

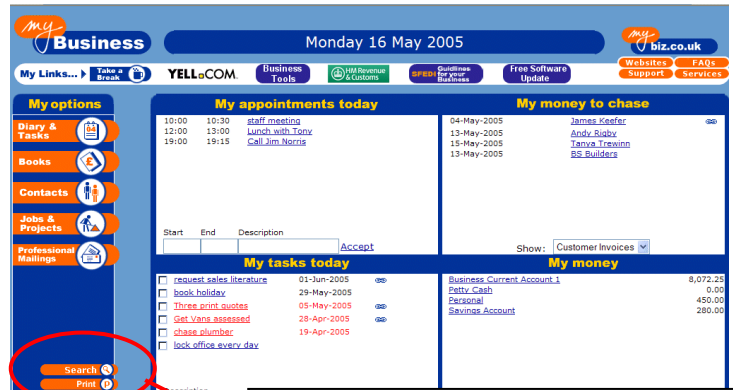
Setting up and changing User Preferences

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.

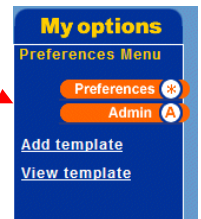
In this quick guide you will see how to change and amend the following functions:

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



The Complete Manager Home Page

These functions can be obtained by going to the Home Page and selecting Preferences. Here you will find two sections under “Admin” and “Preferences” (you will also find some inbuilt Word and Excel templates for your business, and you can link further templates here).



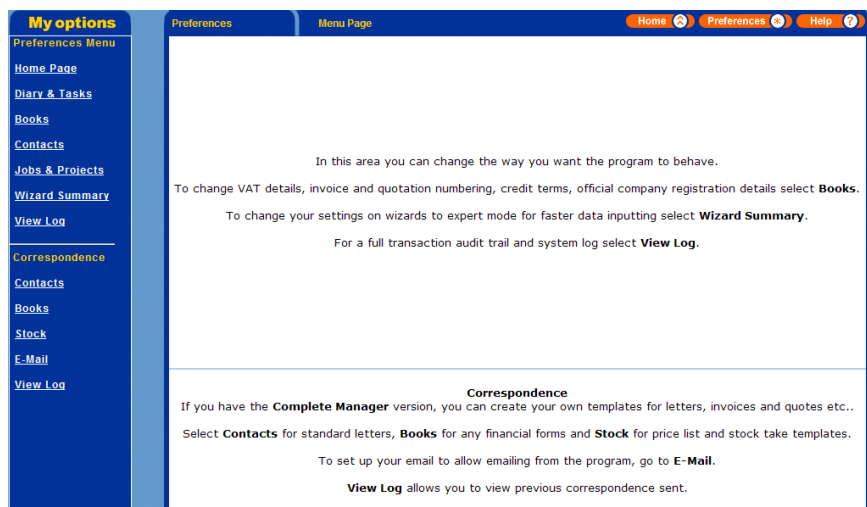
Remember...

Whenever you make changes which you want to keep – you must select **Save** at the bottom of the page.

Preferences

If you select Preferences you will find the menu of options for preferences. Under preferences you can change the way pages behave, access the wizard summary section for faster data entry and also access your correspondence and mailing options.

To change the way a page behaves select that page (you can also access individual page preferences from other home pages). Here we follow the example of changing Books preferences.



• **Changing Books Preferences – 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.

• **Selecting Wizard Summary for faster data entry**

By selecting Preferences / Preferences / Wizard Summary you can choose the faster option for data entry by ticking the relevant box(es).

The software will now take you straight to data entry summary pages rather than going through the wizard screens.

• **Selecting headers for your invoices and letters**

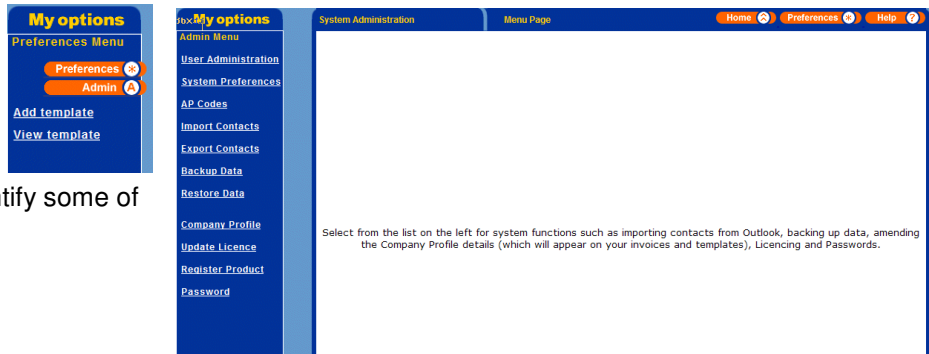
By selecting Preferences / Preferences / Correspondence you can select the defaults for your letters and invoices. In the example of invoices, select Books and choose your defaults. If you are printing on your own letterhead you need to tell the software how much space to allow at the top. You can alternatively choose (and design) your own Header Option. You can also choose which invoice format you want to appear when you use the software.

