Welcome to M.Y.O.B. 7.5!

Click the icons below to view important information about M.Y.O.B. that's not included in your M.Y.O.B. manuals.

What's new in M.Y.O.B. 7.5 -

Overview of M.Y.O.B.'s newest features

Important information for users of Corel WordPerfect Version 8

Read this before using OfficeLink

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You may need to create a new custom report to replace your existing report

Users of Microsoft Small Business Financial Manager for Windows 95 -

Working with M.Y.O.B. account numbers

If you need help upgrading to M.Y.O.B. 7.5 -

Locating an M.Y.O.B. Certified Consultant near you

Copyright information

Users of Microsoft Small Business Financial Manager for Windows 95

Working with M.Y.O.B. account numbers

In M.Y.O.B., account numbers have a prefix to indicate account type, which is followed by a dash and a 4-digit account number. If you use Microsoft Small Business Financial Manager for Windows 95, a plug-in analysis program for Microsoft Excel™, to analyze the information in your M.Y.O.B. data file, account numbers will appear in Microsoft Excel without a dash to separate the prefix from the account number.

What's new in M.Y.O.B. 7.5

Many new features have been added to M.Y.O.B. 7.5. Please read the following topics to gain an overview of these new features and what they mean to you and your business. For more detailed information, refer to your M.Y.O.B. 7.5 Upgrade Guide.

- **M.Y.O.B. OfficeLink in M.Y.O.B. 7.5 for Windows**
- **AppleScript support in M.Y.O.B. 7.5 for Macintosh**
- **Checking data files for errors**
- **Autosave**
- **Multiple customised versions of M.Y.O.B. forms**
- **Printing multiple copies of M.Y.O.B. forms**
- **Greater flexibility in printing statements**
- **Greater flexibility in performing customer and supplier inquiries**
- **Improved bank account reconciliation**
- **HTML-format reports**
- **Support for CaseWare software**

M.Y.O.B. OfficeLink in M.Y.O.B. 7.5 for Windows

M.Y.O.B. OfficeLink, M.Y.O.B.'s exciting new tool for sharing your accounting information with popular word processing and spreadsheet programs, is the most important feature in M.Y.O.B. 7.5 for Windows. (OfficeLink is not available with the Macintosh version of M.Y.O.B.) With OfficeLink, you can export information to Microsoft Excel, Microsoft Word and Corel WordPerfect more seamlessly than ever before.

Using OfficeLink, you can export any of M.Y.O.B.'s 100-plus reports to an active Excel template, where you can create graphs, develop budgets and perform "what-if" analyses to help you anticipate changes in your business – before they occur. OfficeLink includes an Excel template for each of M.Y.O.B.'s reports. With OfficeLink and M.Y.O.B.'s ready-to-use customer letter templates, you can create personalised mailings to thank selected customers for their business, remind customers to pay overdue accounts, or notify them that an item you normally keep in stock is on back order.

To take advantage of OfficeLink's capabilities, you must be using Microsoft Excel Version 7.0 (Office 95) or 8.0 (Office 97); Microsoft Word Version 6.0, 7.0 (Office 95) or 8.0 (Office 97); or Corel WordPerfect Version 6.0a, 6.1, 7.0 or 8.0.

To learn more about using OfficeLink, read chapter 3, "Using M.Y.O.B. OfficeLink," in the M.Y.O.B. 7.5 Upgrade Guide. You also can read this topic in the Online Procedures guide to get started with M.Y.O.B. OfficeLink.

Note: If you install a newer version of Word, Excel or WordPerfect, you may need to reinstall M.Y.O.B.

Note: If you install a newer version of Word, Excel or WordPerfect, you may need to reinstall M.Y.O.B.

If you've installed M.Y.O.B. OfficeLink and in the future you upgrade your word processing or spreadsheet program to a newer version that is compatible with OfficeLink, you will have to reinstall M.Y.O.B. in order to take advantage of OfficeLink with the newer program. Please consult the M.Y.O.B. Getting Started manual for instructions on reinstalling M.Y.O.B. program files.

