

YOUR SOLO STARTER KIT

by myob



With Solo by MYOB, the admin app for sole operators, you can make the boring bits bite-sized. Business admin? That's our day job, not yours. Invoicing, banking, payments, expenses and reports to make tax time a breeze, all in one tidy little app. Here's how to get rolling.

1 SIGN UP TO SOLO (ON THE WEB)

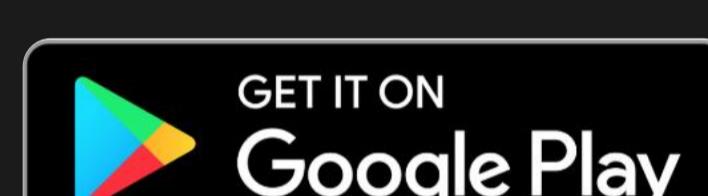
1. Head to solobymyob.com and subscribe to Solo.
2. Name. Email. Password. Done.
3. Add your business name.
4. Set up two-factor authentication, and boom – you're officially good to go.



Scan to buy Solo by MYOB

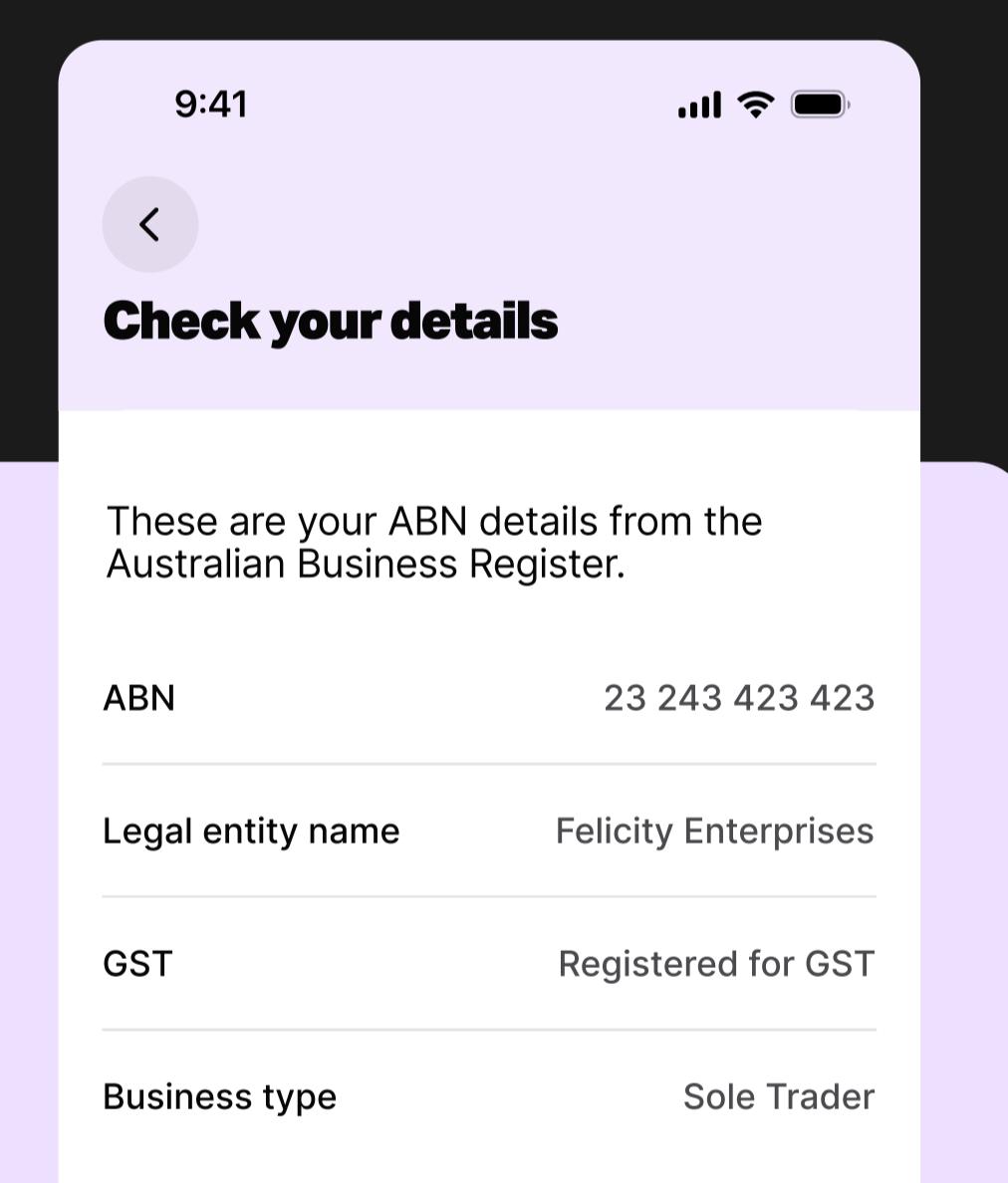
2 DOWNLOAD THE SOLO APP

1. Download the Solo by MYOB app from the [App Store](#) or [Google Play](#) (Australia only).
2. Sign in with your new Solo deets.
3. Follow the prompts, and tell us who you are (ABN, GST, the usual drill).



