MyBusiness

Accounting Software for small businesses

An introduction to MyBusiness

MyBusiness is exceptionally easy to set up and use. The software is designed to be flexible enough to suit the way you work, and it is also designed to avoid accounting complexities and terms.
As well as being so easy to use the software is also unique because it can integrate all of the key functions of a small business. This means that it can help you manage your marketing, sales and projects, as well as your finances.

This guide will give you a quick overview of the core functions and show you how to get the best out of the software. There is a range of further more detailed guides.

This guide will cover:

- Finding your way around the software
- MyBusiness home page
- Bookkeeping and accounting
- Contact Management
- Diary and Tasks
- Project Management
- Professional Mailings
- Networking and Multi Company Options
- Other Free User Guides

Making Changes and Corrections:
If you make a mistake or put in the wrong data - Don’t Worry!
You can make changes and deletions at any time. An audit of all changes is held in the Transaction and Change Logs.

MyBusiness
Accounting Software for small businesses

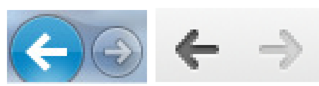
Finding your way around

The software is very easy to navigate around. Use the key functional selectors on the left hand side to go to the main areas of the software, as shown below you have the options of Accounts, Diary & Tasks, Contacts, Jobs & Projects and Templates

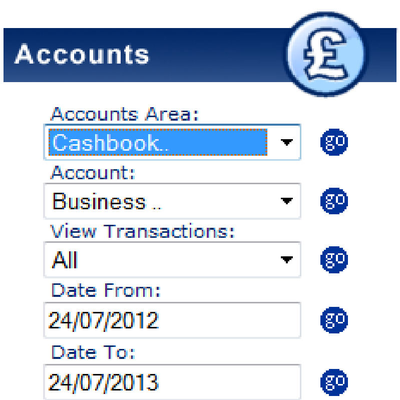
Use the Home button to go back to the main Home Page. Use back button on the browser, except when you are using a wizard – use the wizard "Previous" buttons when you are in a wizard.

MyBusiness Home Button:

Browser Back & Forward buttons (depending on browser):



On many pages you can select the information, which you want to appear by using the left hand side View Selection Options. Example for Accounts and Accounts Options pages:



Choose what area you want to view – cashbook, customer invoices, stock, return to Accounts Main Menu. Make your choice and click "Go".
Choose which of your accounts you want to view. Make your choice and click "Go".
Choose which transactions you want to view – in this case you have the option of All, Reconciled or Un-reconciled (other choices might be paid or unpaid). Make your choice and click "Go".
Choose what period of data you want to view. Make your choice and click "Go".

business
Accounting Software for small businesses

The Home Page

The MyBusiness Home Page is where you can perform all of the functions that you need to run in order to keep up to date with your accounts, ranging from creating invoices to exporting your accounts preparation.

Search for invoices, credit notes and much more.

Create supplier and customer contacts.

A fully functioning CRM system.

View all of your customer invoices in one place.

Export an accounts preparation with ease.

• The Search Function

The search function is a great way to find activities and items in the software.
Select the category that you want to now type in the word or even part of a (in this case “Garden”).
You will be given a list of all of the invoices with “Garden” in the description.

• Setting Preferences

You can change the way your software works by going to preferences. Here you can set your wizards allowing you to enter data faster (Expert mode) and you can change the details you have entered for your letterhead, invoices and financial details. For instance this allows you to change your VAT set up and credit terms. You can also set up templates in Preferences.