AppleScript support in M.Y.O.B. 7.5 for Macintosh

M.Y.O.B. now enables Macintosh users to import and export M.Y.O.B.'s accounting information using a series of AppleScript suites. With M.Y.O.B. 7.5, transferring your business information between M.Y.O.B. and other AppleScript-aware applications is easier than it ever has been before. Using AppleScript scripts, you can transfer information from M.Y.O.B. to database applications, e-mail programs and the like. (AppleScript is not available with the Windows version of M.Y.O.B.)

Greater flexibility in printing statements

Using M.Y.O.B., you now can print customer statements that include a range of activity dates. You can specify both a starting date and an ending date – effectively giving you a cutoff date. Earlier versions of M.Y.O.B. allowed you to enter a starting date but all activity from that date forward was printed on the statements.

Greater flexibility in performing customer and supplier inquiries

When you search for sales and purchase documents using the Inquiry Register window, you have greater flexibility than with previous versions of M.Y.O.B. You now can look up customer invoices using either the customer's purchase order number or the invoice number assigned to the sale in M.Y.O.B. With purchases, you can search by either the supplier's invoice number or the purchase number assigned to the transaction in M.Y.O.B.

Improved bank account reconciliation

When you reconcile a bank account using the Reconcile Accounts window in the Checkbook Command Centre, the window will display only the unreconciled transactions that have a date on or before the bank statement date you specify. In previous versions of M.Y.O.B., *all* unreconciled transactions for the selected account were displayed, even those that occurred after the bank statement date.

HTML-format reports

With M.Y.O.B. 7.5, you can save your reports as HTML (Hypertext Markup Language) files so they can be viewed with World Wide Web browsers.

Checking data files for errors

One of the most proactive things you can do for your business is to spend a few minutes each day to create a daily backup of your company's M.Y.O.B. data file. By doing so, you'll keep your self out of trouble if an unexpected calamity occurs, such as total computer failure or a damaging lightning storm.

Another weapon you can use in your battle to keep your accounting information safe is M.Y.O.B.'s data verification feature. By checking your data file for errors, data verification can catch minor inconsistencies in your company's data file before they cause serious problems. The ability to do this has been added to M.Y.O.B. 7.5.

Note:What errors, exactly, does the data verification feature look for?
To make data verification a daily routine, the verification process can occur at the same time as the process of making a backup, if you wish. Or, if you wish to check your data file for errors immediately, you have that option, as well.
To automatically check your data file for errors during the backup process:

1.   From the Setup menu at the top of your computer screen, choose Preferences to open the Preferences window.

2.   In the Preferences window, click the Security tab.

3.   Mark the box labeled Check Data File for Errors During the Backup Process, then click OK.

4.   The next time you begin to back up your data file, the data verification process will begin. For a detailed description of how the data verification feature works during the backup process, see your User Guide.

To manually check your data file for errors:

1.   From the File menu at the top of your computer screen, choose Verify Data. A message will appear, describing the data verification process. Click OK in the message to begin the process of checking your data file for errors.

Note:Data verification will take some time
2.   When the data verification process is complete, a message will appear, describing the results of the test. If the process was successful, congratulations! Click the OK button to end the data verification process.
         If, on the other hand, data verification discovered errors in your data file, you should strongly consider restoring the most recent backup of your data file and using that data file instead of this one. (Once you restore the backup, we recommend that you check *that* data file for errors, as well.)

Note:What errors, exactly, does the data verification feature look for?

Generally speaking, M.Y.O.B.'s data verification feature scans everything inside your data file – from the transaction entries you've made into the M.Y.O.B. system to the computer code that makes up the basic foundation of any M.Y.O.B. data file.

Note:Data verification will take some time

The process of checking your data file for errors is complex and time-consuming. Depending upon the size of your data file, the process may take several minutes.

