An Introduction to MyBusiness Software

Introduction

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 top 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:

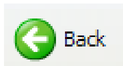
If you make a mistake or put in the wrong data - Don't Worry!

You can make changes and deletions at any time. An audit of all changes is held in the Transaction and Change Logs.

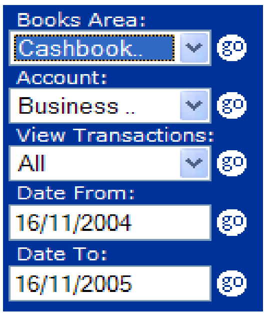
Finding Your Way around MyBusiness software

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.

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.**



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:-



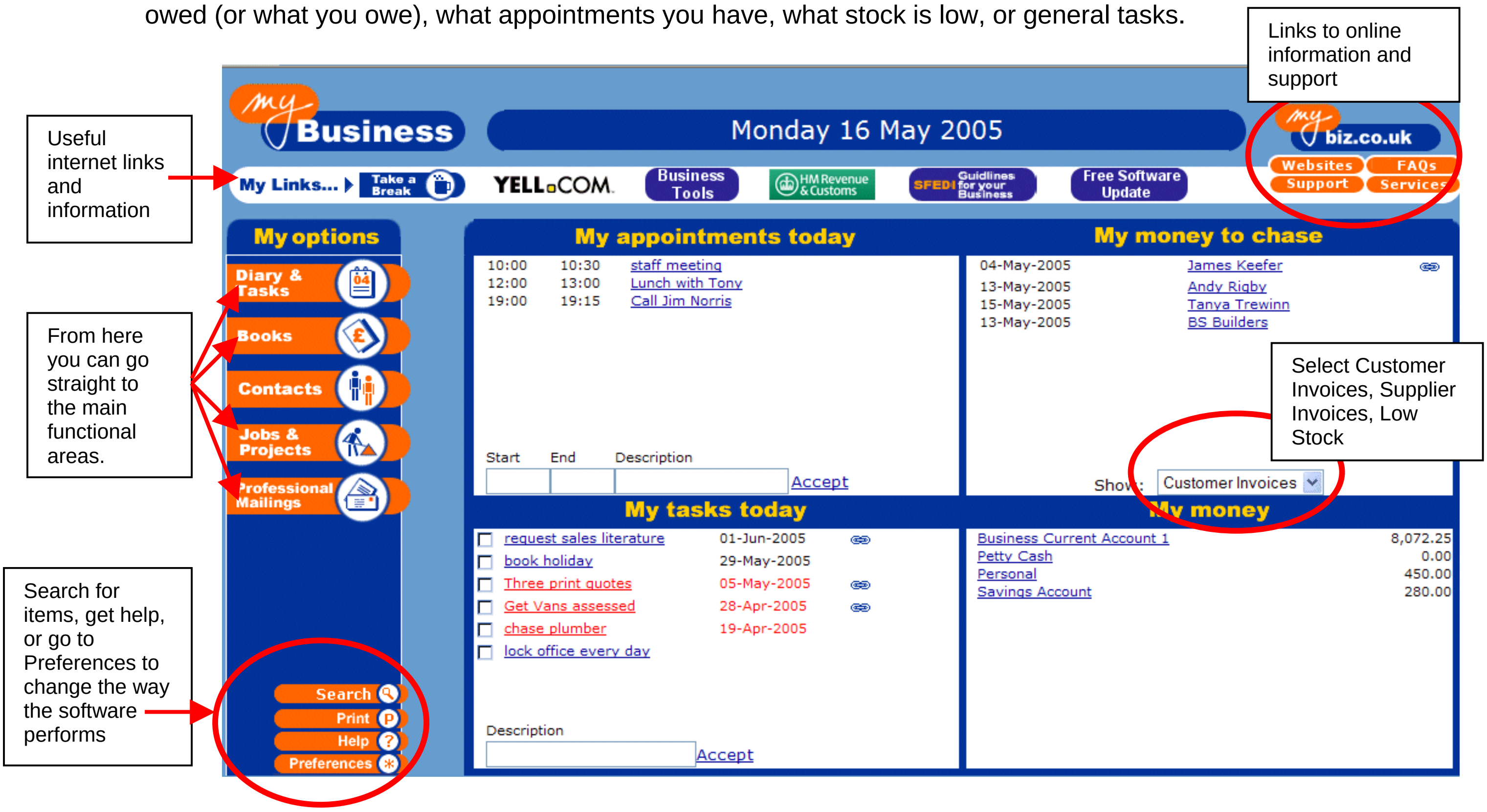
Choose what area you want to view – cashbook, customer invoices, stock, return to Accounts Main Menu. Make your choice and click "Go".
Choose which of your accounts you want to view. Make your choice and click "Go".
Choose which transactions you want to view – in this case you have the option of All, 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".

