Using the Multi-Company and Multi Client Bureau Software

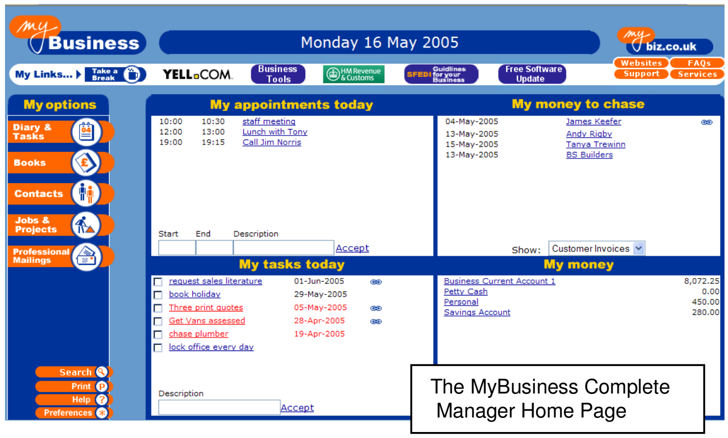
Introduction

MyBusiness software has a multi company Bureau installed with most versions. This software is particularly useful for allowing you to access the data for many companies or clients one at a time.

It is a valuable tool for accountants and advisers. Once on your computer the data is easy to access and manage.

This guide covers:

- Receiving the data from your clients
- Filing the multi company data
- Setting up a new client or company
- Running the Bureau



The MyBusiness Complete Manager Home Page

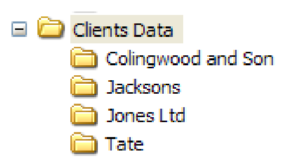
Receiving data from your clients

Data from MyBusiness software is stored in a data or "Script" file. This mybiz.script file is stored on the computer "C Drive", under Program Files, MyBusiness, Data. The easiest way to find this file is to **right** click on Start and select "Explore" from the options.

This file can be saved to a disk or emailed as an attachment.

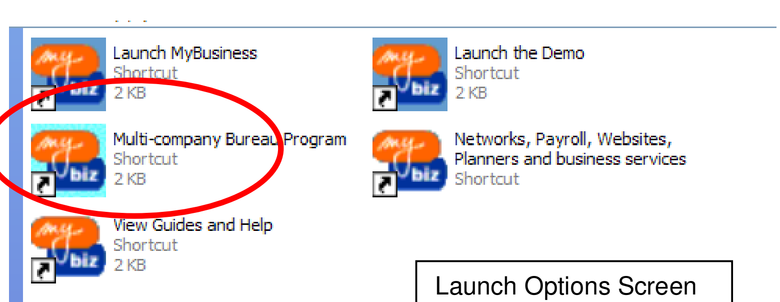
Filing the multi-company data on your computer

Create a Folder called "Clients' Data", or "Company Data". Under this main folder, you will have to set up a sub-folder containing that unique Script file for each client or company. Do not change the name of the script file itself.



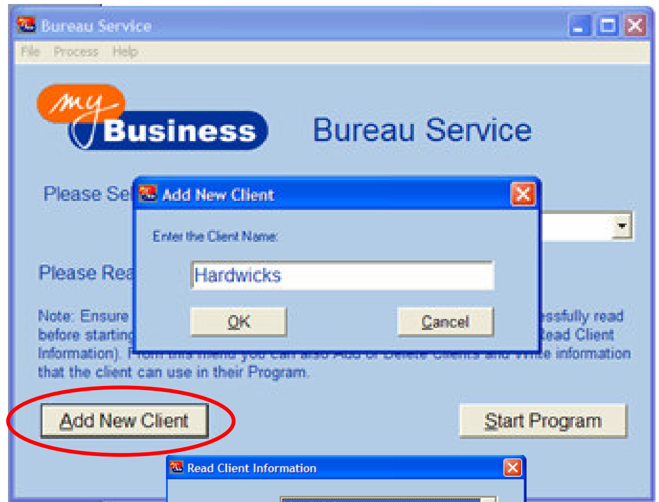
Launching the Bureau Application

Click on the MyBusiness icon on the desktop to launch the Launch Options Screen. From this screen, click on the Multi-company Bureau Program icon to launch the Bureau software.



Launch Options Screen

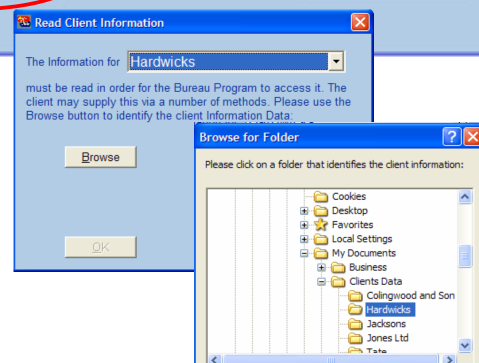
Setting up a new client or company



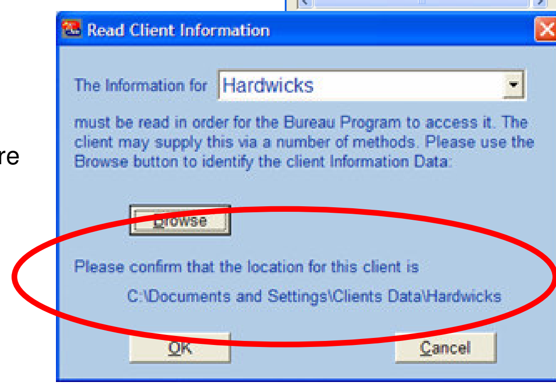
Launch the Bureau software and click on Add New Client.

On the Add New Client screen enter the name or abbreviation of the client or company. In this example it is Hardwick's.

You will be prompted to read in the client data now.

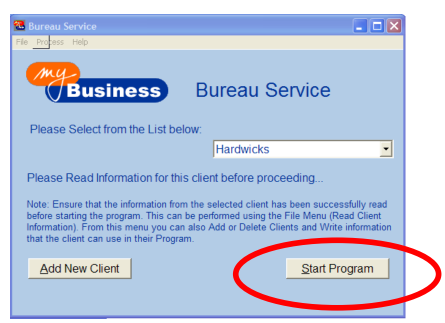


Select OK and you will be taken to the Read Client Information Screen. Select Browse and browse your files and highlight the relevant client data folder.



You will be asked to confirm that the file path is correct. If it is correct, select OK and the software will open up with the Hardwick's database and you can run the software as if you are Hardwick's.

Running your Bureau



When you want to run the Bureau, launch the Bureau Program by clicking on the Bureau icon, select the client's data you want to run and select Start Program.

Since you are working with the client's data it is important that any changes you make are also made in the client's version. You can do this in two ways:

- If the client has not been using the software in the meantime, you can send them the amended script file as an update to copy into their own data file.
- If they have been using the software in the meantime you will need to provide them with a list of all changes that you have made within the software. To assist this process, you can use the Transaction Change Log, which is found on the Books Main menu under For My Accountant.

We hope that you have found this guide useful. If you would like more information or additional guides please ring 0845 226 3319 or visit www.mybiz.co.uk