Choose P to preview the invoice style and E to edit and create your own invoice template formats.

Document Type	Header Option	Preview	Edit
Books - Invoice	Simple Address 1	P	E
Books - Quote	Quote Template (Formal)	P	E
Books - Purchase Order	P.O. With Address	P	E
Books - Customer Invoice / Reminders	Reminder Template	P	E
Books - Customer Credit Note	Credit Note Template	P	E
Books - Statement	Simple Statement	P	E

Admin

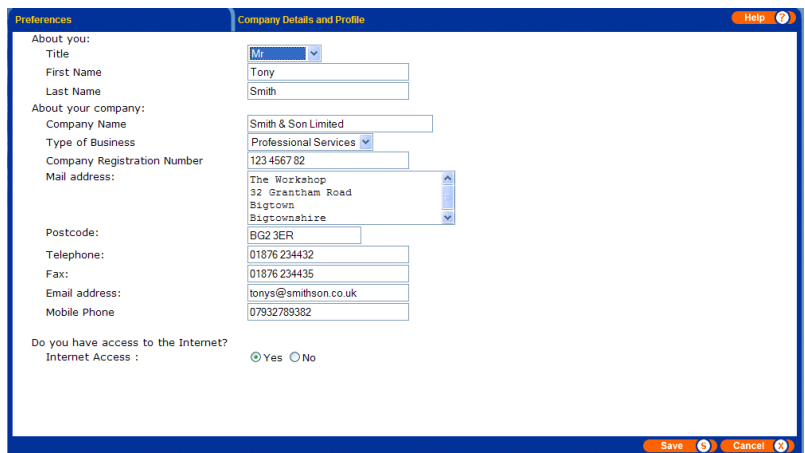
If you select Admin from the Main Preferences options you will be presented with a range of functions, including contacts import, changing passwords and data backup. We are going to identify some of these activities below.



- **Company Profile on your invoicing and letters**

Select Company profile under the Admin section. These are the details which will appear on your forms, invoices and letters (if they are included in the individual form "fields").

Edit the details as required and select Save.

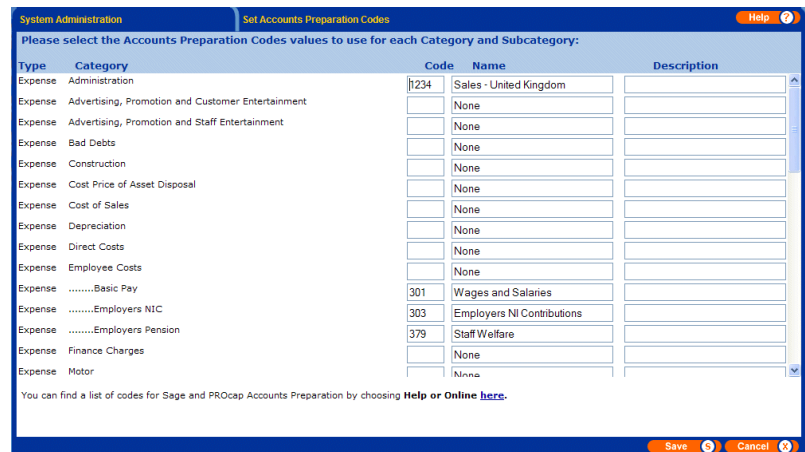


- **Year end Accounts Preparation (AP) codes**

At the year end your accountant may wish to import your data into a Sage or CCH Accounts Preparation software.

To facilitate this you can easily link your income and expense categories to the relevant Codes for Sage and CCH. The Codes can be found at the bottom of this screen, but you may want to obtain the advice of your accountant before linking these codes.

Having done this, when you produce Accounts Preparation reports from the software there will be a worksheet which reports by Accounts Preparation Codes.



We hope that this guide has been helpful. If there is additional information you require please contact our helpline on 08451 20 30 40.