myob AccountRight

MYOB Support: Customers **1300 555 123**   Mon-Fri: 7am-7pm | Sat-Sun: 9am-5pm (AEDT)

MYOB Academy: Use your MYOB online account email and password to Login
        Find learning: Filtered by AU, AccountRight - For the complete list, click on Load More….

Clearwater Links: Using the sample company file (Clearwater)   Download Sample AU/ NZ Files

Download Links: Latest MYOB AccountRight PC version; ALL MYOB Software Desktop versions

Other Handy Links: My Online MYOB Account   Change My 2FA Settings   My Online MYOB Apps

Help: MYOB - Find an Accountant or Bookkeeper   The Institute of Certified Bookkeepers

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ALL TASKS – Overview

Note that all Help for UpToDate tasks (web page breadcrumbs drop down menu) are readily available at -
        New to AccountRight - Start here

Click on any of the following weblink descriptions below for MYOB AccountRight Help:

- New to AccountRight? Start here
- Upgrade to the new AccountRight
- Working online
- Banking
- Sales
- Purchases
- Paying your employees
- Billing for time
- Inventory
- Working with multiple currencies
- Lists
- Transactions
- Reports
- Forms
- Contact management
- Financial control
- End of period procedures
- Managing users and company files
- Importing and exporting data
- Getting help and support
- Glossary

TASK - New to AccountRight? Start here

- Learning about AccountRight
  - Exploring AccountRight
  - Use the glossary for unfamiliar words
- Getting started
  - Install AccountRight
    - Set up a network
      - AccountRight Server Edition Technical Notes
    - Setting up AccountRight on a new computer
    - Which AccountRight installation should I choose?
    - Install AccountRight on a Mac
    - Install AccountRight on a tablet
    - Uninstall AccountRight
    - Download an older version of AccountRight
    - Access an AccountRight company file in a web browser
      - Try these smart, browser-only features
    - What you can and can't do in AccountRight web browser
    - AccountRight MSI installation instructions
  - Create a company file
  - Open a company file
    - Where to start
    - Opening a file in a newer version of AccountRight
  - Sign into AccountRight online services
    - Accessing online services via a proxy server
  - Register your software
  - Activate a company file
    - About activation and confirmation
    - Activation FAQs
    - Your AccountRight serial number
    - Using a free trial
    - Activation and confirmation errors
      - Error: "Maximum number of company files activated"
- Setting up
  - Set up preferences
    - Change the date and currency format
    - Check spelling
  - Set up user access
    - Invite a user to an online file
    - Add a user to an offline file
    - Set a password for the Administrator
    - Add an accountant advisor

- Set up accounts
    - Create detail and header accounts
    - What are linked accounts?
    - Enter account opening balances
    - Distributing profit and loss
    - Customise your accounts list
- Set up sales
    - Sales and purchases information
    - Entering pre-conversion deposits
    - Entering customer opening balances and historical sales
- Set up purchases
    - Entering supplier opening balances and historical purchases
- Set up payroll
- Set up inventory items
- Enter historical information
- Extending AccountRight
    - AccountRight online services
    - Add-ons
- Managing your MYOB account
- Using keyboard shortcuts
- Using the sample company file (Clearwater)

TASK - **Managing users and company files**

- Manage users
  - Set up roles
    - Default user roles
  - Change a user's company file access
  - Check a user's online status
  - Set a user's online access level
    - Change a user's online access level
  - Remove user access
- Changing and resetting user passwords
  - If you can't sign in
- Manage libraries
  - Changing the name of your AccountRight company file
- About backing up and restoring company files
  - Back up your company file
  - Back up your company file before closing
  - Restore your company file
- Confirm activated company files
- Getting the latest version
  - Why do I need to update AccountRight?
  - Updating an AccountRight network
- Changing your business name and contact details
  - ABN branch
- Ways you can protect your AccountRight company file
  - AccountRight settings have been changed email notification
  - Company file security audits
- Your MYOB subscription and payment details
  - Cancelling your MYOB subscription

TASK - Upgrade to the new AccountRight

- Things you should know before upgrading
  - Find the file you want to upgrade
  - How many files you can put online
  - Try AccountRight before you upgrade your file
- Upgrade without putting your company file online
- Complete your upgrade tasks
  - Upgrade task - migrating personalised forms
  - Upgrade task - taxable payments reporting
- We can't upgrade some Premier files
- What's new for v19 users
  - New look and feel
  - More in-product help features
  - Company file changes between v19 and new AccountRight
  - Improved security
  - Credit card details not stored in AccountRight
  - Better ways to manage your information
  - Easier ways to customise your information
  - Other changes
  - Post-upgrade cheat sheet
  - Compare the features of the new AccountRight
  - Changing your AccountRight product
- Upgrade a Premier multi-currency company file
  - Editing currency codes before upgrading to the new AccountRight
- Upgrade to MYOB Essentials
  - How is MYOB Essentials different from AccountRight?

