

# User Guide

## Export Data – Cards

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### EXPORT DATA - CARDS

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If you are in the process of setting up a new MYOB AccountRight Live company file or a new Xero organisation and you were previously using MYOB AccountRight Live, you can easily export: customer, supplier and employee cards to then be re-imported into your new MYOB AccountRight company file or Xero organisation. This is also the ideal time for some spring cleaning and remove all inactive and duplicate records.

#### IMPORT/EXPORT FILE FORMAT

Card records are exported out of MYOB AccountRight Live as a text (.txt) file which can subsequently be opened and amended in Microsoft Excel. The txt file can then be imported directly in the new MYOB AccountRight Live company file. In Xero the data must be copied to a separate csv template file which is compatible with the software Import/export requirements.

#### IMPORT/EXPORT COMPATIBILITY

The type of data that you can dynamically import depends on what software you are upgrading to:

##### MYOB AccountRight Live

As the Company File structure is the same, the data is imported with the same structure (Customer Cards = Customer Cards etc)

##### Xero

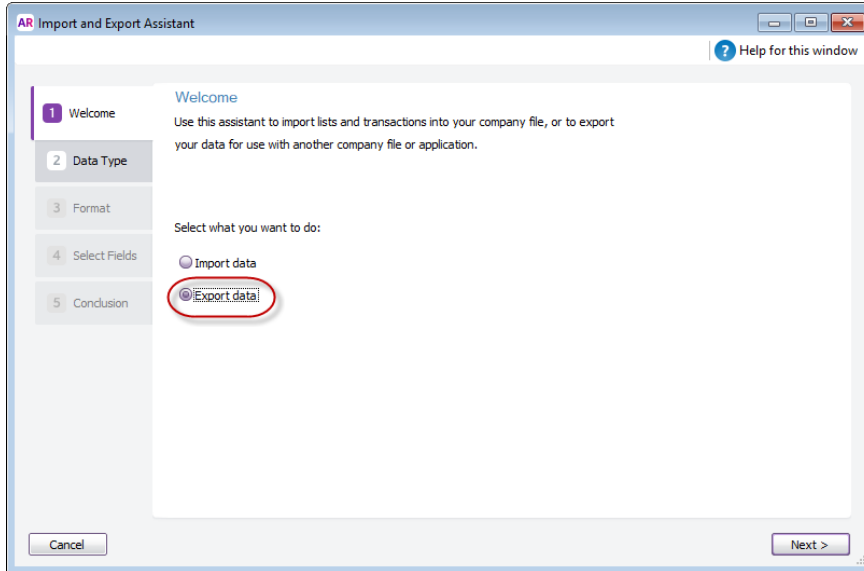
Xero organisation structure is different; therefore the data imports as follows:

- Customer and Supplier Cards are imported as **Contacts**
- Employee Cards **cannot be imported** and must be re-entered manually

## How to export cards from MYOB AccountRight

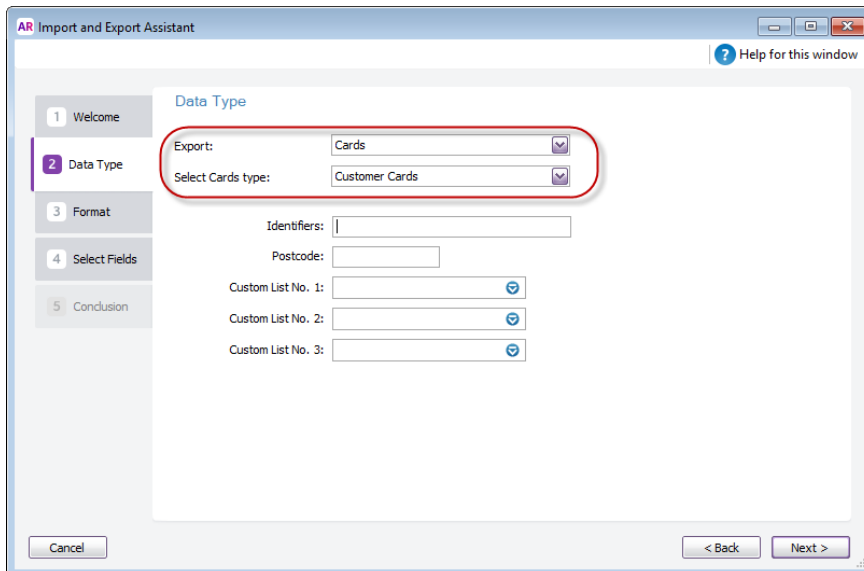
1. From the MYOB Command Centre click on File → Import/Export Assistant