Tip: Keep auto-updates on. We drop new features faster than your lost invoice got paid.

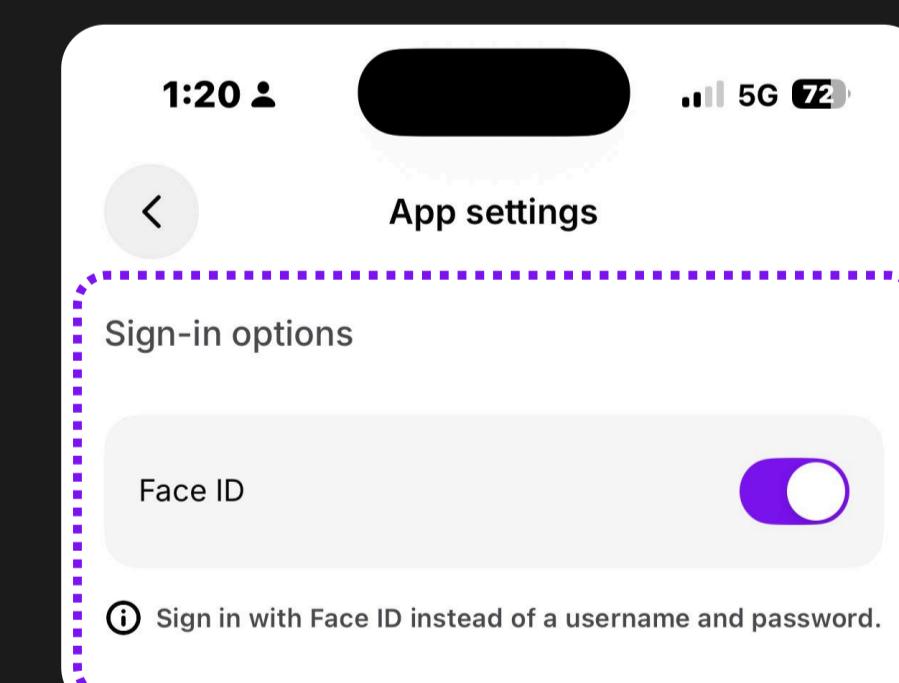
Tip: Need to tweak your plan? Jump into [My Account](#) using your Solo login deets.



No password, no worries.

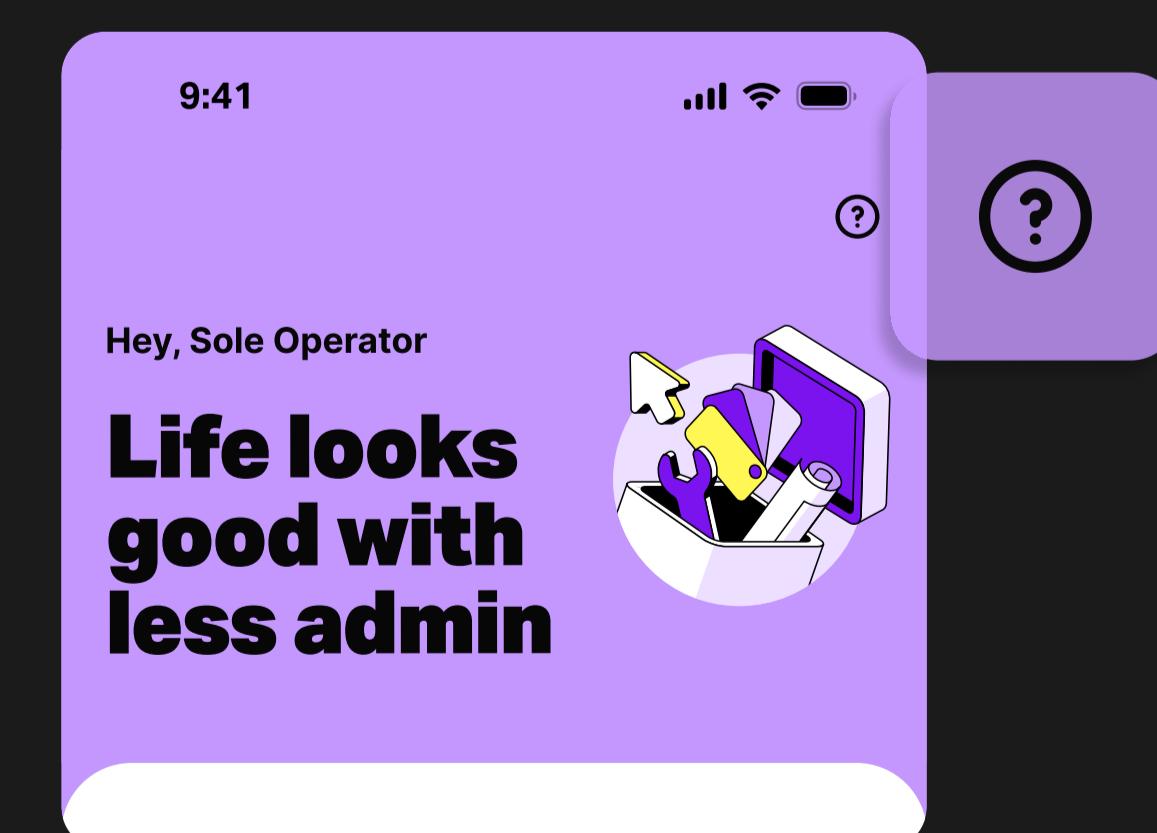
Skip the hassle, save time, and make login easier by using Face ID or Touch ID for next time. Every second counts.

