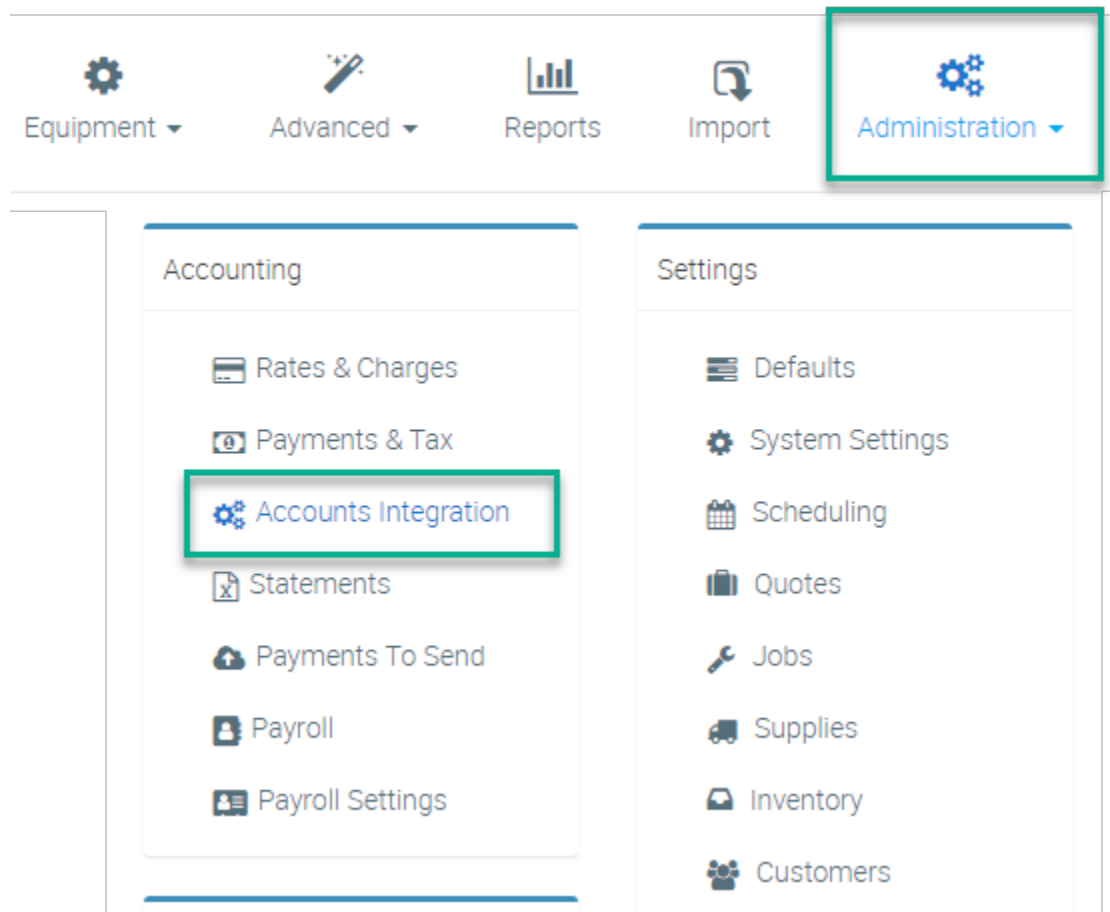


# Integrating Ascora with MYOB Essentials

Ascora can integrate directly with most major accounting packages – Xero, QuickBooks, MYOB Live and MYOB Essentials. Ascora runs two-way, full integration which means data will flow from Ascora into your accounting package as well as from your accounting package back into Ascora to ensure your Customers, Invoices and Payments are always synchronised. To connect Ascora to your MYOB Essentials Accounting Package:

1. From the **Administration Icon** in the Top Menu, choose the **Accounts Integration** option.



2. Select **MYOB Essentials** from the dropdown list. A summary will display on the screen to explain the integration further.

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## Accounting Package Integration

Select the Accounting Package to be used and configure the various required settings.

Accounting Package

MYOB Essentials

▼


Not Specified

MYOB Live

MYOB Essentials

QuickBooks

Xero



3. Click the **Connect to Accounting Package** button to commence the integration. You will be re-directed to MYOB Essentials to authorise Ascora to access your accounting data.



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## Accounting Package Integration

Select the Accounting Package to be used and configure the various required settings.

Accounting Package

MYOB Essentials ▼



4. Enter your MYOB Essentials log-in details and click the **Sign in** button.



## Sign in to MYOB

Email

Password

 [Show](#)

☐ Stay signed in for 12 hours ⓘ

Sign in

[Forgotten your password?](#)

5. MYOB will ask you to provide Ascora access to your MYOB Essentials Account. Click the **Allow access** button to allow Ascora to integrate with MYOB Essentials. You will then be re-directed back to Ascora to finish the integration.