Usual defaults for the above are "All" and the prior 12 month period.

Note: click on any underlined item to see more detail about that item. If you click on an underlined column header this will sort that column.

The MyBusiness Home Page

The MyBusiness Home Page tells you the key activities that you need to do today. What money you are owed (or what you owe), what appointments you have, what stock is low, or general tasks.

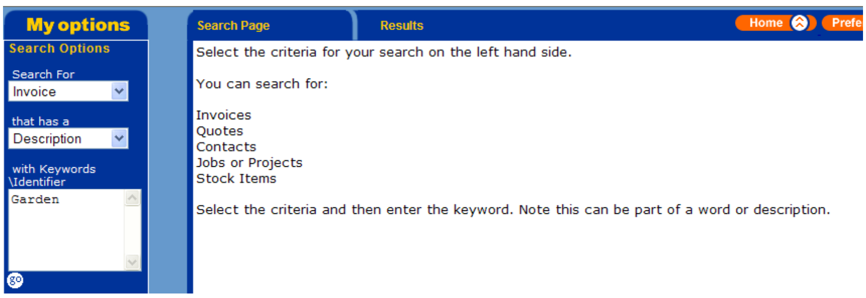


- ### The Search Function

The search function is a great way to find activities and items in the software.

Select the category that you want to search for (in this case an invoice). This will automatically create options under the criteria "that has a". Make your selection here.

Now type in the word or even part of a word (in this case "Garden"). You will be given a list of all of the invoices with "Garden" in the description.



- ### Setting Preferences

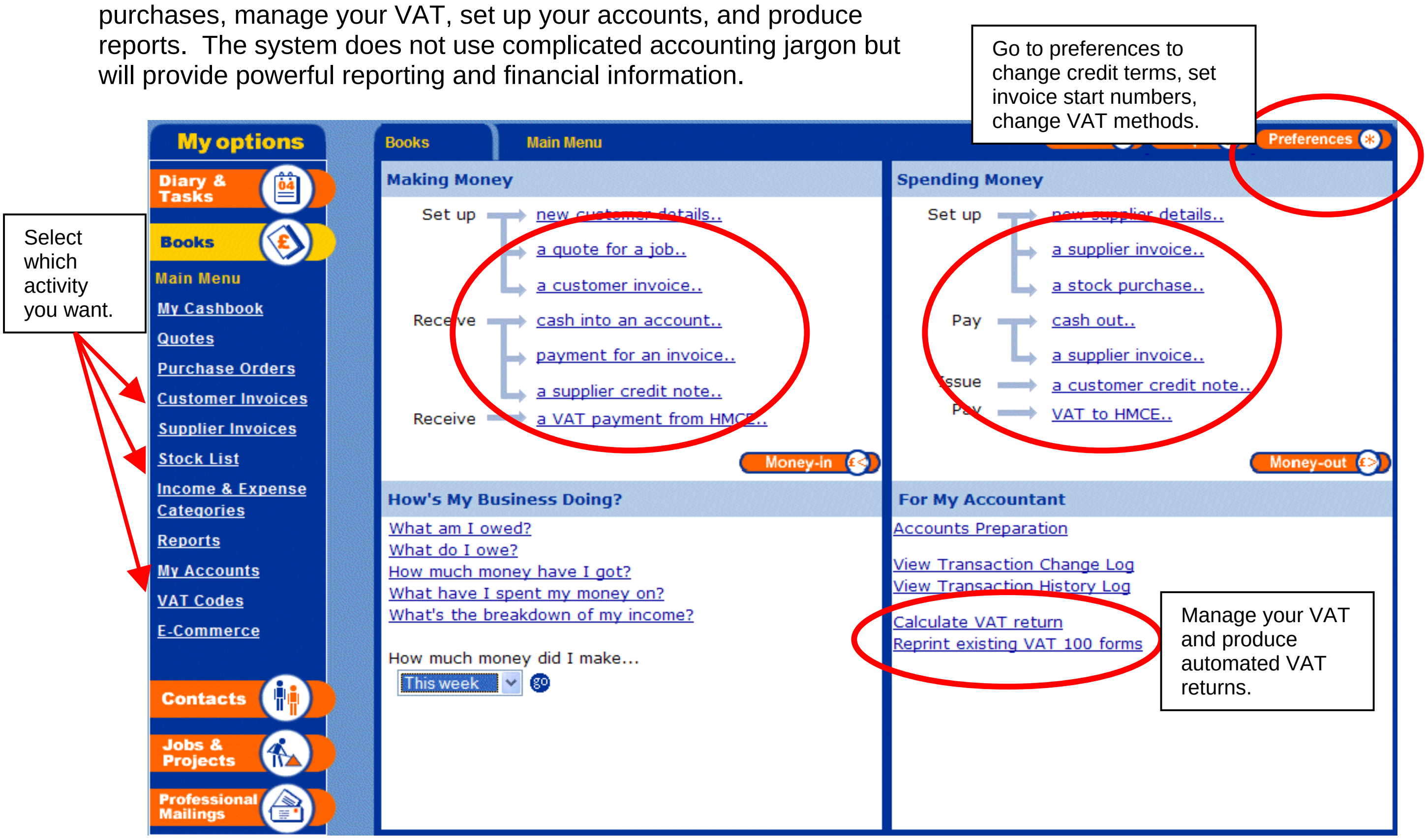
You can change the way your software works by going to preferences. Here you can set your wizards to allow you to enter data faster (Expert mode) and you can change the details you have entered for your letterhead, invoices and financial details. For instance this allows you to change your VAT set up 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, CD or floppy disk, or sent to Support for safekeeping.