Autosave

You can use M.Y.O.B.'s new Auto-Save feature to automatically save changes to your data file after a certain amount of time has passed. If you want to use Auto-Save, click the Security tab in the Preferences window, mark the box labeled "Automatic Save Every _____ Minutes," then enter, in whole minutes, how often you want your data file to be saved. You can enter a maximum of 120 minutes in this field

Support for CaseWare software

You now can export your M.Y.O.B. accounting information to a comma-separated text file that can be used with CaseWare client write-up software, which is popular with many accountants. Using M.Y.O.B.'s new AccountantLink selection, you can create a CaseWare-compatible file containing your company information, detail account information and, if you choose, journal entries.

Multiple customised versions of M.Y.O.B. forms

M.Y.O.B. 7.5 now allows you to design and use many different versions of each of the forms available in M.Y.O.B. Before you could have only one customised version of any form, now if you want you can have three different invoice formats or different size delivery labels depending on whether you're sending a package or a crate!

Here's a list of forms affected by this change, along with the windows you can use to create a new customised form, modify or print an existing one as well as the prefix prompted for new form file names.

Form:	Window used to specify a customised form to print:
Invoices	Print Invoices
Cheques	Print Cheques
Statements	Print Statements
Purchase orders	Print Orders
Mailing labels	Print Labels

Each of the windows in the previous table has a Selected Form field, like the one in the Print Invoices window, shown below.

By clicking on the search icon to the right of the field you can display a Search List of all currently available customised forms. This is shown in the following illustration
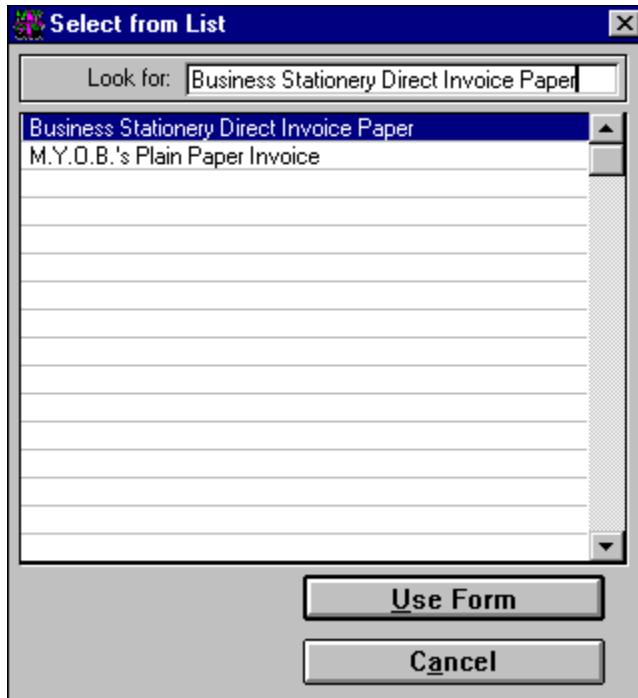
The list shows all available forms for the form type you have selected. The first two items in the list are the "standard" inbuilt form templates. One fits the stationary supplied by Business Stationary Direct. The second as it's name implies is for use with plain paper.

You can purchase Business Stationary Direct forms specifically designed for M.Y.O.B. using the order form that came in the box with your package. You can also order by phone on 0800 833414 or by fax on 0800 833621.

The other forms shown in the list are previously customised forms. Unlike the two standard forms they are kept externally to the program in a folder called Forms. This folder is kept within the M.Y.O.B. program folder.