• Backing Up your data

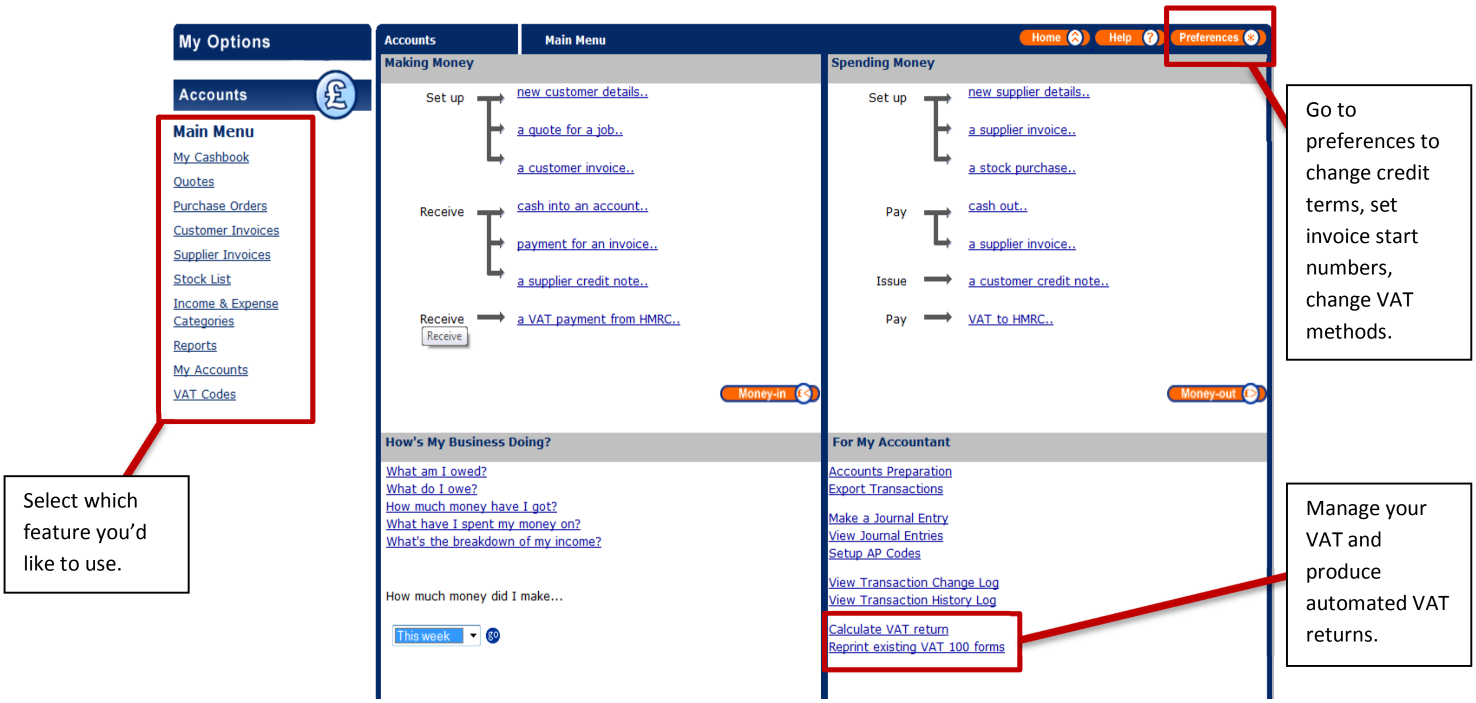
It is important to regularly back up your data. You can do this by going to Home Page, Preferences, Select Admin and the Back Up Data. Data can be saved onto the hard drive, USB, CD or sent to our Support team for safekeeping.

MY business

Accounting Software for small businesses

The Accounts Home Page

From here you can manage your accounts and company finances. You can raise invoices, raise payments, purchases, manage your VAT, set up your accounts, and produce reports. The system does not use complicated accounting jargon but will provide powerful reporting and financial information.



• Set up your accounts

To create new virtual Accounts, either for your cashbook or to track activities such as accruals and opening balances, Go to Accounts on the left hand side. To set up Income and Expense or Balance Sheet Categories, Go To Income and Expense Categories on the left hand side.

• Reports

You can find a wide range of reports by date including:

- Aged Debtor and Creditor
- Stock history and values
- Category reports
- Trading Profit and Loss
- Vat details and summaries
- Trial Balance

• Stock

To manage your Stock in MyBusiness, go to Stock List to enter new stock items and values. The system can automatically add or detriment your stock whenever you raise an invoice.