The Accounts Main Menu

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 set up your credit terms, change the way the system handles VAT (you can manage Standard, Cash or Flat Rate Schemes), set what number to start your invoicing at, or change which screens you want to see first when you open the Accounts section, Go To Preferences.

To create new virtual Accounts, either for your cashbook or to track activities such as accruals and opening balances, Go To My 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

In the section called Reports on the left hand side you can find a wide range of reports by date including:

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

- ### Stock

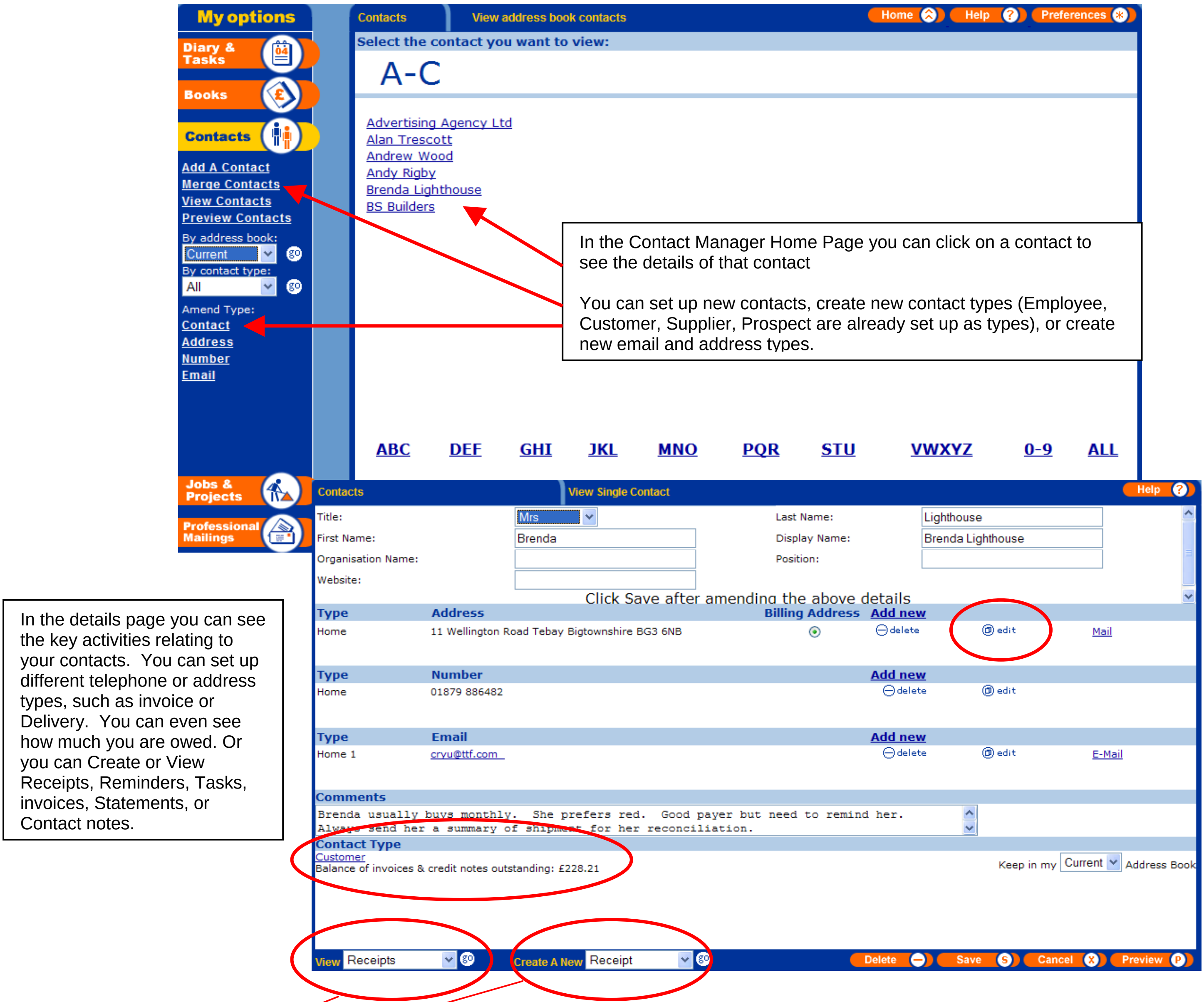
To manage your Stock in MyBusiness, go to Stock List to enter new stock items and values. You can also handle manual stock takes from here. The system can automatically add or detriment your stock whenever you raise an invoice.