👉 Tap More > App settings > Enable biometrics



More Solo support

- 👉 Hit the ? icon in the top right corner if things get weird. Solo's got your back.
- 👉 Tap More > Chat with us for someone who speaks fluent small-business.
- 👉 Pop into the Solo Community to see how other one-person powerhouses are doing it. Tap More > Community forum.



3 SORT YOUR BANKING, SOLO-STYLE

Open a Solo Money account or connect up to two bank accounts and your transactions will flow straight in.

👉 Tap Home, follow the prompts, and get banking set up with Solo as step one.

Open a Solo Money account*

Your built-in business bank account, where you can watch your balance and transactions appear in near real-time. It ensures you keep business and personal money separate.

Order your Solo Mastercard debit card and add it to your Apple Pay or Google Wallet.

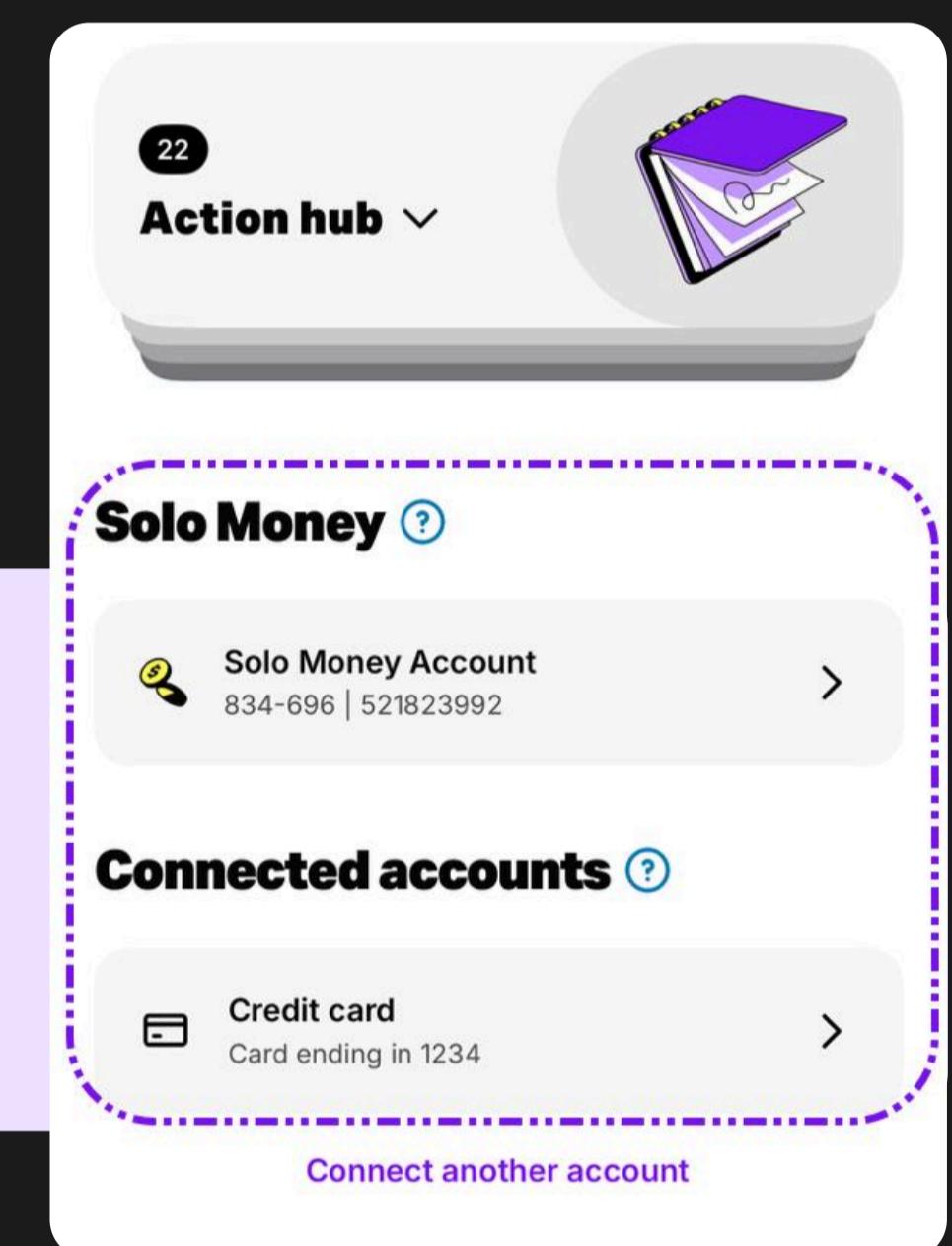
Your bank 🤝 Solo

Connect up to two accounts to Solo. (Just check your bank in on the compatible list first).