• Sorting Columns

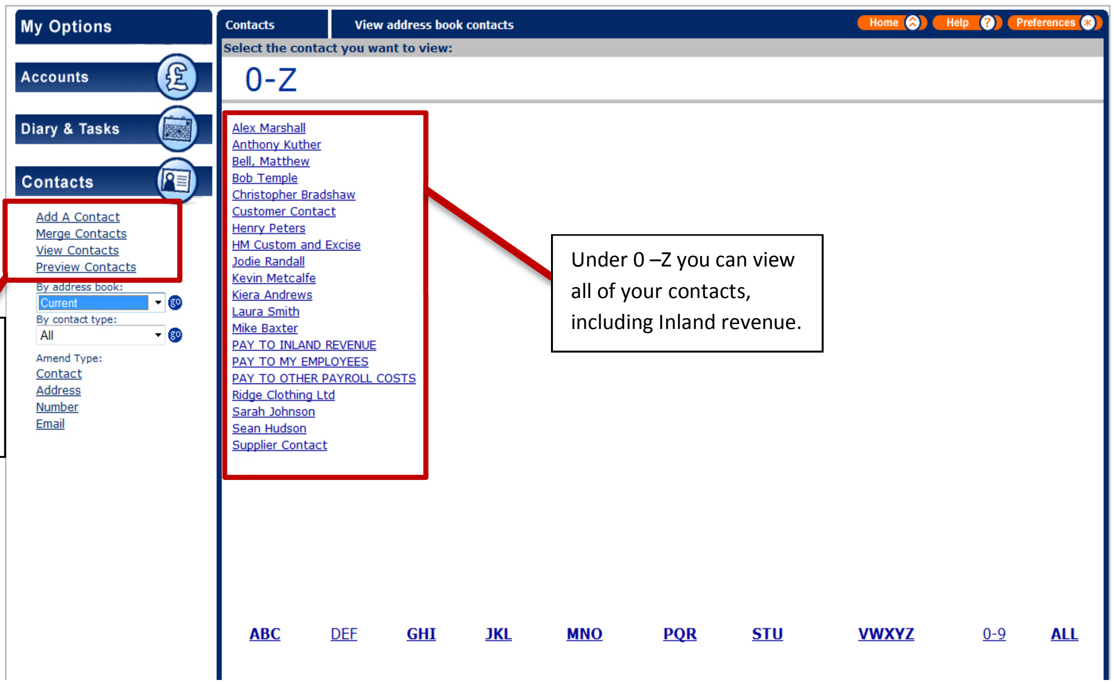
Where you see a list of items, such as Customer or Supplier invoices, or Stock, you can click on underlined headers to resort that column alphabetically or numerically. Where the header is not underlined the column cannot be sorted.

