

MYOB Advanced

Release Notes

2021.1.1

myob

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Introduction

Welcome to the 2021.1.1 release of MYOB Advanced.

What's New in this Release?

MYOB Advanced 2021.1.1 is a major release that adds a wide range of new features across the entire MYOB Advanced system.

Installing this Release

The 2021.1.1 release is automatically deployed to all production accounts.

Upgrade Note: WFM Customisation

For sites that integrate with MYOB Advanced Workforce Management, using a customised installation of MYOB Advanced 2020.8, the customisation must be updated as follows for Advanced 2021.1.1:

1. Uninstall the **MYOB.Advanced.AT.2020.8.R2** customisation before upgrading to 2021.1.1.
2. After upgrading to 2021.1.1, install the **MYOB.Advanced.AT.2021.109.R2** customisation.

New Features

Construction

Debit Adjustments for Subcontracts

In previous releases, users could not process a partial debit adjustment for a bill prepared for a subcontract with retainage because in the lines of the prepared debit adjustment, the quantities, unit cost and extended cost have been unavailable for editing.

As of this release, users can create a partial debit adjustment for a bill prepared for a subcontract with retainage.

UI Changes to the Bills and Adjustments Screen

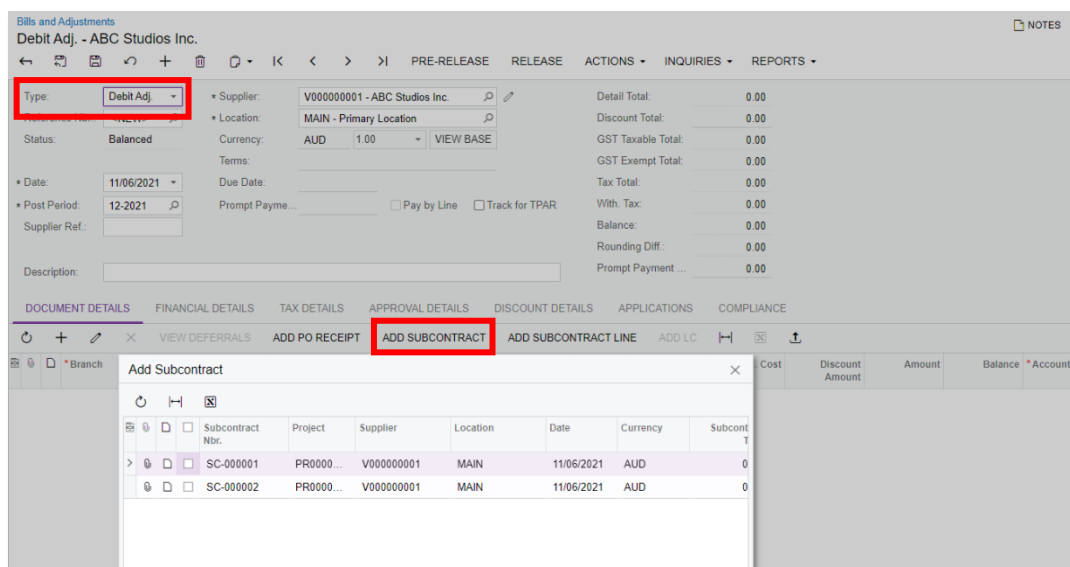
The Add Subcontracts window has been renamed to Add Subcontract.

On the table toolbar of the Document Details tab of the Bills and Adjustments screen (AP301000), an **Add Subcontract Line** button has been added. In the Add Subcontract Line window, which is opened when the user clicks the **Add Subcontract Line** button, Project Task and Cost Code columns have been added; the Subitem column has been removed, and the Subcontract Date has been renamed to Date.

Debit Adjustment Creation

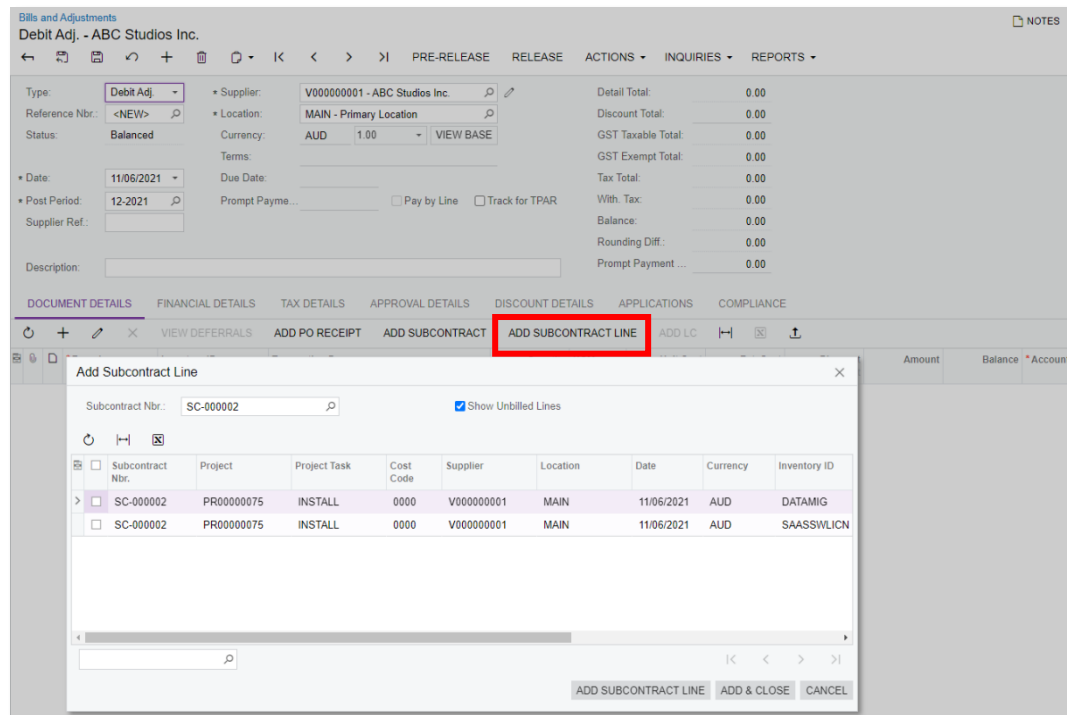
A user can create a debit adjustment on the Bills and Adjustments screen (AP301000) and add particular lines or all lines of a subcontract to this document.

When the user clicks the **Add Subcontract** button, the system opens the Add Subcontract window, which lists the subcontracts of the selected supplier that have at least one non-cancelled line (see the following screenshot). For each subcontract, the system displays the following columns: Subcontract, Project, Supplier, Location, Date, Currency, Subcontract Total, Total Billed Qty., and Total Billed Amount.



When the user clicks the **Add Subcontract Line** button, the system opens the Add Subcontract Line window, which lists the non-cancelled lines of the subcontracts of the selected supplier (see the following screenshot). By default, the table lists the lines with a nonzero billed quantity and billed amount. The user can select the **Show Unbilled Lines** check box to also review the lines with a zero billed quantity and a zero billed amount).

For each subcontract line, the following columns are displayed: Subcontract, Project, Project Task, Cost Code, Supplier, Location, Date, Currency, Inventory ID, Ext. Cost, Unbilled Qty., Unbilled Amount, Billed Qty., Billed Amount.



In the Add Subcontract or Add Subcontract Line window, when the user selects the unlabelled check box for the subcontract or subcontract lines to be added, and clicks **Add & Close**, the system adds the selected subcontract lines to the debit adjustment. The following values are specified in the added debit adjustment lines:

- **Account, Subaccount, Tax Category, Project, Project Task, and Cost Code**, which are copied from the corresponding subcontract line and can be overridden
- **Ext. Cost**, which is copied from the Billed Amount of the subcontract line and can be overridden
- **Quantity and Unit Cost**, which are equal to zero and can be overridden
- **Discount Percent and Discount Amount**, which are equal to zero and cannot be overridden
- **Retainage Percent and Retainage Amount**, which are equal to zero and cannot be overridden

On release of the debit adjustment, the system decreases the billed amount and billed quantity in the subcontract lines of the corresponding subcontract on the Subcontracts screen (SC301000).

If the debit adjustment line is linked to a subcontract line that was closed and completed, on the release of the debit adjustment, the system also clears the **Closed** and **Completed** check boxes in the subcontract line on the Document Details tab of the Subcontracts screen.

Known Limitations

The following limitations apply to the functionality:

- A quantity in a debit adjustment line may not exceed the billed quantity in the corresponding subcontract line. If the quantity in a debit adjustment line is greater than or equal to the billed quantity in the subcontract line, the debit adjustment cannot be released.
- In a debit adjustment line linked to a subcontract, the particular project and project task specified in this line cannot be changed. If a non-project code is specified in a debit adjustment line linked to a subcontract, it can be changed to a particular project, and a project task can be specified in the line; the system will warn the user that the specified project and project task differs from those in the corresponding subcontract line.

Subcontract Billing

The logic related to the billing of subcontract lines that are closed by amount has been adjusted in this release and works as described below.

If the inventory item of a subcontract line has the “By Amount” option selected in the **Close PO Line** field on the General Settings tab of the Non-Stock Items screen (IN202000), when an accounts payable document is created for the subcontract line or the subcontract line is added to an AP document on the Document Details tab of the Bills and Adjustments screen (AP301000), the system populates the value of the **Ext. Cost** column of the corresponding AP document line with the value of the **Unbilled Amount** column of the subcontract line from the Document Details tab of the Subcontracts screen (SC301000).

Also, the system does not copy the discount percent and discount amount of such a subcontract line to an accounts payable document created for the line. That is, the values in the Discount Percent and Discount Amount columns on the Document Details tab of the Bills and Adjustments screen will be zero, as the following screenshot shows.

UI Improvements

In MYOB Advanced 2021.1.1, multiple minor enhancements have been made to construction-related screens to make these screens easier to use:

- On the General tab of the Suppliers screen (AP303000), the Supplier Defaults section has been renamed to Project Defaults.
- In the tables on the following screens, the **Has Expired Compliance Documents** column has been renamed to **Expired Compliance**:
 - The Document Details tab of the Bills and Adjustments screen (AP301000)
 - The Documents To Apply and Application History tabs of the Checks and Payments screen (AP302000)
 - The Document Details and Applications tabs of the Invoices and Memos screen (AR301000)
 - The Documents To Apply and Application History tabs of the Payments and Applications screen (AR302000)
 - The Commitments tab of the Change Orders screen (PM308000)
 - The Document Details tab of the Purchase Orders screen (PO301000)

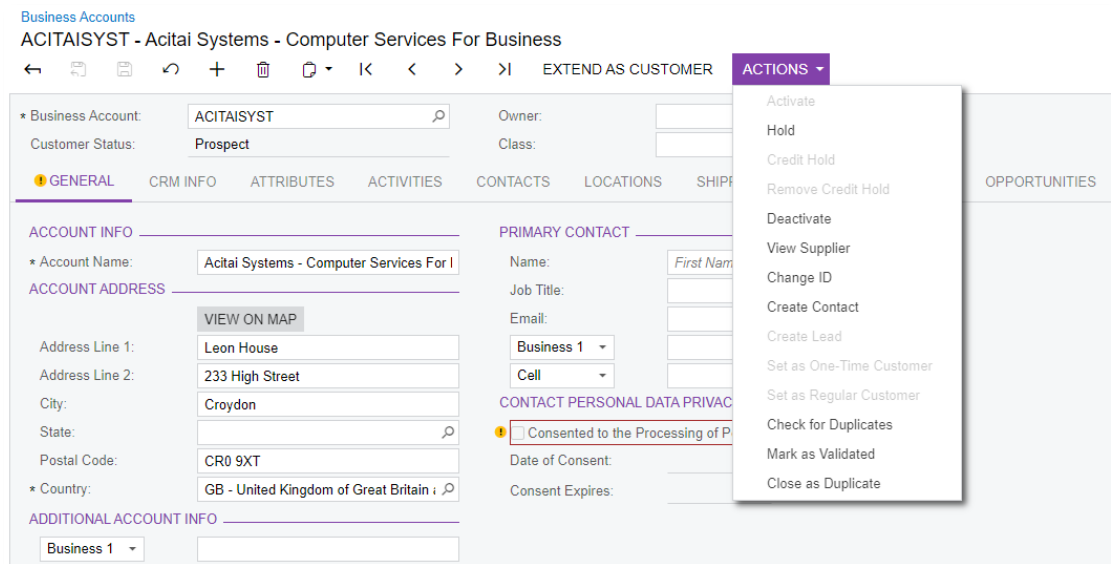
CRM

Enhanced Workflows

In this release, the workflows used for business accounts, customers, suppliers, and locations have been redesigned.

Improved Layout of the Business Accounts Screen

In previous versions of MYOB Advanced, a user manually changed the state of a business account. As of this release, with the new workflow, the state of a business account is changed by the system based on the actions in the Actions menu that are executed. On the Business Accounts screen (CR303000), all the actions to change the state of a business account are now in the Actions menu of the screen toolbar (see the following screenshot).



When a user clicks a particular action, the system automatically changes the state of the business account in the **Customer Status** field of the screen as part of its processing. The **Customer Status** field is no longer available for manual editing.

The following changes to the layout of the screen have also been made:

- The former **Class ID** field has been renamed to **Class** and moved from the CRM Info tab of the screen to the Summary area. Also, an **Edit** button has been added right of the **Class** field.
- The **Type** field has been moved from the Summary area of the screen to the CRM Info tab. After the upgrade to MYOB Advanced 2021.1.1 from previous versions, for the business accounts that formerly had the “Prospect (PR)” type, the system changes the value in the **Type** field to Business Account.

The screenshot displays the MYOB Advanced CRM interface for a Business Account. At the top, the account name is 'ACITAISSYST - Acitai Systems - Computer Services For Business'. The 'Customer Status' field is highlighted with a red box and contains the value 'Prospect'. The 'Class' field is also highlighted with a red box and contains the value 'BUSINESS - Business'. Below the main fields, there are tabs for 'GENERAL', 'CRM INFO', 'ATTRIBUTES', 'ACTIVITIES', 'CONTACTS', 'LOCATIONS', 'SHIPPING', 'RELATIONS', and 'LEADS'. The 'CRM INFO' tab is active, showing the 'Type' field set to 'Supplier' (highlighted with a red box). Other fields include 'Workgroup', 'Parent Account', 'Ext Ref Nbr', 'Source Campaign', and 'Duplicate' (set to 'Not Validated'). The 'CONTACT PREFERENCES' section shows 'Contact Method' set to 'Any' and checkboxes for 'Do Not Call', 'No Marketing', 'Do Not Email', and 'No Mass Mail'.

Enhanced Workflow for Business Accounts, Customers, and Suppliers

As of this release, the workflow for business accounts and customers works the same way, and business accounts and customers share the same states. When the state of a business account is changed to a new one, the state of the associated customer changes accordingly. For example, if a user clicks **Actions > Activate** on the screen toolbar of the Business Accounts screen (CR303000), which causes the system to change the state of the selected business account to “Active”, the system changes the state of the associated customer to “Active” on the Customers screen (AR303000) as soon as the user specifies the required settings and saves the new customer record. The customer state is displayed in the **Customer Status** field of the Summary area on the Business Accounts and the Customers screens.

For a business account that has been extended as a supplier, the Customer Status field still shows the business account and the customer status, and not the supplier status, even though the business account type becomes Supplier. For more information about the new workflow for customers, see “New Workflow Support on Finance Screens” on page 31.

Starting in MYOB Advanced 2021.1.1, the workflow for suppliers has become independent from the workflows for customers and business accounts. For example, if a supplier has the Active state in the Supplier Status field of the Suppliers screen (AP303000), and a user clicks Actions > Put On Hold on the Business Accounts screen, which causes the system to change the state of the associated customer, the state of the supplier remains Active. (The state of the associated customer changes to On Hold.)

States of a Business Account and Transitions Between States

With the new workflow, the states of a business account are shared with the states of the associated customer, but these states are separated from the states of the associated supplier.

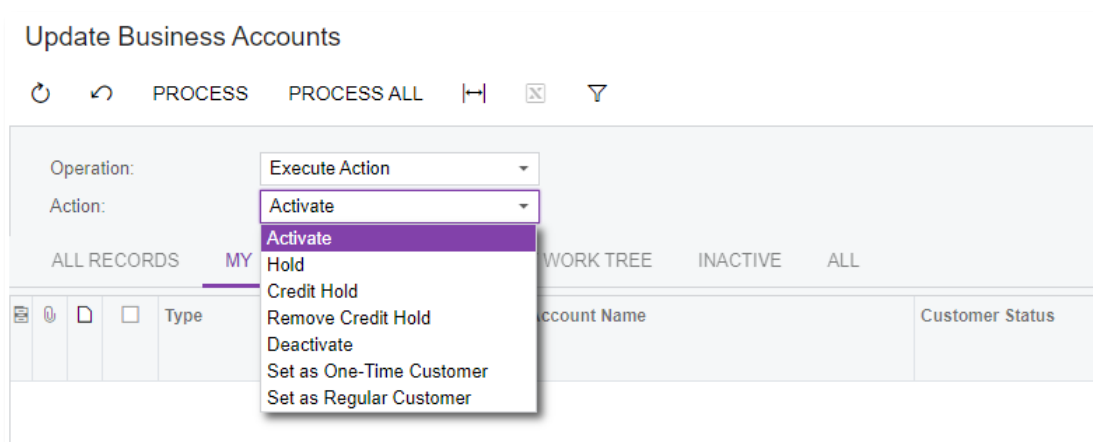
With the new workflow, transitions between states of a business account have been implemented through actions on the Actions menu on the Business Accounts screen (CR303000). When an action is executed, as part of the processing, the system changes the current state of a business account and the associated customer to the particular state that is defined in the workflow. Customers or partners can customize the new workflow by changing these transitions and defining new values for the states, if needed. For more information about the updated states of a business account and the associated customer, and about the updated states of the supplier, see “New Workflow Support on Finance Screens” on page 31.

When a new business account is created through an API, the business account should have the “Prospect” status (reflected in the **Customer Status** field of the Summary area). If the “Active” status is assigned to the new business account when it is created, errors related to the extension of the account as a customer occur.

Improved Layout of the Update Business Accounts Screen

To support transitions between states in business accounts with the new workflow, in the Summary area of the Update Business Accounts screen (CR503320), the following changes have been made:

- An **Operation** field has been added. In this field, a user can select one of the following options: “Update Settings” or “Execute Action”. If “Execute Action” is selected and a user clicks **Process** or **Process All** on the screen toolbar, the system executes the action selected in the **Action** field (see the following item) for the selected business account records or all business account records in the table.
- An **Action** field has been added. If “Update Settings” is selected in the **Operation** field, the **Action** field is unavailable for editing and the screen can be used as it was used in previous versions. If “Execute Action” is selected in the **Operation** field, the **Action** field can be edited and a filter is applied to the table with the list of business account records, so that the table displays only those records to which the selected action can be applied.



Improved Layout of the Account Locations Screen

In previous releases of MYOB Advanced, in the Summary area of the Account Locations screen (CR303010), the **Active** check box indicated (if selected) that the business account location was active and could be used in documents. As of this release, the **Active** check box has been replaced by the new **Status** field, as shown in the following screenshot.

The screenshot displays the 'Customer Locations' screen for 'ACITAISYST MAIN - Primary Location'. The 'Status' field is highlighted with a red box and contains the value 'Active'. Below the main form, there are tabs for 'GENERAL', 'SHIPPING', 'OPPORTUNITIES', and 'CASES'. The 'GENERAL' tab is active, showing 'LOCATION INFO' and 'LOCATION ADDRESS' sections. The 'LOCATION INFO' section includes 'Location Name: Primary Location' and an 'Override' checkbox. The 'LOCATION ADDRESS' section includes an 'Override' checkbox and a 'VIEW ON MAP' button. The 'ADDITIONAL LOCATION INFO' section includes 'Account Name: Acitai Systems - Computer Services For I' and 'Attention: Business 1'.

Similar changes have been made on the Customer Locations (AR303020) and Supplier Locations (AP303010) screens. For more information, see “New Workflow Support on Finance Screens” on page 31.

Enhanced Workflow for Business Account Locations

With the new workflow, transitions between the states of a business account location have been implemented through actions on the Actions menu on the Account Locations screen (CR303010). When an action is executed, as part of the processing, the system changes the current state of the business account location to the particular state that is defined in the workflow.

The state of the business account location is reflected in the **Status** field and can have one of the following options:

- **Active:** The business account location is active and can be used in documents.
- **Inactive:** The business account location is inactive and cannot be used in documents.

During an upgrade from previous earlier versions, business account locations that had the **Active** check box selected on the Account Locations screen are assigned the **Active** state. Other locations have been transitioned to the Inactive state. On the Account Locations screen (CR303010), the Active column has been hidden and replaced by a new Status column, but a user can still add it back, if needed.

Similar changes have been made on the Customer Locations (AR303020) and Supplier Locations (AP303010) screens. For more information, see “New Workflow Support on Finance Screens” on page 31.

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the Business Accounts (CR303000), Update Business Accounts (CR503320), Account Locations (CR303010), Customers (AR303000), Customer Locations (AR303020), Suppliers (AP303000) or Supplier Locations (AP303010) screens, users who work on customisations

will need to redesign the automation of the processes related to these screens by using the new workflow engine. For more information, see the “Creating Workflows” chapter in the MYOB Advanced Customisation Guide.

Enhanced Duplicate Validation Workflow

In MYOB Advanced 2021.1.1, users can more flexibly configure duplicate validation workflow, which helps to decrease the number of duplicate leads, contacts, and business accounts in the system.

Enhanced Duplicate Validation Workflow for Leads and Contacts

In previous releases, users could check if a new lead or contact had duplicates only after the new record had been created in the system. As of this release, the system gives users the ability to check if a lead or contact has duplicates before a new record has been created.

A **Create on Entry** column has been added to the Lead and Contact Validation Rules and Lead and Account Validation Rules tabs of the Customer Management Preferences screen (CR101000). In this column, a user can select one of the following options:

- **Allow** (default): The system can check the values in the Matching Field column for a new lead or contact record to find duplicates before it is saved at least once. However, the system will not either display a warning message or block the creation of a duplicate record. (The duplicate validation process is the same as in previous versions.) In the Summary area of the Duplicate Validation Settings tab, the **Validate Leads and Contacts for Duplicates on Entry** check box is available for editing.
- **Warn**: The system makes the value in the Score Weight column equal to the value in the **Lead and Contact Validation Threshold** field. The **Validate Leads and Contacts for Duplicates on Entry** check box becomes selected and unavailable for editing.

As a result, if a user tries to create a lead or contact that has the duplicate setting, the system inserts “Possible Duplicate” in the **Duplicate** field of the Summary area of the Leads (CR301000) or Contacts (CR302000) screens respectively and displays the warning message if the user tries to save the lead or contact. The user can choose to save the lead or contact or to cancel record creation.

Customer Management Preferences

GENERAL SETTINGS **DUPLICATE VALIDATION SETTINGS** MAILING SETTINGS

Lead and Contact Validation Score Threshold: 5.00
 Lead and Account Validation Score Threshold: 6.00
 Account Validation Score Threshold: 5.50
 Close Leads with no Activities with Score Higher Than: 5.50

Validate Leads and Contacts for Duplicates on Entry
 Validate Accounts for Duplicates on Entry

LEAD AND CONTACT VALIDATION RULES LEAD AND ACCOUNT VALIDATION RULES ACCOUNT VALIDATION RULES

* Matching Field	Score Weight	Transformation Rule	Create on Entry
✓ Email	1.5000	None	Warn
First Name	1.0000	None	Allow
Account Name	1.5000	Split Words	Warn

The **Require Unique Email Address on Contact Validation** check box in the Summary area is now obsolete, and has been removed from the Customer Management Preferences screen.

Enhanced Duplicate Validation Workflow for Business Accounts

In previous versions, users could check if a new business account had duplicates only after the account had been created in the system. As of this release, the system gives users the ability to check if a business account has duplicates before the account has been created or to prevent creation of duplicate business accounts. The system can prevent manual creation of a business account or mass creation of multiple business accounts through an import scenario or API.