TASK - **Financial control**

- Tracking financial information
  - Accounts
    - Accounts command centre
  - Categories
  - Jobs
  - See what's on your To Do List
- Reimbursable expenses
  - 1. Set up a job
  - 2. Assign expenses to the job
  - 3. Bill the customer
  - Changing the status of a reimbursable expense
- Budgets
  - Entering budget amounts
  - Budget Shortcuts window
- Reviewing financial information
  - Business Insights—Customise
  - Business Insights—Overview
- Auditing your records
  - Run the Company Data Auditor
    - Receivables, payables or inventory out of balance

TASK - **Working online**

- Get started online
  - Put your company file online
- Work on an online company file
  - Accept an invitation to work online
- Synchronise a company file
  - Automatic synchronisation
  - Manual synchronisation
- Work offline (checking out and checking in)
  - Checking in without saving changes
- Access a read-only copy of your online file
- What to do if your online file isn't accessible for a while
- Some features are only available if your file's online

TASK - **Working with multiple currencies**

- Changing a transaction's exchange rate
- How is multi-currency different from AccountRight v19?
- The Currency List
- Using the currency calculator

TASK - **Lists**

- Adding a record
  - Adding records when entering transactions
- Setting up tax codes (Australia)
- Setting up GST codes (New Zealand)
- Finding a record
- Changing a record
- Deactivating or reactivating a record
- Deleting a record
  - Deleting an account
- Combining records
  - Combining cards
  - Combining accounts
  - Combining tax or GST codes

TASK - **Transactions**

- Finding a transaction
- Changing or deleting a transaction
  - Changing a transaction
  - Reversing a transaction
  - Deleting a transaction
- Recapping transactions
- Recurring transactions
  - Setting up recurring transactions
  - Deleting a recurring transaction
  - Recording recurring transactions
  - Recurring transaction reminders
  - Changing a recurring transaction
  - Copying a recurring transaction
- Recording a journal entry
- Non-standard GST amounts
- Wine production and sales
- Luxury car tax (Australia only)

TASK - Sales

- Adding a customer
- Personalising invoices
  - Adding direct deposit bank details to invoices
- Entering sales
  - Enter an invoice, quote or order
    - Enter cash sales
  - Add headers, subtotals and lines to sales
  - Build, buy or backorder items
  - Print or email sales
    - Reprinting or re-emailing invoices
- Changing an invoice, quote or order
- Deleting an invoice, quote or order
- Changing a sale's type
- Changing the customer on a recorded invoice
- Online invoice payments
  - Adding a 'How to pay' section to invoices
  - Editing your business bank details
  - Deactivating online payments
  - Fees and charges for online payments
  - Chargebacks for online payments
  - Customer surcharging for online payments
  - MYOB direct debit requests
- Online invoicing
  - Setting up invoice reminders
  - Setting up unpaid invoice summaries
  - How do reminders and unpaid invoice summaries look to your customers?
- Receiving payments
  - Customer overpayments and double payments
  - Customer deposits
  - Merchant fees
  - PayPal payments
  - Receiving retention payments
  - Dishonoured (bounced) customer cheques
  - Stale, stopped, void or lost cheques
  - Customer prepayments
  - Printing payment receipts
  - Deleting a customer payment
- Customer discounts
- Print or email customer statements
  - Personalising statements
- Credit control
  - Credit terms
  - Credit limits
  - Credit holds
  - Finance charges paid by customers

- Customer returns, credits and refunds
  - Settling customer credits
  - Paying customer refunds electronically
  - Transferring credits between customers
- Reviewing your sales information
  - Sales Register window
  - Monthly ageing of invoices
- Dealing with a supplier who is also a customer
- Accounting for bad debts
- Customer trade-ins
- Gift vouchers
- Selling to your employees
- Prepaid hours of service
- Lay-by sales
- Purchasing of debtors by a 3rd party
- Calculating sales commission
- Packing slips and delivery dockets
- Getting business loans and finance
  - Get invoice financing with Butn

