

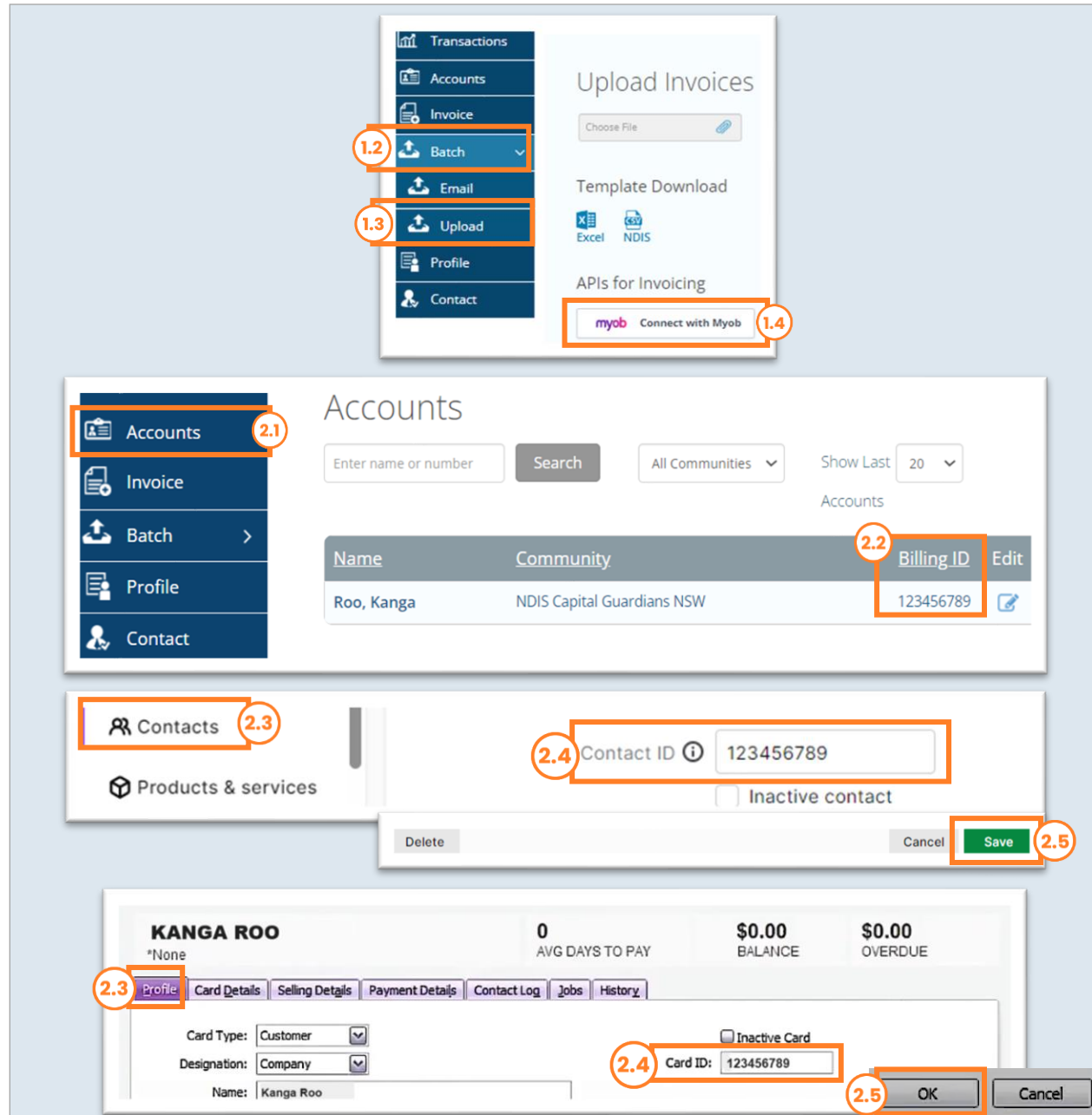
# MYOB Invoicing Setup

## 1 Connect MYOB

- 1.1 Login to **Capital Guardians**
- 1.2 Select **Batch**
- 1.3 Select **Upload**
- 1.4 Select **Connect with MYOB** to be directed to the MYOB API site
- 1.5 Logon to **MYOB**

## 2 Match Billing ID & Contact ID

- 2.1 In **Capital Guardians**, select **Accounts**
- 2.2 Review the **Billing ID**  
**Tip:** The Billing ID is by default the NDIS or Aged Care ID in Capital Guardians. You can Edit to your own Billing ID if needed
- 2.3 In **MYOB**, create or edit a **Contact/Profile**
- 2.4 Update the **Contact ID/Card ID** field to match the **Billing ID** from the Capital Guardians platform
- 2.5 Select **save/OK**



The screenshot displays the Capital Guardians interface for account management and the MYOB interface for contact profile creation. Callouts 1.1-1.5 highlight the navigation path from the main menu to the MYOB connection option. Callouts 2.1-2.5 highlight the selection of an account, the Billing ID, the Contacts section, the Contact ID field, and the Save button in MYOB.