A new Create on Entry column has been added to the Account Validation Rules tab of the Customer Management Preferences screen (CR101000). In this column, a user can select one of the following options:

- **Allow** (default): The system can check the values in the Matching Field column for a new business account record to find duplicates before it has been saved at least once. However, the system will not display a warning message. (The duplicate validation process is the same as in previous versions.) In the Summary area of the Duplicate Validation Settings tab, the **Validate Accounts for Duplicates on Entry** check box is available for editing.
- **Warn** (see Item 1 in the following screenshot): If this option is selected for a setting, the system makes the value in the Score Weight column (Item 2) equal to the value in the **Account Validation Threshold** field (Item 3). The **Validate Accounts for Duplicates on Entry** check box becomes selected and unavailable for editing (Item 4).

As a result, if a user tries to create a business account that has the duplicate setting, on the Business Accounts screen (CR303000), the system inserts "Possible Duplicate" in the **Duplicate** field of the Summary area and displays the warning message. The user can choose to save the business account or to cancel record creation.

- **Block** (Item 5): If this option is selected for the setting in the Matching Field column, the system makes the value in the Score Weight column (Item 6) equal to the value in the **Account Validation Threshold** field (Item 3). The **Validate Accounts for Duplicates on Entry** check box becomes selected and unavailable for editing (Item 4).

As a result, the system prevents creation of a duplicate business account and shows an error message when the user tries to save the account (see the screenshot below).

Customer Management Preferences

GENERAL SETTINGS **DUPLICATE VALIDATION SETTINGS** MAILING SETTINGS

Lead and Contact Validation Score Threshold:

Lead and Account Validation Score Threshold:

Account Validation Score Threshold:

Close Leads with no Activities with Score Higher Than:

Validate Leads and Contacts for Duplicates on Entry

Validate Accounts for Duplicates on Entry

LEAD AND CONTACT VALIDATION RULES LEAD AND ACCOUNT VALIDATION RULES **ACCOUNT VALIDATION RULES**

* Matching Field	Score Weight	Transformation Rule	Create on Entry
E-Mail	2.0000	None	Allow
FullName	2.5000	Split Words	Block
Phone1	1.0000	None	Warn
Phone2	1.0000	None	Allow

Enhancements Related to Contacts and Employees

Enhancements have been made to the layout of the Employees (EP203000) and Contacts (CR302000) screens, and the workflow for contacts has been improved.

Removal of Access to Employee Contact Information from Contacts

In previous releases, on the Contacts screen (CR302000), a user could view the employee settings of contacts that had the Employee type. As of this release, employee settings are no longer available for viewing from the Contacts screen: In the **Contact ID** field of the Summary area, a user can select only a contact record of the "Contact" type.

Contacts

AI Bumbry - BA Industries

← 📄 🔄 + 🗑️ 📄 ⏪ < > ⏩ SEND LOGIN LINK ACTIONS ▾

Contact ID: Business Account:

Status:

DETAILS ACTIVITIES

CONTACT

First Name:

* Last Name:

Company Name:

Job Title:

Email:

Business 1 ▾

Cell ▾

Home ▾

Fax ▾

Web:

Select - Contact ID

Contact	Job Title	Business Account	Company Name
> AI Bumbry	Purchasing	CUST000001	BA Industries
Alan Plain	Software Consultant	CHOCOLATE	Chocolate By
Albert DosSantos		CUST000005	ABC Studios I
Alex Novak	Purchasing Manager	WESTERNTRC	Western Star
Alistair Barnard	Facilities Manager	ASAHSUNTR	Asahi Sun Tou
Anders Nylander	Sales Manager	MAKSYSTEMM	Mak System

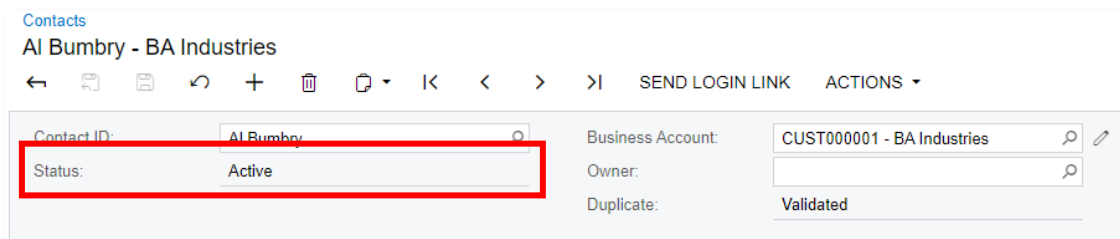
PERSONAL DATA PRIVACY

Consented to the Processing of Personal Data

Also, the **Type** field has been removed from the Summary area of this screen.

Enhanced Workflow for Contacts

In previous releases, in the Summary area of the Contacts screen (CR302000), the Active check box indicated (if selected) that the contact was active and could be used in documents. As of this release, the **Active** check box has been replaced with a new **Status** field.



With the new workflow, transitions between the states of a contact have been implemented through actions on the Actions menu on the Contacts screen. When an action is executed, as part of the processing, the system changes the current state of the contact to the particular state that is defined in the workflow.

The state of the contact is reflected in the **Status** field and can have one of the following options:

- **Active:** The contact is active and can be used in documents.
- **Inactive:** The contact is inactive and cannot be used in documents.

During an upgrade from earlier versions, contacts of the “Person” type that had the **Active** check box selected on the Contacts screen are assigned the “Active” state. Other contacts of the “Person” type are assigned the “Inactive” state.

Improvements to the Employees Screen

The layout of the Employees screen (EP203000) has been enhanced. The **Employee Contact** field in the Contact Info section of the General Info tab, which showed the link to the associated contact record, has been removed.

Another improvement has been made to the General Info tab of the Employees screen: In the Employee Settings section, a **Synchronize to Exchange** check box has been added. If needed, a user can select this check box for an employee record regardless of the value in the **Status** field.

Multifaceted View for Business Accounts

A side panel with a number of tabs has been added for the list of business accounts, which gives users the ability to view the list of business accounts while simultaneously viewing (and modifying, if necessary) various information related to any listed account (prospect, customer, or supplier).

A Side Panel for the List of Business Accounts

In previous releases of MYOB Advanced, a user seeking more information about a particular business account had to open multiple screens to find contacts, opportunities, sales orders, support cases, or other information associated with the business account, which could be time-consuming. As of this release, the Business Accounts screen (CR3030PL) has a side panel, so that the user can have a comprehensive view of a prospect, customer, or supplier by switching between tabs on the side panel (which show

screens and dashboard widgets). Thus, the user can quickly find, view, and modify the information related to any business account.

Users' ability to view or modify the objects on the tabs of the side panel depends on the access rights of their roles for each screen or dashboard shown on a tab and each screen underlying a dashboard widget. Thus, after the upgrade from a previous version to MYOB Advanced 2021.1.1, the side panel tabs or widgets on a dashboard may not be initially available. In this case, on the Access Rights by Role screen (SM202015), a system administrator makes sure each required user role has the needed access rights to the screen with the side panel, to each of the screens and dashboards that are displayed on the tabs of the side panel, and to the screens any dashboard widgets are based on.

The access rights have been preconfigured for the predefined CRM user roles, such as CR Marketing Manager or CR Viewer, to give users with these roles the ability to view, modify, or delete the objects on the side panel. A system administrator can configure similar access rights for any other user role, if needed. On the Business Accounts generic inquiry screen (CR3030PL), a generic inquiry designer can specify a different set of navigation targets to be displayed on the tabs of the side panel, if needed.

The following screenshot shows the Business Accounts screen (CR3030PL) with the tab of the side panel displaying customer invoices of the selected business account.

The screenshot displays the Business Accounts screen (CR3030PL) with the side panel showing customer invoices for the selected business account, AMRO Bank N.V. The main area shows a list of business accounts with columns for Business Account, Business Account Name, and Type. The side panel shows the following details:

- Cases:** AMRO Bank N.V. Customer Account ID: AMROBANK - AMRO Bank N.V.
- ALL CASES:** 11
- PENDING CUSTOMER CASES:** 0
- OPEN CASES:** Updated a moment ago
- Case ID, Subject, Status, Priority, Created On:**

Case ID	Subject	Status	Priority	Created On
000056	Clarifications about API	New	Medium	21/05/...
000054	Clarification on security features...	New	Medium	21/05/...
000050	Display problems	New	Medium	8/03/2...
000044	Login Failed	Open	Medium	8/03/2...
000041	Down Server	Open	High	8/03/2...
- CASES HISTORY:** A bar chart showing the number of cases by priority (Medium, Low, High) for the months of February, March, and May 2020.

The side panel has the following tabs:

- **Business Accounts:** The selected business account on the Business Accounts screen (CR303000). A user can view the account settings and any files and notes associated with the account, and the user can modify the data of the account, if needed.
- **Contacts:** The list of any contacts associated with the business account. If the user clicks the link to a contact, the system will open the Contacts screen (CR302000) for the contact in a separate browser tab.
- **Opportunities:** A dashboard with widgets that show details about any opportunities associated with the business account, including open opportunities and the number of open sales quotes associated with these opportunities.

- **Sales Orders:** A dashboard with widgets that show details of all sales orders associated with the business account, including open and completed sales orders and the number of late sales orders.
- **Receivables:** A dashboard with widgets that show details about any customer invoices associated with the business account, including the customer balance, the list of invoices associated with the business account, and payment history.
- **Cases:** A dashboard with widgets that show details about any support cases associated with the business account, including the list of open cases and the number of pending cases.
- **Services:** A dashboard with widgets that show details about all service orders associated with the business account. The tab is available if the *Service Management* feature is enabled on the Enable/ Disable Features screen (CS100000).
- **Equipment:** A dashboard with widgets that show details about any customer equipment. The tab is available if the *Service Management* feature is enabled on the Enable/Disable Features screen.
- **Contracts:** A dashboard with widgets that show details about any contracts associated with the business account. The tab is available if the *Service Management* feature is enabled on the Enable/ Disable Features screen.
- **Projects:** A dashboard with widgets that show details about all projects and project quotes associated with the business account. The tab is available if the *Projects* feature is enabled on the Enable/Disable Features screen.

The user can click any widget or its title of a dashboard to drill down for more details, and in a separate browser tab, the system will display these details on the screen the widget is based on.

Multifaceted View for Opportunities, Contacts, and Cases

Side panels with a number of tabs have been added for the lists of opportunities, contacts, and cases, which gives users the ability to view the list of records while simultaneously viewing (and modifying, if necessary) various information related to any listed opportunity, contact, or case, respectively.

Side Panels for the Lists of Opportunities, Contacts, and Cases

In previous versions, in order to find more information about a particular opportunity, contact, or case, a user had to open multiple screens to find records and statistics related to these records, which could be time-consuming. As of this release, with side panels on the Opportunities (CR3040PL), Contacts (CR3020PL), and Cases (CR3060PL) screens, the user can have a comprehensive view of a record by switching between tabs on the side panel (which show different screens and dashboard widgets). Thus, the user can quickly find, view, and modify the information related to the record.

Users' ability to view or modify the objects on the tabs of the side panel depends on the access rights of their roles for each screen or dashboard shown on a tab and each screen underlying a dashboard widget. Thus, after the upgrade from a previous version to MYOB Advanced 2021.1.1, the side panel tabs or widgets on a dashboard may not be initially available. In this case, on the Access Rights by Role screen (SM202015), a system administrator makes sure each required user role has the needed access rights to the screen with the side panel, to each of the screens and dashboards that are displayed on the tabs of the side panel, and to the screens any dashboard widgets are based on.

The access rights have been preconfigured for the predefined CRM user roles, such as CR Marketing Manager or CR Viewer, to give users with these roles the ability to view, modify, or delete the objects on the side panel. A system administrator can configure similar access rights for any other user role, if needed. On the Opportunities (CR3040PL), Contacts (CR3020PL), or Cases (CR3060PL) generic inquiry screens, a generic inquiry designer can specify a different set of navigation targets to be displayed on the tabs of the side panel, if needed.

The following screenshot shows the Opportunities screen (CR3040PL) with the tab of the side panel displaying information about quotes related to the selected opportunity.

The screenshot displays the Opportunities screen (CR3040PL) with the following components:

- Main Panel:** A list of opportunities with columns for Opportunity ID, Subject, and Company Name. The selected opportunity is 000099, 'ABC Studios Inc. Implementation query' by ABC Studios Inc.
- Side Panel:**
 - Quotes 000099:** Opportunity ID: 000099
 - QUOTES TO PROCESS:** 1
 - QUOTES TO APPROVE:** 0
 - RELATED QUOTES:**

Quote Nbr.	Type	Print	Description	Status	Currency	Amount
Q000014	Sales Q...	True	ABC Studios Inc. Impl...	Draft	NZD	1,10...
 - PRODUCTS OR SERVICES:**

Description	UOM	Quantity	Unit Price	Amount
Consulting - Junior Consultant	HOURL	10.00	80.00	800.0000
Consulting - Project Manager	HOURL	2.00	150.00	300.0000

The side panel on the Opportunities screen (CR3030PL) has the following tabs:

- **Opportunities:** The selected opportunity on the Opportunities screen (CR304000). A user can view the opportunity settings and any files and notes associated with the opportunity, and the user can modify the data of the opportunity, if needed.
- **Contacts:** The list of contacts associated with the account specified in the opportunity.
- **Quotes** (shown in the screenshot above): A dashboard with widgets that show details about any quotes associated with the opportunity.
- **Sales Orders:** A dashboard with widgets that show details about any sales orders associated with the opportunity.
- **Invoices:** A dashboard with widgets that show details about any invoices associated with the opportunity.
- **Services:** A dashboard with widgets that show details about any service orders associated with the opportunity. The tab is available if the Service Management feature is enabled on the Enable/ Disable Features screen (CS100000).

The following screenshot shows the Contacts screen (CR3020PL) with the tab of a side panel displaying the cases related to the selected contact.

The screenshot shows the Contacts screen (CR3020PL) with a list of contacts on the left and a side panel for the selected contact 'AI Bumbry' on the right. The side panel displays the following information:

- Cases:** AI Bumbry
- Contact ID:** 5069 - AI Bumbry
- ALL CASES:** 4
- PENDING CUSTOMER CASES:** 0
- OPEN CASES:**

Case ID	Subject	Status	Priority	Created On
000042	Down Server	Open	High	8/03/2...
000031	Report Issue	New	Medium	8/03/2...
000025	Worksheet Issue	Open	High	8/03/2...
000021	Connection Issue	Open	High	8/03/2...
- CASES HISTORY:**

Priority	Count
High	4
Medium	0

The side panel on the Contacts screen (CR3020PL) has the following tabs:

- **Contacts:** The selected contact on the Contacts screen (CR302000). A user can view the contact settings and any files and notes associated with the contact, and the user can modify the data of the contact, if needed.
- **Opportunities** (shown in the screenshot above): A dashboard with widgets that show details about any opportunities associated with the contact, including open opportunities and the number of open sales quotes associated with these opportunities.
- **Cases:** A dashboard with widgets that show details about any cases associated with the contact, including the list of open cases and the number of pending cases.

The following screenshot shows the Cases screen (CR3060PL) with the tab of a side panel displaying the invoices associated with the customer in the selected case.

The screenshot shows the Cases screen (CR3060PL) with a list of cases on the left and a side panel for the selected case on the right. The side panel displays the following information:

- Invoices:** AMROBANK - AMRO Bank N
- BALANCE:** 27.57K
- INVOICES TO APPROVE:** 0
- INVOICES ON CREDIT HOLD:** 0
- CUSTOMER INVOICES:**

Type	Reference Nbr.	Status	Date	Amou	Total Amou	Balance	Curre
Invoice	001074	Open	30/0...	870.48	870.48	870.48	NZD
Invoice	001073	Open	30/0...	3,184...	3,184...	3,184...	NZD
Invoice	001072	Open	30/0...	1,529...	1,529...	1,529...	NZD
Invoice	001071	Open	30/0...	1,279...	1,279...	1,279...	NZD
Invoice	001070	Open	30/0...	709.70	709.70	709.70	NZD
Invoice	001056	Closed	1/06/...	800.00	800.00	0.00	NZD
Invoice	001053	Closed	1/06/...	800.00	800.00	0.00	NZD
Invoice	001050	Closed	1/06/...	800.00	800.00	0.00	NZD
Invoice	001047	Closed	1/06/...	800.00	800.00	0.00	NZD
Invoice	001044	Closed	1/06/...	800.00	800.00	0.00	NZD

The side panel on the Cases screen (CR3060PL) has the following tabs:

- **Cases:** The selected case on the Cases screen (CR306000). A user can view the case settings and any files and notes associated with the case, and the user can modify the data of the case if needed.
- **Contracts:** A dashboard with widgets that show details about all contracts associated with the case. The tab is available if the *Service Management* feature is enabled on the Enable/Disable Features screen.
- **Cases Links:** A dashboard with widgets that show details about any cases related to the selected case.
- **Sales Orders:** A dashboard with widgets that show details about any sales orders associated with the customer specified in the case.
- **Invoices** (shown in the screenshot above): A dashboard with widgets that show details about all invoices associated with the customer specified in the case.
- **Services:** A dashboard with widgets that show details about any service orders associated with the case. The tab is available if the *Service Management* feature is enabled on the Enable/Disable Features screen.

On a side panel, a user can click the link to a record, such as a contact or an invoice, and the system will open the record in a separate browser tab. The user can also click any widget or its title to drill down for more details, and in a separate browser tab, the system will open the screen the widget is based on.

Finance

Company Groups

Starting in MYOB Advanced 2020.6, users could limit the usage of a customer record to a selected branch or a company. Similar functionality has been implemented for suppliers in this release (for details, see “Restricted Visibility of Supplier Records” on page 35). However, in some cases, multiple related companies may need to have access to the same set of customer and supplier records. For this purpose, MYOB Advanced 2021.1.1 introduces company groups. A company group is an entity that includes multiple companies that share the same customers and suppliers. For reporting purposes, a company can be included in more than one group.

The functionality of company groups is available in the system if the *Customer and Supplier Restriction* feature has been enabled on the Enable/Disable Features screen (CS100000) screen.

The Company Groups Screen

The release introduces the Company Groups screen (CS102500).

Company Groups
PROD - Production Companies

← 📄 📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩

* Group ID: 🔍

* Group Name:

Currency ID: ✎

🔄 + × ⏪ ☒

Company ID	Group Name	Primary Group	Actual Ledger
RBYTEMAIN	Rapid Byte Main		ACTUAL
RBYTEREGL	Rapid Byte Regional		ACTUAL

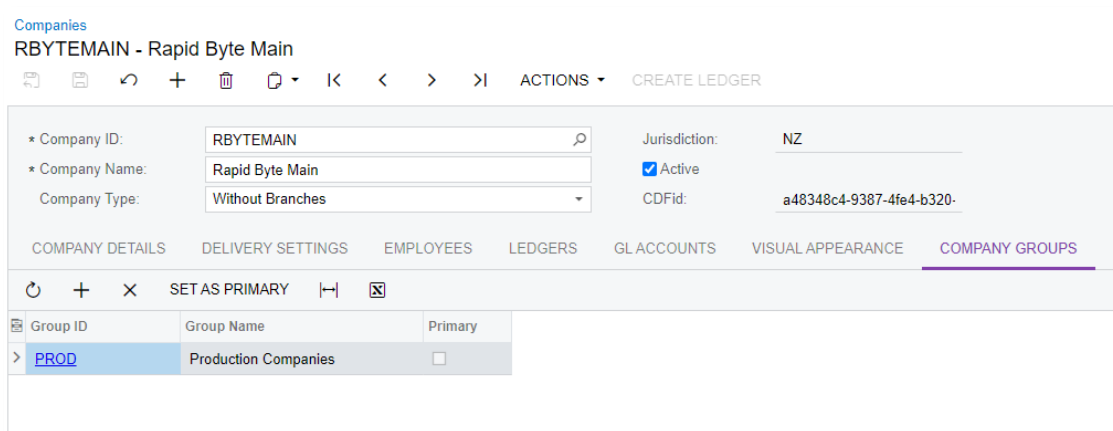
The screen is used for creating, viewing, modifying, and deleting company groups. The structure of the Group ID is defined by the COMPANY segmented key.

A **Currency ID** field appears on the screen, as shown in the screenshot above, if the *Multicurrency Accounting* feature has been enabled on the Enable/Disable Features screen (CS100000). The field is unavailable for editing and specifies the base currency of the current tenant.

The Company Groups screen has also been added to the quick menu of the Configuration workspace.

Changes to the Companies Screen

A Company Groups tab has been added to the Companies screen (CS101500), as shown in the following screenshot.



This tab appears on the screen if the *Customer and Supplier Visibility Restriction* feature has been enabled on the Enable/Disable Features screen (CS100000).

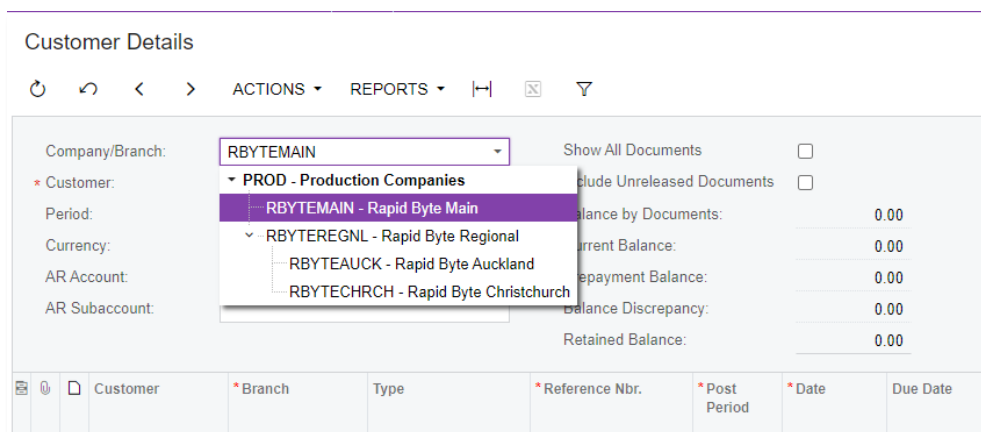
On the tab, a user can review the groups in which the company selected in the Summary area is included, add the company to a group, and exclude the company from a group (by deleting the row with the group). Also, if the company is included in more than one group, the user can or select the company’s primary group by selecting the **Primary Group** check box in the row of the group; only one primary group can be selected for a company.

Changes to the Drop-Down List of the Company/Branch Box

The multilevel drop-down list in the **Company/Branch** field on multiple screens has been modified to display company groups, along with companies and branches.

If a company is included in multiple groups, in the **Company/Branch** field, this company (and any branch within it) will be displayed multiple times—once under each of the groups in which the company is included. However, if a company or branch was previously selected in the **Company/Branch** field and a user opens the list, the company or branch will be highlighted under its primary group; non-primary groups can be collapsed if they contain more than three companies.

The following screenshot illustrates an updated multilevel drop-down list in the **Company/Branch** field on the Customer Details screen (AR402000).