Accounting Software for small businesses

Contact Management

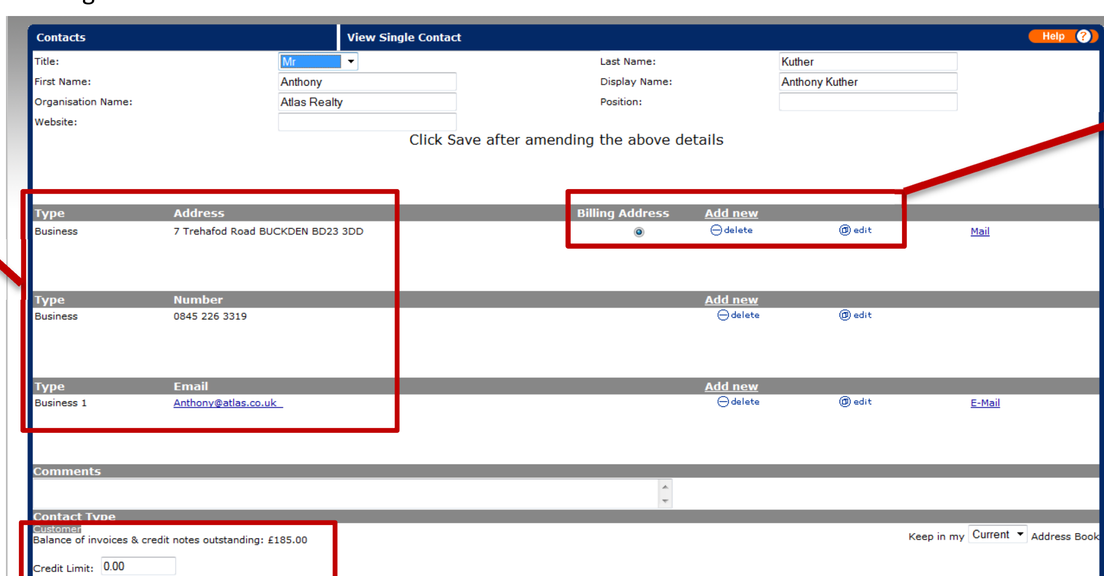
In MyBusiness you can manage the activities and details for all of your contacts. You can create as many different types or groups of contacts you want and each contact can belong to more than one group. Using Professional Mailings these contacts can also be mailed as groups.

Upon selecting a customer from your list of contacts it will display the details of that contact so you can see how much they owe you, what activities are outstanding and create or view invoices, quotes, statements and contact notes.



Add, Merge, View or Preview your contacts.

Viewing a customer:



Change, Add or Edit the contacts billing address.

A view of your contacts details such as address, number and email address.

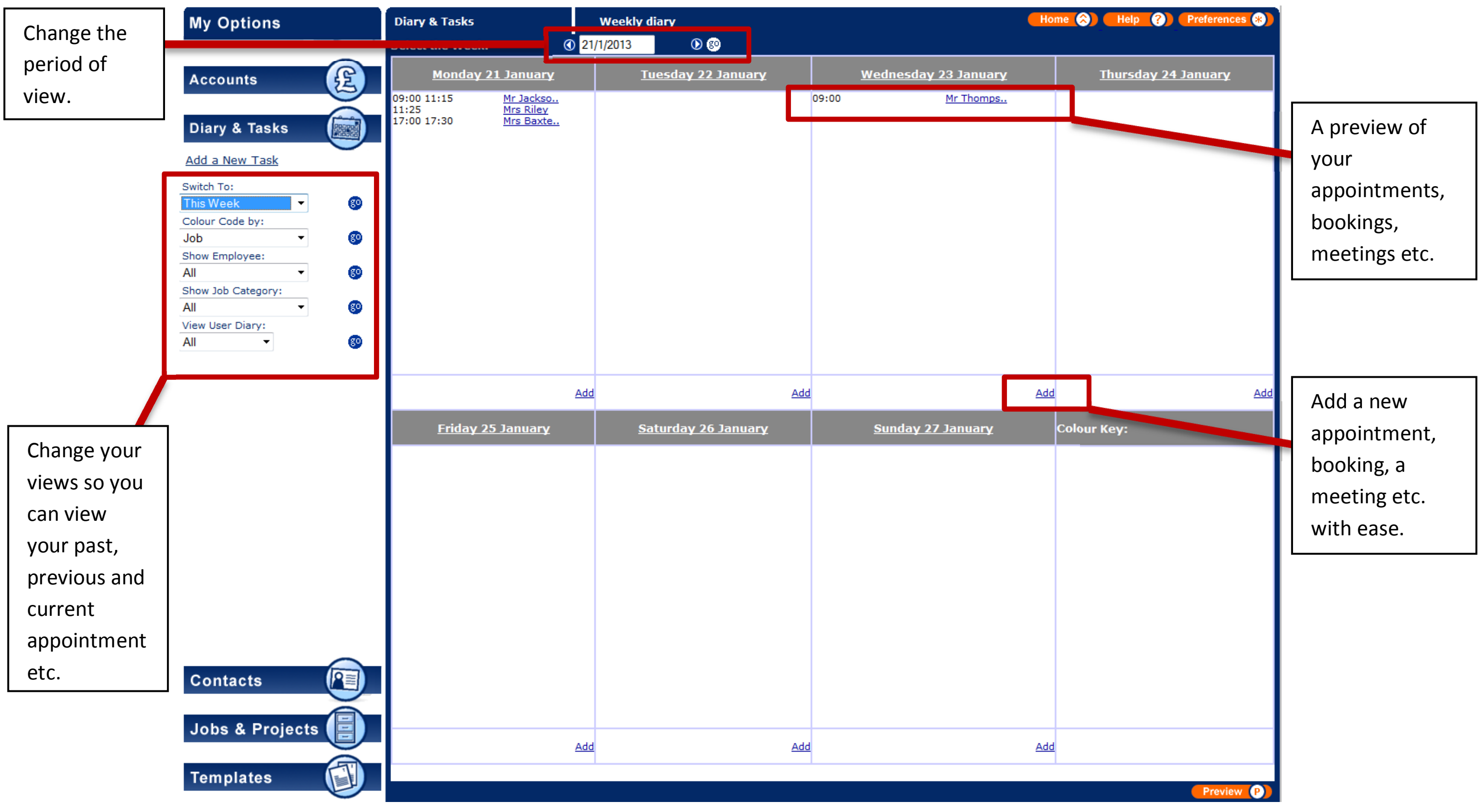
A view of the contacts outstanding invoices and their credit limit.