Once your bank is connected and you've got at least one new transaction, Solo starts pulling data automatically



Tip: If you've got Solo Money and/or connected accounts, you'll see every transaction lined up in [Action hub > Transactions to review](#). It's as simple as scroll, match, confirm, and all tracked for tax time.



*Solo Money accounts are issued by Great Southern Bank, a business name of Credit Union Australia Ltd (ABN 44 087650 959, AFSL and ACL 238317).

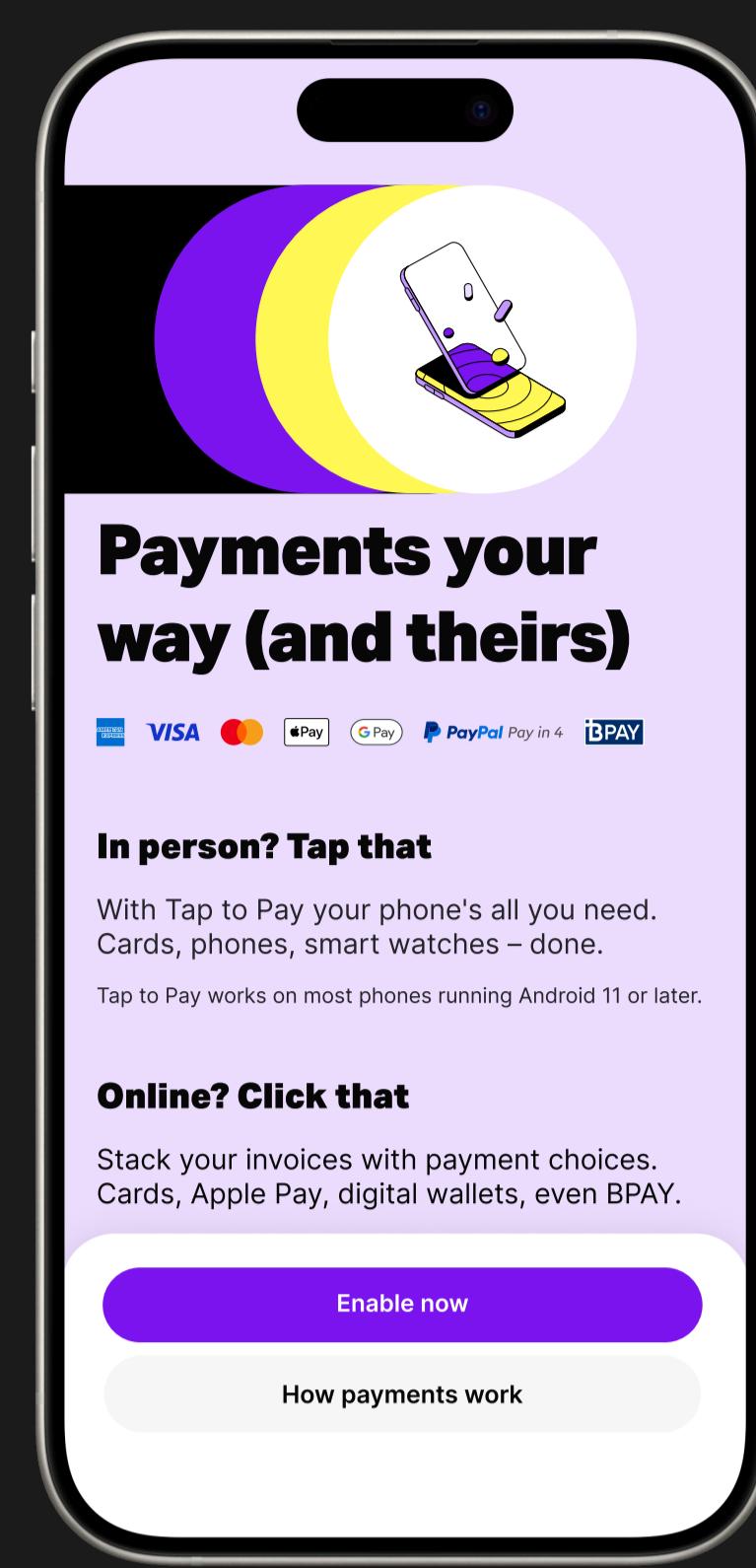


4 CHOOSE HOW YOU WANT TO GET PAID

Money in beats money out, and Solo's got all the ways to get paid. By adding payment options to every invoice, customers can pay you before the dreaded follow-up. With flexi payments, everyone wins.

1. Add your BSB & Account details and PayID.
Using Solo Money? Nice one. That account automatically lands on your invoices. Easy.
2. Apply for payments with one quick form, for two slick ways to get paid.
 - **Tap to pay*** - in-person payments right on your phone. No reader. No cables. Just create an invoice and it's tap, charge, cha-ching.
 - **Online payments**** - cards, Apple Pay, Google Pay, BPAY, PayPal – all the fancy ways your customers send you the sweet stuff (and it makes you look profesh).
 - Every time a payment comes through, Solo automatically ticks it off, handles the GST, sorts the fees, and logs it for tax. You just kick back and watch your payments roll in.