Financial Dashboards

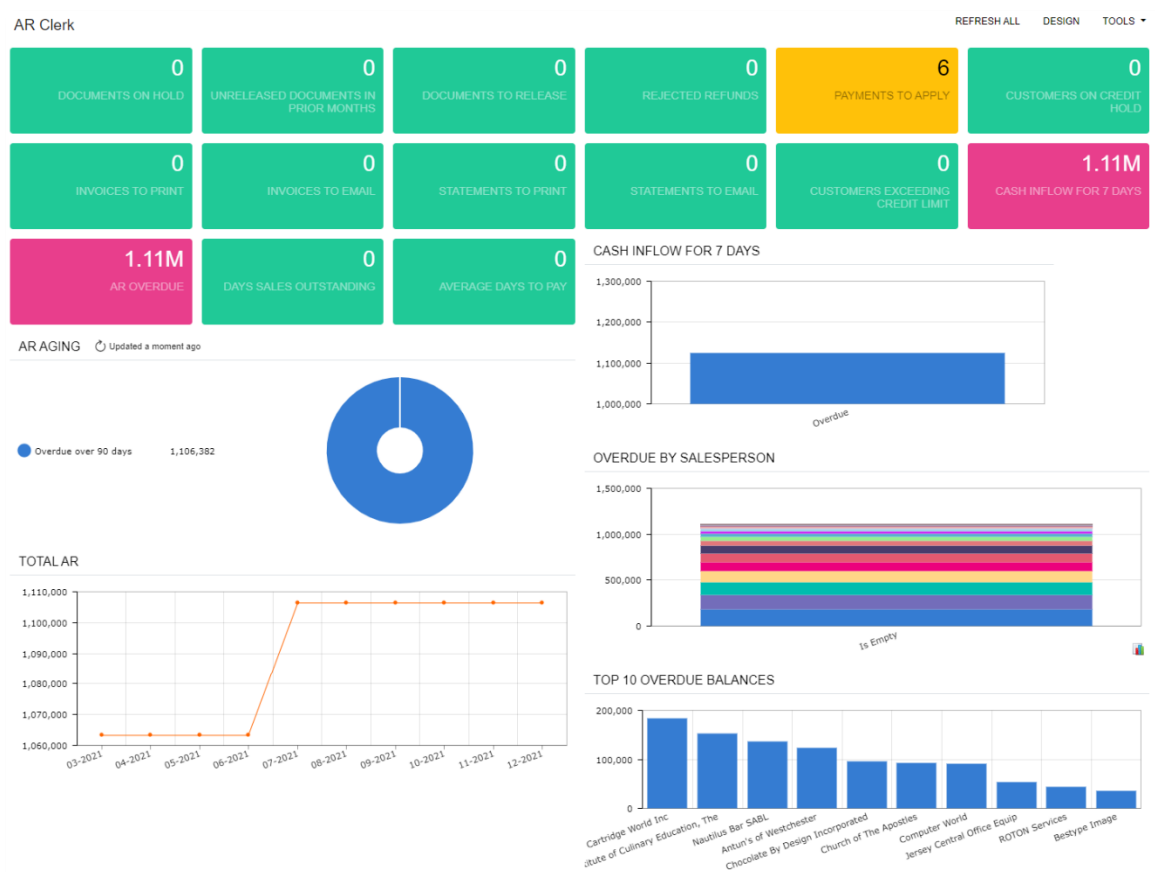
Previously, financial dashboards were introduced as a customisation package. As of this release, financial dashboards are included in MYOB Advanced. The following dashboards are now available for users:

- **AR Clerk (DBAR0001):** A dashboard for the sales department (salespeople, adviser, account manager, customer services manager, or sales manager)
- **AP Clerk (DBAP0001):** A dashboard for employees and managers performing supplier management activities
- **Controller (DBCA0001):** A dashboard for the finance department

These dashboards include various key performance indicators (KPIs), metrics, and charts, and use generic inquiries to gather the underlying data. Users can access the dashboards from the Dashboards workspace, in the Dashboard: Finance category.

AR Clerk Dashboard

The AR Clerk dashboard (DBAR0001) is shown in the following screenshot.



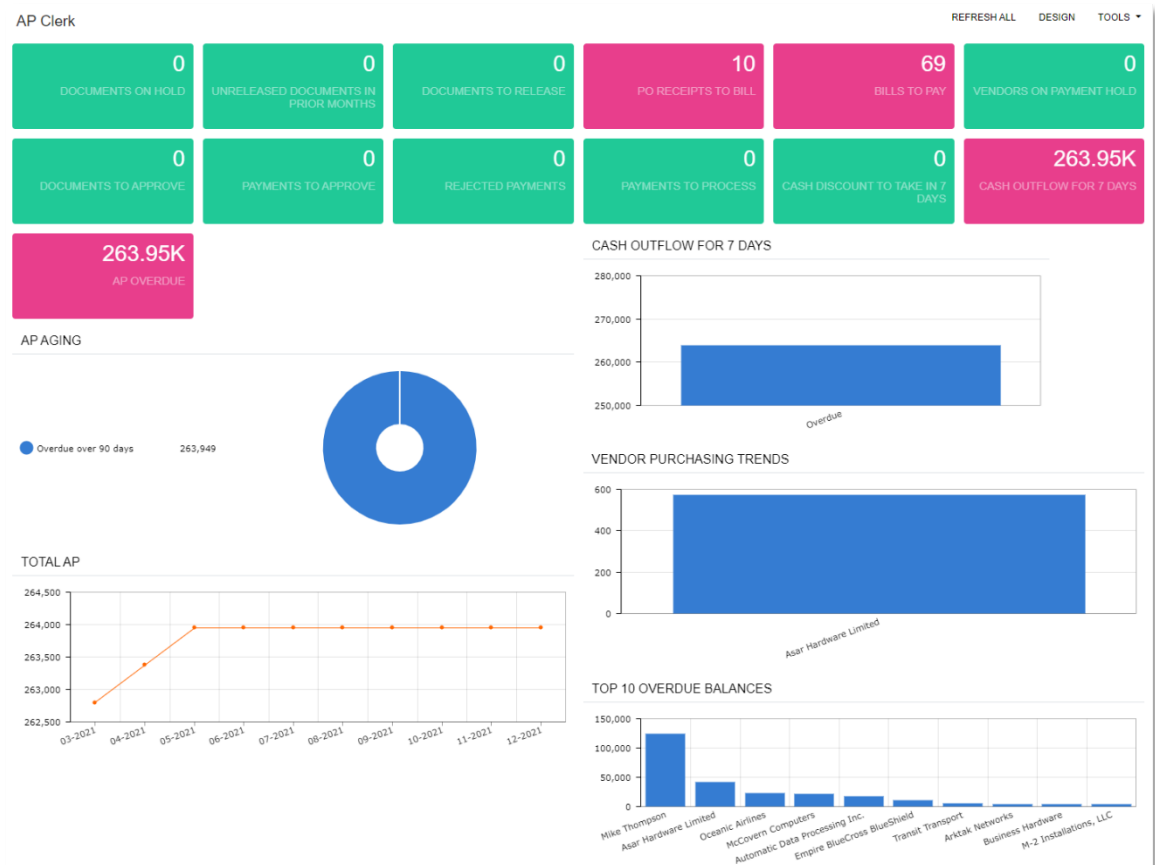
The following table lists the KPIs included in the AR Clerk dashboard and briefly describes each of them.

KPI	MYOB Advanced Widget	Description
Documents on Hold	Scorecard KPI	All AR documents and payments with the <i>On Hold</i> status
Unreleased Documents in Prior Months	Scorecard KPI	All unreleased AR documents, payments, and applications that are dated in past months
Documents to Release	Scorecard KPI	All AR documents, payments, and applications that are ready to be released
Rejected Refunds	Scorecard KPI	All customer refunds with the Rejected status
Payments to Apply	Scorecard KPI	All AR payments with the Open status and without unreleased applications
Invoices to Print	Scorecard KPI	All AR documents with the Balanced or Open status, and with the Printed and Don't Print check boxes cleared on the Invoices and Memos screen (AR301000)
Invoices to Email	Scorecard KPI	All AR documents with the Balanced or Open status, and with the Emailed and Don't Email check boxes cleared on the Invoices and Memos screen
Statements to Print	Scorecard KPI	All unprinted customer statements that have the Don't Print check boxes cleared on the Print Statements screen (AR503500)
Statements to Email	Scorecard KPI	All unsend customer statements that have the Don't Email check box cleared on the Print Statements screen
Customers on Credit Hold	Scorecard KPI	All customers with the Credit Hold status
Customers Exceeding Credit Limit	Scorecard KPI	All customers for which Credit Limit or Limit and Days Past Due is selected in the Credit Verification field on the Financial tab of the Customers screen (AR303000) and the value in the Remaining Credit Limit field is less than or equal to 0.00
Average Days to Pay	Scorecard KPI	The average difference (in days) between the payment date and the invoice's due date for all paid invoices (with the "Closed" status) starting from the first day of the quarter before the current one
Days Sales Outstanding	Scorecard KPI	The average number of days that the company takes to collect revenue after a sale has occurred Formula: (Accounts Receivable / Total Credit Sales (Billed Revenue)) * Number of Days
Cash Inflow for 7 Days	Scorecard KPI	The summary of AR document balances that are overdue and due within seven days of today
AR Overdue	Scorecard KPI	The summary of overdue customer balances as of the current day

KPI	MYOB Advanced Widget	Description
AR Aging	Chart Type: Doughnut	The summary of AR document balances that are current and overdue as of the current day, split by the following aging buckets: <ul style="list-style-type: none"> • Current • Overdue from 1 to 30 days • Overdue from 31 to 60 days • Overdue from 61 to 90 days • Overdue more than 90 days
Cash Inflow for 7 Days by Days	Chart Type: Column	The summary of document balances that are overdue and due in seven days starting from today, split by days; the first column is the total overdue amount
Top 10 Overdue Balances	Chart Type: Column	The 10 customers with the highest overdue balances
Overdue by Salesperson	Chart Type: Stacked Column	The 10 salespersons whose customers have the highest overdue balances, split by customer
Total AR	Chart Type: Line	A summary of the changes in document balances for the past 12 months

AP Clerk Dashboard

The following screenshot illustrates the AP Clerk dashboard (DBAP0001).



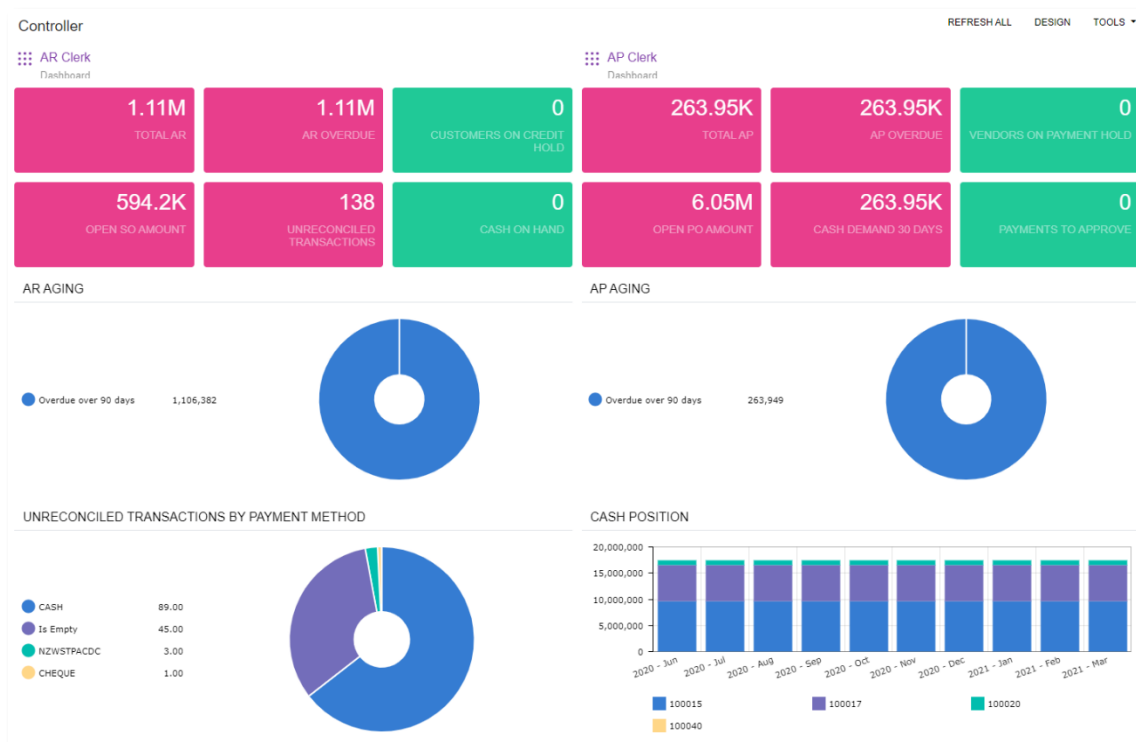
The following table lists the KPIs included in the AP Clerk dashboard and briefly describes each of them.

KPI	MYOB Advanced Widget	Description
Documents on Hold	Scorecard KPI	All AP documents and payments with the <i>On Hold</i> status
Unreleased Documents in Prior Months	Scorecard KPI	All unreleased AP documents, payments, and applications that are dated in past months
Documents to Release (Current Period)	Scorecard KPI	All unreleased AP documents, payments, and applications that are ready to be released
PO Receipts to Bill	Scorecard KPI	All purchase receipts that have not been billed yet
Bills to Pay	Scorecard KPI	All overdue AP documents and documents that will be due within seven days of today Note: This KPI does not include documents with retainage that have a balance of 0.00, because they are already paid but will be closed once the retainage document is closed.
Documents to Approve	Scorecard KPI	All AP documents with the "Pending Approval" status
Payments to Approve	Scorecard KPI	All AP payments with the "Pending Approval" status
Rejected Payments	Scorecard KPI	All customer refunds that have the "Rejected" status
Payments to Process	Scorecard KPI	All AP payments that need to be printed (that is, they have the "Pending Print" status)
Suppliers on Payment Hold	Scorecard KPI	All suppliers that have the "Hold Payments" status
Cash Discount to Take in 7 Days	Scorecard KPI	The summary of cash discounts of the released and unreleased AP documents that can be taken within seven days
Cash Outflow for 7 Days	Scorecard KPI	The summary of AP document balances that are past due and due within seven days of today
AP Overdue	Scorecard KPI	The summary of overdue supplier balances as of the current day
AP Aging	Chart Type: Doughnut	The summary of AP document balances that are current and past due as of the current day, split by the following aging buckets: <ul style="list-style-type: none"> • Current • Overdue from 1 to 30 days • Overdue from 31 to 60 days • Overdue from 61 to 90 days • Overdue more than 90 days
Cash Outflow for 7 Days by Days	Chart Type: Column	The summary of AP document balances that are past due and due within days of today, split by days; the first column is the total past due amount

KPI	MYOB Advanced Widget	Description
Top 10 Overdue Balances	Chart Type: Column	The 10 suppliers with the highest overdue balances
Supplier Purchasing Trends	Chart Type: Stacked Column	The seven suppliers with the highest summary document amount during the quarter
Total AP	Chart Type: Line	A summary of changes in AP document balances for the past 12 months

Controller Dashboard

The following screenshot illustrates the Controller dashboard (DBCA0001).



The following table lists the KPIs included in the Controller dashboard and provides a brief description of each.

KPI	MYOB Advanced Widget	Description
AR Clerk	Link	A link to the AR Clerk dashboard (DBAR0001)
AP Clerk	Link	A link to the AP Clerk dashboard (DBAP0001)
Total AR	Scorecard KPI	The actual summary of customer balances
AR Overdue	Scorecard KPI	The summary of overdue customer balances as of the current day
Open SO Amount	Scorecard KPI	The summary of amounts of open sales orders that have the SO (Sales Order), CS (Cash Sale), and IN (Invoice) order types

KPI	MYOB Advanced Widget	Description
Customers onCredit Hold	Scorecard KPI	All customers with the Credit Hold status
Total AP	Scorecard KPI	The actual summary of supplier balances
AP Overdue	Scorecard KPI	The summary of overdue supplier balances as of today
Open PO Amount	Scorecard KPI	The summary amount of open purchase orders
Suppliers on Payment Hold	Scorecard KPI	All suppliers with the Hold Payments status
Payments to Approve	Scorecard KPI	All payments with the Pending Approval status
Cash on Hand	Scorecard KPI	The summary of cash account balances or all active cash accounts for the current month
Cash Demand 30Days	Scorecard KPI	The summary of balances of all overdue AP documents that will be due within 30 days of today
Unreconciled Transactions	Scorecard KPI	The number of unreconciled transactions that are more than 30 days old
AR Aging	Chart Type: Doughnut	The summary of document balances that are current and overdue as of the current day, split by the following aging buckets: <ul style="list-style-type: none"> • Current • Overdue from 1 to 30 days • Overdue from 31 to 60 days • Overdue from 61 to 90 days • Overdue more than 90 days
AP Aging	Chart Type: Doughnut	The summary of document balances that are current and past due as of the current day, split by the following aging buckets: <ul style="list-style-type: none"> • Current • Overdue from 1 to 30 days • Overdue from 31 to 60 days • Overdue from 61 to 90 days • Overdue more than 90 days
Month-to-Date Expenses	Chart Type: Doughnut	Expenses by category (class) for the current month
Quarter-to-Date Expenses	Chart Type: Doughnut	Expenses by category (class) for the current quarter
Year-to-Date Expenses	Chart Type: Doughnut	Expenses by category (class) for the current year
Income vs Expense by Quarter	Chart Type: Column	A comparison of income and expenses for each quarter; the duration is eight quarters, including the current quarter

KPI	MYOB Advanced Widget	Description
Cash Position	Chart Type: Stacked Column	The summary of cash account balances for all active cash accounts during the past 12 months
Income vs Expense by Month	Chart Type: Line	A comparison of income and expenses for each month over the duration of the past year.

Fixed Assets Under Construction

As of this release, MYOB Advanced supports fixed assets that are under construction. Until the construction is complete, these assets do not require depreciation and do not need to have a **Placed-in-Service Date** specified on the General Settings tab (Asset Summary section) of the Fixed Assets screen (FA303000). The cost of assets under construction is recorded in a dedicated asset account. While an asset is under construction, users can process cost additions and deductions, as well as perform other fixed asset operations, except for depreciation.

When the construction of a fixed asset has been completed, a user should do the following:

1. Specify the **Placed-in-Service Date** for the fixed asset on the Fixed Assets screen.
2. On the Transfer Assets screen (FA507000), transfer the asset to a fixed asset class that is not used for under-construction assets. This process will post the following entry, transferring the asset cost to the Fixed Assets account.

GL Account	Debit	Credit
Fixed Assets	Asset cost	
Fixed Assets under Construction		Asset cost

3. Start depreciating the fixed asset on the Calculate Depreciation screen (FA502000) by selecting Depreciate in the Action field of the Summary area.

Changes to the Fixed Asset Classes Screen

On the Fixed Asset Classes screen (FA201000), the following changes have been made, as shown in the screenshot below:

- On the General Settings tab, an **Under Construction** check box has been added.
- On the General Settings tab, the **Depreciate** check box has been renamed to **Depreciable**.

The screenshot shows the 'Fixed Asset Classes' screen for 'BUILDINGCON - Buildings under construction'. The 'GENERAL SETTINGS' tab is selected. The 'Asset Class ID' is 'BUILDINGC', 'Parent Class' is empty, and 'Description' is 'Buildings under construction'. The 'Active' checkbox is checked, and 'Hold on Entry' is unchecked. Under 'GENERAL SETTINGS', 'Asset Type' is 'BUILDING - Building', 'Tangible' is checked, 'Depreciable' is checked, and 'Under Construction' is checked. 'Useful Life, Years' is '50.0000' and 'Accelerated Depreciation for SL Depr. Method' is unchecked. A red box highlights the 'Depreciable' and 'Under Construction' checkboxes.

The **Under Construction** check box is available for selection only if a class has the **Depreciable** check box selected, because fixed assets under construction will be depreciable after the construction is complete.

By default, the **Under Construction** check box is cleared. If there is at least one fixed asset associated with an asset class for which it is selected, the user cannot change the state of the check box.

Changes to the Fixed Assets Screen

On the Fixed Assets screen (FA303000), the **Placed-in-Service Date** field is now optional for a fixed asset associated with a class that has the Under Construction check box selected on the Fixed Asset Classes screen (FA201000). If the **Placed-in-Service Date** field has a value, and the asset class of the selected fixed asset has the Under Construction field selected, the system displays a warning message in the **Placed-in-Service Date** field indicating that the asset will not be depreciated.

The **Placed-in-Service Date** field is available for editing and can be cleared for a fixed asset associated with an under-construction asset class. If the **Placed-in-Service Date** field is empty, the asset can be transferred only to another under-construction asset class. If a user has created at least one depreciation transaction, the asset cannot be transferred to an under-construction class.

The **Depreciate** check box on the General Settings tab has been renamed to **Depreciable**. The following screenshot illustrates the UI changes made on the Fixed Assets screen.

The screenshot shows the 'Fixed Assets' screen for 'Building - Head Office'. The 'GENERAL SETTINGS' tab is active. In the 'ASSET SUMMARY' section, the 'Depreciable' checkbox is checked and highlighted with a red box. A yellow tooltip message is displayed below the checkbox, stating: 'The fixed asset is under construction and cannot be depreciated.' Other fields include Asset ID (<NEW>), Description (Building - Head Office), Asset Class (BUILDINGCON - Buildings ur), Property Type (Property), Status (Active), Asset Type (BUILDING - Building), Branch (RBYTEMAIN - Rapid Byte Me), and Placed-in-Service Date (31/05/2021).

If a fixed asset has at least one depreciation transaction, the user will not be able to do the following:

- Change the class in the **Asset Class** field for a class that has the **Under Construction** check box selected on the Fixed Asset Classes screen.
- On the Transfer Assets screen (FA507000), transfer the fixed asset to a class that has the **Under Construction** check box selected on the Fixed Asset Classes screen.

The **Calculate Depreciation** command on the Actions menu is not available for fixed assets under construction.

Changes to the Calculate Depreciation Screen

On the Calculate Depreciation screen (FA502000), the records related to fixed assets under construction are now excluded from selection and are not displayed in the table, regardless of the selection criteria specified.

Paid Amounts and Line-Level Balances in AR Reports

In MYOB Advanced 2021.1.1, the AR Open Documents by Project (AR634100) and AR Open Documents by Customer (AR634000) reports have been redesigned and now display information as of the current business date; additionally, these reports show amounts paid or applied. By running these reports, a user can see which customers have open documents for a particular project, how much they owe, and how much has been already paid. Both reports are available in the Project Management and Construction workspaces in addition to the Receivables workspace.

Changes to the AR Open Documents by Project Report

The AR Open Documents by Project report (AR634100) is now available if the *Projects* group of features is enabled on the Enable/Disable Features screen (CS100000).

The following UI changes have been introduced on Report Parameters tab of the report form:

- The **Financial Period** field has been removed. The report now displays the data as of the current business date.
- The **Include Retainage Documents** check box has been removed. The report does not list retainage documents because their amounts are already included in the amounts of the related original documents.
- A **Report Format** field has been added. A user can select one of the following options:
 - **Detailed** (default): The report shows individual documents.
 - **Summary**: The report shows a list of customers with their aggregated amounts grouped by project.

In the AR Open Documents by Project report, a **Paid/Adjusted** column has been added, which shows the total amount of applications. For original documents, the column includes payment applications to the original documents and to related retainage documents. In the report, the documents are grouped first by project and then by customer.

The following screenshot illustrates the AR Open Documents by Project report printed in the Detailed format.

AR Open Documents by Project TOOLS ▾

🔍 🔄 🖨️ 📧 ⏪ ⏩ ▶️ ▶️ PRINT SEND EXPORT ▾
Type your query here Find

AR Open Documents (by Project)											Page:	1 of 9		
Company/Branch: RBYTEMAIN											Date:	31/05/2021 11:03		
User: Michael Andrews														
Project	Description													
X	Non-Project Code.													
Customer	Customer Account Name													
AMROBANK	AMRO Bank N.V.													
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance			
001070	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	709.70	0.00	0.00	709.70	0.00	709.70			
001071	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	1,279.80	0.00	0.00	1,279.80	0.00	1,279.80			
001072	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	1,529.30	0.00	0.00	1,529.30	0.00	1,529.30			
001073	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	3,184.00	0.00	0.00	3,184.00	0.00	3,184.00			
001074	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	870.48	0.00	0.00	870.48	0.00	870.48			
									Customer Totals:	7,573.28	0.00	7,573.28		
Customer	Customer Account Name													
ANTUNSWEST	Antun's of Westchester													
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance			
001069	INVOICE		30/06/2020	30/06/2020	Specific Date in a Month	1,883.18	0.00	0.00	1,883.18	0.00	1,883.18			
									Customer Totals:	1,883.18	0.00	1,883.18		
Customer	Customer Account Name													
ARTCAGES	Artcages Co.													
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance			
001108	CREDIT		23/06/2020			-2,511.60	0.00	0.00	-2,511.60	0.00	-2,511.60			
									Customer Totals:	-2,511.60	0.00	-2,511.60		

Changes to the AR Open Documents by Customer Report

The AR Open Documents by Customer report (AR634000) is available if the *Projects* group of features is enabled on the Enable/Disable Features screen (CS100000).