### Allow access to your MYOB Account?

Ascora is requesting permission to access the following from your MYOB Account:

Essentials Accounting

Allow access

No thanks

**What is an MYOB Account?** Your MYOB Account is the username and password you use to log into Ascora. It's also used to access my.MYOB, which is a portal that provides an easy, secure way for you to interact with MYOB for information about your software, customer support and service. You can use my.MYOB to update your account and business details, and make payments.

6. Once you have successfully connected Ascora with MYOB Essentials, a list of account code options will display. These tell Ascora which account codes in MYOB Essentials to send different information to. Work through the list and select the applicable account codes from the dropdown lists. When you are ready, click the **Save Accounting Settings** button.

**A** – Select the applicable business/company name

**B** – Select the applicable region

**C** – Select the account to record customer payments that you capture in Ascora. Ascora will also poll this account to pull-down payment information recorded directly in MYOB Essentials and mark the applicable invoices as paid in Ascora (for example, when a customer pays by direct debit and you reconcile that payment in MYOB Essentials via your bank feed)

**D** – Select the default payment method used by your customers. You can override this default when recording payments in Ascora

**E** – Select the account for Ascora to push Supplier Invoice income \*\*\*\*\*

**F** – Select the default account to record Expenses. You can override this default when recording Expenses against a Job

**G** – Select the account to record income from Labour

**H** – Select the default account to record income from the sale of Supplies. You can set different Materials Income Accounts for specific Supply Items if required - see Configure Specific Account Codes for Individual Supplies

**I** – Select the default account for recording credit notes issued to Customers

**J** – Tick the checkbox to push line items on an invoice across to MYOB Essentials, in addition to the Invoice summary information

MYOB Business	Pauls Lawn Mowing	A
Region	Australia	B
Account Number To Receive Payments	1-1000 - Cheque account	C
Default Payment Method from Accounts	Cash	D
Default Supplier Invoice Income Account	(no code)	E
Default Expense Account	(no code)	F
Default Labour Income Account	4-2400 - Sales 1	G
Default Materials Income Account	4-2600 - Sales 2	H
Default Credit Note Account Income Account	4-2400 - Sales 1	I
Push Individual Invoice Lines	<input type="checkbox"/>	J
<div>Save Accounting Settings</div>		✓

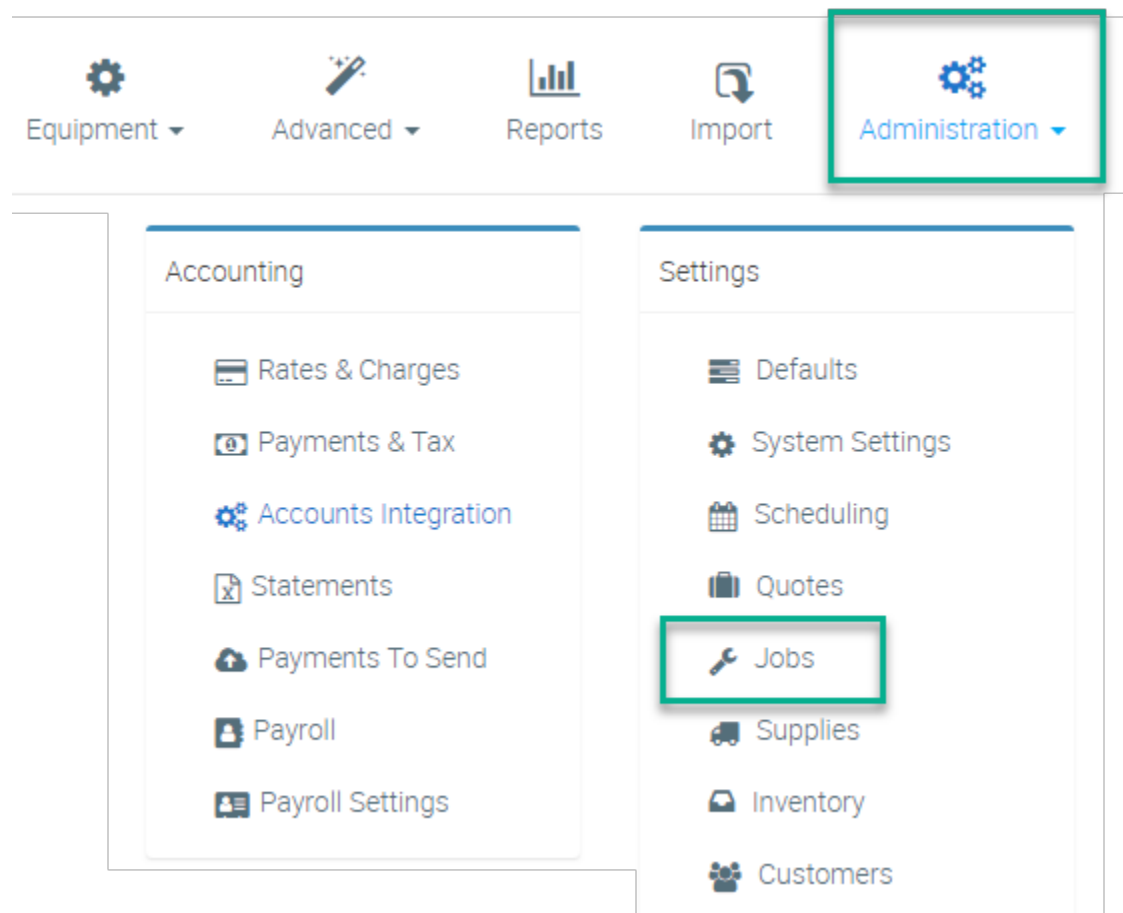
7. Ascora is now integrated with MYOB Essentials and will ask if you wish to import customer information. Click **Yes, import all my customers** to import customer information from MYOB Essentials immediately. Alternatively, click **Not right now** to import data at a later time using the Import Icon in the Top Menu.