**Capital Guardians Accounts Table:**

| Name       | Community                  | Billing ID | Edit |
|------------|----------------------------|------------|------|
| Roo, Kanga | NDIS Capital Guardians NSW | 123456789  |      |

**MYOB Contact Profile Form:**

**KANGA ROO** \*None      0 AVG DAYS TO PAY      \$0.00 BALANCE      \$0.00 OVERDUE

2.3 Profile    Card Details    Selling Details    Payment Details    Contact Log    Jobs    History

Card Type: Customer (dropdown)       Inactive Card

Designation: Company (dropdown)

2.4 Card ID: 123456789

Name: Kanga Roo

2.5 OK    Cancel

# MYOB Invoicing Setup

## 3 Invoice Setup/Select Item

3.1 Select **Services and items** in the **Field layout** setting

3.2 Select item or **Create item** in the **Item ID** field

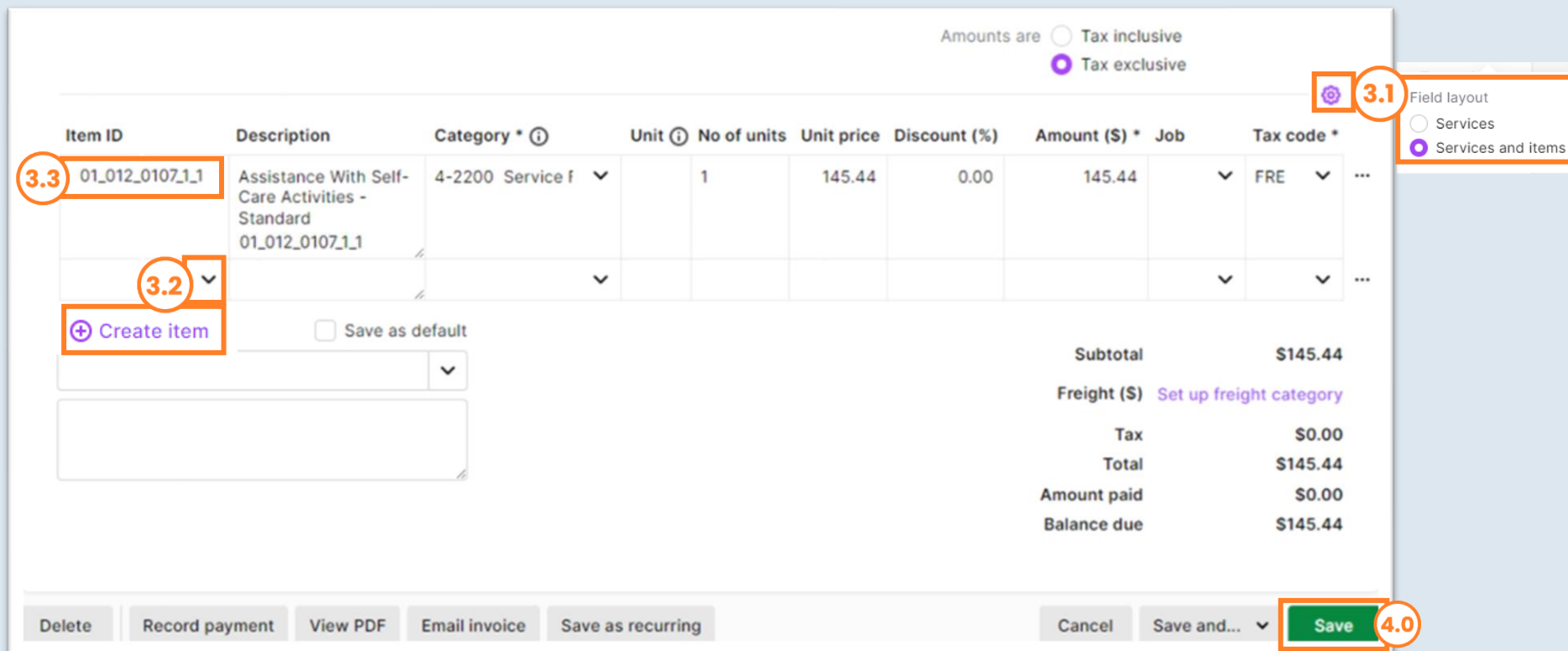
3.3 **(NDIS Providers Only)** Include NDIS Support Item Number in the **Item ID** field, in the same format outlined in the [NDIS Support Catalogue](#) (e.g. 01\_012\_0107\_1\_1)

## 4 Complete & Save Invoice

4.0 Complete and **Save** the invoice in MYOB

**Note:** The invoice will be automatically uploaded in Capital Guardians in 15+ mins, between 9am -5pm (AET).

You can Login to Capital Guardians to check the status of the invoice via the **Transaction** Menu.



The screenshot shows the MYOB Invoicing Setup interface. At the top right, there are radio buttons for "Amounts are" with "Tax inclusive" and "Tax exclusive" options. The "Tax exclusive" option is selected. Below this is a table with columns: Item ID, Description, Category \* ⓘ, Unit ⓘ, No of units, Unit price, Discount (%), Amount (\$) \*, Job, and Tax code \*. The first row has Item ID "01\_012\_0107\_1\_1" (circled with 3.3), Description "Assistance With Self-Care Activities - Standard", Category "4-2200 Service f", Unit "1", Unit price "145.44", Discount "0.00", Amount "145.44", Job "FRE", and Tax code "FRE". Below the table, there is a "Create item" button (circled with 3.2) and a "Save as default" checkbox. On the right side, there is a "Field layout" dropdown menu (circled with 3.1) with "Services" and "Services and items" options. At the bottom right, there is a "Save" button (circled with 4.0). At the bottom left, there are buttons for "Delete", "Record payment", "View PDF", "Email invoice", "Save as recurring", "Cancel", "Save and...", and "Save".

| Item ID         | Description  | Category * ⓘ     | Unit ⓘ | No of units | Unit price | Discount (%) | Amount (\$) * | Job | Tax code * |
|-----------------|--|------------------|--------|-------------|------------|--------------|---------------|-----|------------|
| 01_012_0107_1_1 | Assistance With Self-Care Activities - Standard<br>01_012_0107_1_1 | 4-2200 Service f |        | 1           | 145.44     | 0.00         | 145.44        | FRE | FRE        |

Subtotal \$145.44  
Freight (\$) Set up freight category  
Tax \$0.00  
Total \$145.44  
Amount paid \$0.00  
Balance due \$145.44