MyBusiness

Accounting Software for small businesses

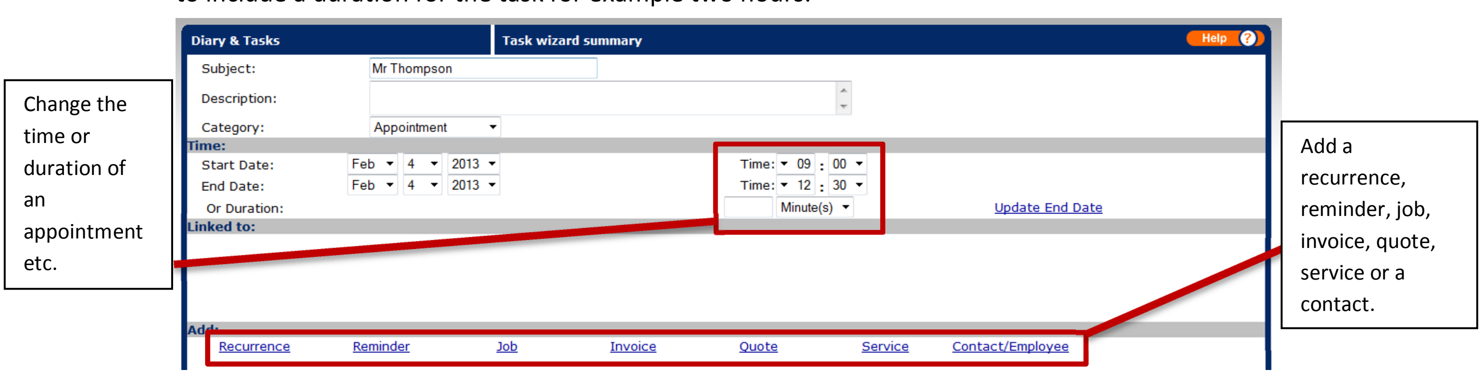
Contact Management

MyBusiness has a very powerful diary and time management module. You can have a separate diary for any contact classified as an "Employee". You can link appointments to projects and jobs and use the diary as a reservations and booking diary. You can track chargeable time to be reminded in your diary. All activites can be colour coded by using the View options on the left hand side.



