



NDA

TRAINING TASMANIA

RTO Provider Code: 60034

MYOB - Advanced

National Competency Standard (ICT):

BEBFIA304 Maintain a general ledger

BSBFIA401 Prepare financial reports

BSBFIA412 Report on financial activity

Course Objectives

This course is designed for current users of MYOB who wish to extend their knowledge and learn more about the customising and exporting aspects of MYOB. A hands-on approach is taken during this course. The exercises are designed to impart relevant skills and knowledge by having participants work through real-life examples and scenarios.

Pre-Requisites

Participants should be familiar with setting up a new company and using the day to day features of MYOB such as invoicing and purchasing.

Duration

1 Day

Course Outcomes

1. Customise features and preferences
2. Apply password and user security to company files
3. Work with custom lists, custom fields, and identifiers
4. Manage your petty cash drawer
5. Use MYOB's job tracking features
6. Manage fixed assets
7. Connect MYOB And Microsoft Office
8. Complete end of year transactions and close the financial year
9. Customise forms.

Optional Assessment

This is a nationally recognised training program. Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit(s) of competency outlined above (additional fee applies – please enquire when you book). Exercises completed during the course will be used as evidence towards unit competency. Participants who choose not to be assessed will receive a Certificate of Attendance.

MYOB - Advanced

Course Content

Customising MYOB

- Preferences
- System, Windows, Reports & Forms, Banking, Sales, Purchases, Inventory, Security, Emailing

Security

- Administrator Password
- Users
- Creating a New User
- Signing In
- Changing a Password
- Editing a Profile
- Inactivating a Profile
- Deleting a Profile

Custom Fields

- Introduction
- Custom Lists
- Custom Fields
- Identifiers
- Assigning Custom Fields
- Custom Price Levels
- Setting Levels for an Item
- Assigning Levels to a Customer
- Filtering Using Custom Fields
- Reports Using Custom Fields

Petty Cash

- Setting Up For Petty Cash
- Raising a Float
- Accounting for Petty Cash
- Paying Bills With A Credit Card
- Reconciling The Credit Card Account

Jobs

- Creating a Job Structure
- Detail Jobs
- Header Jobs
- Creating A Header Job
- Creating Detail Jobs
- Creating Job Budgets
- Using Jobs
- Checking Job Status
- Creating A Reimbursable Expense
- Checking the Reimbursable Expenses List
- Invoicing Reimbursements

Fixed Assets

- Creating Accounts for Fixed Assets
- Receiving Loan Monies
- Purchasing a Capital Asset
- Loan Repayments
- Recording Depreciation
- Selling An Asset
- Writing Off The Asset

MYOB And Microsoft Office

- Letters
- Default Letter Templates
- Modifying a Default Template
- Creating a New Template
- Sending a Bulk Letter
- Sending an Individual Letter
- Mailing Labels
- Exporting to Excel

End of Year

- Stock Take
- Stock Take Adjustment Accounts
- Performing Stock Take Adjustments
- Depreciation
- Bad Debts
- Writing off the Debt
- Settling The Bad Debt
- Prepayments
- Pro Rata Prepayment Adjustment
- Accrued Expenses
- Closing A Financial Year
- Start of Year Adjustments

Customising Forms

- The Customise Forms Window
- Creating A New Custom Form
- Customising the Form
- Selecting Objects
- Arranging Objects
- Moving, resizing and rotating
- Formatting Objects
- Adding A New Data Field
- Adding Other Objects
- Deleting Objects
- Saving the Form