Select the form you wish to customise and click the Use Form button. A window similar to the following illustration will appear.
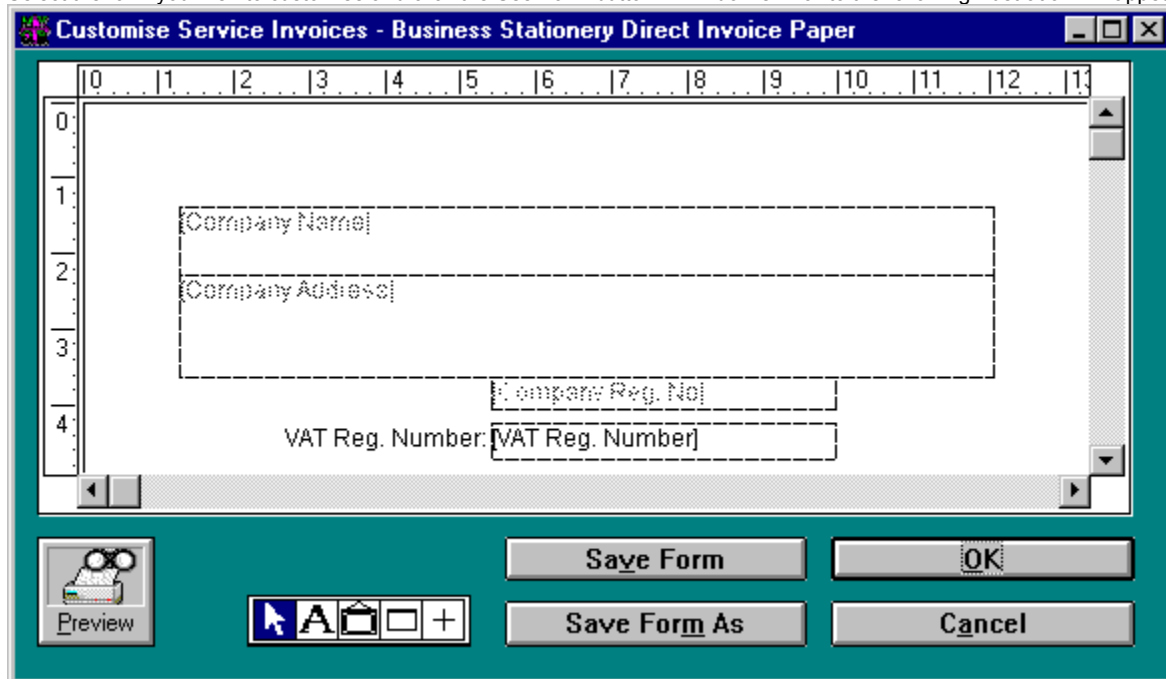
The form customisation window works exactly as in previous versions of M.Y.O.B., except for the addition of Save and Save As buttons. Having made any changes you wish click on the Save or Save As buttons to permanently record the changes. Usually this will cause a window similar to the following illustration to appear.

Save As

Form File Name: SINV0514

Description: Service Invoice for shop

[Cancel] [OK]
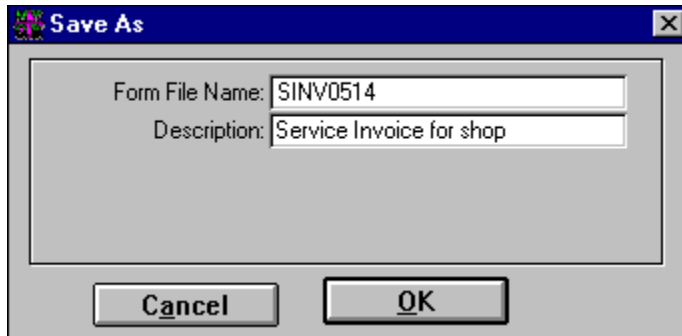
The file name prompted for your new customised form is made up of a prefix denoting the form type and todays date in the form MMDD. You can change this to whatever you like(eight characters for Windows and thirty for Macintosh). Here's a list of forms that can be saved externally along with their default name.

Form:	Default File Name:
Cheques	"CHKMMDD"
Invoice Statements	"ISTMMDD"
Activity Statements	"ASTMMDD"
Item Invoice	"IINVMMDD"
Service Invoice	"SINVMMDD"
Professional Invoice	"PINVMMDD"
Packing Slip(Item)	"IPSMMDD"
Packing Slip(Service)	"SPSMMDD"
Packing Slip(Professional)	"PPSMMDD"
Delivery Label(Item)	"ISLMMDD"
Delivery Label (Service)	"SSLMMDD"
Delivery Label (Professional)	"PSLMMDD"
Item Purchase	"IPOMMDD"
Service Purchase	"SPOMMDD"
Professional Purchase	"PPOMMDD"
Mailing Labels	"LBLMMDD"

Printing multiple copies of M.Y.O.B. forms

M.Y.O.B. 7.5 now allows you to print multiple copies of invoices, statements and other commonly printed forms. (Previously, you were able to do this only if your operating system's Print dialog box contained a field that allowed you to specify the number of copies you wanted. Depending upon the printer you're using and the software used to operate it, you may not have had his capability.)