👉 Start getting paid the easy way. Go to [Money in](#) to apply for payments in Solo.



Tip: Want to fire up Tap to Pay? Learn how to [set it up here](#).

*Applications for Tap to Pay are subject to approval. Fees apply: \$0.30 per transaction + 1.6% of the total invoice. Fees are inclusive of GST. [View terms and conditions here](#).

**Applications for online payments are subject to approval. Fees apply: \$0.25 per transaction + 1.8% of total invoice. If also choose to enable BPAY, you cannot pass on a surcharge to customers who pay via BPAY. [View terms and conditions here](#).

5 INVOICE LIKE A LEGEND

When you create your first invoice, Solo will guide you from A to Z: logo, prices, tax, how you want to get paid and notes. We'll steer. You drive.

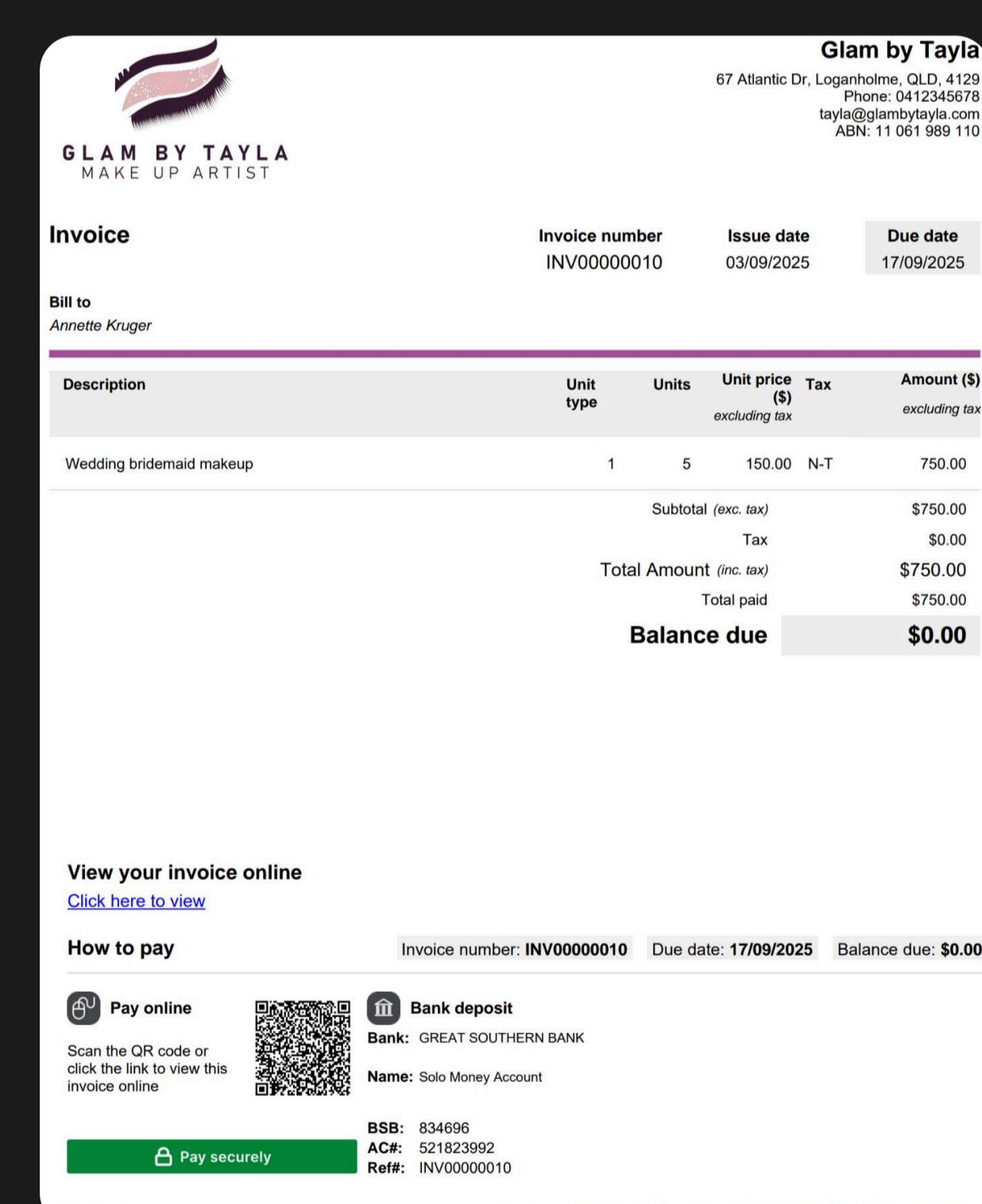
👉 Tap Home > Create invoice

Details for the invoice (tick these off):

- Customer details: Add the name + an email or phone number to send the invoice.
- Payment terms: Set due date, invoice number, and turn on payment reminders (future-you will thank you).
- What you sold: add items or services, with quantity and price (round up the cents if you're feeling bold).