→ *The Import and Export Assistant Wizard screen opens (Step1 – Welcome)*



2. Select [Export Data]

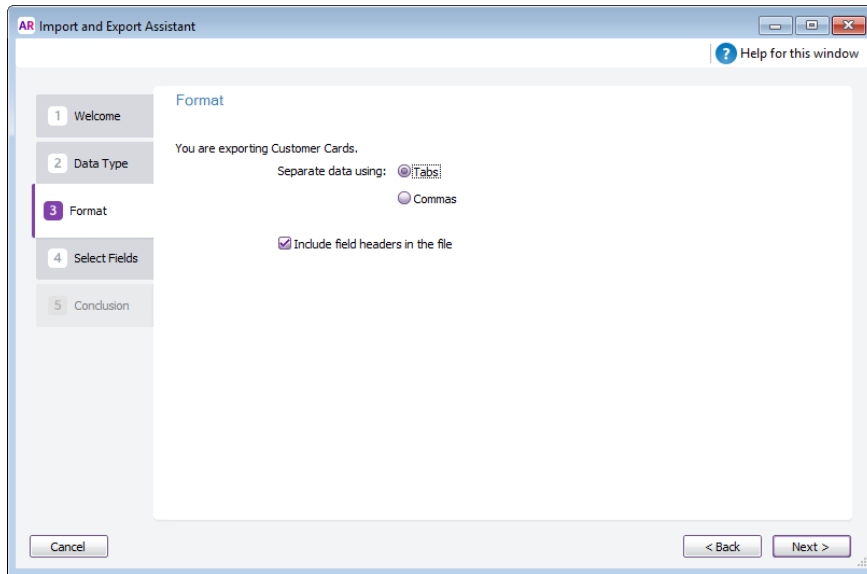
→ *Step 2: Data Type*



3. Select the following  
Export                      Cards  
Select Card Type        Customer/Supplier/Employee Cards

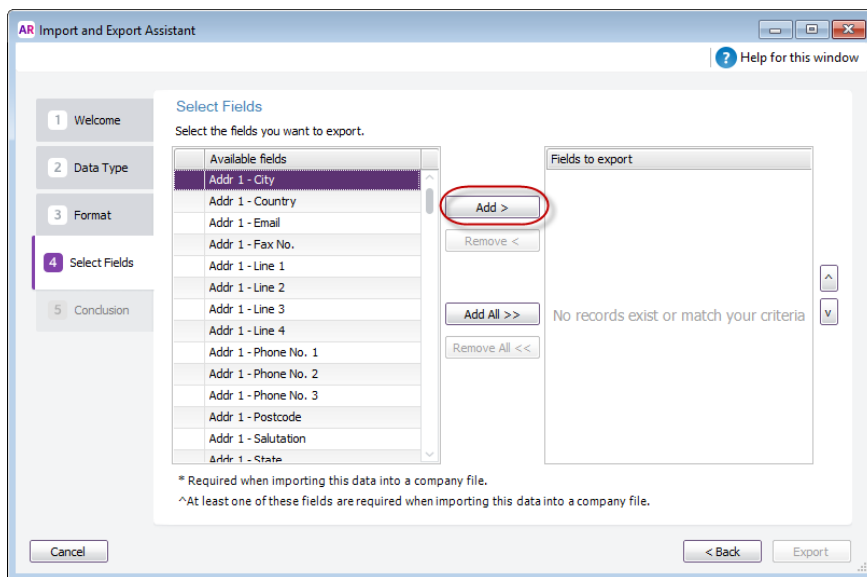
4. Click on [Next >]