The following UI changes have been introduced on Report Parameters tab of the report form:

- The **Financial Period** field has been removed. The report now displays the data as of the current business date.
- The **Include Retainage Documents** check box has been removed. The report does not list retainage documents because their amounts are already included in the amounts of the related original documents.
- A **Report Format** field has been added. A user can select one of the following options:
 - **Detailed** (default): The report shows individual documents.
 - **Summary**: The report shows a list of projects with their aggregated amounts grouped by customer.

In the AR Open Documents by Customer report, a **Paid/Adjusted** column has been added, which shows the total amount of applications. For original documents, the column includes payment applications to the original documents and to the related retainage documents. In the report, the documents are grouped first by customer and then by project.

The following screenshot illustrates the AR Open Documents by Customer report printed in the Detailed format.

AR Open Documents by Customer TOOLS ▾

✎ ↺ 🖨 🔍 ⏪ ⏩ PRINT SEND EXPORT ▾
Type your query here Find

AR Open Documents (by Customer)												
Company/Branch: RBYTEMAIN										Page: 1 of 10		
User: Michael Andrews										Date: 31/05/2021 11:06		
Customer	Customer Account Name											
ALPHABETLD	Alphabetland School Center											
Project Description												
0000000004 Software Maintenance - ALPHA												
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance	
000952	INVOICE		1/05/2020	1/05/2020	Contract Billing 0000000004: Software	920.00	0.00	0.00	920.00	0.00	920.00	
001013	INVOICE		1/06/2020	1/06/2020	Contract Billing 0000000004: Software	920.00	0.00	0.00	920.00	0.00	920.00	
									Project Totals:	1,840.00	0.00	1,840.00
Project Description												
CT000000009 Software Maintenance												
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance	
000945	INVOICE		1/05/2020	1/05/2020	Contract Billing CT000000009: Software	11,040.00	0.00	0.00	11,040.00	0.00	11,040.00	
001015	INVOICE		1/06/2020	1/06/2020	Contract Billing CT000000009: Software	11,040.00	0.00	0.00	11,040.00	0.00	11,040.00	
									Project Totals:	22,080.00	0.00	22,080.00
									Customer Totals:	23,920.00	0.00	23,920.00
AMROBANK AMRO Bank N.V.												
Project Description												
X Non-Project Code.												
Ref. Nbr.	Doc. Type	Customer Ref. /Payment Ref.	Doc Date	Due Date	Description	Total Amount	Original Retainage	Paid/Adjusted	Total Balance	Unreleased Retainage	Net Balance	
001070	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	709.70	0.00	0.00	709.70	0.00	709.70	
001071	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	1,279.80	0.00	0.00	1,279.80	0.00	1,279.80	
001072	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	1,529.30	0.00	0.00	1,529.30	0.00	1,529.30	
001073	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	3,184.00	0.00	0.00	3,184.00	0.00	3,184.00	
001074	INVOICE		30/06/2020	30/06/2020	Genset Maintenance Service Contract	870.48	0.00	0.00	870.48	0.00	870.48	
									Project Totals:	7,573.28	0.00	7,573.28

Other UI Changes

In the Construction workspace, the AR Docs by Project With Paid Amt (AR734100) report has been removed. Users should instead run the AR Open Documents by Project (AR634100) report to view the AR documents that are open as of the current business date and grouped by project, or a list of customers with their aggregated amounts, depending on the report format.

New Workflow Support on Finance Screens

In MYOB Advanced 2021.1.1, the finance screens that used automation steps have been redesigned to support the new workflow engine.

The processes that are performed on multiple screens related to the finance functionality work as they did in the previous version. The UI on these screens has been enhanced to support the functionality of the new workflow engine.

Note: Because the implementation of the new workflow engine entails changes to DACs and business logic, it may affect custom generic inquiries, customisation projects, import and export scenarios, and API integrations. For the complete list of changes, see Release Notes for Developers.

UI Enhancements

On multiple screens related to accounts payable, accounts receivable, contract management, general ledger, tax management, and cash management, the buttons representing the actions that are most relevant to the current status of the document opened on the screen are displayed directly on the toolbar, in addition to being included as menu commands on the Actions menu.

The Actions menu on each of these screens displays only the actions that can be performed for the type of the document selected on the screen. The order of commands on the Actions menu has been rearranged. Now the commands related to the document workflow (such as **Hold** and **Pay**) are located at the top of the menu, and the commands not related to the workflow (such as **Reverse** or **Reclassify GL Batch**) have been moved to the bottom of the menu.

The **Hold** check box has been removed from the Summary area and replaced by the **Hold** and **Remove Hold** actions, which can be selected on the screen toolbar. These UI enhancements have been introduced on the following screens:

- Quick Checks (AP304000)
- Bills and Adjustments (AP301000)
- Checks and Payments (AP302000)
- Batch Payments (AP305000)
- Supplier Price Worksheets (AP202010)
- Invoices and Memos (AR301000)
- Payments and Applications (AR302000)
- Cash Sales (AR304000)
- Sales Price Worksheets (AR202010)
- Customer Contracts (CT301000)
- Trial Balance (GL303010)
- Journal Vouchers (GL304000)
- Journal Transactions (GL301000)
- Tax Adjustments (TX301000)
- Tax Bills and Adjustments (TX303000)
- Transactions (CA304000)
- Funds Transfers (CA301000)
- Bank Deposits (CA305000)
- Reconciliation Statements (CA302000)
- Fixed Asset Transactions (FA301000)
- Fixed Assets (FA303000)

Example of UI Changes to the Invoices and Memos Screen

On the Invoices and Memos screen (AR301000), actions have been renamed to support the workflow engine, as shown in the following table.

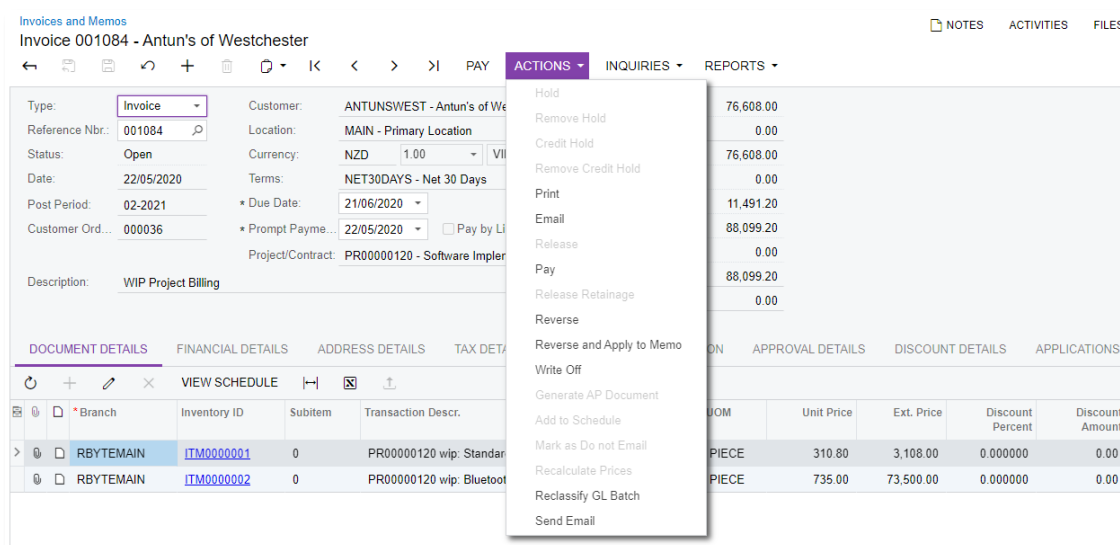
Similar UI changes, which support this functionality, have been made on the other screens listed in the previous section.

Action	Renamed to
Put on Credit Hold	Credit Hold
Release from Credit Hold	Remove Credit Hold
Enter Payment/Apply Memo	Apply for documents with the Credit Memo type
Email Invoice/Memo	Email
Print Invoice/Memo	Print
Generate/View AP Document	Generate AP Document if no AP document has been generated View AP Document if an AP document has been generated

The following changes have also been introduced on the screen:

- For all document types except for “Credit Memo”, the **Customer Refund** action has been removed from the Actions menu.
- The renamed **Print** action has been removed from the Reports menu and added to the Actions menu.
- For documents of the “Overdue Charge” type, the **Reverse** and **Reverse and Apply** actions have been removed because they are not applicable for this document type.
- For the “Credit WO” document type, the **Pending Print** and **Pending Email** statuses have been removed.
- The **Approve** and **Reject** actions appear on the Actions menu if the *Approval Workflow* feature has been enabled on the Enable/Disable Features screen (CS100000) and an approval map has been added and activated on the Approval tab of the Accounts Receivable Preferences screen (AR101000).

The following screenshot shows an AR invoice with the “Open” status on the Invoices and Memos screen. The **Pay** button is displayed on the screen toolbar, and the corresponding menu command is included on the Actions menu. Other menu commands that can be selected for the selected invoice are available for selection on the menu.



Other UI Changes

The following UI changes have been introduced to unify the action names throughout the system:

- On the Customer Details screen (AR402000), the **Enter New Invoice** action has been renamed to **Create Invoice**, **Enter New Payment** has been renamed to **Create Payment**, and **Enter Payment/Apply Memo** has been renamed to **Pay/Apply Document**. The **Pay/Apply Document** action can be selected for documents with the Invoice, Debit Memo, Overdue Charge, Payment, Prepayment, Credit Memo, and Customer Refund types.
- On the Customers screen (AR303000), the **Status** field in the Summary area has been renamed to **Customer Status**. The following commands have been added to the Actions menu: **Put on Hold**, **Put on Credit Hold**, **Deactivate**, **Activate**, **Set as One-Time Customer**, and **Set as Regular Customer**. For more information on the new workflow for customers and customer accounts, see “Enhanced Workflows” on page 5.
- On the Supplier Details screen (AP402000), the **Enter New Bill** action has been renamed to **Create Bill**, **Enter New Payment** has been renamed to **Create Payment**, and **Pay Bill/Apply Adjustment** has been renamed to **Pay/Apply Document**. The **Pay/Apply Document** action can be selected for documents with the Bill, Debit Adjustment, Credit Adjustment, and Prepayment types.
- On the Suppliers screen (AP303000), the **Status** field in the Summary area has been renamed to **Supplier Status**. The following commands have been added to the Actions menu: **Put on Hold**, **Hold Payments**, **Deactivate**, **Activate**, **Set as One-Time Supplier**, and **Set as Regular Supplier**. For more information on the new workflow for suppliers and supplier accounts, see “Enhanced Workflows” on page 5.
- On the Journal Transactions screen (GL301000), the **Reverse Batch** action has been renamed to **Reverse**.

- On the Manage Credit Holds screen (AR523000), in the **Action** field, the “Apply Credit Hold” option has been renamed to “Credit Hold”, and the “Release Credit Hold” option has been renamed to “Remove Credit Hold”.

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the screens listed above, users who work on customisations will need to redesign the automation of the processes related to the applicable screens by using the new workflow engine. For more information, see the “Creating Workflows” chapter in the MYOB Advanced Customisation Guide.

Prepare Payments by Project

In previous versions of MYOB Advanced, users could not prepare payments by project, and the system had no way of collecting and paying bills of a particular project. As of this release, the Prepare Payments screen (AP503000) supports filtering by project.

Changes to the Prepare Payments Screen

In the Selection area of the Prepare Payments screen (AP503000), a **Project** field has been added. This field is displayed on the screen if the *Projects* feature has been enabled on the Enable/Disable Features screen (CS100000). Project-related columns (**Project**, **Project Task**, **Account**, **Inventory ID**, and **Cost Code**) appear in the table on the Documents to Pay tab if both the *Projects* and *Payment Application by Line* features have been enabled on the Enable/Disable Features screen.

By selecting a project in the **Project** field, a user can pay bills related to this particular project.

Changes for Documents Paid by Line

For bills with the **Pay by Line** check box selected, each line of a bill that contains the project that matches the project selected in the Selection area of the Prepare Payments screen (AP503000) is displayed on the Documents to Pay tab with the value in the Amount Paid column related to the selected project. Bills with the **Pay by Line** check box cleared and multiple projects in their lines are displayed on the Documents to Pay tab if at least one line of the bill contains a project that matches the project selected in the Selection area of the Prepare Payments screen.

A bill with the **Pay by Line** check box cleared is always shown as one aggregate line on the Prepare Payments screen. If such a bill has multiple projects specified in its lines, when a user filters bills by project, near the line with this bill, the system displays a warning message indicating that the value in the Amount Paid column refers to the whole bill and all projects of its lines.

Changes for Documents with Retainage

On the Prepare Payments screen (AP503000), the lines of retainage documents for which the Pay by Line check box is cleared are now shown if the project specified in the Project field in the Summary area of this screen is the same as the project specified for a line of the retainage bill.

Note: If an original bill has the same project specified for each of its lines, this project is specified in the retainage bill. If the original bill has various projects specified for its lines, the retainage bill has X (the non-project code) in the Project column of its lines.

Restricted Visibility of Supplier Records

When multiple companies with their own accounting departments are configured within the same tenant, users may want to restrict the visibility of supplier accounts to employees of the particular company or branch. To support this requirement, starting in this release, the visibility of each supplier account in MYOB Advanced can be associated with one of the following:

- **A branch:** If the visibility of the supplier is restricted to a branch, the supplier can be accessed by users assigned to the role specified for the branch in the **Access Role** field of the Branch Details tab (Configuration Settings section) on the Branches screen (CS102000). The supplier can be selected in documents originating from this branch.
- **A company:** If the visibility of the supplier is restricted to a company, the supplier can be accessed by a user that has access to at least one of the company's branches (or to the company if it has no branches). That is, the supplier can be accessed by a user with access to the role specified in the **Access Role** field (Configuration Settings section) on the Branch Details tab of the Branches screen for the branch, or the Company Details tab of the Companies screen (CS101500) for the company. The supplier can be selected in documents originating from any branch of the company.
- **No entity:** If the visibility of the supplier is not restricted to a branch or company, it can be accessed by any user. The supplier can be selected in documents originating from any branch.

These capabilities are now available if the *Customer and Supplier Visibility Restriction* feature has been enabled on the Enable/Disable Features screen (CS100000). With this feature enabled, the UI changes described further in this topic appear on the appropriate screens.

Note: If any restriction groups have been configured in the system, they will be applied in addition to the supplier visibility restriction functionality.

Changes to the Enable/Disable Features Screen

On the Enable/Disable Features screen (CS100000), the *Customer Visibility Restriction* feature has been renamed to the *Customer and Supplier Visibility Restriction*.

Changes to the Supplier Classes Screen

On the Supplier Classes screen (AP201000), a **Restrict Visibility To** field has been added on the General Settings tab (Default General Settings section), as shown in the following screenshot. If any active branch or company is selected in this field for the class, this branch or company will be used as the default setting for suppliers of the class.

The screenshot displays the 'Supplier Classes' interface for 'ADV - Advertising'. The 'GENERAL SETTINGS' tab is active, showing the 'DEFAULT GENERAL SETTINGS' section. The 'Restrict Visibility To' field is highlighted with a red box and contains the value 'RBYTEMAIN - Rapid Byt...'. Other fields include 'Class ID' (ADV), 'Description' (Advertising), 'Country' (NZ - NEW ZEALAND), 'Tax Zone ID' (DOMESTIC), 'Tax Calculation Mode' (Tax Settings), 'Shipping Terms', and 'Receipt Action' (Accept but Warn). The 'DEFAULT FINANCIAL SETTINGS' section includes 'Terms' (CASHONLY - Cash Only), 'Payment Method' (CASH - Cash Payment), 'Cash Account', 'Payment By' (Due Date), 'Currency ID' (NZD), 'Curr. Rate Type' (SPOT), and 'DEFAULT PRINT AND EMAIL SETTINGS' (Print Orders, Send Orders by Email).

If a user changes this setting for a supplier class, the modified setting applies to new suppliers created based on this class and to existing suppliers that are reassigned to the class after it has been modified.

Changes to the Suppliers Screen

On the Suppliers screen (AP303000), the Restrict Visibility To field has been added to the Financial Settings section on the Financial tab, as shown in the screenshot below. In this field, a user can select a company or a branch that will work with the supplier exclusively.

If a branch is selected in this field, the system copies this value to the **Default Branch** field on the Purchase Settings tab (Other Settings section) of this screen. If a company is selected in this field, in the **Default Branch** field, the system restricts the list of values for selection to the branches of the selected company.

The screenshot shows the 'Suppliers' screen for 'EDPOWER - Edison Power'. The 'FINANCIAL' tab is selected, and the 'FINANCIAL SETTINGS' section is expanded. The 'Restrict Visibility To' field is set to 'RBYTEMAIN - Rapid Byte Main'. Other fields include 'Terms' (CASHONLY - Cash Only), 'Currency ID' (NZD), and 'Curr. Rate Type' (SPOT). The 'RETAINAGE SETTINGS' section shows 'Retainage Percent' at 0.000000 and an unchecked 'Apply Retainage' checkbox.

If a user changes the supplier class of an existing supplier in the **Supplier Class** field, the system displays a window asking the user to confirm this change. If the change is confirmed, the system inserts the **Restrict Visibility To** value that is specified for the newly selected supplier class.

On this screen, a user can select in the **Supplier ID** field only suppliers that are visible in the branches the user has access to, based on the **Restrict Visibility To** setting of each supplier, the access role assigned to the branch, and the roles assigned to the user. The list of classes available in the **Supplier Class** field on this screen is also restricted based on the roles assigned to the current user: Only supplier classes with the visibility restriction that is a branch or company accessible by the user can be selected on the screen.

Other UI Changes

The following list summarises other UI changes that have been made to support the restricted visibility of supplier records:

- On the Supplier Locations screen (AP303010), the list of values in the Default Branch field on the General tab (Other Settings section) is limited based on the supplier visibility restriction.
- On multiple data entity screens that have the originating branch, the list of suppliers is limited to those that are visible in the originating branch.
- On multiple processing screens that have the Company or Branch setting, only suppliers visible in the selected branch or company can be selected in the Supplier field and can be processed. On other screens that have the Supplier setting but do not have the Company or Branch setting, the list of suppliers is limited based on the current user's access role.
- On the Supplier Summary (AP655000) or Supplier Profiles (AP655500) reports, when a user runs the report to display supplier-related information, the report will

show only the suppliers visible to the current user based on the roles assigned to the user.

- The Suppliers (AP3030PL) and Supplier Locations (AP3030P1) lists have been modified to restrict the visibility of suppliers and supplier locations according to the configured visibility of the user.

Support for Cash Transactions in Bank Deposits

In previous versions of MYOB Advanced, users could not add cash transactions to bank deposits, because clearing accounts could not be selected on the Transactions screen (CA304000). As of this release, MYOB Advanced supports the addition of cash transactions to a bank deposit along with customer payments. Users can now post cash account entries to clearing accounts and add these entries on the Payments tab of the Bank Deposits screen (CA305000).

Changes to the Transactions Screen

On the Transactions screen (CA304000), a column for the **Clearing Account** check box has been added to the lookup table for the **Cash Account** field, as shown in the following screenshot.

Cash Account	Account	Description	Currency	Subaccount	Branch	Clearing Account
> 100015	100015	Cheque Account - NZD Main	NZD	000-000-000	RBYTEMAIN	<input type="checkbox"/>
100040	100040	Cheque Account - NZD	NZD	000-000-000	RBYTEMAIN	<input type="checkbox"/>
CIBANZ	100017	ANZ Bank New Zealand	NZD	000-000-000	RBYTEMAIN	<input checked="" type="checkbox"/>

A Payment Information section has been added to the Financial Details tab on this screen. The **Cleared** check box and **Clear Date** field have been moved to the new section from the Link to GL section. The fields in the new section provide information related to the bank deposit, with the **Batch Deposit** check box selected automatically by the system when the user selects a clearing account in the **Cash Account** field of the Summary area.

Transactions
Cash Entry 000001 - 100015 Cheque Account - NZD Main

Tran. Type: Cash Entry Tran. Date: 24/11/2018 Amount: 355.00
 Reference Nbr.: 000001 Fin. Period: 08-2019 GST Taxable T...: 0.00
 Cash Account: 100015 - Cheque Account - NZD Main Entry Type: CHARGE - Bank Charges GST Exempt T...: 0.00
 Currency: NZD 1.00 Disbursement/...: Disbursement Tax Total: 0.00
 Status: Released Document Ref.: 098
 Owner: EP00000020 - Andy Taylor

Description:

TRANSACTION DETAILS TAX DETAILS **FINANCIAL DETAILS** APPROVAL DETAILS

LINK TO GL TAX SETTINGS

Batch Number: 000945 Tax Zone:
 Branch: RBYTEMAIN - Rapid Byte Main Tax Calculatio...: Tax Settings

PAYMENT INFORMATION

Deposit After: Cleared
 Clear Date: 24/11/2018
 Batch Deposit
 Deposited
 Batch Deposit Date:
 Batch Deposit Nbr.:

Changes to the Bank Deposits Screen

On the Bank Deposits screen (CA305000), the Add Payment to Deposit window opens when a user clicks **Add Payment** on the table toolbar of the Payments tab. In MYOB Advanced 2021.1.1, the system now displays cash transactions in the table, in addition to customer payments, which can be added to a bank deposit. The following screenshot illustrates the Add Payment to Deposit window with cash transactions.

Bank Deposits
CA Deposit <NEW>

Tran. Type: CA Deposit * Deposit Date: 12/29/2020 Deposits Total: 0.00
 Reference Nbr.: <NEW> * Fin. Period: 12-2020 Charge Total: 0.00

* Cash Account:
 Currency:
 Status:
 Description:

Add Payment to Deposit

Clearing Account: * Start Date: 12/22/2020 Selection Total: -175.00
 Payment Method: * End Date: 12/29/2020 Number of Documents: 2

Doc. Module	Type	Reference Nbr.	Customer/Vendor	Account Name	Location	Payment Ref.	Payment Date	Currency	Payment Amount	Cash Account
<input checked="" type="checkbox"/>	CA	Cash Entry	000219			29122020-01	12/29/2020	USD	19.00	10400
<input checked="" type="checkbox"/>	CA	Cash Entry	000220			29122020-02	12/29/2020	USD	156.00	10400
<input type="checkbox"/>	CA	Cash Entry	000221			29122020-02	12/29/2020	USD	157.00	10400
<input type="checkbox"/>	CA	Cash Entry	000222			12292020-01	12/29/2020	USD	19.00	10400
<input type="checkbox"/>	CA	Cash Entry	000223			12292020-02	12/29/2020	USD	158.00	10400

ADD & CLOSE CANCEL

A cash transaction added to a bank deposit affects the total amount of the bank deposit as follows, depending on the entry type specified for it on the Transactions screen (CA304000):

- **Disbursement entry type:** The cash transaction produces a credit entry for the clearing account. The amount of this entry is shown with a negative value in the Deposit Amount column on the Payments tab of the on the Bank Deposits screen. This amount is posted to the debit side of the deposit batch.
- **Receipt entry type:** The cash transaction produces a debit entry for the clearing account. The amount of this entry is shown as a positive value in the Deposit Amount column on the Payments tab of the Bank Deposits screen. This amount is posted to the credit side of the deposit batch.

The following screenshot shows a bank deposit to which two cash transactions have been added, one with the “Receipt” entry type and the other with the “Disbursement” entry type. The system has calculated the total amount of the deposit in the **Total Amount** field in the Summary area.