- Linking activities & charging for time

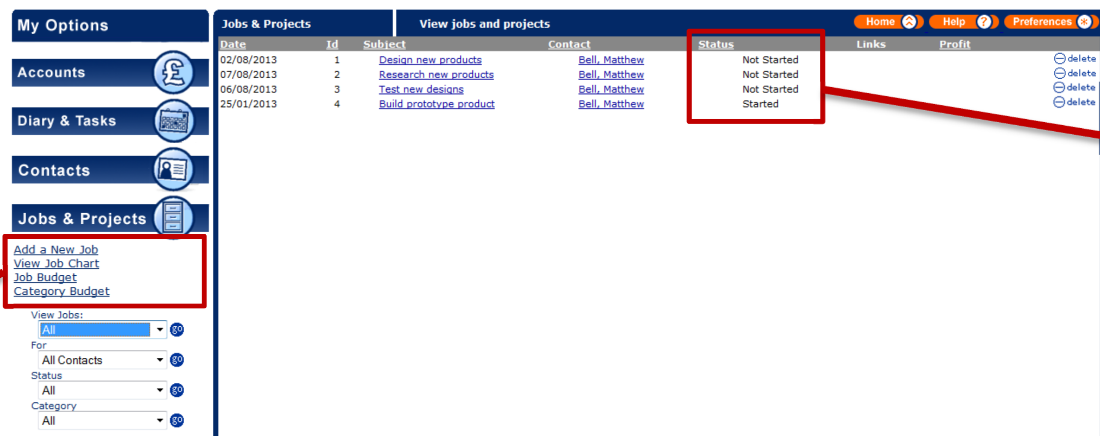
You can click on the Task or appointment within the diary and it will take you to the Task summary page, from here click on the activity that you want to link. To charge for time it will need to be set up in your Stock Price list first, then when you are selecting a service as a link this allocated to chargeable time. When you raise an invoice you will be able to add time to the invoice. You will need to include a duration for the task for example two hours.



Accounting Software for small businesses

Jobs & Project Management

Please Note: In MyBusiness Jobs & Projects are the same, in this section you can link invoices, contacts and tasks to Jobs & Projects, helping you track your business activities. This section can also be used to manage items which you want to track in a diary for example research, design and develop new products.



Shows you clearly what the status of the Job or Project is.

Allows you to create a new job, view your Job Chart, Job Budgets and category budgets.

- Setting up a Job (or Project)

Go to Jobs & Projects, Add a New job. You will be prompted to add a description, some notes and a Category. This Category allows you to view only these grouped projects when it is selected in the diary or Job Chart. You might want this to relate to a type of Project, a group of products such as prototypes. Next you can select a start and finish (actual or projected) for the project. You will be reminded of overdue project start dates and these dates will appear in your Job Chart.

- Linking activities & invoices to Jobs

Whenever you raise an invoice or set up a new diary activity you are given the option to link it to a job. You can also got to the Job detail page (click on an underlined job in the job list) and create or view tasks, invoices, quotes, or purchase orders, which will automatically be linked to the selected job.