Here's a list of forms affected by this change, along with the windows you can use to indicate the number of copies you want printed.

Each of these windows now has a Print __ Copies field.

Form:	Window used to specify number of copies:
Invoices	Review Invoices Before Printing
Cheques	Review Cheques Before Printing
Statements	Review Statements Before Printing
Purchase orders	Review Orders Before Printing
Mailing labels	Review Labels Before Printing

Please note: If your operating system Print dialog box allows you to specify the number of copies you want to print, **you generally should enter 1** if you've already specified the number of copies you want using M.Y.O.B. If you specify multiple copies both in M.Y.O.B. and in the Print dialog box, you may end up with many more copies of the form than you'd planned. There are some cases, in which you may find it useful to enter amounts both in M.Y.O.B. and in the Print dialog box.

When you print multiple copies using M.Y.O.B., all the copies for one form will be printed before the second form is printed; all copies of the second form will be printed, then all copies of the third form will be printed, and so on. If you print multiple copies using the Print dialog box, all the forms will be printed once, then a complete set of copies will be printed, followed by another full set of copies, and so on, until all the copies you requested have been printed.

Click here to see an example.

You can use this feature to your advantage when printing mailing labels. Say you're printing customer mailing labels, and you want three labels for each customer to be printed in succession in each set of labels, and you want two sets of labels to be printed. To do this, enter 3 in the Review Labels Before Printing window (to print three labels in a row for each customer), and enter 2 in the Print dialog box (to create two sets of labels). A total of six labels will be created for each customer.

Example:

Printing multiple copies using M.Y.O.B.:	Printing multiple copies using the Print dialog box:
Invoice A	Invoice A
Invoice A	Invoice B
Invoice A	Invoice C
Invoice B	Invoice A
Invoice B	Invoice B
Invoice B	Invoice C
Invoice C	Invoice A
Invoice C	Invoice B
Invoice C	Invoice C

If you've customised the Invoice Inquiry report

You may need to create a new custom report to replace your existing report

If you've been using M.Y.O.B. for some time and have customised the Invoice Inquiry report, please print a copy of this report to be sure the headings on the report are printing properly. Changes to the design of the report may cause the headings on the custom report to print over top of one another. If this is the case with your report, you must create a new custom report using M.Y.O.B. 7.5 to replace the one you've been using. For more information about creating a new custom report, refer to Part 20, Reports, in the Online Procedures Guide.

We recommend that you use the same name for your new report as you used for the older version; that way, the old, incorrect version will be overwritten (erased), and you won't confuse it with the newer custom report.

If you need help upgrading to M.Y.O.B. 7.5

If you need help implementing M.Y.O.B. 7.5 or upgrading from a previous version of M.Y.O.B., consider contacting an M.Y.O.B. Certified Consultant. Certified Consultants are independent businesspeople who have joined with BestWare to offer dedicated and specialised support to M.Y.O.B. customers. Each Certified Consultant is knowledgeable about the vital aspects of doing business with M.Y.O.B.

Certified Consultants are located across the country. To find the one closest to you, please refer to the online Certified Consultants Directory. While running M.Y.O.B. 7.5, choose BestWare Products & Services from the Help menu, then choose Certified Consultants Directory from the submenu that appears.