TASK - **Purchases**

- Adding a supplier
- Entering purchases
    - Enter a bill, quote or order
    - Add headers, subtotals and lines to purchases
    - Print or email purchases
        - Reprint or re-email purchases
- Changing a bill, quote or order
- Deleting a bill, quote or order
- Working with In Tray documents
    - Automating supplier invoices
    - Emailing documents to your In Tray
    - Using the MYOB Capture app
- Receiving items without a supplier bill
    - Set up an accrual account for items received
    - Recording items received without a supplier bill
    - Recipient created tax invoices
    - How Receive Items works
- Creating a purchase order from a sale
- Changing the purchase type
- Changing the supplier on a recorded bill
- Reviewing your purchases information
    - Purchases Register
- Supplier deposits
- Supplier discounts
- Paying bills
    - Print or email remittance advices
    - Withholding payments from contractors
    - Supplier overpayments and double payments
    - Supplier prepayments
- Supplier returns, debits, and refunds
    - Settling supplier debits
- Finance charges paid to suppliers
- Recording overseas purchases and import costs (Australia)
    - Deferring GST on imported goods
- Recording overseas purchases and import costs (New Zealand)
- Landed costs for imported inventory
- Reporting taxable payments (Australia only)
- Capital purchases and finance
- Expenses for business and private use
- Recording purchases in branches and remitting the payment to head office

TASK - **Paying your employees**

- Add an employee
  - Employee self-onboarding
  - Enter employee payroll information
  - Review standard pay details
- Single Touch Payroll
  - About Single Touch Payroll reporting
  - Setting up Single Touch Payroll reporting
    - Notify the ATO you're using MYOB for Single Touch Payroll reporting
    - Assign ATO reporting categories for Single Touch Payroll reporting
    - Add a declarer for Single Touch Payroll reporting
    - What happens after I've set up Single Touch Payroll?
    - Updating Single Touch Payroll details
  - Edit company information for Single Touch Payroll reporting
  - Edit employee details for Single Touch Payroll reporting
  - Check payroll details for Single Touch Payroll reporting
  - Connect to the ATO for Single Touch Payroll reporting
  - Closely held employees
  - Reporting past-dated pays for Single Touch Payroll
  - View Single Touch Payroll reports
    - Where are my Single Touch Payroll reports?
    - Send Single Touch Payroll reports after processing payroll
  - Troubleshooting a pay run with Single Touch Payroll reporting
  - Fix rejected reports in Single Touch Payroll
    - Single Touch Payroll error CMN.ATO.AUTH.007
    - Single Touch Payroll error SBR.GEN.AUTH.006
    - Single Touch Payroll reporting error: "CMN.ATO.GEN.200001"
    - Single Touch Payroll reporting error: "MYOB error code: 404"
    - Single Touch Payroll reporting error: Accepted with errors
  - End of year finalisation with Single Touch Payroll reporting
    - Reportable fringe benefits amounts (RFBA) with Single Touch Payroll reporting
    - Changing a pay after finalising with Single Touch Payroll
  - Getting ready for STP Phase 2
    - Lump sum E payments
- Personalising pay slips
- Payroll categories
  - Wages
    - Allowances
    - Overtime
    - Bonus and commission payments
    - Back pay
    - Wage advances and employee loans
    - Employee reimbursements
    - Public holidays

- Leave and entitlements
  - Adjusting leave entitlements
  - 'Running down' method of sick leave
  - Long service leave
  - Leave without pay
  - Leave loading
  - Paid parental leave
  - Rostered days off
  - Time in lieu
  - Tracking leave accruals as liabilities
  - Cashing out annual leave
  - Calculating an entitlement percentage
  - Paying leave in advance
  - Portable Long Service Benefits Scheme
- Deductions
  - Child support payments
  - Salary sacrificing
  - Salary packaging
- Employer Expenses
- Taxes
  - Working holiday makers
- Superannuation
  - Set up superannuation funds
  - Set up Pay Super
    - Sign up for Pay Super
    - Add a new employee to Pay Super payments
    - Check super fund and employee details
    - Add a Pay Super payment authoriser
    - Changing your Pay Super payment details
  - Make superannuation payments
    - Authorise and review super payments
    - Reversing and reprocessing superannuation payments
    - Troubleshooting Pay Super payments
  - About SuperStream
  - Set up salary sacrifice superannuation
  - Employees with multiple super funds
  - Superannuation Guarantee for the building industry
  - Checking and adjusting superannuation
  - Additional superannuation contributions
  - Print a superannuation standard choice form
  - Staying compliant with super guarantee rate increases
  - Removal of the $450 earnings threshold for super
  - Paying super for employees aged under 18