- Tracking Jobs in the diary

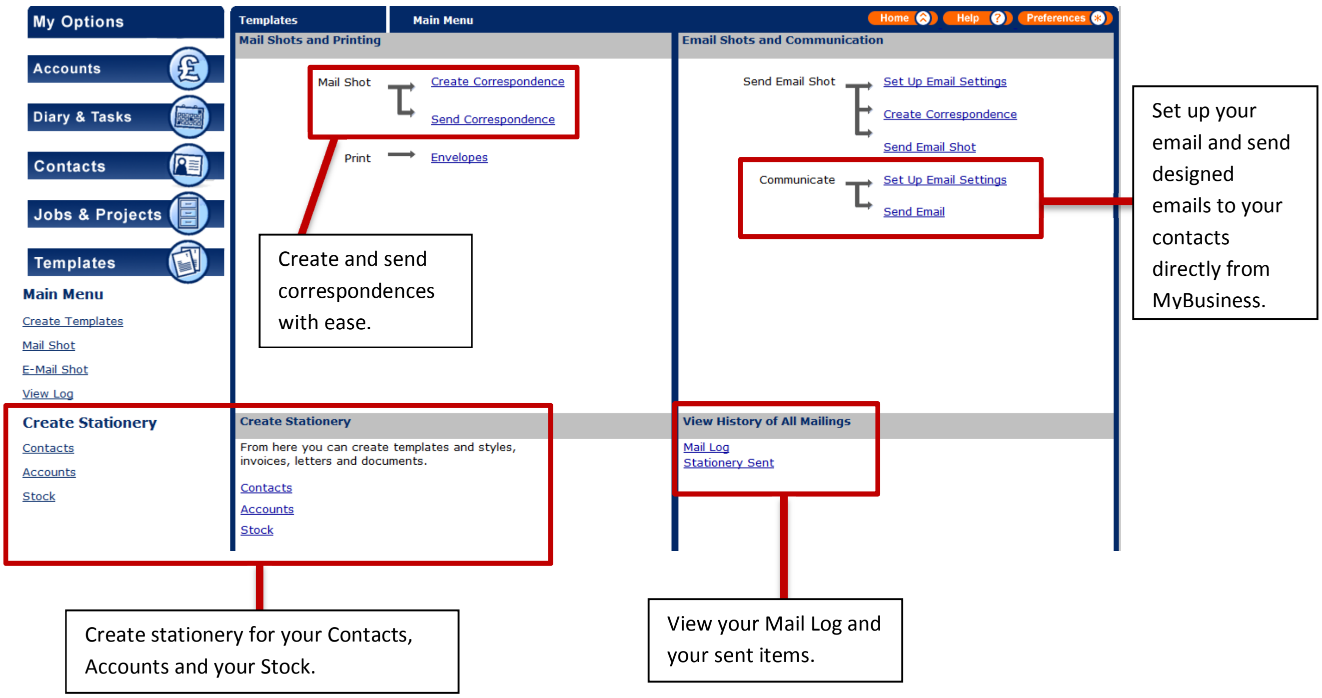
By linking tasks to Jobs and then selecting specific views on your diary you can track jobs or groups of jobs very easily. In this case the selection is to Colour Code by: “Job”; Show Job Category for example: “Website”. There are activities for two Jobs in the week on view.

- The Job Chart

Go to Jobs and Projects and select View Job Chart to see an outline of Project workloads for any period selected.

Professional Mailings

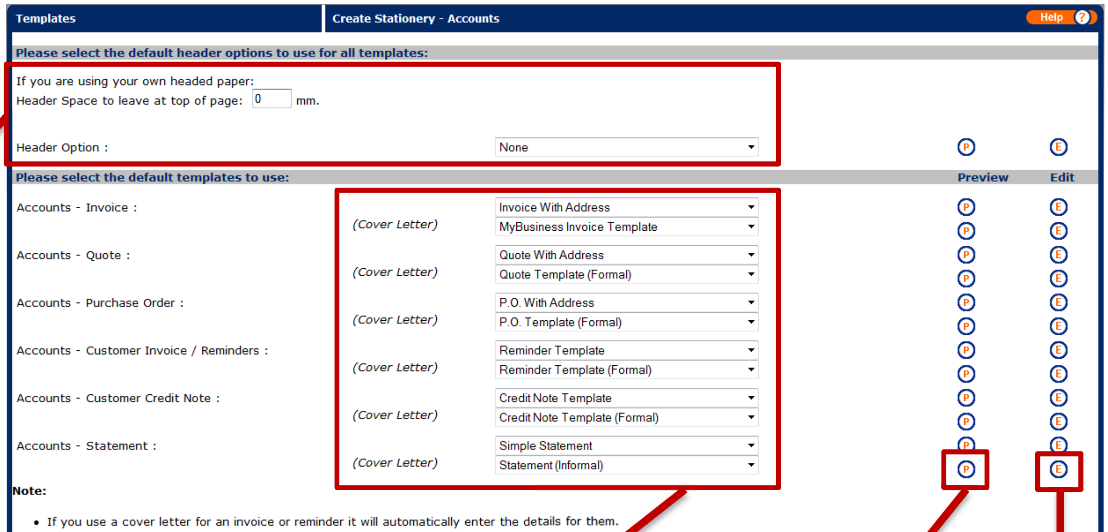
In Templates (Professional Mailings) you can create letters and invoice templates and send mail shots by post or by email. The Templates will pull the information which you entered for your Company Details. If you want to change these simply go to the Home Page, Preferences, User Settings and then Company Profile.