And you're set.

Email, SMS, or WhatsApp, pick your poison and send it off straight from Solo. We'll auto-fill the rest (date, business details, invoice number) so it looks sharp every time.



Tip: Want to change your payment preferences? Go to [More > Invoice settings > Payment settings](#).

Tip: Set up your items, services and customers once. Solo remembers, so you don't have to.

Items or services for forever-use.👉 Tap [More > Items and services](#).
Add and edit customers with a click.👉 Tap [More > Customers and suppliers](#).

6 TRACK SPENDING IN A SNAP

👉 Tap Home > Create expense

Snap it. Sort it. Done.

- Take a photo of your receipt in Solo or upload a PDF/image of a business expense or tax invoice.
- Solo reads it for you with amount, date, and supplier auto-filled. Bye bye, admin.
- You can also plan for unpaid expenses, like insurance or subscriptions, so you're not ambushed later.

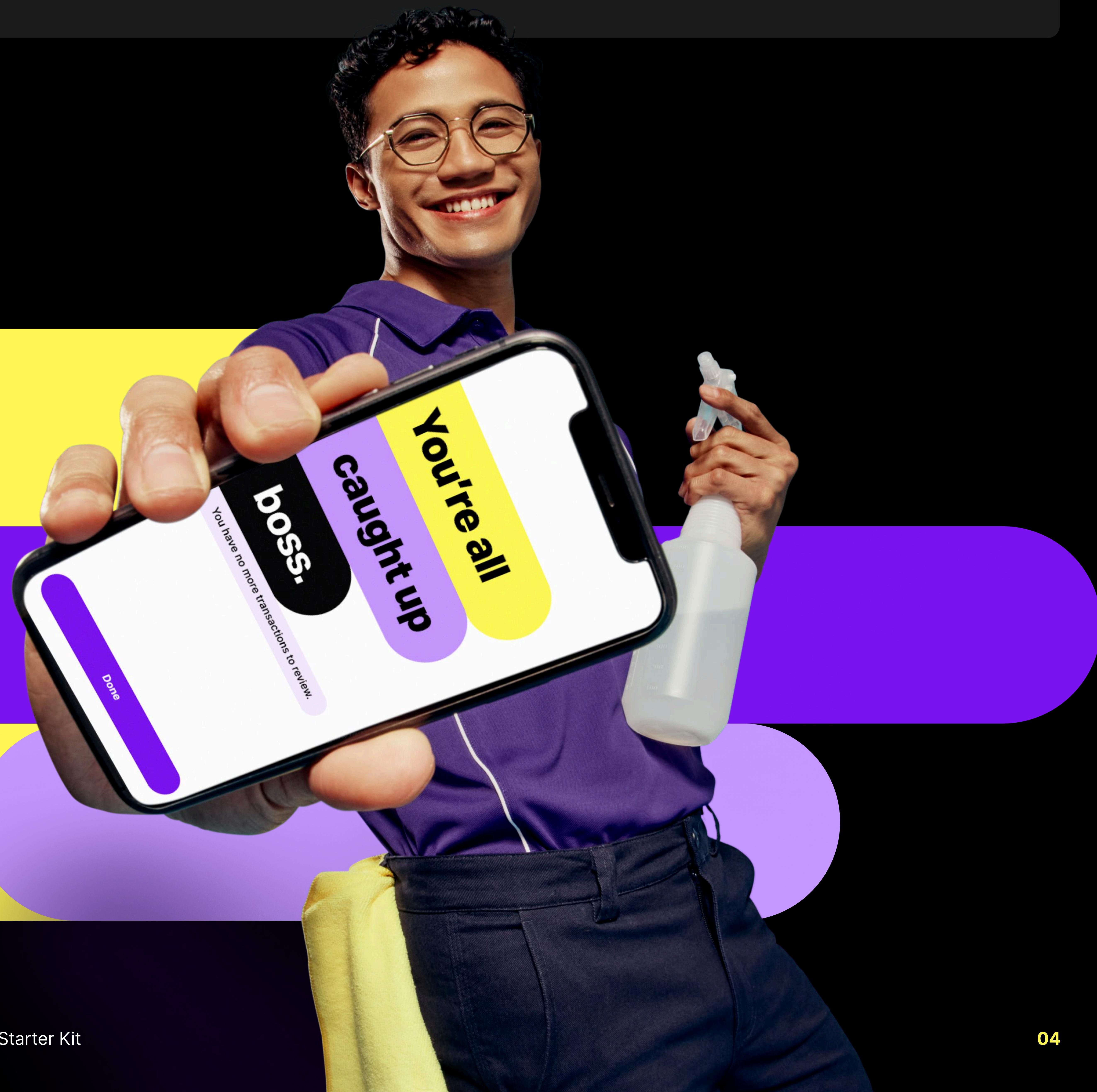
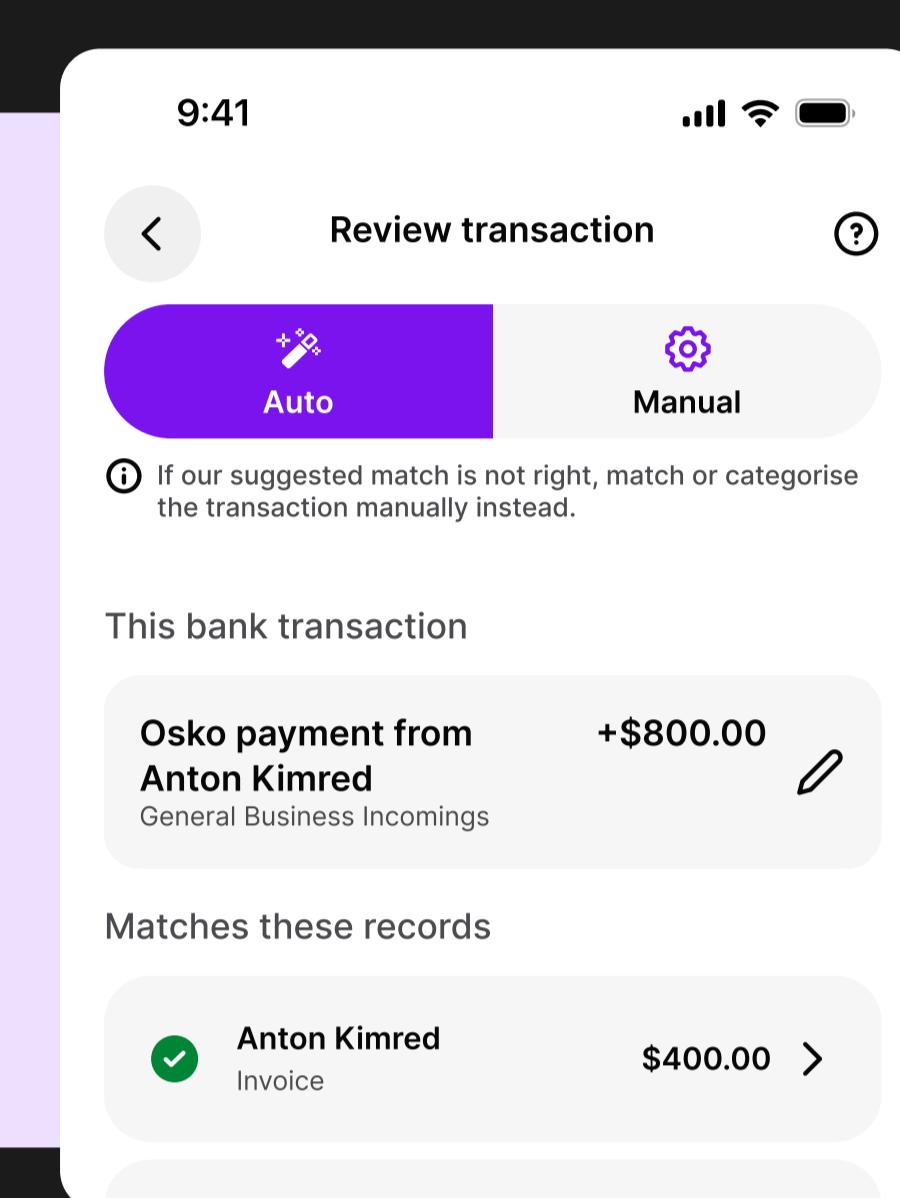
Smart categories, zero confusion.

