



What are Contacts?

Contacts in MYOB are records of people or businesses you deal with, such as:

- Customers (who buy from you)
- Suppliers (who sell to you)
- Employees

👉 Creating contacts allows MYOB to link transactions like invoices, bills, and payments to the correct person or business.



Why Creating Contacts is Important ?

Creating contacts in MYOB helps you to:

- ✓ Issue invoices to customers
- ✓ Record purchase bills from suppliers
- ✓ Track balances (receivable & payable)
- ✓ Maintain accurate reports
- ✓ Avoid duplicate or incorrect records

Without proper contacts, accounting data becomes confusing and unreliable.

Important Concept

- Contact creation does not affect accounts or balances.
- Financial impact happens only when transactions (invoice, bill, payment) are recorded



Steps to Create Contacts in MYOB ?

1 Open Myob

Open your MYOB company file

2 Go to Contacts

From the main menu, click Contacts.

3 Create Contacts

Click on create new contacts

4 Select Contact Type

Select:

- Customers
- Suppliers
- Employees

5 Enter Contact Details

- Fill in:
- Name / Business name
- Address
- Phone number
- Email ID

6 Enter Tax & Payment Details (If Required)

Add:

- GST number (if applicable)

- Payment terms
- Bank details

8 Save Contact

Click Save to create the contact.



What Happens After Saving a Contact?

Once a contact is created:

- It becomes available in Sales, Purchases, and Payroll
- Transactions can be linked to that contact
- Reports show contact-wise balances

✖ Common Mistakes to Avoid

- ✗ Creating duplicate contacts
- ✗ Selecting wrong contact type
- ✗ Missing GST details
- ✗ Incorrect spelling of names