

my.MYOB

An Introduction for Accountants in Practice

my.MYOB provides you with a number of self-serve resources to help you make better use of your software and time.



What does my.MYOB offer?

As an online tool, my.MYOB is available to you at all times. It

provides easy access to:

- + Our constantly updated Knowledge Base
- + A simple Support Request area
- + Update your practice contact details
- + Sign up for our regular eBulletin newsletters
- + Manage staff access to AccountRight Live files
- + Product downloads
- + Your invoices
- + Make product recommendations to clients; and have your say on our Community Forum.

Levels of access

There are three different levels of access for my.MYOB:

- + Administrator: can update details of the Practice, download software, view invoices and also add, remove and update the details of other staff members. They can also make other staff members Administrators.
- + Partner Administrator: can manage staff access to AccountRight Live files. A person can be both an administrator and a partner administrator, but they will need to be set up with both roles.
- + General User: Anyone with a my.MYOB login can update their own details such as name, contact number, role, access the Knowledge Base, log a support request, subscribe to eBulletins, participate in the community forum or recommend a product to a client (provided the Practice has chosen to enable this function).

The Administrator selects the access level when they set up staff in My Account > Maintain Users.

Accessing my.MYOB

For Australian Clients: <https://my.myob.com.au>

For New Zealand Clients: <https://my.myob.co.nz>

Enter your email address and password. If you have a my.MYOB login and have forgotten your password, please click the link on the Welcome page "Forgot your password?" and a new one will be sent to you. If you do not have a my.MYOB login, please see the my.MYOB administrator in your practice. They will be able to create one for you. Otherwise, please contact your MYOB Client Manager to have them register your practice.

Knowledge Base

Our Knowledge Base has thousands of articles, with more published all the time. These articles cover everything from installations to application functionality and they're tailored to the products you own. All you need to do is enter in the phrase or software message you want to look up and let the search engine find the best answers. To access, log in to my.MYOB then click on the link on the main page, or hover your mouse over Support in the Purple Bar at the top of the Page and click on Knowledge Base.

Support Requests

my.MYOB allows easy logging of your Support Requests. It will save you time and lets you get on with your work while we investigate your query. The more information you give us about your query, the quicker we'll be able to resolve it. Software messages are a great help, as are screenshots that you can attach to each request. If it is outside MYOB business hours you can still log your support request without having to wait for the phone lines to open. On average we respond to requests within 2 business days. This time will vary depending on the number of online requests logged and the complexity of the requests logged.

How to Log a Support Request or check on the progress of an existing one

As an online tool, my.MYOB is available to you at all times. It provides easy access to:

- + Log into my.MYOB.
- + Click on the Create Support Requests link near the bottom of the page. Alternatively, hover your mouse over support in the purple bar at the top of the page and click on Support Requests.
- + You will see a list of your existing support requests; either click on one to check the current status, or
- + Click Create New Support Request.
- + Complete the form that comes up on the screen.
- + Attach any documentation that is relevant.
- + Click Submit.

Providing staff with access to shared client AccountRight Live files

Through My.Account > Manage online file access staff with my.MYOB Partner Administrator access can allocate practice staff to AccountRight Live company files where clients have invited a Practice contact as an AccountRight Live Administrator. Online file access can also be managed through the Clients tab of Practice Online provided you have both Administrator and Partner Administrator access.

Getting access to eBulletins

eBulletin is a regular communication from MYOB. It:

- + announces the release of products,
- + allows for the download of new releases,
- + provides training schedules for online webinars
- + provides information on known issues; and
- + provides hints and tips on how to use our products.

All software support requests are covered by your maintenance. There is no extra charge. Also covered are software updates and enhancements. Maintenance does not include one off work such as server migrations, installations, reinstallations, network management, or third party software (i.e. Microsoft) management.

Updating Practice Details

It is important you keep your practice details up to date. It ensures you get any relevant information or updates the first time they are sent. my.MYOB Administrators can edit, add or delete staff members in your practice by going to My Account > Maintain Users Good tip: To avoid duplication you can change the drop down list to show all contacts before creating new ones on your account.

Updating your own details

Anyone with a my.MYOB login can update their own details such as name, contact number or role. You can also manage your eBulletin subscription with just a few simple clicks. Log into my.MYOB.

To update your details

- + Click on Edit Profile in the top right corner of my.MYOB or hover on My Account and click on My Details.
- + Update information about yourself in the top section of the screen.

Please note if you are an Administrator you can do this for all contacts in your Practice by editing their details in Maintain Users.

If you aren't receiving eBulletins today you can simply request them.

- + Hover on My Account and click on My Details.
- + Enter a tick in the box under Receive eBulletin from MYOB in My Account.
- + Select the products you wish to receive eBulletin content on.
- + Click Update.

Fact Sheet

Product downloads

my.MYOB Administrators have access to download products and releases through my.MYOB, provided the client has a valid maintenance agreement.

To download your products:

- + Click on the Download your Product Upgrade link near the bottom of the page, or, hover your mouse over My Products in the purple bar at the top of the page and click on Downloads.
- + Then select the product you are looking for from the drop down.

Recommend products to your client

Partners are encouraged to set up new accounts via Transaction Processing in Practice Online.

Managing your account

The easiest way to manage your current account balance is to view it on my.MYOB. A my.MYOB Administrator can download your invoices, both current and historical, check outstanding balances and pay current invoices.

Community Forum – have your say

The Forum provides you with the opportunity to connect with other accountants. Like other professional forums, you drive the discussion. So far we have seen some of our clients helping each other out with tips and shortcuts, especially useful if you are using a part of the software you don't necessarily spend a lot of time in.

Need more information?

For more information about the service, contact your Client Manager or contact MYOB on the details below.

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