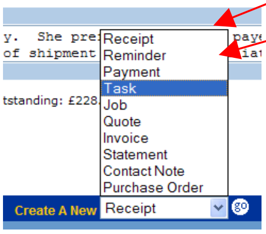
- ### Sorting Columns

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

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, for instance “Customer”, “2004”, “Aberdeen”. Using Professional Mailings, these contacts can be mailed as groups. Within the details page of each contact you can see how much they owe you, what activities are outstanding and create or view invoices, quotes, statements and contact notes.





By selecting Create or View you will be able to select a range of tasks and activities relating to that contact. This might be a note regarding a call; a reminder for a follow up call; an invoice, statement, or details of a project. Select the activity you want and click “Go” and follow the relevant wizard instructions.

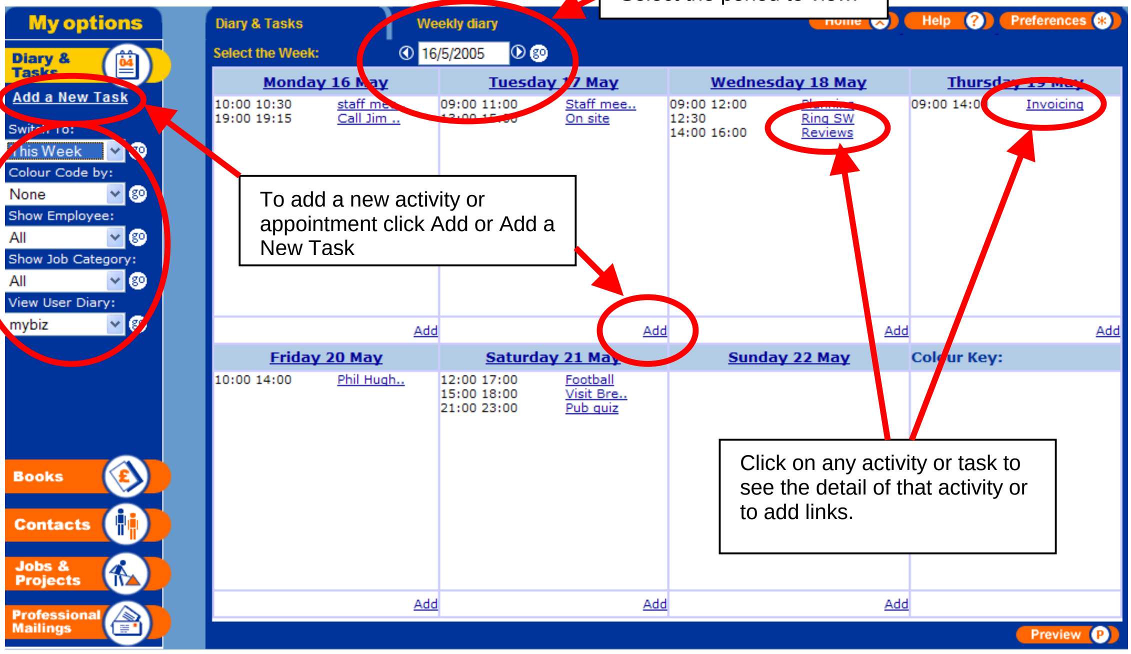
By having all of this information at you fingertips you show your contacts that they are important to you and that you value their business. By creating reminders and activities you can provide prompt service and ensure that your clients’ needs are serviced whilst also supporting you sales processes.

