

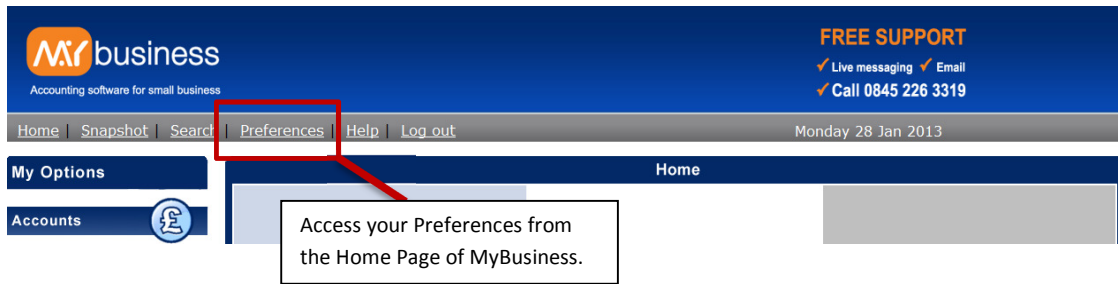
Setting up & Changing User Preferences

Introduction

MyBusiness is designed to work the way you work and is exceptionally flexible. You can choose and amend the way the software works to suit you.

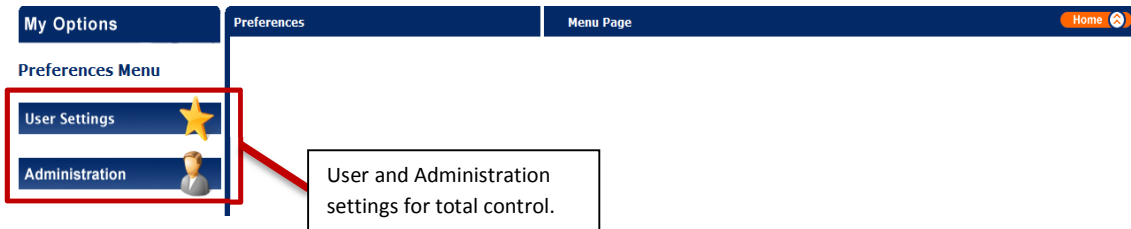
In this quick guide you will see how to change and amend the following functions:

- Your VAT and other accounting settings
- Speed up data entry through wizard summaries
- How you company details appear on your letterheads
- Select default invoice headers
- Decide the way your screens are viewed and behave
- Set up Accounts Preparation codes to allow easy yearend data export to Sage and CCH



These functions can be obtained by going to the Home Page and selecting Preferences. Here you will find two sections under User Settings and Administration.

Please remember whenever you make changes which you want to keep you must select Save at the bottom of the page.

