2009-112 - Export Clients/Suppliers to MYOB

Overview:

This procedure will be the same for exporting suppliers, follow the same instructions except the user will be working in the Export Suppliers from MYOB window. *Note:* Ensure there are no extra spaces in, before or after the Export Name when it is created as this will cause an error when export invoices.

Export Clients/Suppliers to MYOB

Open the *Invoicing* tab and click on Export-MYOB icon to open the MYOB – Cloud Window. Click on 'Export Clients' within the window.

| 🐼 MYOB - Cloud | I | | | | | | | | | - • × |
|----------------|--------------------------------|----------|----------------------------|---------|----------------------------|--------------|--------|------------|--------------------|-------------------|
| 🔘 Logon | Online Online | - | | | | | | | | ដ; 其; Settings |
| | | | | | | | | | | |
| Export Invoice | Export Purchase Export Clients | Export : | uppliers Import Account Co | des Imp | ort Tax/Category/Job Codes | Check Inv/Pu | ar Upo | late Balar | nce | |
| | | | | | | | | | | |
| Client Code | Client Name | Active | MYOB Client Name | Active | UID MYOB | UId OPIO | ÇЛ | Err | Select Clients | |
| A-Z | - | Yes | | | | | | 0 | | me |
| ANION | TEST CLIENT FOR RENAME EMP | Yes | | | | | | 0 | 😑 Clear All | Export Univ |
| AUST_WIDE | Australia vvide Transport | Yes | | | | | | 0 | - | C Active in M/OR |
| BADGER | Badger Mining Pty Ltd | Yes | | | | | | 0 | BOLIN | Active in MYOB |
| BANDRILL | Bandicoot Drilling Pty Ltd | Yes | | | | | | 0 | Select All | CMTi ne in iTMS |
| BEAVER | Beaver Manufacturing Co | Yes | | | | | | 0 | | |
| BRIS_ENG | Combined Companies-MYOB1 | Yes | | | | | | 0 | | |
| CAM_METALS | Camelot Sheetmetals Works | Yes | | | | | | 0 | | |
| CASH | Cash Sales | Yes | Cash Sales | Yes | 00921110-6d2a-4218-9bd | | No | 0 | | |
| DIV_1 | DIVISION 1 | Yes | | | | | | 0 | | |
| EAGLE | Eagle Engineering | Yes | | | | | | 0 | Arr Export Clients | |
| ITMS | Sheridan Jansson | Yes | | | | | | 0 | | |
| LUSH_LAND | Mower Land Pty Ltd | Yes | | | | | | 0 | Clients Imported | |
| MISC_CLIENT | м | Yes | | | | | | 0 | - oneno importee | |
| PEL_MARINE | Pelican Marine Services | Yes | | | | | | 0 | Link Clients | |
| PPP | nbjkhgjguiyliu | Yes | | | | | | 0 | | |
| STOCK | FOR STOCK | Yes | | | | | | 0 | 📃 Is Individual | |
| WOMBAT | Wombat Holdings | Yes | | | | | | 0 | | |
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| | | | | | | | | | G Link Clients | 🖶 Print |
| | | | | All C | lients Selected | | | | | |
| | | | | | | | | | | |

The window generates a list of all clients in Opto and will recognise whether the client is active and if they are already in MYOB. Select the Clients for export by **clicking** anywhere on the line of the Clients, then **click** on the **Export** button to begin the export. When the export has finished a message pane appears, **click** on <u>OK</u>.

