the Bank Register • Using the Sales Register to determine Open and Closed Invoices 	<p>The Banking Module</p> <ul style="list-style-type: none"> • 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 • Performing a Bank Reconciliation <p>Finding Transactions</p> <ul style="list-style-type: none"> • Working with the Find Transactions button on your Command Centre <p>Trouble shooting</p> <ul style="list-style-type: none"> • Deleting transactions • Editing transactions • <p>Reports</p> <ul style="list-style-type: none"> • Creating the Profit and Loss Report • Creating the Balance Sheet Report • Aged Payables and Receivables reports <p>Backups</p> <ul style="list-style-type: none"> • Understanding Backup and Restore • Performing a backup • Performing a Restore
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