- Processing your payroll
  - Start a pay run
  - Include employee timesheets in a pay run
  - Review employee pays before recording them
  - Process cash, cheque and electronic pays
  - Print or email pay slips
    - Reprinting or resending pay slips
  - Changing a recorded pay
    - Fixing a payroll overpayment or underpayment
  - Saving and resuming a pay run
  - Print paycheques
- Timesheets
  - Delete timesheet entries
  - View timesheet reports
- Paying payroll liabilities
  - Removing paid amounts from the Pay Liabilities window
  - Pay Liabilities and BASlink
- Payroll tax reporting
- Processing a final pay
  - 1. Process the final standard pay
  - 2. Determine any outstanding entitlements
  - 3. Create payroll categories for termination payments
  - 4. Exclude termination payroll categories from superannuation calculations
  - 5. Record the final termination pay
  - 6. Enter termination details
  - 7. Report the termination to the ATO
  - Terminate an employee in Single Touch Payroll reporting
    - Removing an employee termination
    - Removing an employment termination payment
  - Fixing an ETP
  - Reinstating an employee
- Reviewing payroll information
  - Viewing pay history for the current year
  - Viewing pay history for the current and last year
  - Viewing an employee's entitlement balances
  - Reviewing payroll liabilities
  - Print or export employee details
- Paying workers' compensation
  - Calculating WorkCover on superannuation and gross wages
- Paying employees from multiple cheque accounts
- Jury duty
- Integrate MYOB Payroll (NZ)
- Integrate Ace Payroll (NZ)
- Changing an employee from full time, part time or casual
- Changing an employee's salary or hourly rate

TASK - **Paying your employees** - continued

- COVID-19 wage subsidy (JobKeeper) payments
  - Monthly JobKeeper declarations
  - Changing an employee's JobKeeper start or finish date
  - Choosing employee JobKeeper tier levels
  - Working out turnover for a COVID-19 grant
- Getting started with MYOB Team
- Handling JobMaker payments

TASK - Billing for time

- The time billing workflow
- Setting time billing preferences
- Setting billing rates
- Creating activities
- Creating activity slips
    - Creating multiple activity slips
    - Using the MYOB Invoice app
- Changing, reviewing and deleting activity slips
- Creating time billing invoices
- Work in progress

TASK - Inventory

- Inventory management in AccountRight
- Creating items
- Updating items
- Deleting or deactivating items
- Searching the Items List
- Filtering the Items List
- Making inventory adjustments
- Multiple inventory locations
    - Move items between locations
- Building items
    - Auto-Building items
        - Include labour cost when using Auto-Build
- Recording stocktakes
- Reviewing your inventory information
- Setting item prices
- Customising inventory
    - Custom price levels
    - Custom item lists
    - Custom item fields
    - Item pictures
    - Periodical inventory
- Adding value to inventory
- Tracking and transferring stock sent off-site
- Breaking down items into saleable parts
- Including labour in inventory item cost
- Inventory change overs
- Consignment stock
- Units of measure
- Standard cost
- Average cost
- Incorrect COGS on edited sales
- Using inventory in AccountRight browser

TASK - **Reports**

- Displaying a report
- Printing and emailing reports
- Frequently used reports
  - Review monthly reports
    - Statement of Cash Flow report
- Exporting reports
  - Microsoft Excel templates
- Customising reports
  - Filter and sort a report
  - Add and remove report columns
  - Add text and pictures to a report
  - Change the report background
  - Editing report elements
  - Saving and deleting custom reports
- Report groups
  - Accounts reports
    - Printing account numbers on reports
    - Showing Cost of Sales adjustments in reports
  - Banking reports
  - GST/Tax reports
    - Out of Balance in Tax/GST Information Reconciliation reports
    - Why the GST report in the browser is different to AccountRight desktop
  - Sales reports
  - Time Billing reports
  - Purchases reports
  - Payroll reports (Australia only)
  - Inventory reports
  - Cards reports
  - Online invoice payment reports
- Consolidating reports for multiple company files
- Standard Business Reporting (SBR)
- Getting started with MYOB for Excel
- AccountRight browser reporting features

TASK - **Forms**

- Forms you can print and email
- Sending forms when you record a transaction
- Sending forms in a batch
  - Advanced batch filters
  - Removing transactions from the print or email queue
- Sending emails
  - Choose how to send emails
  - Sending emails using Microsoft Outlook
  - Set up AccountRight to send emails
  - Track email delivery status
  - Set up your default email messages
    - Setting default email delivery methods
  - Set the default forms to use when emailing or printing
  - Email troubleshooting
- Printing from AccountRight
- Personalising forms
  - Open a form you want to design
  - Set the form size and background
  - Add text and fields to forms
    - Fields and columns you can add to forms
  - Add tables to forms
  - Add pictures and shapes to forms
  - Editing form elements
  - Save a personalised form
  - Delete a personalised form
  - Personalising cheques
- Sharing forms with other company files