Bank Deposits
CA Deposit 000226

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

REMOVE HOLD ACTIONS REPORTS

Tran. Type: CA Deposit * Deposit Date: 12/29/2020 Deposits Total: 138.00
 Reference Nbr.: 000226 * Fin. Period: 12-2020 Charge Total: 0.00
 Cash Account: 10200 - Company Checking Account * Document Ref.: 12292020 **Total Amount: 138.00**
 Currency: USD 1.00 VIEW BASE Cash Drop Acc...
 Status: On Hold Cash Drop Am... 0.00
 Description: Bank deposit

PAYMENTS CHARGES FINANCIAL DETAILS

ADD PAYMENT

* Doc. Module	Type	Reference Nbr.	Customer/Vendor	Account Name	Location	* Account	Currency	Deposit Amount	Payment Method	Status	Payment Ref.	Payment Date	Charge Type
CA	Cash Entry	000222				10400	USD	-19.00		Released	12292020-01	12/29/2020	
CA	Cash Entry	000221				10400	USD	157.00		Released	29122020-02	12/29/2020	

Support for Price Lists for Net/Gross Prices

In MYOB Advanced, users can define gross and net prices by assigning business-to-business (B2B) and business-to-consumer (B2C) customers or customer locations to different customer price classes and setting up prices that depend on the customer's price class. However, in previous versions, it was not obvious from a price list whether a price was gross or net. For example, it was possible to set up a customer with the Gross tax calculation mode and assign a customer price class with Net prices to this customer. As a result, prices calculated in a sales order or SO invoice could be incorrect.

As of this release, a new setting—**Tax Calculation Mode**—has been added to the Sales Prices (AR202000) and Sales Price Worksheets (AR202010) screens. Users can now create a sales document with the Gross tax calculation mode and specify gross prices or create a sales document with the Net tax calculation mode and specify net prices for it.

This functionality is available if the Net/Gross Entry Mode feature is enabled on the Enable/Disable Features screen (CS100000).

Changes to the Sales Prices Screen

On the Sales Prices screen (AR202000), a **Tax Calculation Mode** field has been added to the Summary area, and Tax Calculation Mode and Tax Category columns have been added to the table, as shown in the following screenshot.

The screenshot shows the 'Sales Prices' screen with a 'CREATE PRICE WORKSHEET' button. The 'Tax Calculation Mode' dropdown menu is open, showing options: 'All Modes', 'Gross', 'Net', and 'Not Set'. The table below lists various price entries with columns for Price Type, Price Code, Inventory ID, Description, UOM, Warehouse, Promotion, Break Qty, Price, Currency, Tax Calculation Mode, Tax Category, and Effective Date.

Price Type	Price Code	Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Currency	Tax Calculation Mode	Tax Category	Effective Date
Base		EXACCLEAN	Airconditioning Unit Clean up	EACH			0.00	108.00	AUD	Not Set	DEFAULTD	1/01/2018
Customer	CUST000005	EXACCLEAN	Airconditioning Unit Clean up	EACH			0.00	138.00	AUD	Not Set	DEFAULTD	1/01/2018
Customer Price Cl...	EDUC	EXACCLEAN	Airconditioning Unit Clean up	EACH			0.00	120.00	AUD	Not Set	DEFAULTD	1/01/2018
Base		HDSERV	Hardware Service	HOUR			0.00	120.00	AUD	Not Set	DEFAULTD	1/01/2018
Customer	CUST000005	HDSERV	Hardware Service	HOUR			0.00	172.50	AUD	Not Set	DEFAULTD	1/01/2018
Customer Price Cl...	EDUC	HDSERV	Hardware Service	HOUR			0.00	150.00	AUD	Not Set	DEFAULTD	1/01/2018
Base		ITM0000001	Standard Keyboard	EACH			0.00	35.79	AUD	Not Set	DEFAULTD	1/07/2019
Customer	CUST000005	ITM0000001	Standard Keyboard	EACH			0.00	33.24	AUD	Not Set	DEFAULTD	1/07/2019
Customer Price Cl...	EDUC	ITM0000001	Standard Keyboard	EACH			0.00	30.68	AUD	Not Set	DEFAULTD	1/07/2019
Base		ITM0000002	Bluetooth Keyboard	EACH			0.00	19.95	AUD	Not Set	DEFAULTD	1/07/2019
Customer	CUST000005	ITM0000002	Bluetooth Keyboard	EACH			0.00	18.52	AUD	Not Set	DEFAULTD	1/07/2019
Customer Price Cl...	EDUC	ITM0000002	Bluetooth Keyboard	EACH			0.00	17.10	AUD	Not Set	DEFAULTD	1/07/2019
Base		ITM0000003	Kingsbrand Keyboard	EACH			0.00	9.34	AUD	Not Set	DEFAULTD	1/07/2019
Customer	CUST000005	ITM0000003	Kingsbrand Keyboard	EACH			0.00	8.67	AUD	Not Set	DEFAULTD	1/07/2019
Customer Price Cl...	EDUC	ITM0000003	Kingsbrand Keyboard	EACH			0.00	8.01	AUD	Not Set	DEFAULTD	1/07/2019
Base		ITM0000004	Kingsbrand Bluetooth Keyboard	EACH			0.00	18.67	AUD	Not Set	DEFAULTD	1/07/2019
Customer	CUST000005	ITM0000004	Kingsbrand Bluetooth Keyboard	EACH			0.00	17.33	AUD	Not Set	DEFAULTD	1/07/2019

A user can select one of the following values in the **Tax Calculation Mode** field to narrow the prices listed in the table:

- **All Modes** (default): Prices with all available tax calculation modes are shown.
- **Not Set**: Only prices with the Not Set tax calculation mode are shown.
- **Gross**: Only prices with the Gross tax calculation mode are shown.
- **Net**: Only prices with the Net tax calculation mode are shown.

When the user clicks the **Create Price Worksheet** button on the screen toolbar, the system copies the value selected in the **Tax Calculation Mode** field to the created worksheet. If "All Modes" is selected in this field, the system displays an error message indicating that a tax calculation mode must be selected.

The Tax Calculation Mode column in the table can have the following values:

- **Not Set** (default): The price either includes a tax or does not, depending on the tax settings.
- **Gross**: The tax amount is included in the item price.
- **Net**: The tax amount is not included in the item price.

The Tax Category column is not available for editing; it displays the tax category specified for the stock item or non-stock item on the General tab of the Stock Items (IN202500) or Non-Stock Items (IN202000) screens.

Changes to the Sales Price Worksheets Screen

On the Sales Price Worksheets screen (AR202010), a **Tax Calculation Mode** field has been added to the Summary area, and a **Tax Category** column has been added to the table, as shown in the following screenshot.

The screenshot shows the 'Sales Price Worksheets' interface for a 'Customer based price book'. The summary area includes fields for Reference Nbr (000011), Effective Date (1/07/2019), Status (Open), and Tax Calculation Mode (Gross). A dropdown menu for Tax Calculation Mode is open, showing options: Gross, Net, and Not Set. Below the summary is a table with columns: Price Type, Price Code, Alternate ID, Inventory ID, Description, UOM, Warehouse, Break Qty, Source Price, Pending Price, Currency, and Tax Category. The table lists various items like Standard Keyboard, Bluetooth Keyboard, and Desktop Office Pro Packages.

Price Type	Price Code	Alternate ID	Inventory ID	Description	UOM	Warehouse	Break Qty	Source Price	Pending Price	Currency	Tax Category
Customer	CUST000005		ITM0000001	Standard Keyboard	EACH		0.00	51.75	33.240000	AUD	DEFAULTD
Customer	CUST000005		ITM0000002	Bluetooth Keyboard	EACH		0.00	54.05	18.520000	AUD	DEFAULTD
Customer	CUST000005		ITM0000003	Kingsbrand Keyboard	EACH		0.00	56.35	8.670000	AUD	DEFAULTD
Customer	CUST000005		ITM0000004	Kingsbrand Bluetooth Keyboard	EACH		0.00	90.85	17.330000	AUD	DEFAULTD
Customer	CUST000005		ITM0000005	Standard Mouse	EACH		0.00	40.25	31.200000	AUD	DEFAULTD
Customer	CUST000005		ITM0000013	Desktop Office Pro Package A	EACH		0.00	640.55	15.610000	AUD	DEFAULTD
Customer	CUST000005		ITM0000014	Desktop Office Pro Package B	EACH		0.00	661.25	7.800000	AUD	DEFAULTD
Customer	CUST000005		ITM0000015	Desktop Editor Pro Package A	EACH		0.00	790.05	58.500000	AUD	DEFAULTD

A user can select one of the following values in the **Tax Calculation Mode** field:

- **Not Set** (default): The item price can either include a tax or not include it.
- **Gross**: The item price includes the tax amount.
- **Net**: The item price does not include the tax amount.

The Tax Category column is not available for editing; it displays the tax category specified for the stock item or non-stock item on the General tab of the Stock Items (IN202500) or Non-Stock Items (IN202000) screens.

Other UI Changes

In the Summary area of the Supplier Prices screen (AP202000), the **Effective As Of** field displays the current business date by default.

On the Supplier Price Worksheets screen (AP202010), in the Copy Prices window, which opens when a user clicks **Copy Prices** on the table toolbar, the system copies only the prices that have a tax calculation mode selected in the worksheet.

Price Selection Rules

The priority of prices copied by default to a document has not been changed, but if the "Net/Gross Entry Mode" feature has been enabled, the system selects only prices that meet particular criteria as follows, depending on the value in the **Tax Calculation Mode** field specified for a document:

- If the document's tax calculation mode is "Gross", only prices with the Gross or Not Set tax calculation mode can be selected.
- If the document's tax calculation mode is "Net", only prices with the Net or Not Set tax calculation mode can be selected.
- If the document's tax calculation mode is "Tax Settings", prices with any tax calculation mode can be selected.

Synchronisation of Tax Periods with Financial Periods

In previous versions of MYOB Advanced, if an administrative user changed user-defined periods in the financial calendar on the Master Financial Calendar screen (GL201000), the system updated the tax periods for a tax year with all the tax periods having the “Open” status. If at least one tax period in the tax year had the “Prepared” or “Closed” status, the update of the tax periods based on the financial calendar was not performed.

In MYOB Advanced 2021.1.1, the tax periods for which Financial Periods is selected in the Tax Period Type field on the Tax Periods screen (TX207000) can be synchronised with financial periods in the company calendar, regardless of the status of tax periods.

To support this functionality, on the Tax Periods screen (TX207000), the Synchronize Periods with GL command has been added to the Actions menu. This command synchronises the tax year structure with the company's financial year—which is specified on the Master Financial Calendar screen (GL201000), or on the Company Financial Calendar screen (GL201100) if the “Multiple Calendar Support” feature is enabled—starting from the first open tax period; it deletes the existing tax periods and generates new tax periods for the year. If the next tax year has been generated and the end date of the selected tax year does not immediately precede the start date of the next tax year, the next tax year will be deleted upon confirmation.

On the Tax Periods screen, if “Financial Periods” is selected in the **Tax Period Type** field for the company specified in the **Company** field and the tax agency selected in the **Tax Agency** field, when a user changes the user-defined financial periods on the Master Financial Calendar or on the Company Financial Calendar screen, the user should update tax periods based on the updated financial calendar in the following ways:

- On the Prepare Tax Report screen (TX501000), the system displays an error message if the start and end dates of the tax period to be prepared differ from those of the corresponding financial periods for the selected company or if the financial periods have been deleted. The user has to correct the tax period structure by using the **Synchronize Periods with GL** command on the Tax Periods screen.
- On the Release Tax Report screen (TX502000), if the start and end dates of the tax period to be released differ from the corresponding financial period of the selected company or if the financial periods have been deleted, the system displays an error message. The user should void the tax report, and then use the **Synchronize Periods with GL** action on the Tax Periods screen to correct the period structure for the tax year.

Tax Support for Expenses on Bank Transfers

In previous versions of MYOB Advanced, users could not apply taxes to bank fees and charges created on the Funds Transfers screen (CA301000). In MYOB Advanced 2021.1.1, tax support for expenses on the Funds Transfers screen has been implemented. With this support, users can add a tax to each expense line. One expense line can have multiple tax lines.

Changes to the Funds Transfers Screen

The following columns have been added to the table on the Funds Transfers screen (CA301000):

- **Tax Amount:** The total amount of all tax lines added to the current expense. The displayed amount is a link a user can click to open the Expense Taxes window.
- **Total Amount:** The total amount of the expense, which is calculated based on the following formulas, which differ based on whether the taxes are inclusive:
 - **For non-inclusive taxes:** Total Amount = Amount + Tax Amount where Taxable Amount = Amount
 - **For inclusive taxes:** Total Amount = Taxable Amount + Tax Amount where Total Amount = Amount

In these formulas, Amount is the amount of the expense manually defined by a user. For non-inclusive taxes, this amount is also known as the taxable amount. Tax Amount is the total amount of the taxes applied to this expense manually or automatically.

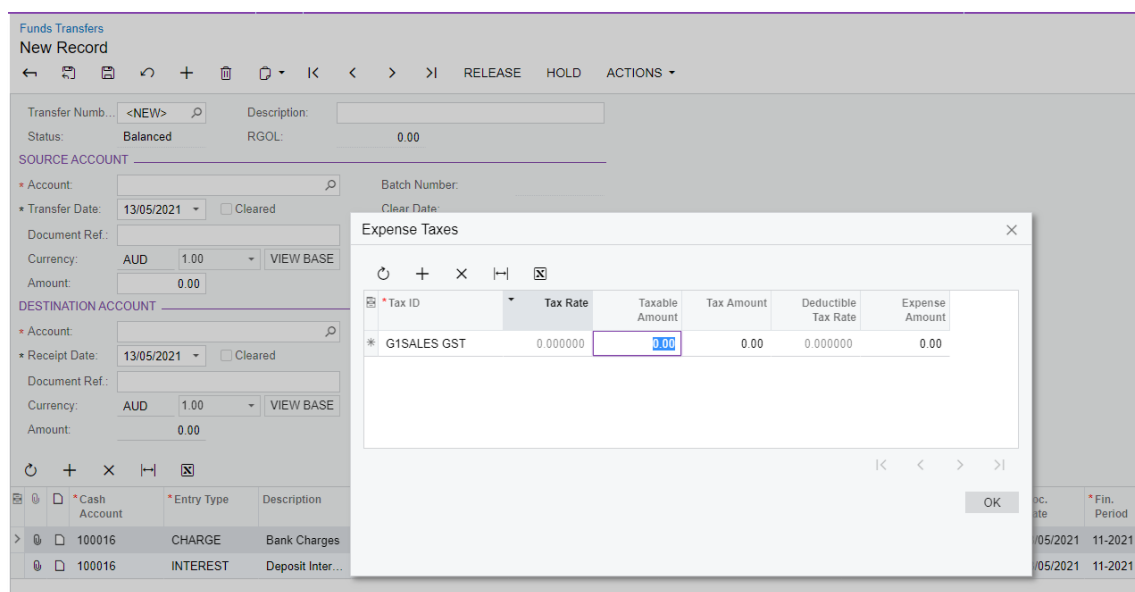
- **Tax Zone:** The tax zone applied to the expense. By default, the tax zone is copied from the tax zone of the selected cash account and entry type.
- **Tax Category:** The tax category of the tax zone.

The following screenshot illustrates the UI changes introduced on the Funds Transfers screen.

The screenshot shows the 'Funds Transfers' screen with a 'New Record' form. The form includes fields for Transfer Number, Description, Status (Balanced), RGOL (0.00), SOURCE ACCOUNT, and DESTINATION ACCOUNT. Below the form is a table with the following columns: Cash Account, Entry Type, Description, Amount, Tax Amount, Total Amount, Currency, Currency Rate, Document Ref., Offset Account, Offset Subaccount, Doc. Date, Fin. Period, Tax Zone, Tax Category, and Tax Calculation Mode.

Cash Account	Entry Type	Description	Amount	Tax Amount	Total Amount	Currency	Currency Rate	Document Ref.	Offset Account	Offset Subaccount	Doc. Date	Fin. Period	Tax Zone	Tax Category	Tax Calculation Mode
100016	CHARGE	Bank Charges	150.00	0.00	150.00	AUD	1.00000000		600691	000-000-000	13/05/2021	11-2021			Tax Settings
100016	INTEREST	Deposit Inter...	50.00	0.00	50.00	AUD	1.00000000		400500	000-000-000	13/05/2021	11-2021			Tax Settings

The following screenshot illustrates the Expense Taxes window, which opens when the user clicks a link in the Tax Amount column.



In this window, the user can review the taxes applied to the expense and manually update the values in the Tax Amount and Expense Amount columns.

Other Improvements

Multiple improvements to the UI and financial management processes have been introduced, as described below.

Renaming of UI Elements from Validate to Recalculate

In previous versions of MYOB Advanced, UI elements on multiple screens used the word validate to describe the recalculation of values, but the system did not perform validation. In MYOB Advanced, to make the user experience more intuitive, the following UI changes have been made on the following screens:

- Validate Account Balances (CA503000) has been renamed to Recalculate Account Balances. The **Validate** and **Validate All** buttons on the screen toolbar have been renamed to **Process** and **Process All**, respectively.
- Validate Project Balances (PM504000) has been renamed to Recalculate Project Balances. The **Validate** and **Validate All** buttons on the screen toolbar have been renamed to **Process** and **Process All**, respectively.
- Validate Supplier Balances (AP509900) has been renamed to Recalculate Supplier Balances.
- Validate Customer Balances (AR509900) has been renamed to Recalculate Customer Balances.
- Validate Deferred Balances (DR509900) has been renamed to Recalculate Deferred Balances. The **Validate** and **Validate All** buttons on the screen toolbar have been renamed to **Process** and **Process All**, respectively.
- Validate Inventory (IN505000) has been renamed to Recalculate Inventory.
- Validate Account History (GL509900) has been renamed to Recalculate Account History. The **Validate** and **Validate All** buttons on the screen toolbar have been renamed to **Process** and **Process All**, respectively.

- On the Projects screen (PM301000), the Validate Project Balance command on the Actions menu has been renamed to Recalculate Project Balance.

The tooltips for the **Process** and **Process All** buttons on the listed screens have been updated based on these changes.

Supplier Class Selection on the Prepare Payments Screen

On the Prepare Payments screen (AP503000), a **Supplier Class** field has been added to the Selection area, as shown in the following screenshot.

The screenshot shows the 'Prepare Payments' screen with the following details:

- Buttons: PROCESS, PROCESS ALL
- Branch: RBYTEMAIN - Rapid Byte Head Quar
- Supplier Class: EMPLACT - Accounting
- Supplier: (empty)
- Payment Meth... (empty)
- Cash Account: (empty)
- Payment Date: 13/05/2021
- Post Period: 11-2021
- Currency: AUD 1.00
- VIEW BASE button
- Pay Date Within: 3 Days
- Due Date Within: 3 Days
- Prompt Payment Disc. Expire...: 3 Days
- Always Take Prompt Paymen...:

Below the form are tabs for 'DOCUMENTS TO PAY' and 'EXCEPTIONS'. The 'DOCUMENTS TO PAY' tab is active, showing a table with columns: Document Type, Reference Nbr., Supplier ID, Line Nbr., Supplier Name, Cost Code, and Account.

By selecting a supplier class in this field, users can narrow the documents that are listed and available for processing on the Process Payments / Print Checks screen (AP505000) and avoid processing the documents of suppliers assigned to other supplier classes.

Note: The implementation of this functionality may affect custom generic inquiries, customisation projects, import and export scenarios, and API integrations. For the complete list of changes, see the *MYOB Advanced 2021.1.1 Technical Release Notes*.

The Change ID Action Added to the Ledgers Screen

On the Ledgers screen (GL201500), an Actions menu with the **Change ID** command has been added, as shown in the following screenshot.

The screenshot shows the 'Ledgers' screen for 'ACTUAL - Actual' with the following details:

- Ledger ID: ACTUAL
- Description: Actual
- Type: Actual
- Currency: AUD
- Consolidation Source:

Below the form are tabs for 'COMPANIES' and 'BRANCHES'. The 'COMPANIES' tab is active, showing a table with columns: Company, Company Name, Active, and Company Type.

Company	Company Name	Active	Company Type
RBYTEMAIN	Rapid Byte Head Quarters	<input checked="" type="checkbox"/>	Without Branches
RBYTEREGN	Rapid Byte Regional Offices	<input checked="" type="checkbox"/>	With Branches Requiring ...

An 'ACTIONS' menu is open, showing the 'Change ID' option.

By clicking **Actions > Change ID**, a user can change the identifier to be used for the ledger—for example, to correct a typo in a ledger ID, or to update the ID of an existing ledger in order to better distinguish it among multiple ledgers in the system.

Support for Statistical Ledgers on the Recalculate Account History Screen

Previously, the Recalculate Account History screen (GL509900) listed the Actual and Reporting types of ledgers. Statistical ledgers—those for which Statistical is selected in the Type field on the Ledgers screen (GL201500)—are now displayed along with ledgers of other types, and users can recalculate the balances of these ledgers based on the transactions posted to the ledgers. The following screenshot illustrates a statistical ledger selected for recalculation on the Recalculate Account History screen.

The screenshot shows the 'Recalculate Account History' screen. At the top, there are navigation icons and buttons for 'PROCESS' and 'PROCESS ALL'. Below this is a search bar for 'Fin. Period' with the value '01-2018'. The main area contains a table with the following columns: 'Ledger ID' and 'Description'. The table lists four ledger types: 'ACTUAL', 'REPORTINGM', 'REPORTINGR', and 'STAT'. The 'STAT' row is highlighted, and its 'Type' checkbox is checked.

Ledger ID	Description
ACTUAL	Actual
REPORTINGM	Reporting - HQ
REPORTINGR	Reporting - Regional
STAT	Statistical Ledger

Improved Usability of the Calculate Overdue Charges Screen

On the Calculate Overdue Charges screen (AR507000), when a user updated the value in the **Statement Cycle** field of the Selection area, the system reset the value in the **Overdue Charge Date** field. This happened if on the Accounts Receivable Preferences screen (AR101000), on the General Settings tab (Data Processing Settings section), the **Set Default Overdue Charges by Statement Cycle** check box was selected.

To eliminate this unexpected resetting of the date, the **Statement Cycle** field has been moved to the top of the Selection area, as shown in the following screenshot.

The screenshot shows the 'Calculate Overdue Charges' screen. At the top, there are navigation icons and buttons for 'CALCULATE', 'PROCESS', and 'PROCESS ALL'. Below this is a search bar for 'VIEW LAST CHARGE'. The main area contains several input fields: 'Statement Cycle' (highlighted with a red box and containing 'EOTM - End of The Month'), 'Overdue Charge Date' (containing '13/05/2021'), and 'Fin. Period' (containing '11-2021'). There are also fields for 'Customer Class' and 'Customer'. Below the input fields is a table with the following columns: 'Type', 'Reference Nbr.', 'Date', 'Due Date', 'Customer', 'Customer Name', and 'Currency'.

Type	Reference Nbr.	Date	Due Date	Customer	Customer Name	Currency
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Other UI Improvements

On multiple screens, the following UI changes related to currency management have been made:

- On the Write Off Balances and Credits screen (AR505000), the **Branch** field has been replaced with the **Company/Branch** field.
- On the Revalue AP Accounts (CM504000), Revalue AR Accounts (CM505000), and Revalue GL Accounts (CM506000) screens, a **Company/Branch** field has been added to the Selection area; in this field, a user can select a company, branch, or company group. The field shows the list of the companies, branches, and company groups to which the current user has access. The default value is the current branch (that is, to which the user is signed in). If a company or branch is selected in the **Company/Branch** field, the **Fin. Period** field shows the financial periods from the company calendar; if a company group is selected or the field is empty, the financial periods from the master calendar are shown.
- In the table, the system loads the records related to the branches of the company or company group selected in the **Company/Branch** field or the records of the branch selected in the field.
- On the Cash Flow Forecast screen (CA401000), a **Company/Branch** field has been added to the Summary area. This field appears on the screen if the *Multi-Branch Support* feature has been enabled on the Enable/Disable Features screen. On this screen, the field contains the current branch by default, and the list contains the entities to which the current user has access.