## Configure Specific Account Codes for Different Job Types

When you create a Job Type in Ascora, you can choose to assign unique Labour and Materials Income Account Codes to it. For example, you can set a Domestic Job Type to push income to Domestic Labour and Domestic Materials income accounts in MYOB Essentials.

Note that you do not need to configure specific Account Codes for different Job Types - any Job Type that does not have a specific Labour and/or Materials Income Account Code assigned to it will use the default Labour and Materials Income Account Codes configured in the main Accounts Integration settings.

1. From the **Administration Icon** in the Top Menu, choose the **Jobs** option.



2. Under the Job Type section, click the **+Add New** button to create a new Job Type, or click the **Edit** button to edit an existing Job Type.

## Job Type

+ Add New

Click to Add a new Job Type, or to Edit and existing Job Type.

Available classifications for different types of Job. Select when creating or editing a Job.

Job Types also define the Accounting Income Code used for Labour and Supplies when Invoices are transferred to an Accounting Package.

See [Accounts Integration](#) for further details on linking Ascora to your Accounting Package.

	Name	Colour
 Edit  Delete	Callback	
 Edit  Delete	Commercial	

3. The Job Type details pop-up window will display. Select the required Labour and Materials Income Account Codes from the dropdown lists then click the **Save** button.

### Edit Job Type

Name

Commercial

Account Labour Income Code

200 - Sales

Account Materials Income Code

200 - Sales

Default Job Check List

Please Select

## Configure Specific Account Codes for Individual Supplies

You can configure Ascora to push income generated from a specific Supply Item into a specific Income Account Code in MYOB Essentials. This would typically be used when, for example, you charge out a rate for the use of a particular piece of equipment and have the equipment listed as a Supply in Ascora. By specifying a unique Income Account Code, you can track income specifically generated by that piece of equipment.