Important information for users of Corel WordPerfect Version 8

There are several issues you should be aware of if you plan to use Corel WordPerfect 8 with M.Y.O.B. OfficeLink. Please read the following topics to learn more about these issues:

➤ **Users of the Windows NT operating system will experience reduced performance when using WordPerfect 8 with OfficeLink**

➤ **Users of Corel WordPerfect Version 8 may need to follow additional steps in order to use OfficeLink**

➤ **Users of Corel WordPerfect who are upgrading from a previous version of M.Y.O.B. 7.5 will see extra templates for mail merging**

Users of the Windows NT operating system will experience reduced performance when using WordPerfect 8 with OfficeLink

If you're using the Windows NT operating system on this computer, you can use M.Y.O.B. OfficeLink and Corel WordPerfect 8 together to create mail-merge letters, but you will experience reduced performance. If you have WordPerfect Version 7 or an OfficeLink-compatible version of Microsoft Word (Version 6.0., 7.0 or 8.0), you may wish to use that program instead to create your mail-merge letters.

Note: This issue affects only those using Windows NT. If you're using Windows 3.1x or Windows 95, your system will perform satisfactorily with OfficeLink and WordPerfect Version 8.

Users of Corel WordPerfect who are upgrading from a previous version of M.Y.O.B. 7.5

If you've been using a previous version of M.Y.O.B. 7.5 and you installed OfficeLink, you'll see extra templates for mail-merge letters that aren't needed with the current version of M.Y.O.B. 7.5.

In the previous version of M.Y.O.B. 7.5, there was a set of letter templates (the sample letter forms that are used to create your personalised letters) that could be used with WordPerfect Version 6, and a separate set of letter templates that could be used with WordPerfect Version 7. The templates for WordPerfect Version 6 are unchanged, but new templates have been added which can be used with *both* Version 7 and Version 8.

Here's a list of the old templates and the new templates that can be used in their place:

Previous WordPerfect templates	Current WordPerfect templates
7APOLOGY.WPT	APOLOGY.WPT
7BACKORD.WPT	BACKORD.WPT
7BLANK.WPT	BLANK.WPT
7BOUNCED.WPT	BOUNCED.WPT
7COLL_1.WPT	COLL_1.WPT
7COLL_2.WPT	COLL_2.WPT
7COLL_3.WPT	COLL_3.WPT
7COLL_FI.WPT	COLL_FI.WPT
7FAXCOVR.WPT	FAXCOVR.WPT
7RESOLUT.WPT	RESOLUT.WPT
7THANKYO.WPT	THANKYO.WPT

If you wish to remove the old templates, you can do so by locating them in the Letters folder inside the folder containing M.Y.O.B. 7.5, then by deleting the template files as you would any other file. **We strongly suggest that you use caution in doing this, however.** If you accidentally delete a template you wish to use in the future, you'll have to reinstall M.Y.O.B. 7.5 again to replace it.

Refer to this topic for a more detailed list of all the templates in the newest version of M.Y.O.B. 7.5.

Users of Corel WordPerfect Version 8 may need to follow additional steps in order to use OfficeLink

If you wish to use Corel WordPerfect Version 8 with M.Y.O.B. OfficeLink to create personalised letters for customers and others:

- You must have the Converter component of Corel WordPerfect Suite 8 installed on your computer. If you're not sure whether the Converter component is installed on your computer, reinstall the Converter component.
- It also may be necessary to remove all Desktop Application Director (DAD) icons from the desktop.

Please note that these steps are necessary *only* for people using WordPerfect Suite 8. If you're using an earlier version of WordPerfect, these steps don't apply to you, and you should skip them.

Reinstalling the Converter component in Corel WordPerfect Suite 8

Please refer to your Corel WordPerfect Suite 8 documentation for instructions on reinstalling the Converter component.

Removing Desktop Application Director (DAD) icons from the desktop

The Desktop Application Director (DAD) is a collection of icons that appear on the Windows 95 taskbar and give you quick access to WordPerfect Suite 8 applications. In isolated instances, the DAD icons may be incompatible with M.Y.O.B. OfficeLink, however; if this is the case, the icons cannot be displayed while you are using OfficeLink. If problems arise while you're using WordPerfect 8 with OfficeLink, we recommend that you disable the DAD icons as a possible solution to the problems you're experiencing.