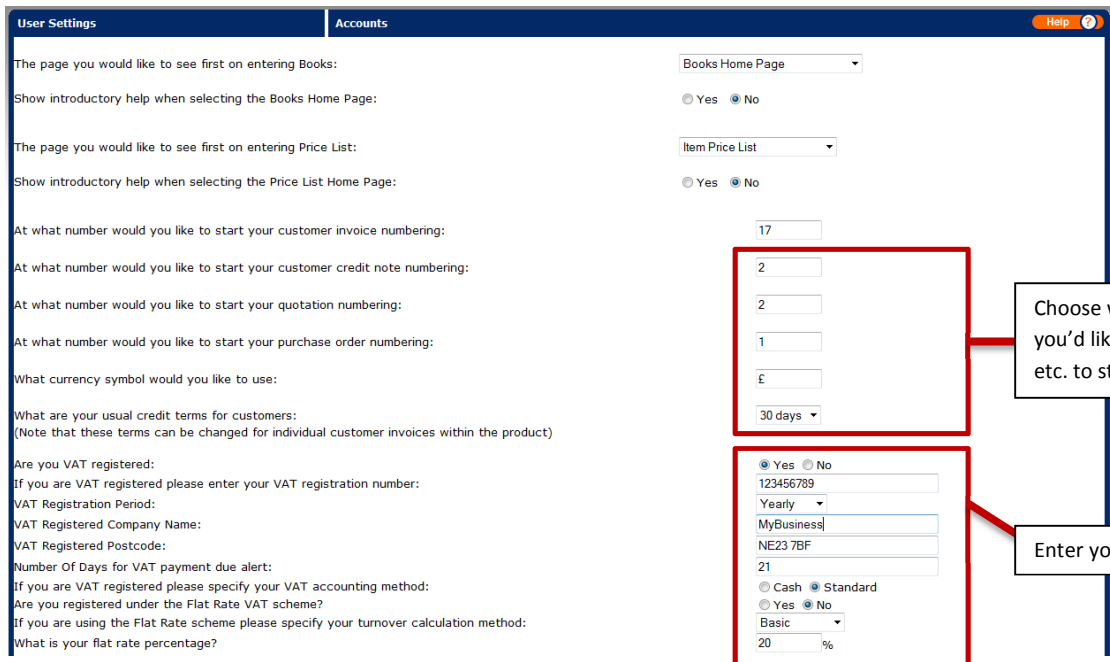


Changing User Settings

Changing User Settings – VAT, invoice numbering etc.

Here you can select whether you want to see help when you enter the page and what section you want to see first as a default. You can also choose what numbering you want Invoices and Quotes etc to start from if you have already raised invoices.

You can choose that the system knows you to be VAT registered and to work out your VAT (if you do not select this option VAT will not be handled in the software). You can also select the type and periods of VAT you wish to operate. Make sure that you get advice and go through the right steps to become VAT registered.



User Settings | Accounts Help ?

The page you would like to see first on entering Books:

Show introductory help when selecting the Books Home Page: Yes No

The page you would like to see first on entering Price List:

Show introductory help when selecting the Price List Home Page: Yes No

At what number would you like to start your customer invoice numbering:

At what number would you like to start your customer credit note numbering:

At what number would you like to start your quotation numbering:

At what number would you like to start your purchase order numbering:

What currency symbol would you like to use:

What are your usual credit terms for customers:

Are you VAT registered: Yes No

If you are VAT registered please enter your VAT registration number:

VAT Registration Period:

VAT Registered Company Name:

VAT Registered Postcode:

Number Of Days for VAT payment due alert:

If you are VAT registered please specify your VAT accounting method: Cash Standard

Are you registered under the Flat Rate VAT scheme? Yes No

If you are using the Flat Rate scheme please specify your turnover calculation method:

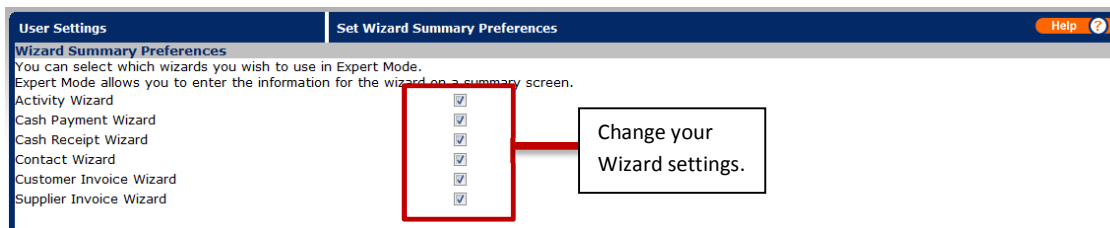
What is your flat rate percentage? %

Choose what numbers you'd like your invoices etc. to start from.

Enter your VAT details.

Selecting Wizard Summary for faster data entry

By selecting Wizard Summary in Preferences then within Administration you can choose the faster option for data entry by ticking the relevant box (es). The software will now take you straight to the data entry summary pages rather than going through the wizard screens.