Additionally, the following UI changes have been made on this screen:

- The **Convert To Currency** field has been renamed to **Forecast Currency**.
- The **Include AP, AR Documents with No Cash Account Specified** check box has been renamed to **Include Documents Without Cash Account**.
- The **Convert Curr. Rate Type** field has been renamed to **Currency Rate Type**.

Integration

Changes to Product Exporting

Users can now control which stock, non-stock, and template items should be exported to external e-commerce systems.

Changes to the Item Classes Screen

On the General Settings tab of the Item Classes screen (IN201000), a new **Export to External System** check box has been added (as shown in the following screenshot).

The screenshot shows the 'Item Classes' screen for class ID 'ELEC - - Electronics & Computers Mfg'. The 'GENERAL SETTINGS' tab is active. Under 'GENERAL SETTINGS', the 'Export to External System' checkbox is checked. Other settings include 'Stock Item' (checked), 'Allow Negative Quantity' (unchecked), 'Accrue Cost' (unchecked), 'Item Type' (Finished Good), 'Valuation Method' (Average), and 'Tax Category' (DEFAULTD - Default Domestic - Attract). The 'UNIT OF MEASURE' section shows 'Base Unit', 'Sales Unit', and 'Purchase Unit' all set to 'EACH' with 'Divisible Unit' checked for each. A table at the bottom right shows conversion factors for units.

* From Unit	Multiply/Divide	Conversion Factor	To Unit

This check box is displayed only if the *Commerce Integration* feature is enabled on the Enable/Disable Features screen (CS100000). By default, this check box is selected for all new item classes.

Changes to the Stock Items, Non-Stock Items, and Template Items Screens

On the eCommerce tab of the Stock Items (IN202500), Non-Stock Items (IN202000) and Template Items (IN203000) screens, an **Export to External System** check box has been added; the following screenshot shows this check box on the Stock Items screen.

This check box is displayed only if the *Commerce Integration* feature is enabled on the Enable/Disable Features screen (CS100000).

Stock Items
ELEBOARD - Laptop computer motherboard

← ↻ 📄 ↶ + 🗑️ 📄 ↷ < > >| ACTIONS ▾ INQUIRIES ▾

* Inventory ID: ELEBOARD - Laptop computer mothe 🔍 Product Workgroup: 🔍
 Item Status: Active ▾ Product Manager: 🔍
 Description: Laptop computer motherboard

GENERAL SUBITEMS PRICE/COST MANUFACTURING WAREHOUSES SUPPLIERS ATTRIBUTES PACKAGING CROSS-REFERENCE

Export To External System

Visibility: Visible ▾
 Availability: Store Default ▾
 When Qty Unavailable: Store Default
 Custom URL:
 Page Title:

Media URLs

* URL	Type
* <input type="text"/>	Image

When a new stock, non-stock, or template item is created, the state of the **Export to External System** check box is determined by the state of the similar check box of the item class of the item. That is, if the **Export to External System** check box is selected for the item class to which the item belongs, the check box will be selected for the item as well. The user can override the default state of the check box for the selected item, if necessary.

Only items for which the **Export to External System** check box is selected can be exported to an external e-commerce system during the synchronisation of the Stock Item, Non-Stock Item, and Template Item entities.

For matrix items, the system sets the state of the **Export to External System** check box as follows:

- When matrix items are generated, the initial state of the check box is inherited from the template item the matrix items are based on as follows:
 - If this check box is selected for the template item, it is also selected for all generated matrix items.
 - If this check box is cleared for the template item, it is also cleared for all matrix items generated from it. The check box is not available for editing for individual matrix items.
- If this check box was selected for the template item when matrix items were generated, when a user clears this check box for the template item and then clicks **Update Matrix Items** on the toolbar of the Template Items screen (IN203000), the system also clears the check box for all matrix items. In this case, next time the Template Item entity is synchronised, the system will assign the Invalid status to the synchronisation record of the template item.

The state of the **Export to External System** check box for individual matrix items is currently inherited from the template item settings and cannot be changed manually.

Changes to Tax Settings

The Taxes section of the Order Settings tab of the BigCommerce Stores (BC201000) and Shopify Stores (BC201010) screens has been redesigned (see the screenshot below).

In previous releases, to synchronize taxes between an online store and MYOB Advanced, a user had to select the synchronisation type, manual or automatic, and then specify either the default tax zone (which was used if no other tax zone could be determined based on the order details) or the primary tax zone (which overrode any other tax zone that was determined based on the order details).

Starting in MYOB Advanced 2021.1.1, to specify each store's settings for the synchronisation of taxes, a user needs to perform the following steps:

1. Tick the new **Tax Synchronisation** check box to indicate that taxes should be imported from the external e-commerce system.
2. In the **Default Tax Zone** field, specify the tax zone that will be used to calculate taxes if the system cannot determine the tax zone based on the customer location or shipping address.

- To indicate that the tax zone specified as the **Default Tax Zone** should be used as the primary tax zone, select the **Use as Primary Tax Zone** check box. If a tax zone is specified as the primary tax zone, the system uses it to calculate taxes for sales orders imported from the external e-commerce system, even if a different tax zone can be determined based on the customer location of the shipping address.

The screenshot shows the 'BigCommerce Stores' configuration page. The 'ORDER SETTINGS' tab is selected. In the 'TAXES' section, the following options are visible:

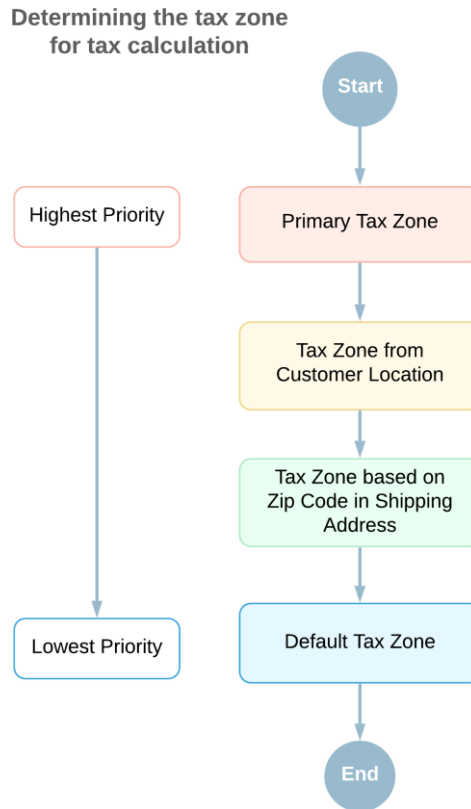
- Tax Synchronization
- Default Tax Zone: DOMESTIC - Domestic
- Use as Primary Tax Zone

- If an external tax calculation service is used in the company, the user should select the **Tax Synchronisation check** box, specify the tax zone configured for the service in the **Default Tax Zone** field, and select the **Use as Primary Tax Zone** check box. In this case, on the Financial Settings tab of the Sales Orders screen (SO301000), for each sales order imported from the store, the system will select the **Override Tax Zone** check box and insert the primary tax zone into the **Customer Tax Zone** field.
- When the **Tax Synchronisation** check box is cleared, a sales order is imported from an external system, and the tax zone specified in the order has been defined in MYOB Advanced, then the system will use this tax zone for tax calculations.

If tax synchronisation is turned on, when a sales order is imported from the external e-commerce system to MYOB Advanced, the system searches for the tax zone that should be used for tax calculation as follows, stopping the search when it finds a qualifying tax zone:

- The system searches for the primary tax zone (that is, the tax zone that is specified in the **Default Tax Zone** field if the **Use as Primary Tax Zone** check box is selected).
- The system searches for the tax zone of the customer location.
- The system tries to determine the tax zone based on the zip code of the shipping address.
- The system searches for the default tax zone (that is, the tax zone that is specified in the **Default Tax Zone** field if the **Use as Primary Tax Zone** check box is cleared).

The process is illustrated in the following diagram.



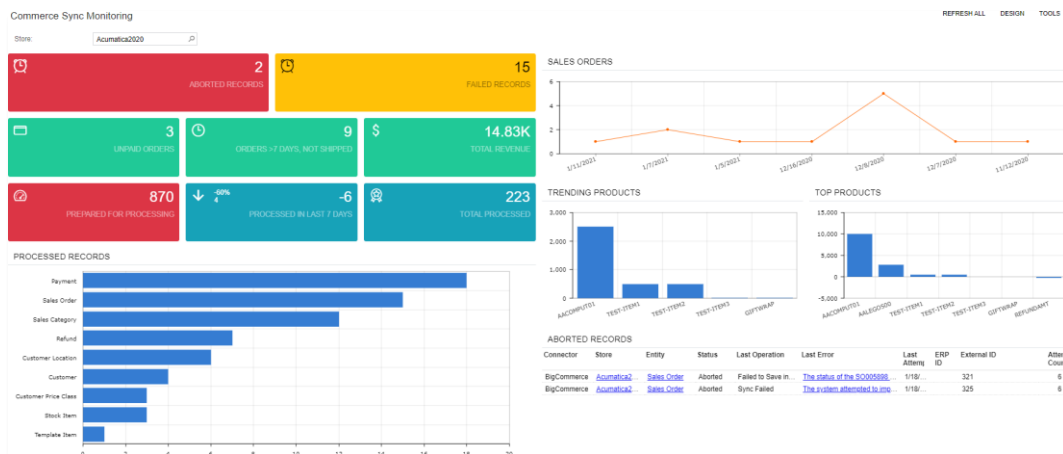
Enhancements in the Commerce Sync Monitoring Dashboard

In MYOB Advanced 2021.1.1, multiple enhancements have been made to the Commerce Sync Monitoring dashboard, which displays commerce-related statistics (see the screenshot below) for the store selected at the top of the dashboard as follows:

- The following tiles have been added:
 - **Aborted Records:** The number of commerce records that have the Aborted status. These are the records that exceeded the maximum number of allowed failed attempts.
 - **Failed Records:** The number of commerce records with the Failed status. These records are within the limit of the maximum number of allowed failed attempts.
 - **Unpaid Orders:** The number of orders that are imported from external systems and that do not have payments attached, as well as the orders that have been created in MYOB Advanced without payments attached and exported to an external system.
 - **Orders > 7 Days, Not Shipped:** The number of orders that were imported more than 7 days ago and have not been shipped.
 - **Total Revenue:** The sum of order total values (in the base currency) of all the orders that were imported or exported by using the commerce connector.
 - **Prepared for Processing:** The number of commerce records with the Prepared status.
 - **Processed in Last 7 Days:** The number of commerce records that have been processed in the last 7 days.

Note: The records are regarded as processed when they have been processed by the connector; these records can have various statuses, such as Processed, Filtered, Invalid, Deleted, or Skipped.

- **Total Processed:** The number of commerce records that have been processed.
- A Sales Order line chart has been added, which shows the number of sales orders imported per day. The maximum number of days shown is 10 by default.
- A Processed Records bar chart has been added. For the selected store, this chart shows the number of commerce records that have been processed for each entity type.
- An Aborted Records table has been added, which shows the commerce records with the Aborted status for the selected store.



Filtering Entities by Custom Fields and Attributes

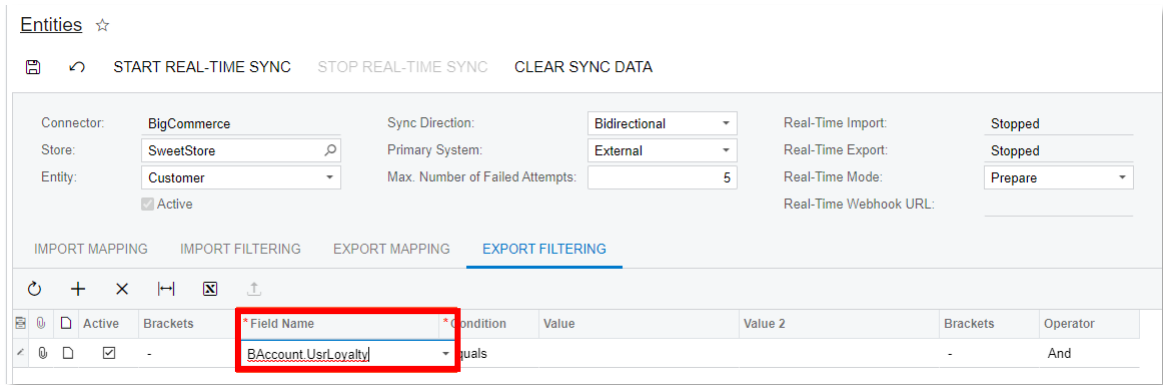
As of this release, users can filter entities to be exported to an online store by custom fields and attributes.

Export Filtering by Custom Fields

Export filtering by custom fields, which are fields added to a screen as a result of publishing a customisation project, is available for the following entities:

- Customer
- Stock Item
- Non-Stock Item
- Template Item
- Sales Order

To use a custom field in a filtering condition, on the Export Filtering tab of the Entities screen (BC202000), a user should type the name of the field in the **Field Name** column of the table (shown in the following screenshot). The system validates the field name against the API field list and displays an error if the field name cannot be found.



To avoid typing errors, the user can copy the name of the needed field from the API Advanced list as follows:

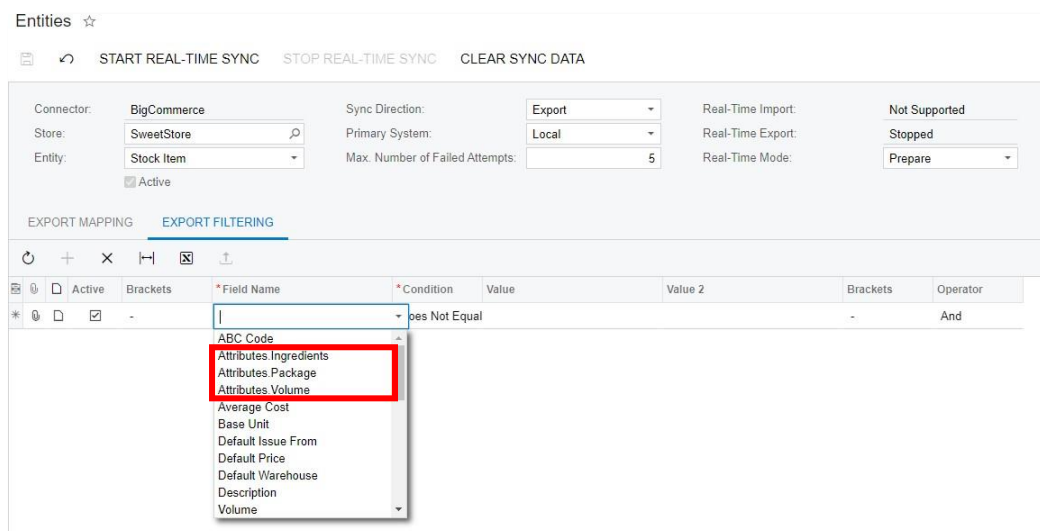
1. On the Export Mapping tab, in the Source Object column, the user selects the <Entity> → Advanced option.
2. In the Source Field / Value column, the user clicks the down arrow, and then selects and copies the needed field name.

Export Filtering by Attributes

Export filtering by attributes is available for the following entities:

- Customer
- Stock Item
- Non-Stock Item
- Template Item

When an attribute is created and added to a customer class or item class, it becomes available for selection on the Entities screen (BC202000). To use an attribute in a filtering condition, a user should select it in the Field Name column of the table on the Export Filtering tab. An attribute can be distinguished from other fields by the Attributes prefix before its name (shown in the following screenshot).



Special Considerations

In some situations, a custom field or an attribute used in a filtering condition may become unavailable during export. For example, an attribute may be removed from an item class or a customer class of an item or a customer, respectively, being exported, or a customisation project that added a field may be unpublished. In this case, the system will treat the value in the condition that contains the missing field as null. To avoid issues during the export, the Is Not Empty condition should be added to each filtering condition that includes custom fields or attributes. The following screenshot shows an example of an extended condition that contains the Ingredients attribute.

Entities ☆

START REAL-TIME SYNC STOP REAL-TIME SYNC CLEAR SYNC DATA

Connector: BigCommerce Sync Direction: Export Real-Time Import: Not Supported
 Store: SweetStore Primary System: Local Real-Time Export: Stopped
 Entity: Stock Item Max. Number of Failed Attempts: 5 Real-Time Mode: Prepare

EXPORT MAPPING EXPORT FILTERING

Active	Brackets	*Field Name	*Condition	Value	Value 2	Brackets	Operator
<input checked="" type="checkbox"/>	-	Item Class	Equals	JAM		-	And
<input checked="" type="checkbox"/>	-	Attributes.Ingredients	Equals	Apple		-	And
<input checked="" type="checkbox"/>	-	Attributes.Ingredients	Is Not Empty			-	And

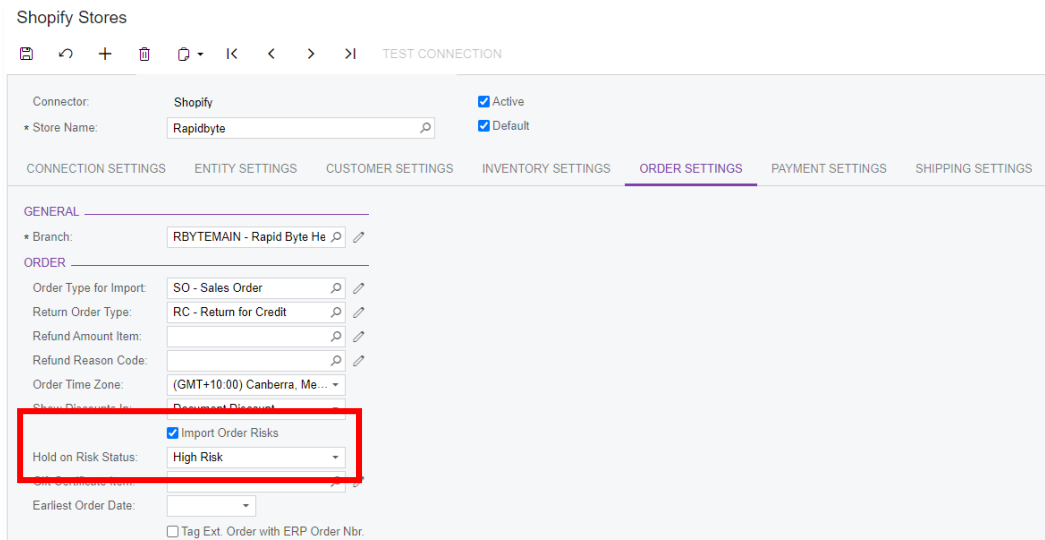
Importing Order Fraud Analysis from Shopify

In MYOB Advanced 2021.1.1, for sales orders created in Shopify, fraud analysis data with risk recommendations can be imported from Shopify.

Setting Up the Import of Order Risk Information

To set up the import of fraud analysis data along with sales orders from Shopify, an implementation manager should do the following in the Order section of the Order Settings tab of the Shopify Stores screen (BC201010):

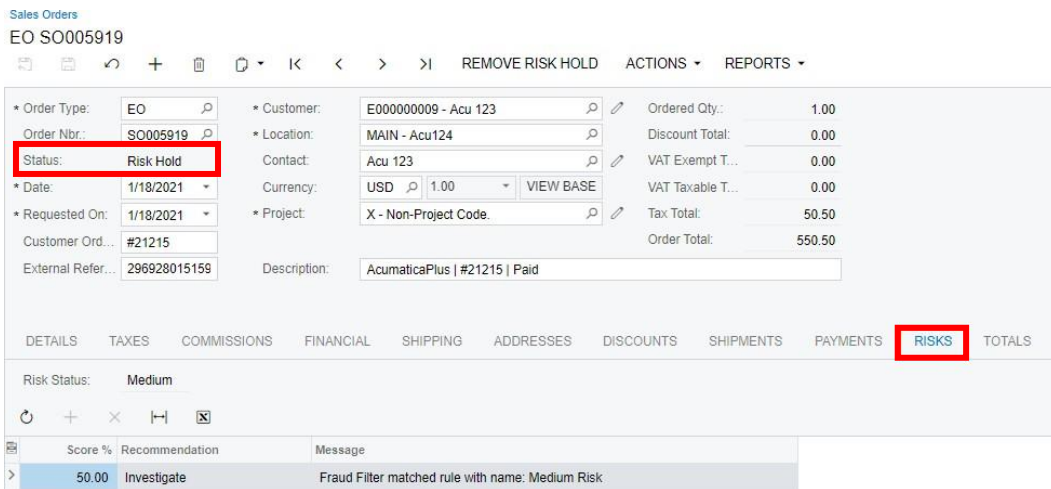
1. Select the new **Import Order Risks** check box (shown in the following screenshot).
2. In the new **Hold on Risk Status** field (also shown in the following screenshot), which became available when you selected the check box, select one of the following options:
 - **High Risk:** The system will assign the new Risk Hold status to imported sales orders with high risk only.
 - **Medium or High Risk:** The system will assign the new Risk Hold status to imported sales orders with both medium risk and high risk.



Processing Sales Orders with the Risk Hold Status

A manager who reviews sales orders imported from Shopify can do the following to process the orders with the Risk Hold status:

1. Open the sales order on the Sales Orders screen (SO301000).
2. Open the new Risks tab (shown in the following screenshot) and analyse information about order risks, such as the following:
 - The status in the **Risk Status** field, which can be Low, Medium, or High.
 - The score in the **Score %** column of the table. (The mapping of risk scores for statuses is listed in the table below the screenshot.)
 - The recommendations in the **Recommendation** column.



Note: Each order can have more than one risk recommendation and score. The Risk Status field displays the maximum risk in the list of risk recommendations.

3. If it seems too risky to process the order, the manager clicks **Actions > Cancel Order** on the screen toolbar. The order is assigned the Cancelled status and excluded from processing.
4. To process the order, the manager clicks the new **Remove Risk Hold** button on the screen toolbar. The order is assigned the Open or Pending Approval status, depending on the workflow configuration.

Score %	Risk Status
0.00–20.00	Low
20.00–60.00	Medium
60.00–100.00	High

Importing Returns and Refunds from BigCommerce

The BigCommerce Connector now supports the importing of returns and refunds that have been processed in BigCommerce Store.

Configuration of the Import of Refunds in MYOB Advanced

To configure the import of refunds from the BigCommerce store to MYOB Advanced the user needs to perform the following general steps:

1. On the Entity Settings tab of the BigCommerce Stores screen (BC201010), activate the Refunds entity.
2. On the Order Settings tab (see the following screenshot), specify settings in the following fields:
 - **Return Order Type:** The order type, which has been created on the Order Types Order Types screen (SO201000), that is assigned to return orders imported to MYOB Advanced from the BigCommerce store. In this field, only order types based on the “RMA Order” order type template—that is, only order types with RMA Order selected as the automaton behaviour on the Template Settings tab of the Order Types screen—can be selected.
 - **Refund Amount Item:** The non-stock item, which has been created on the Non-Stock Items screen (IN202000), that is used to represent imported refund amounts in sales orders and in return orders. The non-stock item selected in this field is excluded from synchronisation and is not exported when the Non-Stock Item entity is synchronised. The non-stock item representing refund amounts should be exempt from taxes.
 - **Refund Reason Code:** The reason code, which has been created on the Reason Codes screen (CS211000), to be inserted in return orders for refunds imported to MYOB Advanced from the BigCommerce store. In this field, only reason codes of the Issue usage type can be selected.