If you use DAD icons to launch WordPerfect, Quattro Pro and other Corel applications, you can temporarily remove the DAD icons. If you never use these icons, you may wish to remove them permanently. Choose one of the following topics to learn more about disabling DAD icons.

> **To remove DAD icons temporarily**

> **To remove DAD icons permanently**

To remove DAD icons temporarily

If you haven't changed the settings in Corel's DAD Properties window, Corel's DAD icons will be displayed automatically when you start your computer. The DAD icons appear in the notification area of the Windows 95 taskbar, as shown in the illustration below. (Note: Depending upon the programs you've installed additional icons may be displayed.)
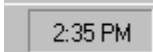

To remove Corel's DAD icons from the notification area of the Windows 95 taskbar temporarily, complete the following steps:

1.	Place your mouse pointer over any of the DAD icons and click the right mouse button. The following menu will appear:

2.	Choose Exit DAD. The DAD icons will be removed, but will reappear the next time you restart your computer.

When you've completed these steps, your taskbar should look similar to this one:

Again, depending upon the other programs you've installed, some icons may be displayed here.
For more information about making changes to DAD, refer to the Corel WordPerfect Suite 8 User's Guide.

To remove DAD icons permanently

If you haven't changed the settings in Corel's DAD Properties window, Corel's DAD icons will be displayed automatically when you start your computer. The DAD icons appear in the notification area of the Windows 95 taskbar, as shown in the illustration below. (Note: Depending upon the programs you've installed additional icons may be displayed.)
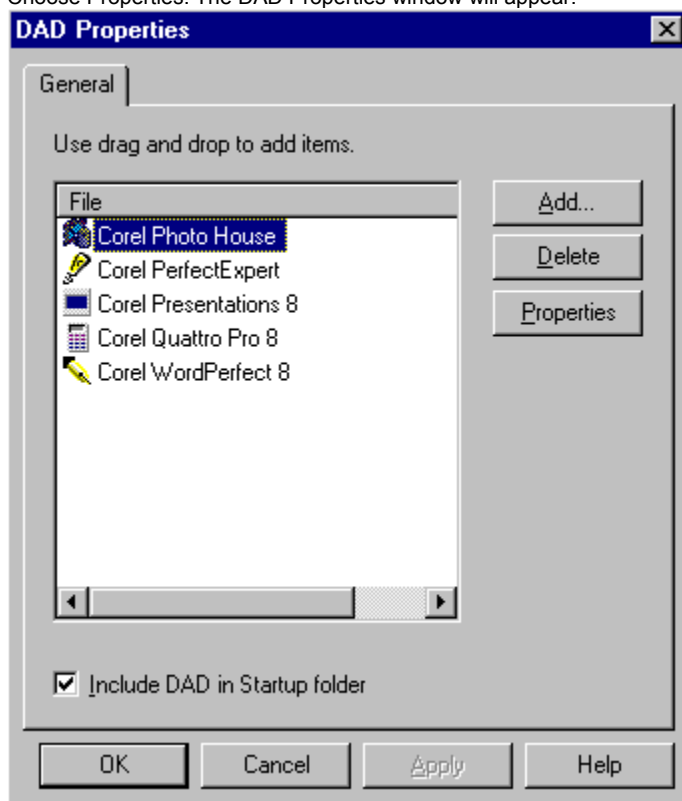

To remove Corel's DAD icons from the notification area of the Windows 95 taskbar permanently, complete the following steps:

1. Place the place your mouse pointer over any of the DAD icons and click the right mouse button. The following menu will appear:

2. Choose Properties. The DAD Properties window will appear:

3.   Unmark the Include DAD in Startup folder option, then click OK.
4.   Place the right mouse button over any of the DAD icons in the taskbar notification area again and click the right mouse button to redisplay the menu pictured above. This time, choose Exit DAD. The DAD icons will be removed.

When you've completed these steps, your taskbar should look similar to this one:

Again, depending upon the other programs you've installed, some icons may be displayed here.
For more information about making changes to DAD, refer to the Corel WordPerfect Suite 8 User's Guide.

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