User Settings | Set Wizard Summary Preferences Help ?

Wizard Summary Preferences

You can select which wizards you wish to use in Expert Mode. Expert Mode allows you to enter the information for the wizard on a summary screen.

Activity Wizard

Cash Payment Wizard

Cash Receipt Wizard

Contact Wizard

Customer Invoice Wizard

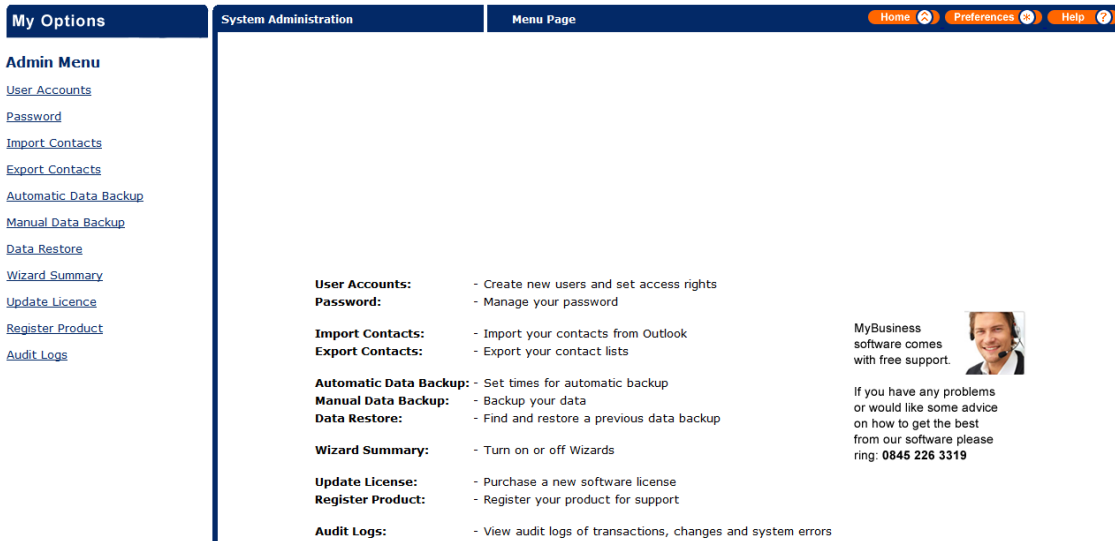
Supplier Invoice Wizard

Change your Wizard settings.

Changing Admin Settings

Changing Admin Settings – User accounts, data backups etc.

When in Administration you have access to a number of key features, for example you can handle your User Accounts, along with permissions then you have access to other important features such as Data backups (manual & automatic).