Accounting Software for small businesses

- Setting up your default invoices & letter heads

To set up your default invoices and letter heads simply click Accounts under the option of Accounts, here you can select your default templates for invoices, quotes, purchase orders and much more.



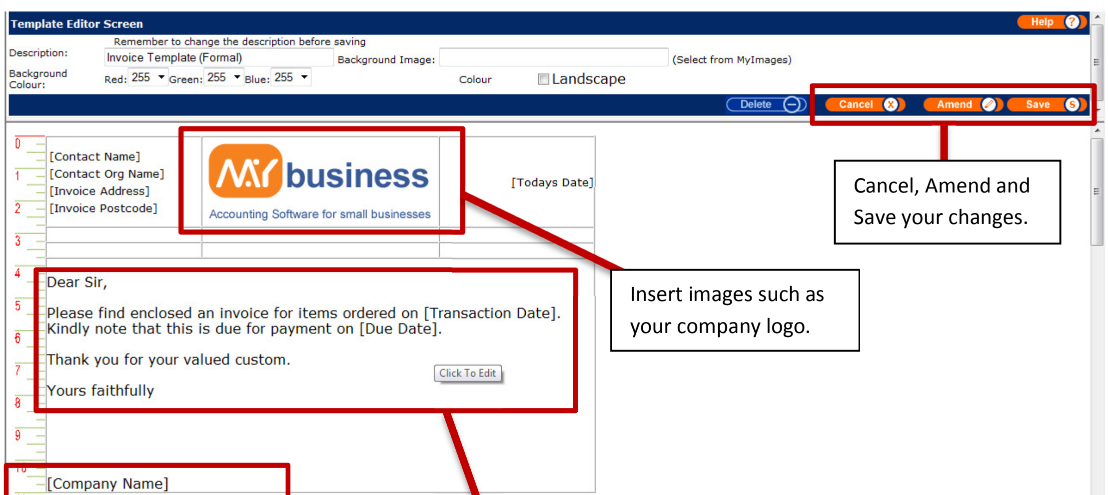
Select your header and your header spacing.

Use the drop down menus to select your default templates for invoices, quotes, purchase orders, reminders. credit notes and statements.

Preview the template selected.

Edit the template selected.

To edit your templates you will notice a "P" button this to preview the selected template and an "E" button this to edit the selected template, for example shown below you can edit it by entering your company logo, enter a background image such as a watermark and also change the font.



Cancel, Amend and Save your changes.

Insert images such as your company logo.

Brings information from your Company Profile and inserts it automatically.

Change your content, font size, font and colour.

Networking Options

It is very easy to network MyBusiness. You will need a multi user license, this can be obtained by purchasing it from our website and choosing Complete Manager if five users. You can also contact our support team. The network can be worked across two PC's or Mac and PC easily by using one of the machines as a server.

By networking them together you can allow your team to share diaries, view contacts and project information and raise activities. A range of access and user rights can be created so that some diaries can be shared and others remain private.

Networking can be managed across the Internet using a VPN, which means that you can network between the home and office or between two offices across the country.

Other MyBusiness User Guides

We have a wide range of more detailed guides, which are available to help you get the best from the software and your business. You can obtain these guides by visiting our website or by contacting our support team by telephone or email.

Telephone: 0845 226 3319
Email: support@mybiz.co.uk