BigCommerce Stores

Connector: BigCommerce Active

Store Name: Rapidbyte Default

CONNECTION SETTINGS ENTITY SETTINGS CUSTOMER SETTINGS INVENTORY SETTINGS **ORDER SETTINGS** PAYMENT SETTINGS

GENERAL SHIPPING OPTION MAPPING

Branch: RBYTEMAIN - Rapid Byte He

ORDER

Order Type for Import: EO - BigCommerce Order

Order Types for Export: EO - BigCommerce Order

Return Order Type: RC - Return for Credit

Refund Amount Item: REFUNDAMT - Refund Amou

Refund Reason Code: REFUND - eCommerce Refur

Order time zone: (GMT+10:00) Canberra, Me...

Show Discounts In: Document Discount

Gift Certificate Item:

Earliest Order Date:

Import of Refunds

Refunds are imported from the BigCommerce store to MYOB Advanced as part of the synchronisation of the Refunds entity, which can be synchronised only in the Import direction. During the preparation of refund data for synchronisation, the system creates one synchronisation record for all refunds that have been issued for a single sales order in the BigCommerce store.

For a refund to be imported successfully, all of the following conditions must be met:

- The original sales order has been synchronised.
- The original sales order must be either not shipped or shipped in full. If the sales order has been shipped partially, the refund will not be imported.
- The original payment to which the refund pertains has been imported and released, unless the order is fully refunded or cancelled, and the original payment has the Authorised payment processing status. In this case, it is not necessary to release the original payment, because the refund process will void the original payment.

The subsequent sections of this topic describe the results of the successful synchronisation of various types of refunds.

Refunds Without Returns

A refund without any returned item is a refund that does not involve the return of a product. A refund of this type may be issued, for example, if a customer has not received the ordered items or has been charged more than expected.

During the import of refunds on order amounts, if the original sales order has the “Open” or “On Hold” status on the Sales Orders screen (SO301000), the following actions occur:

- On the Payments and Applications screen (AR302000), the system creates a payment of the Customer Refund type in the refunded amount and applies it to the original payment if it is a partial refund.
- If the sales order is fully refunded or cancelled and the processing status of the original payment is “Authorised”, then the original payment is voided.
- In the original sales order, on the Document Details tab of the Sales Orders screen, the system inserts a line for the non-stock item that was specified in the Refund Amount Item field on the Order Settings tab of the BigCommerce Stores screen (BC201000). In the **Unit Price** and **Ext. Price** columns of the added line, the system inserts the reversed refund amount (that is, an amount with the minus sign). In the **Reason Code** column, the system inserts the reason code that was specified on the Order Settings tab of the BigCommerce Stores screen.

If the original sales order has the “Completed” status, the following actions are performed:

- On the Sales Orders screen, the system creates a return order of the type selected in the Return Order Type field on the Order Settings tab of the BigCommerce Stores screen. In the **External Reference** field of the Summary area, the system inserts the identifier of the refund in the BigCommerce store.
- In the return order, on the Document Details tab, the system inserts a line with the non-stock item that was specified in the Refund Amount Item field on the Order Settings tab of the BigCommerce Stores screen. In the **Unit Price** and **Ext. Price** columns, the system inserts the refund amount (with the plus sign). In the **Reason Code** column, the system inserts the reason code that was specified on the Order Settings tab of the BigCommerce Stores screen.

If the original sales order has a status other than “Open”, “On Hold”, or “Completed”, the system displays an error message saying that the refund cannot be applied.

Refunds for Item Returns

A refund for a returned item is a refund that involves the return of a product. A refund of this type may be issued if, for example, a customer wants to amend the order to decrease the quantity of a purchased item or because the customer wants to return the item whose condition or performance is unsatisfactory.

During the import of refunds on item returns, if the original sales order has the Open or On Hold status on the Sales Orders screen (SO301000), the following actions occur:

- On the Payments and Applications screen (AR302000), the system creates a payment of the Customer Refund type in the refunded amount and applies it to the original payment if it is a partial refund.
- If the sales order is fully refunded or cancelled and the processing status of the original payment is Authorised, then the original payment is voided.
- If the sales order is fully refunded or cancelled and the processing status of the original payment is “Captured” or “Settled”, then a new voided payment is created against the original payment.
- In the original sales order, on the Document Details tab of the Sales Orders screen, the system updates the order line or lines to decrease the item quantities. Discounts and taxes, if applied, are recalculated accordingly.

If the original sales order has the Completed status, the following actions occur:

- On the Sales Orders screen, the system creates a return order of the type that was specified in the Return Order Type field on the Order Settings tab of the BigCommerce Stores screen (BC201000). In the **External Reference** field of the Summary area, the system inserts the identifier of the refund in the BigCommerce store.
- In the return order, on the Document Details tab of the Sales Orders screen, the system inserts a line with the applicable quantity of the returned item. In the **Reason Code** column, the system inserts the reason code that was specified on the Order Settings tab of the BigCommerce Stores screen.
- In the return order, on the Document Details tab of the Sales Orders screen, the system inserts a line with the non-stock item that was specified in the **Refund Amount Item** field on the Order Settings tab of the BigCommerce Stores screen. In the **Unit Price** and **Ext. Price** columns, the system inserts the refund amount (with the plus sign). In the **Reason Code** column, the system inserts the reason code that was specified on the Order Settings tab of the BigCommerce Stores screen.

If the original sales order has a status other than “Open”, “On Hold”, or “Completed”, the system displays an error message saying that the refund cannot be applied.

Notes

When a user imports refunds from the BigCommerce store to MYOB Advanced, the user should keep in mind the following information:

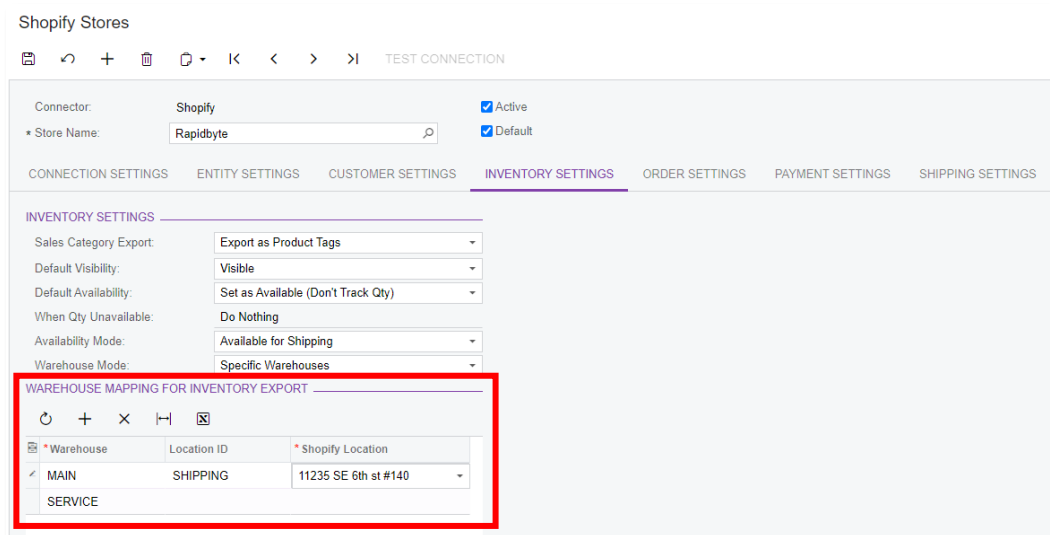
- If a refund is created for a sales order in the BigCommerce store before the sales order is synchronised, when the Sales Order entity is synchronised, the refunded or partially refunded sales order is imported with the amount that reflects the refund. In this case, no Customer Refund document is created on the Payments and Applications screen (AR302000).

- If a refund has been imported for a sales order and a Customer Refund document has been created for it on the Payments and Applications screen, a second refund for the same sales order can be imported only after the Customer Refund document is released.
- A Customer Refund document is created on the Payments and Applications screen for each refunded payment. If the original sales order had two payments (for example, if the customer redeemed a gift card for part of the order amount and paid the rest with a credit card) and then two refunds were created (one for each of these payment methods), after the Refund entity is synchronised, two Customer Refund documents are created in MYOB Advanced.

Support for Multiple Warehouse Locations for Shopify

Multiple warehouse locations are now supported in the synchronisation settings of the Shopify store on the Shopify Stores screen (BC201010).

If more than one warehouse location has been created in Shopify, then an implementation manager can now specify the way the inventory availability data will be exported from MYOB Advanced. To make this possible, multiple settings have been added to the Inventory Settings tab (see the following screenshot).



In the new **Warehouse Mode** field, the implementation manager can select one of the following options:

- **All Warehouses:** The system will always export the inventory availability data to the first warehouse location created in Shopify, even if multiple locations have been created.
- **Specific Warehouses:** An implementation manager specifies the warehouses and their locations in the Warehouse Mapping for Inventory Export table, which appears below the **Warehouse Mode** field when this option is selected.

The Warehouse Mapping for Inventory Export table contains the following columns:

- **Warehouse** (required): A warehouse from MYOB Advanced that holds inventory items whose availability data should be exported to Shopify. The implementation manager should select a warehouse from the list, which contains the active warehouses that have been created on the Warehouses screen (IN204000).

- **Location ID** (optional): A warehouse location from MYOB Advanced that contains inventory items whose availability data should be exported to Shopify. The implementation manager can select a warehouse location from the list, which contains the active locations that have been created on the Warehouses screen for the warehouse selected in the Warehouse column of the row. If no location is selected, the system exports the availability data for items stored in all locations of the selected warehouse.
- **Shopify Location** (required): The Shopify warehouse location where the system will export availability data for inventory items from MYOB Advanced. The implementation manager selects a location from the list, which contains all the warehouse locations created in Shopify.

Note: If no values are selected in the Warehouse Mapping for Inventory Export table, the system will behave as it would if the All Warehouses mode is selected.

Synchronisation of Multiple Order Types with BigCommerce

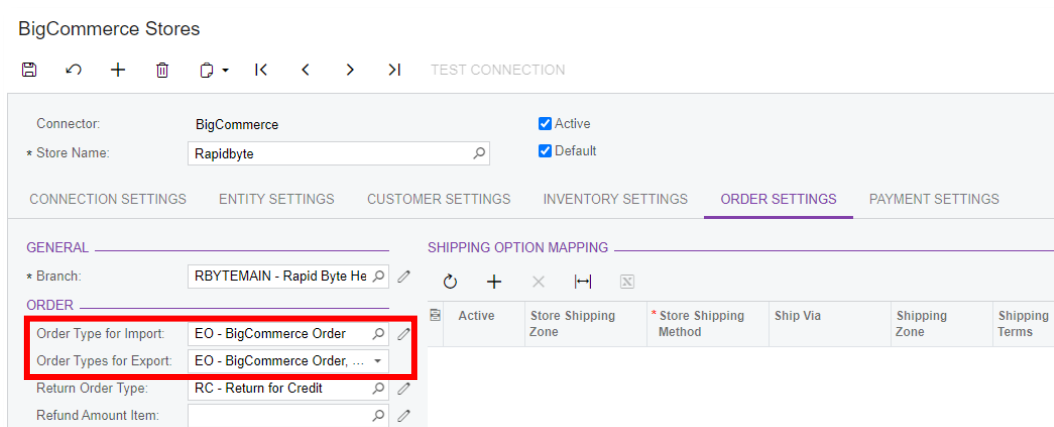
Support has been added for the export of orders of multiple types to BigCommerce stores.

This functionality is available only if the *Custom Order Types* feature is enabled on the Enable/Disable Features screen (CS100000).

Export of Orders of Multiple Order Types

In previous versions of MYOB Advanced, during the synchronisation of the Sales Order entity, only one order type could be assigned to orders imported to MYOB Advanced from a BigCommerce store, and only orders of that order type could be exported from MYOB Advanced to the BigCommerce store. An administrative user specified that order type in the **Order Type** field (which has been renamed to **Order Type for Import**) on the Order Settings tab of the BigCommerce Stores screen (BC201000) during the configuration of the connection to the store.

This release adds a new field, **Order Types for Export** (see Item 1 in the following screenshot), to the Order Settings tab. For the BigCommerce store selected on the screen, an administrative user can now select in this field any number of order types for orders to be exported to the BigCommerce store in addition to orders of the type selected in the **Order Type for Import** field (Item 2).



Note: Orders are exported to the BigCommerce store only if the synchronisation direction of the Sales Order entity is set to Export or Bidirectional for that store on the BigCommerce Stores screen or on the Entities screen (BC202000).

Changes to the Order Types for Imported Orders

As was the case in previous versions of MYOB Advanced, when orders are imported from a BigCommerce store, by default, they are created in MYOB Advanced based on the order type specified in the **Order Type for Import** field on the Order Settings tab of the BigCommerce Stores screen (BC201000).

An administrative user can now override the default order type assigned to imported orders (that is, the order type selected in the **Order Type for Import** field) by configuring an import mapping rule on the Import Mapping tab of the Entities screen (BC202000).

For example, to make the system assign the IO (international order) order type instead the default EO (e-commerce order) order type to an order shipped to a country other than the United States, on the Import Mapping tab, a user can specify the following settings in a mapping rule for the Sales Order entity.

Active	Target Object	Target Field	Source Object	Source Field / Value
Selected	Sales Order	Order Type	Order Data → Order Shipping Address	=IIf (Country='US', 'EO', 'IO')

With these settings, during the import of a sales order from the BigCommerce store, the system checks the shipping address of the order and assigns the order type to the imported order as follows:

- If the country is US, assigns the EO order type
- If the country is other than US, assigns the IO order type

Note: The order types used in the formula editor must exist in MYOB Advanced; otherwise, the import of the order will fail.

Other Improvements

A number of improvements have been made to the e-commerce functionality. The sections of this topic describe these improvements.

Updated List of Fields Available for Mapping and Filtering

Revisions have been made to the list of fields that can be used for mapping on the Export Mapping and Import Mapping tabs of the Entities screen (BC202000) and for filtering on the Export Filtering and Import Filtering tabs of that screen. Some of the fields have been removed from the lists of available fields and can no longer be specified in mappings or filtering conditions.

If a removed field was used in a mapping or a filtering condition, after the upgrade, the system will display an error as follows:

- If the removed field was used in a mapping for an entity, an error is displayed when the Prepare Data process for the entity is started for the first time, or when the user makes changes to the entity settings on the Entities screen and tries to save these changes.
- If the removed field was used in a filtering condition for an entity, the system displays an error when the Process Data process is started for any prepared synchronisation records of the entity for the first time; it also displays an error

when the user makes changes to the entity settings on the Entities screen and tries to save the changes.

Support for Drag-and-Drop Functionality on the Entities Screen

On the Export Mapping and Import Mapping tabs of the Entities (BC202000) screen, users can now change the order of any row in the table by dragging it to its new position.

Renamed Availability Options

The options available for selection in the following fields have been renamed:

- The Default Availability field (in the Inventory Settings section of the Inventory Settings tab) on the BigCommerce Stores (BC201000) and Shopify Stores (BC201010) screens
- The Availability field of the Non-Stock Items (IN202000), Stock Items (IN202500), and Template Items (IN203000) screens; this field is found on the eCommerce tab of each of these screens

These options in these fields have been renamed as follows:

- Available - Track Qty to Set as Available (Track Qty)
- Available - Don't Track Qty to Set as Available (Don't Track Qty)
- Pre-Order to Set as Pre-Order
- Disabled to Set as Unavailable

Skipping of the Availability Synchronisation

In some cases, companies may want to update the available quantity of particular items manually in a store instead of exporting this quantity from MYOB Advanced. To support this scenario, a new option, **Do Not Update**, has been added to the availability synchronisation settings to prevent the export of the quantity and availability settings for particular items (or all items) during the synchronisation of the Stock Item, Non-Stock Item, Template Item, and Product Availability entities.

A new **Do Not Update** option has been added to the following screens in the noted fields:

- BigCommerce Stores (BC201000) and Shopify Stores (BC201010): The Default Availability field on the Inventory Settings tab (Inventory Settings section)
- Non-Stock Items (IN202000), Stock Items (IN202500), and Template Items (IN203000): The Availability field on the eCommerce tab

The **Do Not Update** setting is applicable during the synchronisation of the Stock Item, Non-Stock Item, Template Item, or Product Availability entity if any of the following conditions is met:

- The **Do Not Update** option is selected for a non-stock, stock, or template item in the Availability field on the eCommerce tab of the Non-Stock Items, Stock Items, or Template Items screen, respectively.
- The **Store Default** option is selected for a non-stock, stock, or template item in the Availability field on the eCommerce tab of the Non-Stock Items, Stock Items, or Template Items screen, respectively, and the **Do Not Update** option is selected for the store with which data is synchronised in the **Default Availability** field on the Inventory Settings tab of the BigCommerce Stores or Shopify Stores screen.

If this setting is applicable, during the synchronisation of the Stock Item, Non-Stock Item, Template Item, or Product Availability entity, the following settings of the product in this store are not updated:

- For a BigCommerce store, in the Inventory section of the product management page: The **Track inventory** check box, the On the product level and On the variant level option buttons, and the **Stock** field
- For a Shopify store, in the Inventory section of the product management page: The **Track quantity** and **Continue selling when out of stock** check boxes, and the **Available** field

Changes to the Availability Synchronisation Settings for Shopify Stores

Because the ability to make products available for pre-order is not available in Shopify stores out of the field, the availability synchronisation settings have been updated on the Inventory Settings tab of the Shopify Stores screen (BC201010) as follows:

- In the **Default Availability** field, the “Pre-Order” option has been removed.
- In the **When Qty Unavailable** field, the “Set as Pre-Order” option has been removed.

Note: If any of the removed options were selected on the Shopify Stores screen before the upgrade to MYOB Advanced 2021.1.1, during the upgrade, the system will change the selected option to “Set as Available (Don't Track Qty)”.

Stock items, non-stock items, and template items can be synchronised with stores built on e-commerce platforms other than Shopify (for example, BigCommerce). Thus, the Set as Pre-Order option is still available on the eCommerce tab of the following screens:

- Non-Stock Items (IN202000): In the **Availability** field
- Stock Items (IN202500) and Template Items (IN203000): In the **Availability** and **When Qty Unavailable** fields

If the “Set as Pre-Order” option is selected for an item in the **Availability** field or the **When Qty Unavailable** field and the item is synchronised with a Shopify store, the e-commerce connector processes it as if the “Set as Available (Don't Track Qty)” was selected in the corresponding field instead of Set as Pre-Order.

Removal of Overrides for Matching Billing and Shipping Data

In previous versions of MYOB Advanced, when a sales order was imported from an external e-commerce system, the **Override** check box was always selected for the billing contact, billing address, shipping contact, and shipping address, and these details were saved in the database separately even if they matched the existing customer and customer location information. To reduce the amount of data to be stored and improve the system performance, during the export of a sales order, the system now clears the check boxes on the Sales Orders screen (SO301000) as follows:

- If the billing contact matches the customer's saved data, the **Override Contact** check box in the Bill-To Contact section on the Financial Settings tab
- If the billing address matches the customer's saved data, the **Override Address** check box in the Bill-To Address section on the Financial Settings tab
- If the shipping contact matches the data of a customer location, the **Override Contact** check box in the Ship-To Contact section on the Shipping Settings tab
- If the shipping address matches the data of a customer location, the **Override Address** check box in the Ship-To Address section on the Shipping Settings tab

In guest orders—that is, in orders that are placed in an online store by non-registered customers— that are imported to MYOB Advanced, the Override Contact and Override Address check boxes are always selected.

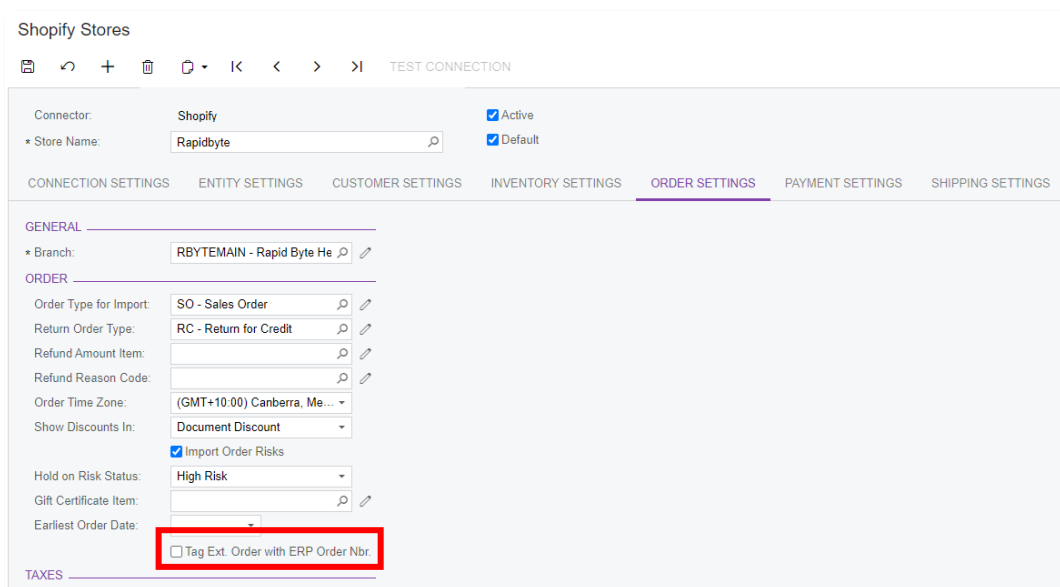
Renamed Fields on the Sync History and Process Data Screens

The following enhancements have been made on the Sync History (BC301000) and Process Data (BC501500) screens:

- The following statuses for the commerce records have been renamed so that they align with the names of the screens where the statuses are displayed:
 - Pending to Prepared
 - Synchronised to Processed
- The following columns have been renamed:
 - Local ID to ERP ID
 - Pending Sync to Ready to Process
- The following actions have been renamed:
 - Set as Synced to Set as Processed
 - Set Selected Synced to Set Selected as Processed
 - Set All Synced to Set All as Processed

Ability to Tag an External Order Number with an MYOB Advanced Order Number

For Shopify connector, for orders imported from Shopify to MYOB Advanced, the ability to export the sales order number generated in MYOB Advanced back to Shopify has been implemented. To manage this ability, a **Tag Ext. Order with ERP Order Nbr.** check box has been added to the Orders section of the Order Settings tab on the Shopify Stores screen (BC201010), which is shown in the following screenshot. This functionality would be useful for customer sales representatives to cross verify sales orders in MYOB Advanced and Shopify.



Manufacturing

Capable-to-Promise Functionality

Capable-to-promise (CTP) functionality has been implemented In MYOB Advanced Manufacturing Edition, which will be valuable for organisations who use advanced planning and scheduling. This functionality provides these organisations with the ability to commit to delivery dates for customer orders based on production and on resource capacity and inventory.

CTP determines when delivery will be possible by using finite scheduling. It takes into consideration the constraints of the manufacturing system that might hinder production, such as accessibility of necessary resources, lead times for acquiring raw materials or purchased parts, and the ability to acquire resources needed for subassemblies or lower-level components.

This functionality is available only when the *Advanced Planning and Scheduling* feature is enabled on the Enable/Disable Features screen (CS100000).

Configuring CTP Functionality

For an organisation using the CTP functionality, we recommend that a specific production order type be created on the Production Order Types screen (AM201100) that is dedicated to CTP. The order type should be assigned to the Planning function and may have a different numbering sequence than the one used for other production order types. We also recommend that the **Exclude from MRP** check box (in the Order Defaults section of the General Settings tab) be selected for the production order type, so that the system excludes production orders of this type from the MRP regeneration process. The following screenshot shows a production order type with the recommended settings for CTP and other sample settings.

The screenshot displays the 'Production Order Types' configuration screen for 'CT - CTP production order type'. The 'Function' is set to 'Planning'. The 'Order Numbering Sequence' is 'AMCTP - CTP Order Number'. The 'Costing Method' is 'Estimated' and the 'Exclude from MRP' checkbox is checked. Other settings include 'Scrap Source: None', 'Scrap Warehouse: MAIN - Main', and 'Scrap Location: RECEIVING - Receiving'.

