PPMP®
PRACTICE
MANAGEMENT
SOFTWARE

MYOB/PPMP Integration
Setup & Configure

This MYOB/ PPMP integration will allow you to upload your PPMP Payment figure to your MYOB account as a Journal entry.


PLEASE NOTE:
We highly recommend you have your Accountant to help you set this feature up, or someone in the business that has a very good knowledge of the business accounts and accounting practices. It is also assumed that you have already installed MYOB (AccountRight) and have set it up with your chart of accounts. The PPMP/MYOB integration feature is only available in PPMP v9.6.0 and higher. PPMP will NOT rectify or take any responsibility over any errors or mistakes that may occur due to a lack of understanding of your Businesses MYOB accounts and accounting practice. Also, PPMP is not an Accounting business and DOES NOT offer any accounting advice.

To setup the MYOB/ PPMP integration feature please follow the steps below:

1. The first thing you need to do is make sure this feature is activated in PPMP. To activate this feature go to:
   Main Menu > Setup > Computer Resource Usage
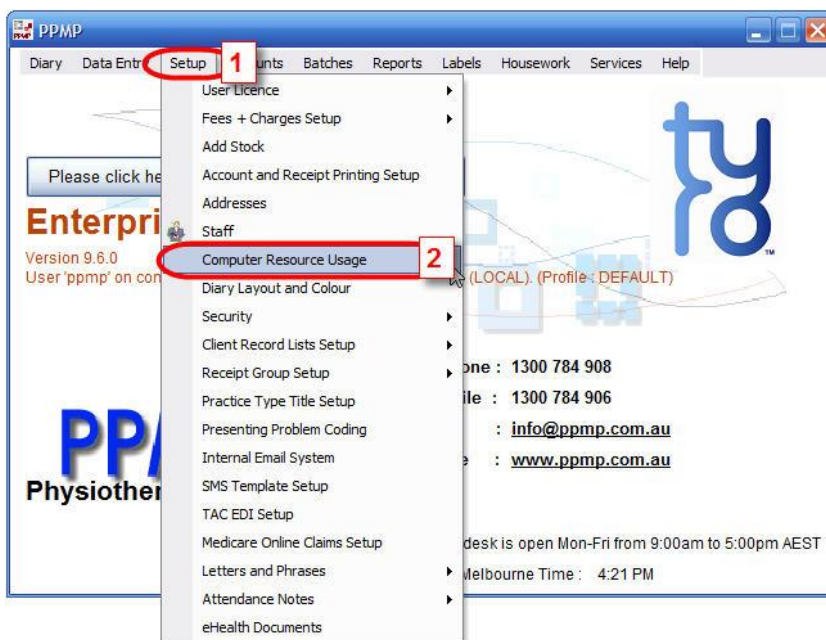
Then click on the "**Program Links**" Tab, select "**Activate MYOB link**" check box and then press "**OK**".
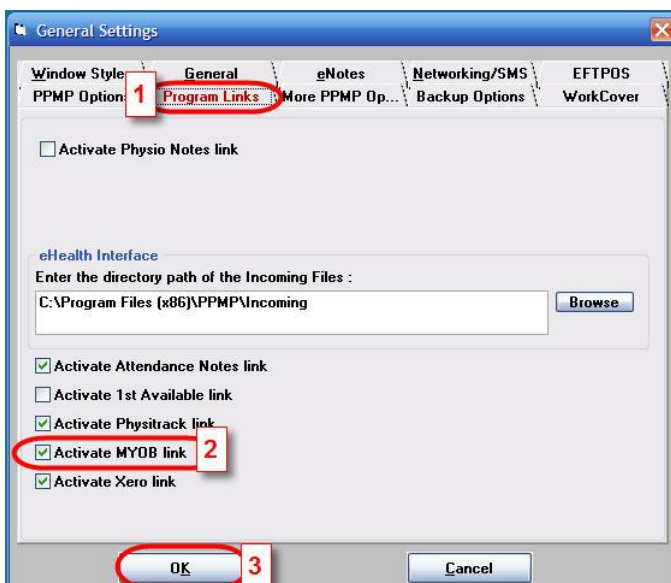

Now you will need to logout of PPMP and then log back in.