Diary and Tasks

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 activities can be colour coded by using the View options on the left hand side.

Select the period to view.

Change the views on your diary. You can choose day, week or month view, colour code by activity, staff member or project, view the activities of all of your staff or just one, view the activities for all projects or just groups or types of project.

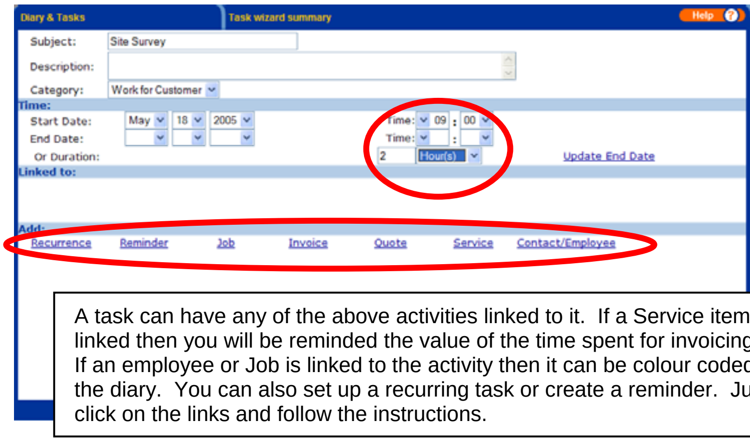


To add a new activity or appointment click Add or Add a New Task

Click on any activity or task to see the detail of that activity or to add links.

- ### Linking activities

To Link items, such as invoices, contacts, or jobs to an activity Go To add New Task (or Add) and link the items during the Task wizard. Alternatively you can click on the Task or appointment within the diary and it will take you to the Task summary page opposite. From here click on the activity that you want to link.

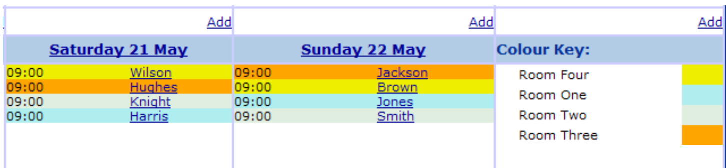


A task can have any of the above activities linked to it. If a Service item is linked then you will be reminded the value of the time spent for invoicing. If an employee or Job is linked to the activity then it can be colour coded in the diary. You can also set up a recurring task or create a reminder. Just click on the links and follow the instructions.

- ### Charging for time

If you set up chargeable Services in your Stock Price list, when you select Service as a link (see example for a plumber on the right hand side) this is allocated as chargeable time. When you raise an invoice you will be able to add the time to the invoice. You will need to include a duration for the task, e.g. 2 hours.