➔ *Step3: Format*



5. Do not alter the default format settings, click on [Next >]

➔ *Step 4: Select Fields*



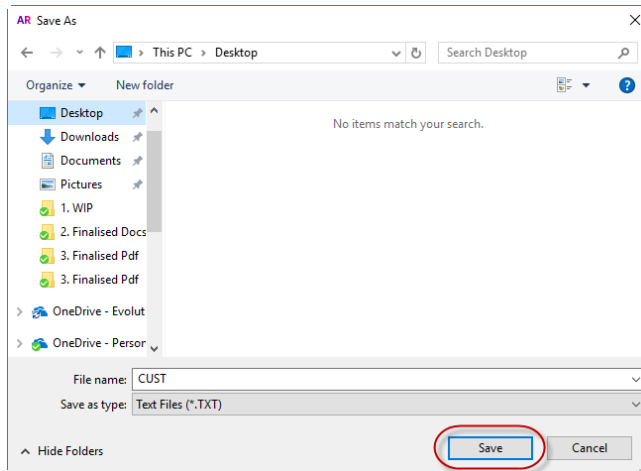
6. Click on either:

[Add All >>] to add all card fields

[Add >>] to add specific fields

7. Click on [Export]

➔ *The Save As Screen opens*



8. Select a folder where to save the file in your computer and then click on [Save]

➔ *The file is saved as a Text(.txt) file*

## How to work with the data file in MS Excel

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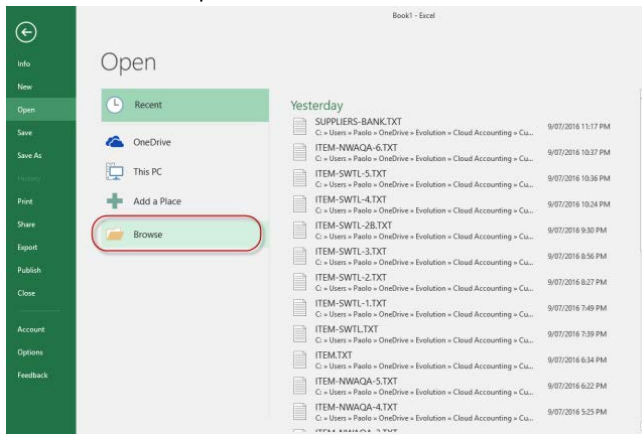
Once the file is exported and opened in MS Excel, you will need clean some data, this may include the following tasks:

- Remove any cards you do not want to re-import in the new file (such as old or duplicates cards)
- Add correct ABN numbers, email addresses and phone numbers
- Add Suppliers' Bank Account Details

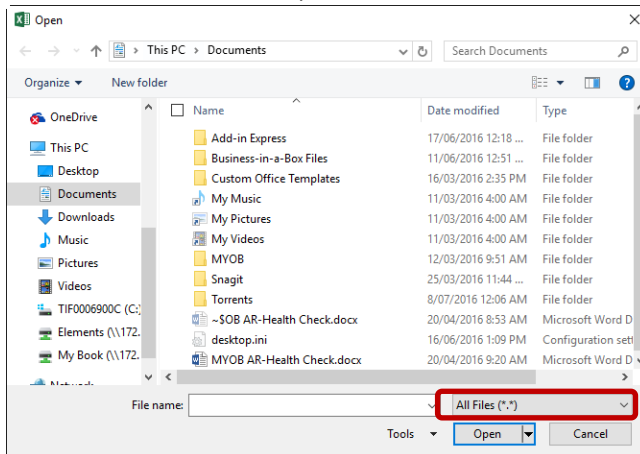
**Note:** When you enter bank account details ensure the following details are entered correctly:

- BSB: must be entered in the following format 000-000
- Account Nbr: must not include characters like: (, ), ", ", &
- Account Name must be entered in Capital letters