2. Once you've logged back into PPMP, you will now find that the "**Transmit MYOB Journal Entry**" link has appeared. This link gives you access to the MYOB Screen where you will transmit your PPMP Debit & Credit financial data into your MYOB Journal Account. To open this screen go to:
Main Menu > Accounts > Transmit MYOB Journal Entry

3. The first screen **Step 1 – Calculate Journal Amount** is where you use the filters to extract the appropriate figure from PPMP that you wish to upload to your MYOB system. The figure can be based on **Payment Types** or **Treatment Charges**, you can choose whether to use the **Cash** or **Accrual** accounting practice. Also, there is a **Show Advanced Options** button that allows you drill down on your **Payment Method**, **Staff** and **Treatment Location** if you wish to extract a more specific payment figure.
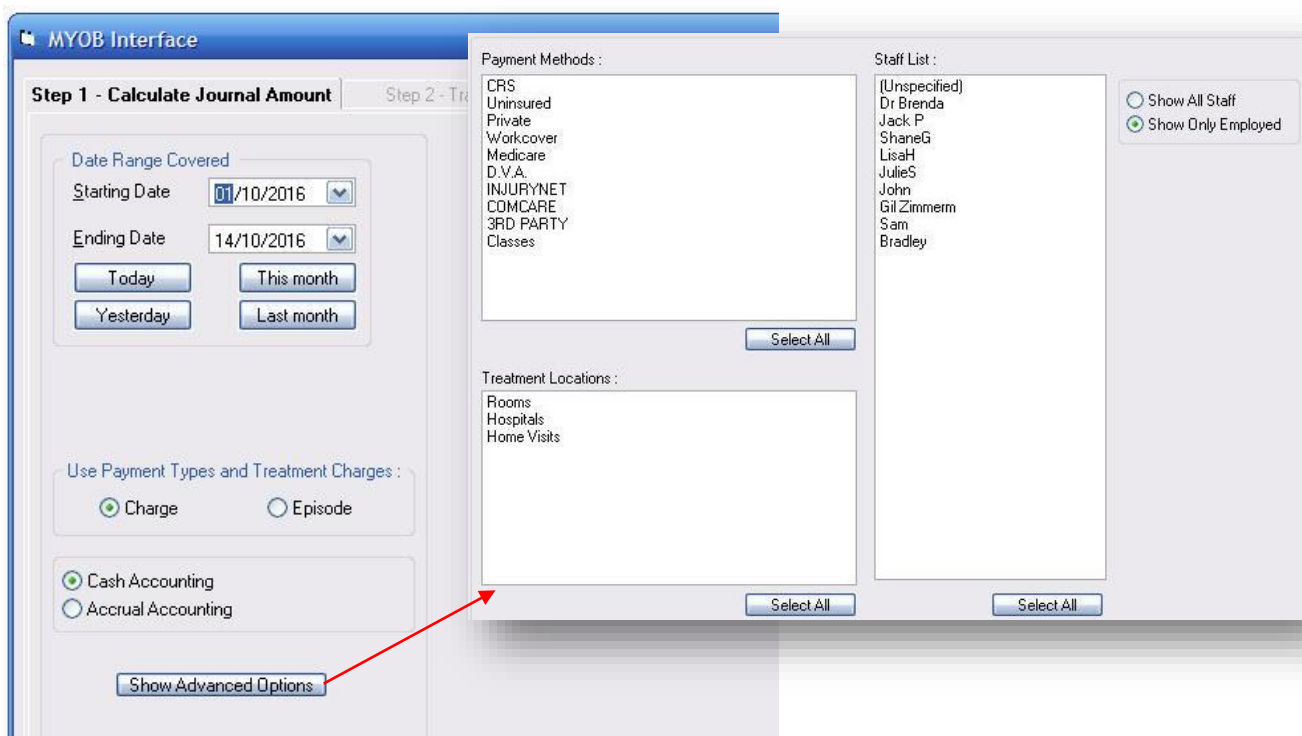
4. Once you have made all your selections, click on the **Calculate Amount** button. PPMP will then move to the **Step 2 – Transmit General Journal Transactions** screen.


5. Once you have clicked the above button the screen **Step 2 – Transmit General Journal Transactions** will appear. If you have selected your filter options, in the first screen, correctly you will find that it will show a dollar value at the buttom of this screen.
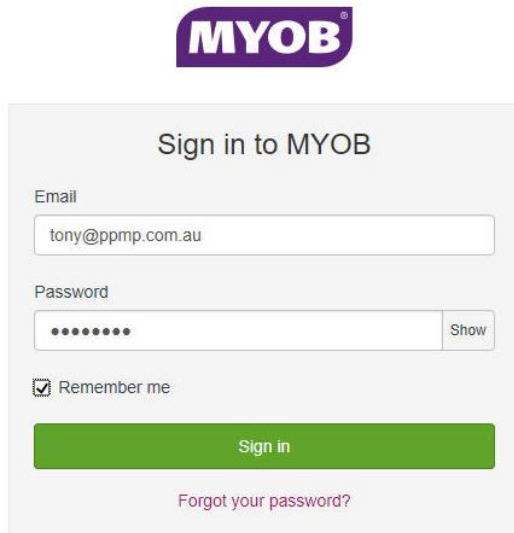