| A 10/00 - 01 | | | | | | | | | | |
|---------------------|--------------------------------|--------|----------------------------|--|-------------------------------|---------------|------|------------|----------------------|----------------------------|
| 39 MYOB - Cloud | | | | | | | | | | |
| 🗿 Logon | Online Online | • |] | | | | | | | ដ ្រុំ Settings |
| Export Invoice | Export Purchase Export Clients | Export | Suppliers Import Account G | odes Imp | ort Tax/Category/Job Codes | Check Inv/Pu | r Up | date Balan | ce | |
| | | | | | | | | | | |
| Client Code | Client Name | Active | MYOB Client Name | Active | Uid MYOB | Uid OPTO | C/I | Err | 🚨 Select Clients | |
| A-Z | - | Yes | | | | | | 0 | | |
| ANTON | TEST CLIENT FOR RENAME EMP | Yes | | | | | | 0 | Clear All | Export Only |
| AUST_WIDE | Australia Wide Transport | Yes | Australia Wide Transport | Yes | 618975bf-197b-4e93-ac05 | 618975bf-197b | No | 1 | Ciear Air | |
| BADGER | Badger Mining Pty Ltd | Yes | | | | | | 0 | | Active in MYOB |
| BANDRILL | Bandicoot Drilling Pty Ltd | Yes | Bandicoot Drilling Pty Ltd | Yes | 1511bde1-720c-4b2b-870 | 1511bde1-720 | No | 1 | 🔏 Select All | |
| BEAVER | Beaver Manufacturing Co | Yes | 5, | | | | | 0 | | Active in I MS |
| BRIS ENG | Combined Companies-MYOB 1 | Yes | Combined Companies-MYO | C 10 | | î | No | 1 | | |
| CAM METALS | Camelot Sheetmetals Works | Yes | | Export Dor | ie | | | 0 | | |
| CASH | Cash Sales | Yes | Cash Sales | | | | No | 0 | | |
| DIV 1 | DIVISION 1 | Yes | | All selected Clients Exported to MYDB. | | | _ | | | |
| EAGLE | Fagle Engineering | Yes | Fagle Engineering | | | | No | 1 | - Evenent Clients | |
| TIMS | Sheridan jansson | Vec | Sheridan jansson | | | | No | 1 | Export clients | |
| LUSH LAND | Mower Land Phy Ltd | Vec | Mower Land Phy Itd | | ······ | | No | 1 | _ | |
| MISC CLIENT | M | Ver | mower canar grea | | QK | | 140 | 0 | 📒 🛛 Clients Importer | 4 |
| DEL MADINE | Palican Marine Senices | Yes | Palican Marine Senicer | | | | | 0 | — | |
| DOD | a bild minuted in a | Yes | Fencal Manne Services | | 00010100-4100-4025-000- | CC01010C-4100 | | 0 | Link Clients | |
| FFF | nbjkngjgulyllu | res | FOR STOCK | | - 3 4- 0 405 0/ Ch 416/ - 47/ | -24-0405-0661 | | 0 | — • • · · · · | |
| MOMPAT | POR STOCK | TES | FORSTOCK | | a2ueouo5-9660-4116-8471 | d2ueouo5-3001 | | 0 | Is Individual | |
| WUMBAI | wombat Holdings | res | | | | | | U | | |
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| | | | A | All selected G | lients exported to MYOB | | | | | |
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The client can now be viewed in MYOB (example below).

| Search: Enter text to search | × | Customise | Group | Filter | Advanc | ed 🔲 Show Inactive | 2 |
|--------------------------------------|-----------|--------------|----------|-----------------|----------|--------------------|---|
| Name | Card ID | Phone No. 1 | Type | Current Balance | A | Overdue | |
| FAIRFIELD CITY MOWERS AND CHAINSAWS | | 02 9724 4622 | Customer | \$0.00 | | \$0.00 | |
| First Avenue Machinery Sales Pty Ltd | | 07 4161 1722 | Customer | \$0.00 | | \$0.00 | |
| Flowcrete Pty Ltd | | 02 9457 8044 | Customer | \$0.00 | | \$0.00 | |
| Fluid Power Centre | | 08 8952 6999 | Customer | \$0.00 | | \$0.00 | |
| Fluid Power Services Pty Ltd | | 03 6423 1110 | Customer | \$254.10 | \$254.10 | | |
| Footloose Dance Studio | CUS000005 | 02 9987 5689 | Customer | \$0.00 | | \$0.00 | |
| FOR STOCK | | | Customer | \$0.00 | | \$0.00 | |
| Fred Monckton Bearing Centre | | 02 6752 4111 | Customer | \$3,366.22 | | \$3,366.22 | |
| Freedom Irrigation | | 07 4636 4228 | Customer | \$0.00 | | \$0.00 | |
| Fulljames Engineering | | 0428 682 543 | Customer | \$0.00 | | \$0.00 | |
| G & B Stainless | | 07 38036100 | Customer | \$0.00 | | \$0.00 | |
| 8540 | Cards | | | | | | |
| | | | | | | | |