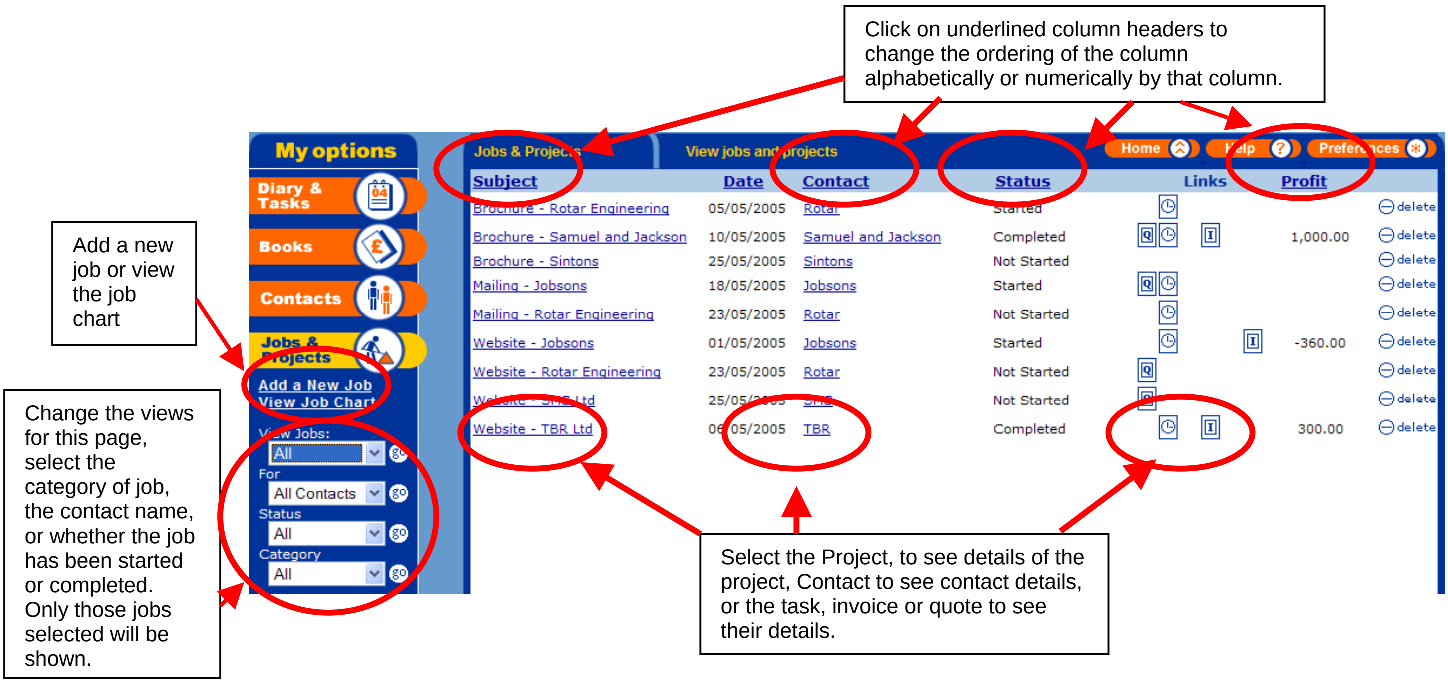
- ### Bookings and Reservations



Create Jobs or Projects by the name of the items to be reserved, in this case Table One etc.. Create a Job Group, in this case called Rooms. When you set up activities you can link these to these "Jobs" or tables. You can give the activity descriptions the names of the people staying in the rooms. By selecting views as shown on the left hand side you will have a colour coded reservation calendar just for the Job category "Rooms". You could have another view for "Tables". This process is also suitable for hiring out equipment etc..

Project and Job Management

Note: in MyBusiness Jobs and Projects are the same thing! In this section you can link invoices, contacts and tasks to Jobs and Projects, helping you track your business activities. This section can also be used to manage items which you want to track in a diary, such as Hire Equipment, Hotel Rooms, Restaurant Tables. Set the item up as a Job, for instance Table 1, under a suitable Job Category, eg. Tables.

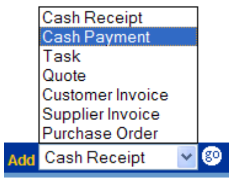


- ### Setting up a Job (or Project)

Go to Jobs and 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 Hotel Rooms, or Department such as Marketing or Estimating. 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.

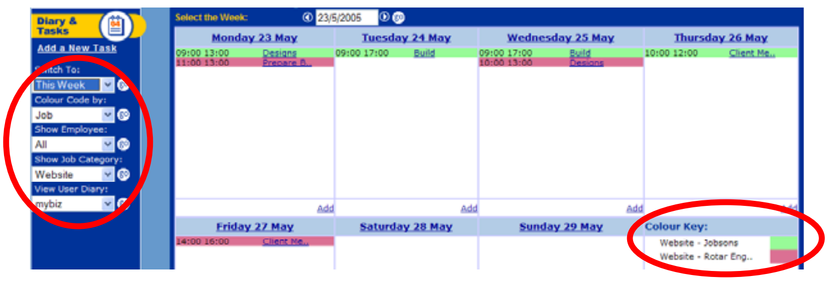
- ### Linking activities and invoices to Jobs

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 go 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.