1. Open MS Excel
2. Click on File → Open → Browse

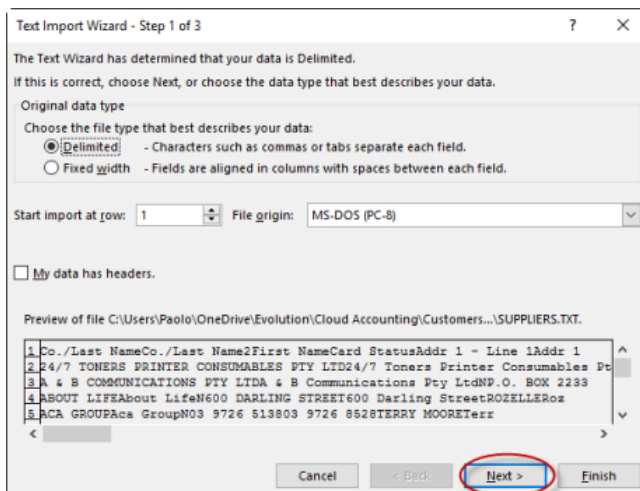


→ The Excel Browse screen opens



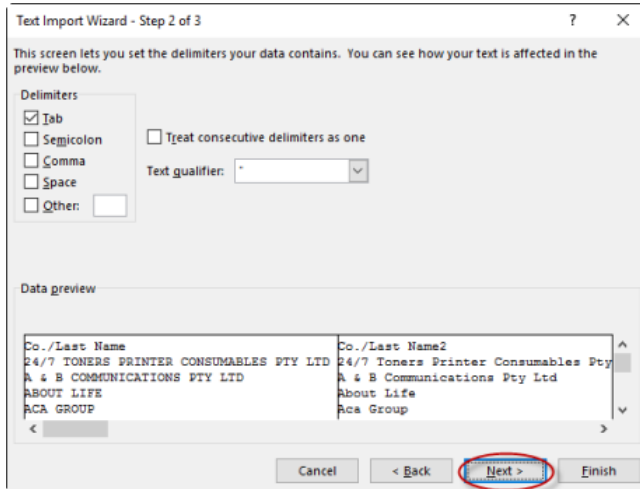
3. Ensure you change the file type selection from All Excel Files to **All Files**
4. Find the export (.txt) file and then click on **[Open]**

→ The Import data wizard screen opens: Step 1



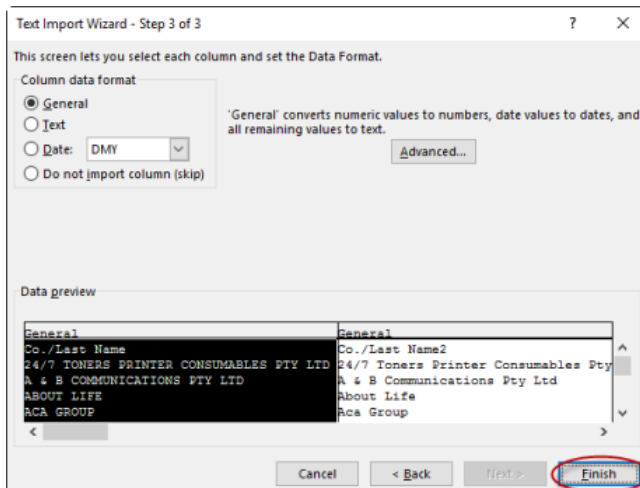
5. Click on [Next >]

➔ Step 2



6. Click on [Next >]

➔ Step 3



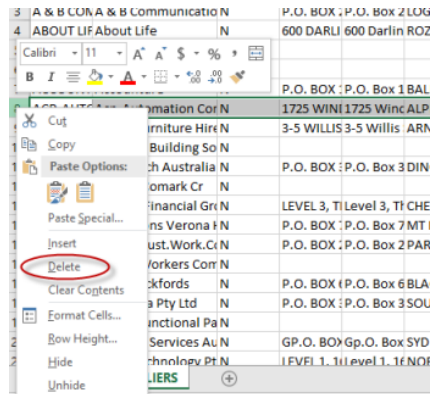
7. Click on [Finish]

➔ The data populates in Ms Excel

8. Update any details as required (add email addresses, ABN numbers or bank details)

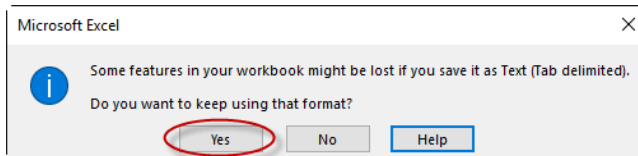
9. To remove any old cards from the file:

- select the relevant line
- right click
- click on Delete



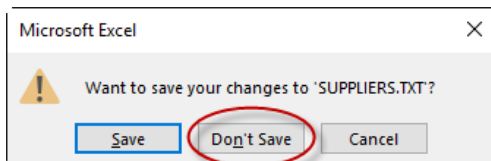
10. Once you updated all details and removed any unwanted cards, click on File → Save

→ The following message appears



11. Click on [Yes] and close the file

→ The following message may appear



12. Click on [Don't Save]

13. Email the txt file to Evolution Cloud Accounting so we can import it into your new MYOB AccountRight Live file or Xero.