The **MYOB** Essentials Upgrade

Get ready for the new MYOB Essentials with this quick overview of key information you need to become an MYOB Essentials power user. Keep this interactive PDF saved on your desktop to save you time later.

We've highlighted the top 4 things to know about the upgrade:

1

Why and when am I getting upgraded?

We're upgrading Essentials to a new platform, giving you access to new features and more frequent updates, improved workflows and a cleaner, mobile-responsive experience.

When will I know I'm being upgraded?
We'll let you know in the days leading up to the upgrade. Watch your inbox for emails and for messages on your Essentials dashboard.

2

What do I need to do before the upgrade?

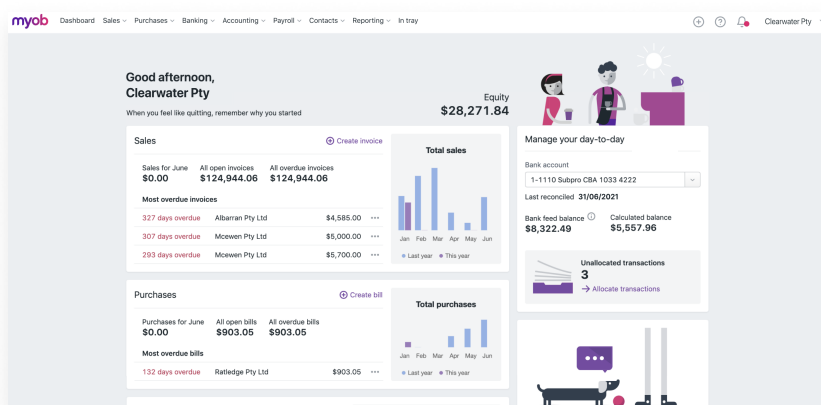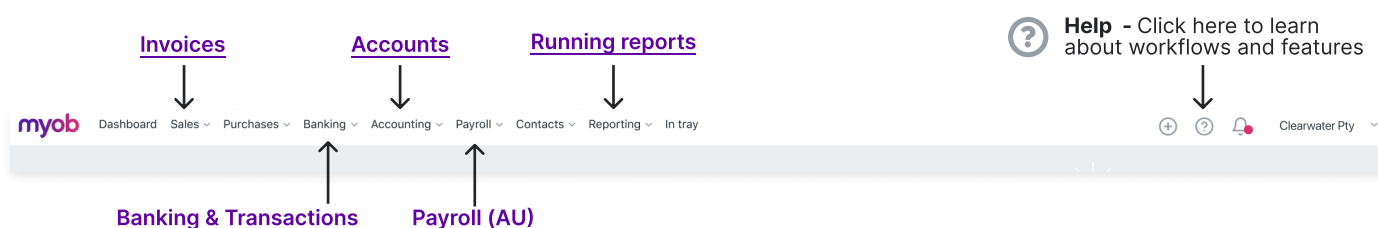We recommend you read through these **pre-upgrade tasks**, to ensure your business is ready.

3

What are the key changes?

The new Essentials gets the job done and more. Now with improved features, a new look and reorganised menus. Some of the changes are highlighted below. To find out more, see the **key changes to your file** and **changes to Payroll** help pages.

The new user interface

Click the links below to learn more about...

Invoices   **Accounts**   **Running reports**

Help - Click here to learn about workflows and features

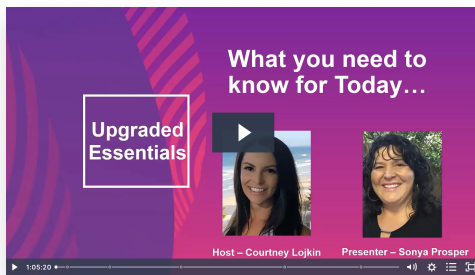**Banking & Transactions**   **Payroll (AU)**

Explore how to navigate around

Free online training

Watch these detailed training videos to get a sneak peek into what's new. And bookmark these videos to access after the upgrade when you're seeking guidance.

Payroll changes (AU)

General changes after upgrading

Online learning to get you up to speed. Book into a live webinar with a certified trainer to understand key changes after the upgrade and ask questions you may have.

Register for our live webinars

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4 My business has just been upgraded, what next?

Checklist of onboarding tasks

✓ **Is your bank reconciliation up to date?**

✓ **Review your bank feed rules**

✓ **Is your chart of accounts set up correctly?**

✓ **Personalise your business with settings**

✓ **Set up invoice templates**

Payroll Onboarding

✓ **Check your employee details**

✓ **Get familiar with new Pay items**

✓ **Using super portal? Set up Pay super**

✓ **Using Your Pay? Set up MYOB Team**

Getting into your file

How do I access my upgraded business?
Access it through **app.myob.com**. Remember to edit your bookmark.

How can I see all my businesses, upgraded or not?
Access your full list of businesses through **app.myob.com**.

Upgrades FAQ

- **My reports aren't providing the right information, how do I customise these?**

- **How do I print off reports and invoices?**

- **My report settings don't seem to be saving when I refresh the page, what do I need to do?**

- **Why do default hours appear when I'm paying a casual employee?**

- **Where can I find payroll summaries and payslips?**

- **What's the process for bank reconciliations?**

- **How do I download and use the new Invoices app?**

More info

Essentials Training:
https://academy.myob.com/

Can I offer feedback? 💬

Keep an eye on your inbox. Shortly after the upgrade, we'll send through a survey where you can tell us what you think. We appreciate and consider your thoughts on how to improve our product.

myob