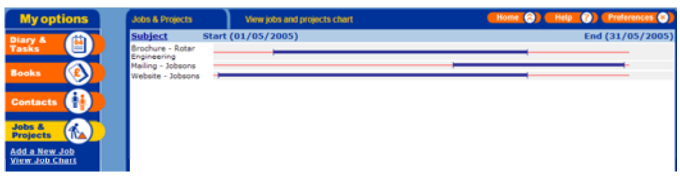
- ### Tracking Jobs in the Diary

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: "Website". There are activities for two Jobs in the week on view.



- ### The Job Chart

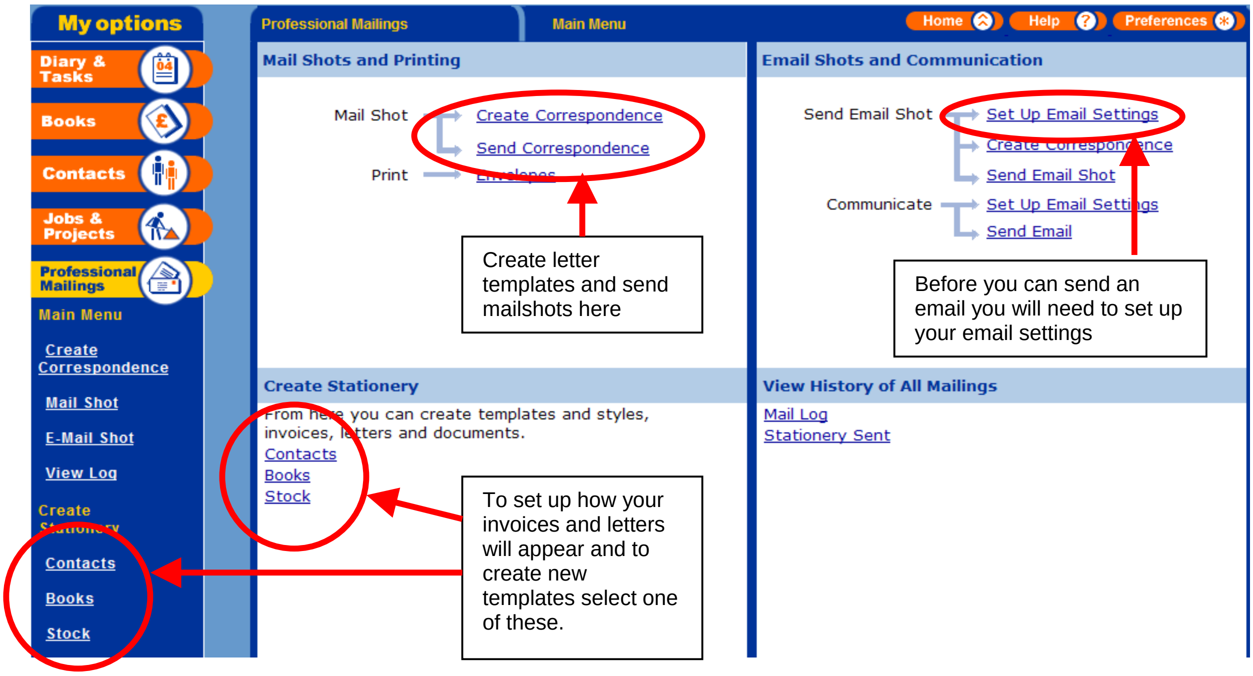
Go to Jobs and Projects and select View Job Chart to see an outline of Project workloads for any period selected. The example on the right is for Started projects. Selections could have been