Solo tracks money in and out and suggests categories built for sole operators. Tweak it to fit your business world:👉 Tap More > Categories.



Tip: Solo remembers your regulars. For repeat buys add the supplier, ABN, and expense category (e.g., Officeworks > Printing & stationery). Next time, Solo sees Officeworks and categorises it for you. Auto-admin on tap. To set up suppliers tap More > Customers and suppliers.

Tip: To claim GST on purchases over \$82.50 (including GST), you'll need a valid tax invoice from your supplier.



7 RUN YOUR DAY THE SOLO WAY

Home's where the magic happens. Invoices, expenses, customers, all just a tap away. Use [Quick actions](#) to fire off the boring bits so you can get back to the good stuff.



Tip: If you have been approved for Tap to Pay*, you can [Take payment](#) straight from the [Home](#) screen. An invoice is automatically created & marked as paid when you take payment.

Action hub

Your daily to-do's sorted by your Solo assistant.

👉 Transactions to review

If you have Solo Money or you've connected accounts, you will see transactions you need to review in date/time order, ready for review.

This is Solo AI's moment. It matches your invoices, receipts you've snapped, or the category it thinks you were aiming for. Happy with the match? Hit **Confirm**. If not, tap **Manual** to steer it in the right direction.

Dropped \$50 at Officeworks? Solo will smart-match this bank transaction to the \$50 expense you snapped in Solo, and suggests Printing & stationary. You tap review and confirm. Admin done!