6. You now need to connect PPMP to your MYOB AccountRight software. To do this you need to select **Cloud System**, then enter your MYOB **Username** and **Password** then click the **Load/Refresh Lists** button.
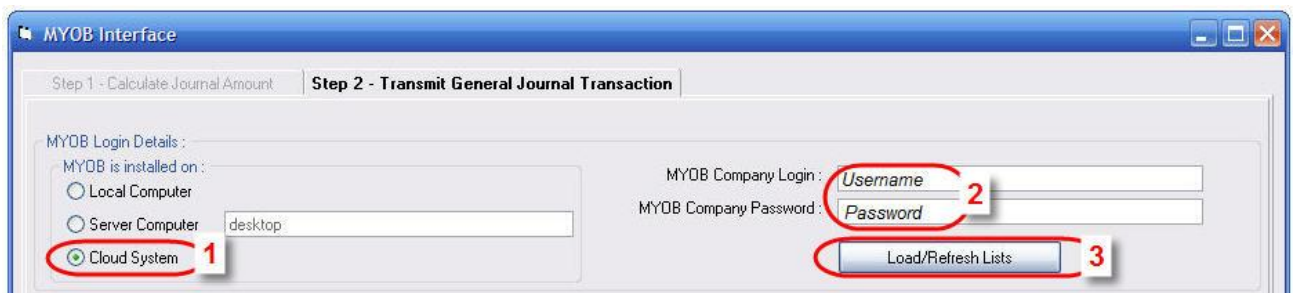
7. If your Username and Password is correct a **Sign In** screen will appear. You might find this screen sometimes hides behind other screens on your PC's desktop. If this is the case, you can find it by hovering your mouse over the shortcut at the bottom of your computer screen and then clicking on the **Sign In** screen when it pops up.
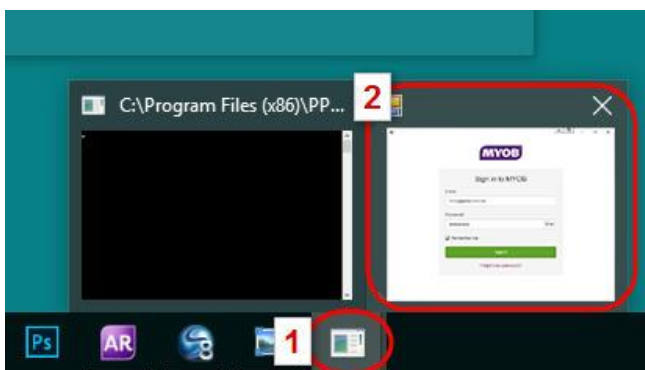
8. In the **Sign In** screen please enter your MYOB **Email** and **Password**, select **Remember me** and then click the **Sign in** button. The **Authorisation** screen will then appear and simply click the **Allow access** button and then return to PPMP.

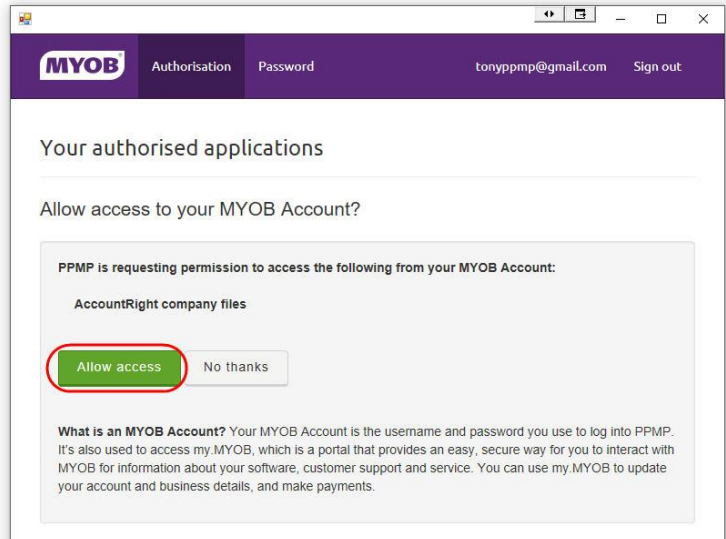9. Once the connection to MYOB is made click the dropdown button and select your **MYOB Company Name**. Then if you have categories setup select your **Category** and then enter a **Description** – this description will show up in your Memo field as part of your MYOB Journal entry. Then select your **Debit** & **Credit** accounts (these account lists are straight out of your MYOB system), then for each corresponding account enter a **Description**, **Job #** (if you have one) and **Tax Code**.

10. Once all account details have been entered click on **Save & Generate MYOB Journal Entry** button to send this information to MYOB. If successful you will receive a message like this:

That's It your done!!

Please Note: The details you entered in the second screen (MYOB logins, account info, etc) will be saved in PPMP so you don't have to enter them in everytime you want to upload to MYOB.

If You Want To Confirm:

To check these enteries in MYOB goto your MYOB system. Click on **Accounts**, **Transaction Journal**. Then click the **General** tab and scroll down until you find the Description and the date of the transaction you just uploaded or if you have many transactions you may want to use the **Date** filter.