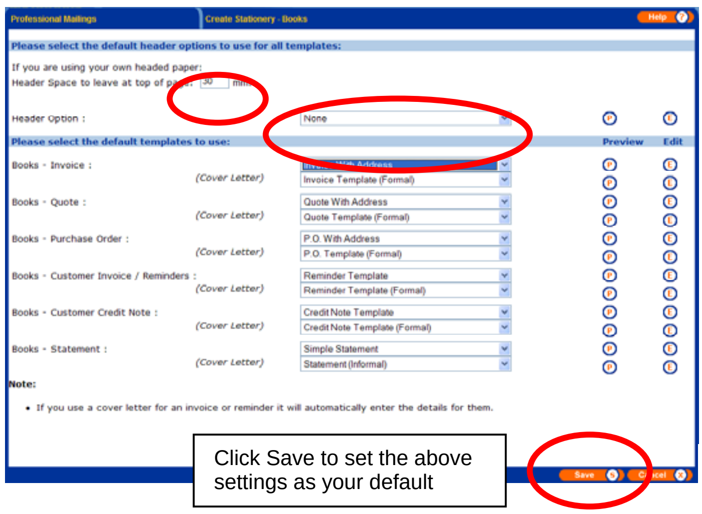


for All Projects or a Category of Project.

Professional Mailings

In Professional Mailings you can create letters and templates and send mail shots by post or email. The templates will pull in the information, which you entered for your Company Details. If you want to change these go to the Home Page, Preferences, Admin, Company Profile.





- ### Setting up your default invoices and headers

Select Accounts under Create Stationery. If you are printing on your own letterhead enter how much space in mm to allow from the top and select Header Option “None”. Alternatively you can select a header option by going to Edit to create your own design.

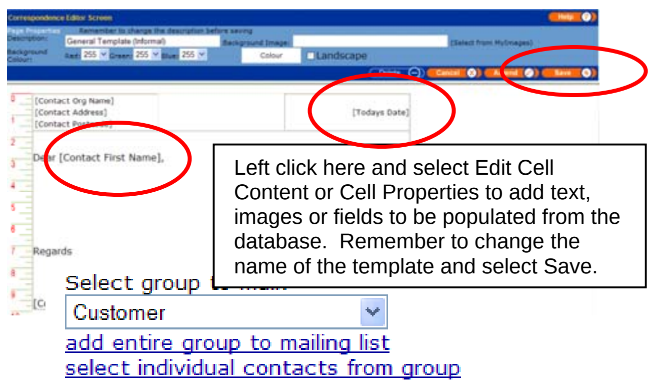
To view an Invoice or Cover letter style select Ⓟ

To Edit a style select Ⓔ

To dictate which template you want to have as the default, make sure the template style is showing (in this case Invoice With Address), and ensure to click Save before leaving the page.

- ### Creating a letter template

Go to Contacts or Create Correspondence. Select a letter template and choose Edit. Left click in the letter area to amend and select Edit Cell Content to enter Text, or select Cell Properties to add Images or Fields to be populated from the database (such as names or addresses).



- ### Sending a mail shot

Go to Send Correspondence. Select the group (or individual) to mail from your Contact categories. Select the documents and envelopes you want to send and click next. The documents will be printed onto your default printer.

Networking Options

It is very easy to network MyBusiness. You will need a multi user license and this can be obtained by contacting the help team. The network can be worked across two PC's or Mac and PC very easily by using one of the machines as a server.

By networking you can allow your team to share diaries, view contact 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. For example, some users may not be able to view or amend financial information.

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.

Multi Company Options

By using the MyBusiness Multi Company Bureau software you can use your software to run the accounts of a number of companies. You can store data or "script files" for each company and then use the Bureau to access these files individually and run the data through your version of MyBusiness.

Other MyBusiness User Guides

We have a 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 contacting the Support Team by phone or by emailing support@mybiz.co.uk.

- Introduction to MyBusiness
- Setting up and entering Opening Balances
- Setting up Categories
- Year end Processes
- Using Contacts
- Using Projects
- Using Diary and Tasks
- Using Professional Mailings
- A Guide to the Multi-Company Bureau
- Guide to Networking
- A Guide for Accountants
- Managing VAT
- Managing Stock
- A Guide to Invoicing
- Managing Expenses
- Handling Prepayments and Accruals
- A guide to Reporting
- A Guide to CIS4
- A Guide for Trades
- A Guide for Retailers
- A Guide for Manufacturers
- A Guide for Service Providers
- Managing Your Finances
- Marketing and Sales
- Managing Projects

An Introduction guide for MyBusiness with more illustrations is available. Please contact MyBusiness Support on 0845 1 20 30 40 or email support@mybiz.co.uk to request a copy.