👉 Overdue invoices

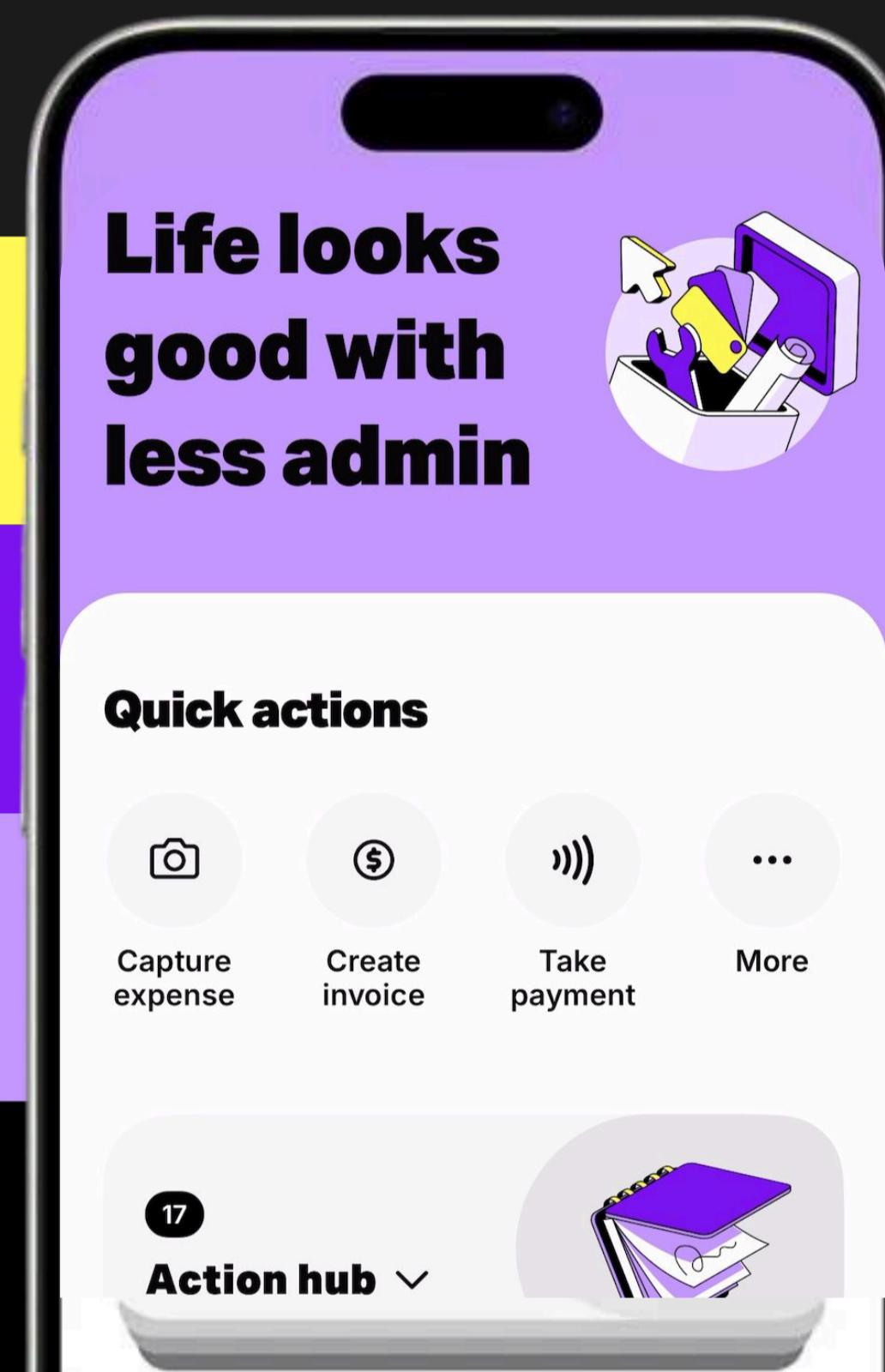
See the unpaid wall-of-shame in one spot. Turn on [automatic invoice reminders](#) so Solo can handle the chasing.

Cashflow

Keep the stress low with healthy cash flow. Solo shows your money in vs money out in a simple graph so you can spot patterns, plan ahead, and keep things calm.

Adjust the date range to see the last three months or zoom out further.

What you see includes GST and excludes the stragglers (unpaid or unmatched stuff).



8 TAX TIME = RELAX TIME. (SOLO KEEPS RECEIPTS)

You don't have to turn into a human stress ball at tax time. Start with Solo and stay compliant from day one. No panic, no midnight Googling. Just cool, easy, compliant taxes.

- Solo sorts all your GST for you and lines it up neatly, ready for you to lodge in the ATO portal.
- Want to see how things are tracking? Tap [More > Reports](#) in the app.
- Wondering who owes who (you or the ATO)? Boss your BAS with simple GST-ready reports with Solo. Just tap [More > Reports](#) in the app.
- Got an accountant or bookkeeper in your corner? Give them [shared access](#) so they can jump in, tweak, tidy, or add records without you lifting a finger. Tap [More > Share access](#) in the app.