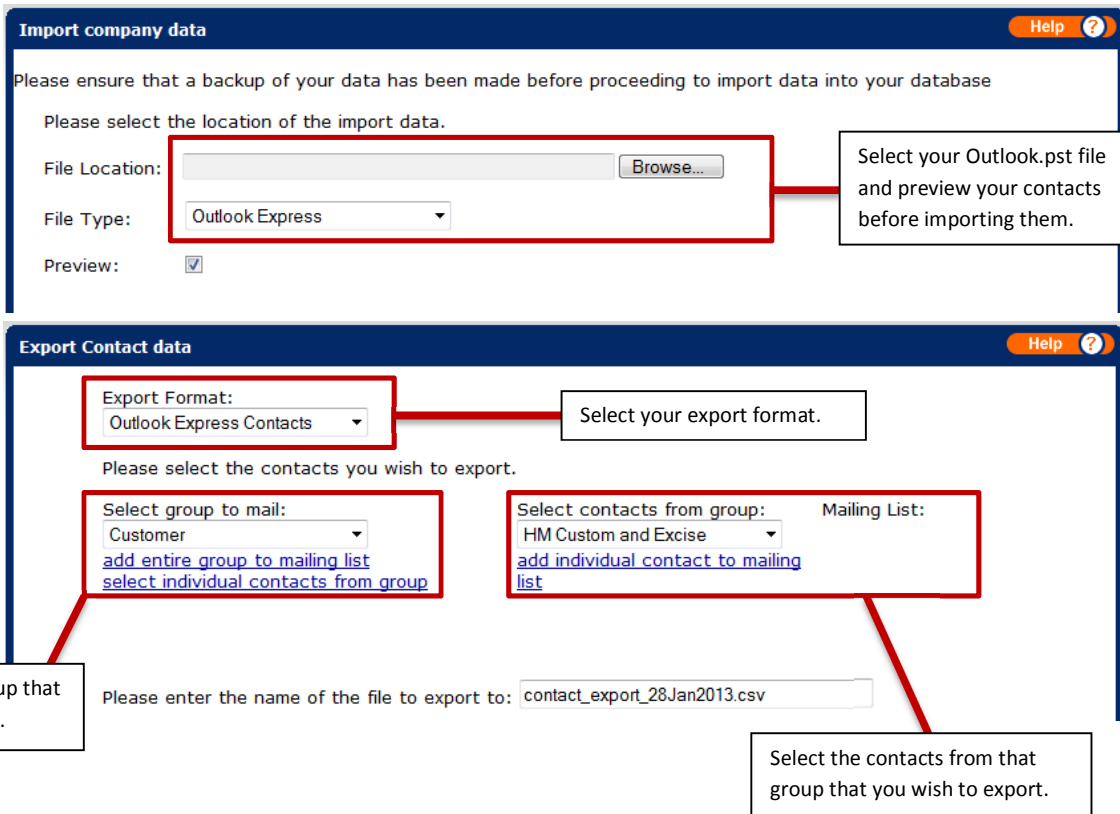
The screenshot shows the 'System Administration' section of the MyBusiness software. The left sidebar contains an 'Admin Menu' with links to: User Accounts, Password, Import Contacts, Export Contacts, Automatic Data Backup, Manual Data Backup, Data Restore, Wizard Summary, Update Licence, Register Product, and Audit Logs. The main content area lists several settings categories:

- User Accounts:** - Create new users and set access rights
- Password:** - Manage your password
- Import Contacts:** - Import your contacts from Outlook
- Export Contacts:** - Export your contact lists
- Automatic Data Backup:** - Set times for automatic backup
- Manual Data Backup:** - Backup your data
- Data Restore:** - Find and restore a previous data backup
- Wizard Summary:** - Turn on or off Wizards
- Update Licence:** - Purchase a new software license
- Register Product:** - Register your product for support
- Audit Logs:** - View audit logs of transactions, changes and system errors

On the right side, there is a 'MyBusiness software comes with free support.' section featuring a photo of a support agent and contact information: 'If you have any problems or would like some advice on how to get the best from our software please ring: 0845 226 3319'.

Importing & Exporting Contacts

You can import your contacts into the MyBusiness software by using your Outlook.pst file, and then you can export you contacts from the MyBusiness software into a readable CSV spread sheet.



The image shows two screenshots of the MyBusiness software interface with callouts explaining key steps:

Import company data: The form prompts the user to ensure a backup is made and to select the location of the import data. A callout points to the 'File Location' field and 'Browse...' button, stating: 'Select your Outlook.pst file and preview your contacts before importing them.' The 'File Type' is set to 'Outlook Express' and 'Preview' is checked.

Export Contact data: The form prompts the user to select the export format. A callout points to the 'Export Format' dropdown, stating: 'Select your export format.' Below, the user is prompted to select contacts to export. Two callouts point to the 'Select group to mail' and 'Select contacts from group' dropdowns, stating: 'Select the group that wish to export.' and 'Select the contacts from that group that you wish to export.' respectively. The 'Mailing List' dropdown is also visible. At the bottom, a callout points to the 'File name' field, which contains 'contact_export_28Jan2013.csv'.