TASK - **Contact management [Cards]**

- Creating, editing and deleting cards
- Keeping in touch with your contacts
    - Personalised letters
        - Microsoft Word template fields
    - Mailing labels
    - The contact log
    - Other ways to keep in touch
    - View a contact on a map
- Grouping your contacts
    - Identifiers
    - Custom lists
- Synchronising cards with Microsoft Outlook
    - Exporting your AccountRight cards to your Outlook contacts
    - Importing your Outlook contacts to AccountRight
    - Outlook Sync Mapping Reference
- Custom card fields
- Card identification codes
- Card pictures
- Reviewing your contact information
- The Cards List
    - Finding a customer or supplier
    - Customise the Cards List
    - Group columns in the Cards List
    - Filter the Cards List
    - Conditional formatting in the Cards List
- Attaching documents to your cards

TASK - **End of period procedures**

- Month-end procedures
  - Record depreciation
  - Lodge your activity statement (Australia only)
    - Prepare your activity statement online
      - Get ready to lodge activity statements online
    - Prepare your activity statement manually
      - BASlink FAQs
    - Recording your ATO payment or credit
    - Changing your accounting basis
    - Fuel tax credits
    - Simpler BAS reporting
  - Prepare your GST return (New Zealand only)
    - AIM worksheet for adjustments and shareholders salary (New Zealand only)
    - Filing an AIM statement of activity (New Zealand)
    - Using the AIM provisional tax option (New Zealand)
  - Lock a period
- End of financial year tasks
  - Provide information to your accountant
  - Enter end-of-year adjustments
  - Close the financial year
  - Change the last month of a financial year
- End of payroll year tasks
  - Prepare payment summaries
    - Payment summaries: Introduction
    - Payment summaries: Company information
    - Payment summaries: Service provider details
    - Payment summaries: Payment summary fields
    - Payment summaries: Reportable employer super
    - Payment summaries: Reportable fringe benefit
    - Payment summaries: Review the payment summaries
    - Payment summaries: Verify your payroll information
    - Payment summaries: Lodge the payment summaries
    - Payment summaries: Make a backup
    - Payment summaries for multiple ABN branches
    - Reprinting a payment summary
  - Close the payroll year
  - PAYG tax tables
- Transacting in closed financial years

TASK – **Importing and exporting data**

- Exporting data
  - Export options
  - Exporting customer or supplier details
  - Bulk update customer and supplier cards
  - Bulk update item prices
- Importing data
  - Import options
  - Importing an accounts list from MYOB Accountants Office
  - Import error log
  - Dealing with duplicate records when importing
- Import and export fields
- Importing and exporting tips
- Opening an export file in Excel
- Using an import template

TASK - Getting help and support

- Troubleshooting online files
- Installation troubleshooting
- AccountRight library service issues
- AccountRight server locator service issues
- AccountRight server service issues
- Error: 'Hosts' file setup incorrectly
- Error: "The ServicePortNo registry key for AccountRight Server isn't valid"
- Error: "You must specify a linked account"
- Error: Arial or Tahoma font can't be found
- Error: Connection error
- Something's gone wrong error: "DataException (10000)"
- Error: Huxley.Application has stopped working
- Error: InvalidLicenceToken (100007)
- Error: Non-zero value
- Error: Not enough items on hand to record this transaction
- Error: Port unavailable, blocked, not enabled, or already in use
- Error: Something's gone wrong and AccountRight needs to close
- Something's gone wrong error: "System.Data.SqlServerCe.SqlCeException"
- Something's gone wrong error: "System.InvalidOperationException"
- Something's gone wrong error: "System.NullReferenceException"
- Error: The Base Filtering Engine (BFE) service doesn't exist or can't be started
- Error: Windows shared folder can't be created
- Error: AccountIdNull or AccountNull
- Fixing display issues
- Speed and performance tips
- Error: ValidationException
- Error: "PurchaseEventLine_ItemTotalAmountUnBalance"
- Error: DataInvalid
- Something's gone wrong error: "System.Runtime.InteropServices.COMException"
- AccountRight not responding
- Error: "PayrollCategory_InvalidStpCategory"
- Error: "Unable to open company file"
- Error: "The serial number doesn't match your account"
- Error: "You have indicated that the transaction is to be paid electronically"
- AccountRight and Windows 7
- Using TeamViewer for MYOB remote access

Glossary