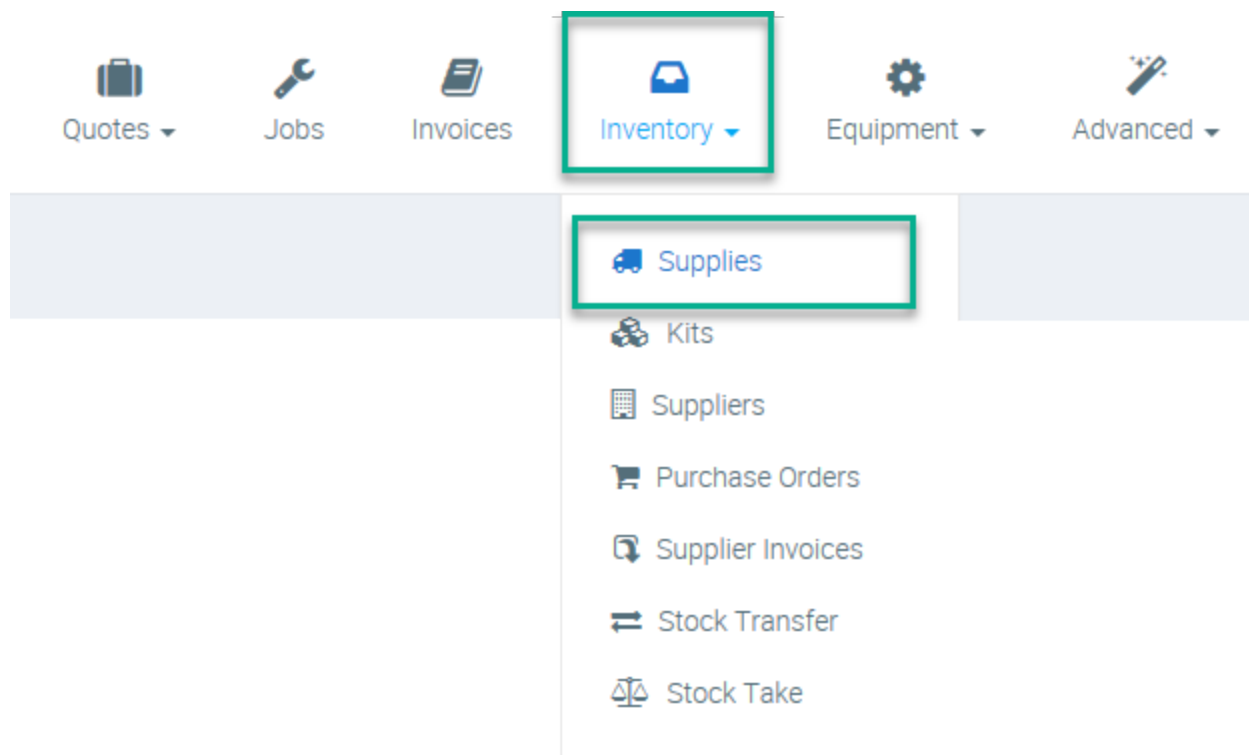


Only change the Account Income Code for an individual Supply if you want to use an Account Income Code other than the default.

You do not need to set the Account Income Code for each individual Supply item – Ascra will, by default, apply the Income Code you selected in the main Accounts Integration settings.




If the (no code) option is displayed for the Account Income Code for any given Supply, Ascra will use the default Account Income Code.

1. From the **Inventory Icon** in the Top Menu, choose the **Supplies** option.



2. Locate the Supply in the Supplies List for which you wish to apply a specific Income Account Code and click the **Edit** button.




## Supplies

Category	Select Category	Supplier	Select Supplier
	Category ↑	Part Number ↑	Description
	BATHROOM VANITIES	1861916-1	RIFCO OVERLAY CABINET SGL DOOR 900X4
	BATHROOM VANITIES	1791615-1	IVY WALL HUNG VANITY 600MM (EA)
	Cables & Connectors	4070-012	3 WAY CONNECTOR RJ45 2XF/1XM+LEAD

3. The Edit Supply pop-up window will display. Select the applicable Income Account Code from the dropdown list then click the **Save** button.

Active	<input checked="" type="checkbox"/>
Must Be Ordered	<input checked="" type="checkbox"/>
Is Favourite	<input type="checkbox"/>
Account Income Code	(no code)
Pack or Box Quantity	1.00

The inventory item must be ordered in multiples of this amount. E.g. if 5 units per box or if stocked in per metre and comes in 5 metres rolls.

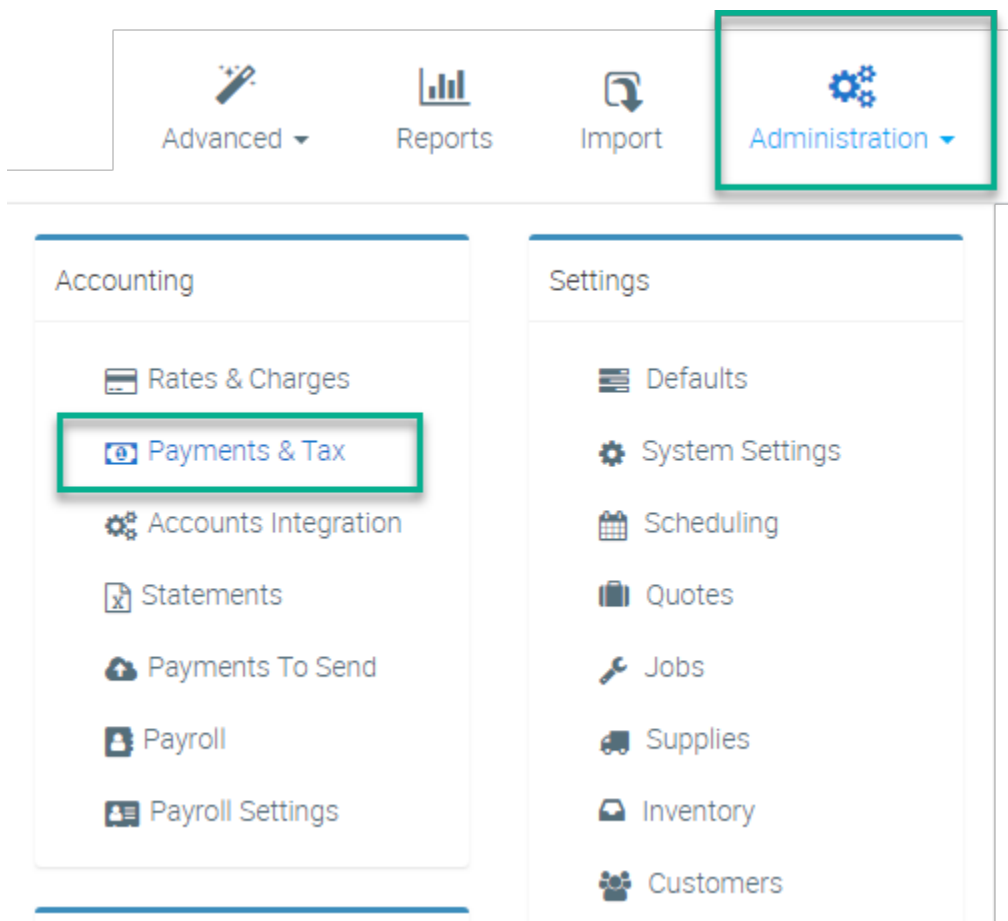
 Delete Supply  Save and Close  Save Cancel

## Configure Account Codes for Credit Card Surcharges

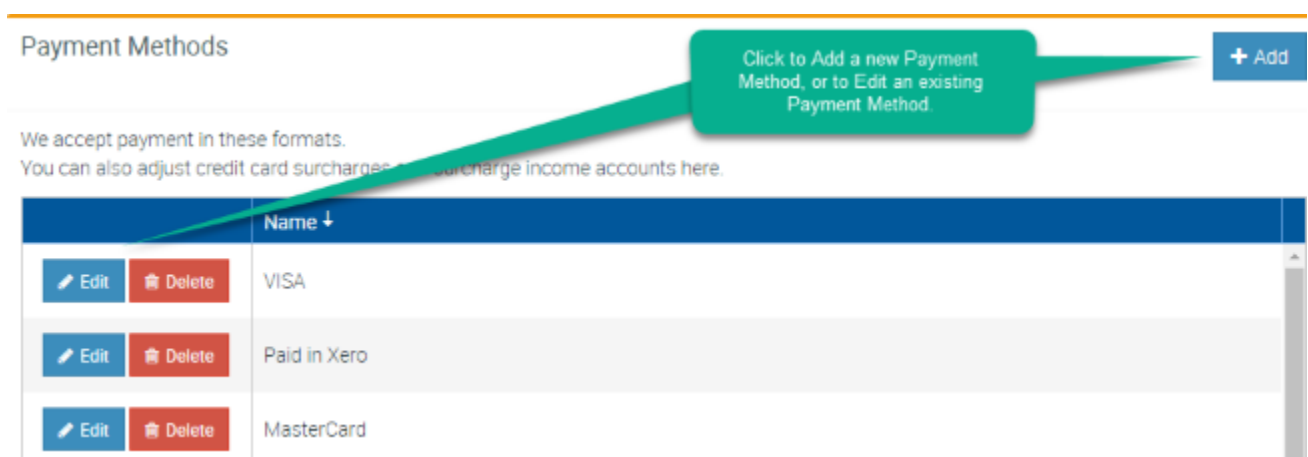
Ascora allows you to (optionally) apply surcharges to credit card payments. You can apply different surcharge amounts to different card types if required and you can also define the Account Code in MYOB Essentials for Ascora to push Surcharge Income into.

1. From the **Administration Icon** in the Top Menu, choose the **Payments & Tax** option.





2. Under the Payment Methods section, click the **+Add** button to add a new Payment Method or click the **Edit** button to edit an existing Payment Method.



3. The Payment Method pop-up window will display. Select the applicable Surcharge Income Account Code from the dropdown list then click the **Save** button.

## Edit Payment Method



Name

Mastercard

Accepted Cards

☐ Visa

☒ Mastercard

☐ Amex

☐ Diners

### Credit Card Surcharge Details

Surcharge Amount

\$0.00



Surcharge  
Percentage

3.00



%

Surcharge Income  
Account

200 - Sales



Save

Cancel