Section	Field	Value
GENERAL SETTINGS	Order Type	CT
GENERAL SETTINGS	Description	CTP production order type
GENERAL SETTINGS	Function	Planning
GENERAL SETTINGS	Active	<input checked="" type="checkbox"/>
NUMBERING SETTINGS	Order Numbering Sequence	AMCTP - CTP Order Number
ACCOUNT SETTINGS	Work in Process Account	100350 - Work in Progress - I
ACCOUNT SETTINGS	Work In Process Sub.	000-000-000 - Default
ACCOUNT SETTINGS	WIP Variance Account	100330 - Work In Progress - I
ACCOUNT SETTINGS	WIP Variance Sub.	000-000-000 - Default
ORDER DEFAULTS	Costing Method	Estimated
ORDER DEFAULTS	Exclude from MRP	<input checked="" type="checkbox"/>
ORDER DEFAULTS	Substitute work Centers	<input type="checkbox"/>
SCRAP	Scrap Source	None
SCRAP	Scrap Warehouse	MAIN - Main
SCRAP	Scrap Location	RECEIVING - Receiving
COPY BOM NOTES	Item/Header	<input type="checkbox"/>
COPY BOM NOTES	Material	<input type="checkbox"/>
COPY BOM NOTES	Tool	<input type="checkbox"/>
COPY BOM NOTES	Operation	<input type="checkbox"/>
COPY BOM NOTES	Step	<input type="checkbox"/>
COPY BOM NOTES	Overhead	<input type="checkbox"/>
PRINTING	Print Production Report ID	AM.62.50.00 - Production Ticket
SCHEDULING	Check for Material Availability	<input checked="" type="checkbox"/>

The order type dedicated to CTP should be specified in the new **Capable to Promise Order Type** field in the Data Entry Settings section of the General Settings tab of the Production Preferences screen (AM102000), as shown in the following screenshot.

Production Preferences

GENERAL SETTINGS

NUMBERING SETTINGS

- Move Numbering Sequence: DUMMY - Dummy
- Labor Numbering Sequence: DUMMY - Dummy
- Material Numbering Sequence: DUMMY - Dummy
- Wip Adjust Numbering Sequence: DUMMY - Dummy
- Cost Numbering Sequence: POLANDCOST - PO Landed
- Disassembly Numbering Sequence:
- Vendor Shipment Numbering Sequence:

SCHEDULING

- Default Move Time: 0 h 00 m
- Use Order Start Date for MRP

DATA ENTRY SETTINGS

- Use Labor Rate: Standard
- Default Order Type:
- Default Disassemblable Order Type:
- Capable to Promise Order Type: CT - CTP production order type**
- Include Scrap in Completions
- Post Summary on Updating GL
- Hold Documents on Entry
- Validate Document Totals on Entry
- Default User Employee ID
- Restrict Clock Entry to Current User

Also, to indicate that CTP functionality can be applied to a particular stock item, the new **CTP Item** check box must be selected on the Manufacturing tab (General section) of the Stock Items screen (IN202500), as shown in the following screenshot.

Stock Items

ITM0000013 - Desktop Office Pro Package A

Inventory ID: ITM0000013 - Desktop Office Pro Pac | Product Workgroup: | Item Status: Active | Product Manager: | Description: Desktop Office Pro Package A

GENERAL SUBITEMS PRICE/COST **MANUFACTURING** WAREHOUSES SUPPLIERS ATTRIBUTES PACKAGING CROSS-REFERENCE

GENERAL

- Default BOM ID:
- Planning BOM ID:
- Configuration ID:
- Group Planning: 0
- Dflt Mark For: No Default
- Make to Order Item
- MRP Item
- Quantity Round Up
- CTP Item**

REPLENISHMENTS

- Source: Purchase Override
- Safety Stock: 0.00 Override

SCRAP

- Scrap Warehouse:
- Scrap Location:

SCHEDULING

- Check for Material Availability

Sub Item Defaults

Warehouse	Subitem	D	Default BOM ID	Planning BOM ID

CTP for Sales Orders

When a customer service manager creates a sales order on the Sales Orders screen (SO301000) with items to be produced and the customer expects to receive the items by a particular date (the **Requested On** date, which is specified in each line on the Document Details tab), the manager can estimate the projected date when the requested quantity of items can be shipped to the customer. To provide this capability, a **Process CTP** action has been added to the Actions menu of the Sales Orders screen; a manager can click it to open the new Process Capable to Promise screen (AM515000) with the lines of the sales

order that have the **CTP Item** check box selected on the Manufacturing tab of the Stock Items screen (IN202500).

On the Process Capable to Promise screen, the customer service manager can select one line or multiple lines of the sales order (by selecting the unlabelled check box for each line), select the “Process CTP” action in the **Action** field, and click **Process** on the screen toolbar to calculate the projected dates for the items in the selected lines. When the system finishes the calculation, the projected dates are displayed in the **CTP Date** column (see the following screenshot). During the calculation of the projected date, the system creates a planning order, whose type and number are displayed in the **Prod. Order Type** and **Prod. Order Nbr.** columns, respectively (also shown in the following screenshot). The planning order can be viewed on the Production Order Details screen (AM209000).

Line Description	Warehouse	UOM	Open Qty.	Requested On	Ship On	Prod. Order Type	Prod. Order Nbr.	CTP Date	CTP Accepted	Original Request Date
Desktop Office Pro Package A	MAIN	EACH	1.00	10/06/2021	10/06/2021	CT	000001	10/06/2021	<input type="checkbox"/>	

The manager can accept the dates by selecting the needed lines of the sales order (using the Included check boxes), selecting the **Accept** action, and clicking **Process** on the screen toolbar. For the accepted lines, the system creates a production order, whose type and number are displayed in the **Prod. Order Type** and **Prod. Order Number** columns, respectively, and ticks the check box in the **CTP Accepted** column (see the following screenshot).

Line Description	Warehouse	UOM	Open Qty.	Requested On	Ship On	Prod. Order Type	Prod. Order Nbr.	CTP Date	CTP Accepted	Original Request Date
Desktop Office Pro Package A	MAIN	EACH	1.00	10/06/2021	10/06/2021	RG	000002	10/06/2021	<input checked="" type="checkbox"/>	10/06/2021

If any CTP dates do not meet the date requested by the customer, the manager can reject the dates by selecting the needed lines of the sales order (using the Included check boxes), selecting the **Reject** action, and clicking **Process** on the screen toolbar. For the rejected lines, the system deletes the planning order. In this case, the manager can negotiate with the customer to agree on new dates when the items in the order can be shipped; the manager can then update the requested dates in the sales order.

Also, the manager may want to find out how many of the item the company could actually ship to the customer by the requested date. The manager can click the quantity in the **Open Qty.** column of the needed line to open the Quantity Available window, which displays the following:

- **Requested:** The requested quantity of the item
- **Available:** The available quantity of the item (which is calculated based on availability calculation rules)
- **Supply Available by Requested Date:** The quantity of the item projected to be available by the requested date (due to planned receipts of inventory not allocated to other orders)
- **Production Available by Requested Date:** The quantity of the item projected to be produced by the requested date (based on the current available capacity of production and the demand)
- **Total Available by Requested Date:** The sum of the values in the Available, Supply Available by Requested Date, and Production Available by Requested Date fields

Enhanced Linking of Sales Order Lines and Production Orders

In the previous versions, a production order could be linked to a sales order line (SO line) only when the production order was directly created from the SO line. In MYOB Advanced 2021.1.1, the ability to link an existing production order to an SO line has been implemented. This ability could be beneficial for organizations that create production orders during material requirements planning and then need to link the production orders to the SO lines that generated the demand.

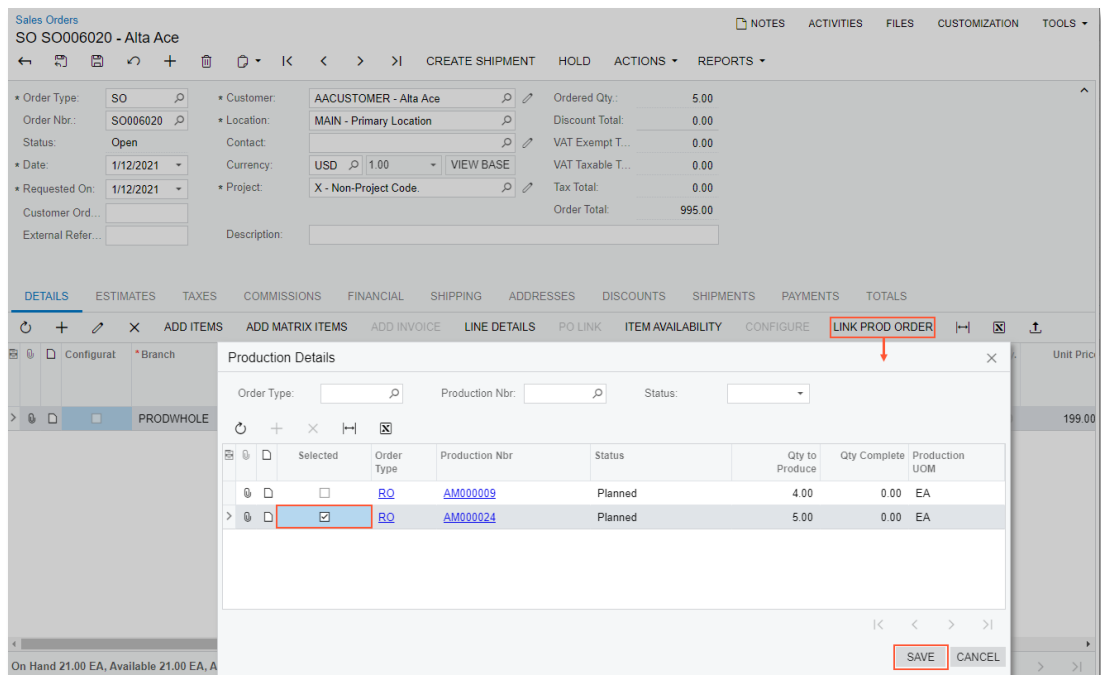
A user can link the existing production order to the SO line either by specifying the production order for the SO line on the Sales Orders screen (SO301000) or by specifying an SO line for the production order on the Production Order Maintenance screen (AM201500). Additionally, a user can remove the link between an SO line and an production order.

Linking a Production Order to a Sales Order Line

If a stock item in a sales order should be produced, a production order must be created for the line item. In the previous versions, a customer service manager used the Production Orders action on the Sales Orders screen (SO301000) to create the production order for the entire sales order.

In 2021.1.1, if the production order for the line item already exists, the sales order line can be linked to a production order in either of the following ways:

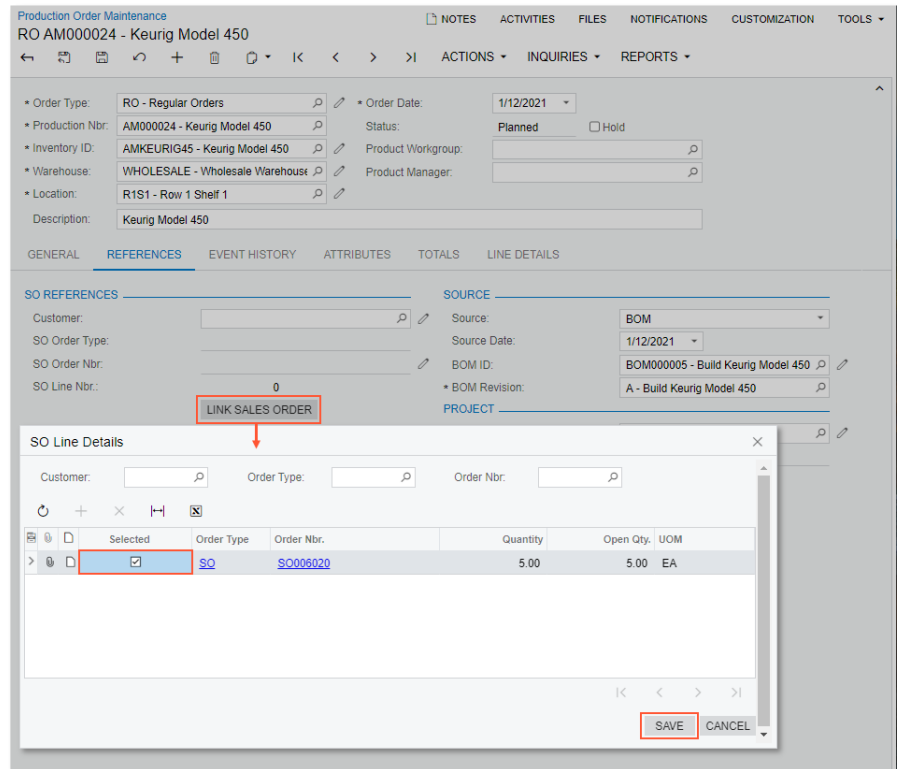
- On the Sales Orders screen, the customer service manager can:
 1. Click the line on the Details tab.
 2. On the table toolbar, click **Link Prod Order** to open the Production Details dialog box (shown in the following screenshot).



3. In the dialog box, select the check box in the Selected column in the row with the production order to be linked to the SO line and click Save.

When the dialog box closes, the customer service manager can see the identifier of the production order in the Production Nbr. column of the linked SO line.

- On the Production Order Maintenance screen (AM201500) (in the SO References section of the References tab), a production manager can:
 - At the bottom of the section, click the **Link Sales Order** button, which is displayed only if no SO line has been linked to the production order, to open the SO Line Details dialog box.



- In the dialog box, select the check box in the Selected column for the SO line to be linked to the production order, and click **Save**.

When the dialog box closes, the production manager can see the boxes of the SO References section filled in with the customer, sales order type, sales order, and SO line.

A production order can be linked to an SO line if all of the conditions specified in the following table are met.

Entity	Requirements
Sales order	The sales order is not assigned the Cancelled, Back Order, or Completed status.
Production order	<ul style="list-style-type: none"> The production order is not linked to an SO line. The order is not assigned the Completed, Cancelled, or Closed status.
Stock item	<ul style="list-style-type: none"> The same stock item is specified in the production order and in the SO line. The stock item is not a configured item. (That is, the Configurable check box is cleared for the SO line on the Details tab of the Sales Orders form.)
SO line	<ul style="list-style-type: none"> The Mark for Production check box is selected for the SO line on the Sales Orders screen. No production order is linked to the SO line. The SO line has not been cancelled.

When the link between an SO line and a production order is created, the following changes occur in the system:

- The type and number of the production order are displayed in the SO line on the Details tab of the Sales Orders screen.
- The customer, sales order type, sales order number, and SO line are displayed in the SO References section of the References tab on the Production Order Maintenance screen (AM201500).
- The item quantity is allocated for production; the item plan can be viewed on the Inventory Allocation Details screen (IN402000).

Changing or Removing the Link

The link between an SO line and a production order can be changed or removed only on the Production Order Maintenance screen (AM201500), because a production manager should know about all changes in production orders. To remove the link, the production manager does the following in the SO References section of the References tab:

1. Clicks the **Remove Link** button.
2. Confirms the removal in the Confirm dialog box that opens.

When the link between an SO line and a production order is removed, the following changes occur in the system:

- The type and number of the production order are removed from the SO line on the Details tab of the Sales Orders form.
- The customer, sales order type, sales order number, and sales order line are removed from the SO References section of the References tab on the Production Order Maintenance (AM201500) form.
- The allocation of the item quantity for production is removed. That is, the item plan is removed on the Inventory Allocation Details (IN402000) form.

When the link to the SO line is removed a production manager can add the link to another SO line.

Implementation Details

The functionality of linking SO lines and production orders has the following requirements:

- One production order can be linked to only one SO line, and an SO line can be linked to only one production order.
- If the *Multiple Warehouses* feature is enabled on the Enable/Disable Features screen (CS100000), the same warehouse must be specified in the production order and in SO line.

Other UI Enhancements

To support the enhanced linking of sales order lines and production orders, the following enhancements have been made to the UI:

- On the General Settings tab of the Order Types screen (SO201000), all settings related to manufacturing have been moved to the Manufacturing section (see the following screenshot).

The screenshot displays the 'Order Types' screen for 'SO - Sales Order'. The 'MANUFACTURING SETTINGS' section is highlighted with a red box and contains the following options:

- Allow Production Orders - Approved
- Allow Production Orders - Hold
- Allow Estimating
- Allow Configuration Entry
- Enable Warehouse On Line With Linked Production
- MTO Order

- On the Sales Orders screen (SO301000), the **Production Orders** action has been renamed to **Create Production Order**.

Enhanced Work Centre Capacity Scheduling

In MYOB Advanced Manufacturing Edition 2021.1.1, organisations that use rough cut planning for scheduling production orders will benefit from managing work centre capacity based on crew size and efficiency. The finite scheduling algorithm has been enhanced to consider crew size and efficiency when calculating the duration of an operation. The run time on the operation no longer has to be manually adjusted to account for fluctuations in crew size and efficiency. Instead, the planning manager can alter the crew size number or efficiency percent for the work centre, so that when scheduling is executed, the proper resource capacity is utilised.

For example, suppose that a new process has been introduced to a manufacturing operation. The standard run rate is specified for the operation; however, company personnel expect the resources assigned to the operation to need time to gain experience with the new process. The planning manager can set an efficiency lower than 100% for the work centre to cause each production order to be scheduled for a longer duration. As the efficiency expectation improves, the manager can increase the efficiency percent of the work centre without having to adjust each production operation.

The ability to alter the crew size number or efficiency percent for a work centre is available only when the *Advanced Planning and Scheduling* feature is enabled on the Enable/Disable Features screen (CS100000).

Enabling the Use of the Crew Size and Efficiency in Scheduling

For those companies who would like to use the new scheduling algorithm, the **Use Shift Crew Size** check box must be selected in the Scheduling section of the Production Preferences screen (AM102000), (shown in the following screenshot).

The screenshot shows the 'Production Preferences' window with the 'SCHEDULING' section expanded. The 'Use Shift Crew Size' checkbox is checked and highlighted with a red box. Other settings include 'Default Move Time' set to '0 h 00 m' and 'Use Order Start Date for MRP' checked.

If the check box is cleared, the system uses the same scheduling algorithm as it did in the previous versions of MYOB Advanced Manufacturing Edition.

Specifying the Crew Size and Efficiency for a Work Centre

To make the system consider crew size and efficiency during scheduling of operations in a work centre, on the Work Centres screen (AM207000), a planning manager selects "Crew Size" in the **Basis for Capacity** field and then specifies the crew size and efficiency percent for each shift of a work centre in the **Crew Size** and **Efficiency** columns, respectively, on the Shift Info tab. (See the following screenshot.)

The screenshot shows the 'Work Centres' screen for 'WC10 - Assembly'. The 'Basis for Capacity' is set to 'Crew Size'. The 'Shift Info' tab is active, showing a table with the following data:

* Shift	Crew Size	Efficien	* Calendar ID	Diff Type	Shift Diff	* Labor Code
> 001	2.000000	0.800000	AUCALEN...	Amount	0.00	DIRLAB
002	1.000000	1.000000	AUCALEN...	Amount	1.00	DIRLAB

If any adjustments are required in the duration of the operations, the planning manager can correct the crew size, efficiency, or both on the Work Centres screen and then reschedule the operations by using the Rough Cut Planning screen (AM501000).

Calculating the Duration of an Operation

The following formula is now used for calculating the duration of an operation:

$$QtP * (RT / (RU * C))$$

Parameters of the formula are the following:

- QtP is the quantity to produce, as specified in a production order.
- RT is the run time specified on the Bill of Material screen (AM208000) for the bill of material used to produce the item included in the production order.
- RU is the number of run units specified on the Bill of Material screen for the bill of material.
- C is the capacity of a work centre assigned to the operation, which is calculated as: Crew Size * Efficiency.

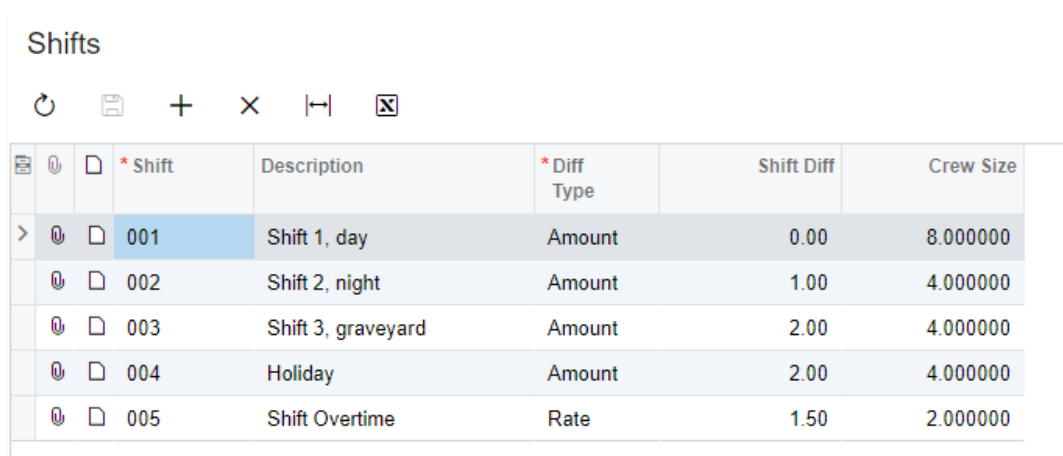
For example, suppose that the operation of sticking labels to jam jars is performed in the WC10 work centre, and the throughput of the operation is 10 jars per hour (run time is 1 hour, and run units are 10). Further suppose that one employee, Martha, works in the WC10 work centre with 100% efficiency. If a production order for 20 jars has been created in the system, Martha will be able to process this number of jars in 2 hours.

Then suppose that Martha has been moved to another operation, and a new employee, Kim, has started to stick labels. Because Kim is not yet familiar with this operation, her efficiency is lower than Martha's. To adjust the time required for sticking labels in the operation schedule, a planning manager sets the efficiency to 80%. With this setting, the sticking operation for the production order with 20 jars is expected to take 2.5 hours.

Also, suppose that the work centre where the packing operation takes place (which goes after the sticking operation) is idle, so to reduce the idle time, the planning manager decides to involve a second employee, Ben, in sticking labels in the WC10 work centre. Because both employees are new to the sticking operation, their efficiency will still be set to 80%. The sticking operation for 20 jars will now take 1.25 hours.

Viewing the Work Centre Schedule by Crew

A planning manager may want to monitor the number of employees involved in production during a working day. To do this, the manager specifies the standard number of crew members per shift in the newly added **Crew Size** column on the Shifts screen (AM205000), which is shown in the following screenshot.



*Shift	Description	*Diff Type	Shift Diff	Crew Size
001	Shift 1, day	Amount	0.00	8.000000
002	Shift 2, night	Amount	1.00	4.000000
003	Shift 3, graveyard	Amount	2.00	4.000000
004	Holiday	Amount	2.00	4.000000
005	Shift Overtime	Rate	1.50	2.000000

With the crew sizes specified, the manager can then open the new Work Centre Crew Schedule screen (AM405100) (shown in the following screenshot) and make sure that the number of employees involved in operations in different work centres during a shift does not exceed the standard crew size.

In the following screenshot, time blocks with start time of 9:00 AM on the same schedule date are highlighted. The number of employees involved in production during these time blocks is 3 whereas the maximum number of employees per shift is 8. This means that the planning manager has no need to reschedule the operations in order to reduce the number of employees.

Work Center Crew Schedule CUSTOMIZATION TOOLS ▾

Work Center: From Date: 1/12/2021 ▾
 Shift: To Date:

⏪ + × |⏪ |⏩

Work Center	Shift	Scheduled Blocks	Schedule Date ↑	Start Time	End Time	Crew Size	Standard Crew Size
> WC10	0001	2	1/12/2021	9:00 AM	10:00 AM	1.000000	8.000000
WC10	0001	4	1/12/2021	10:00 AM	12:00 PM	1.000000	8.000000
WC10	0001	2	1/12/2021	12:00 PM	1:00 PM	1.000000	8.000000
WC10	0001	8	1/12/2021	1:00 PM	5:00 PM	1.000000	8.000000
WC10	0001	1	1/12/2021	5:00 PM	5:30 PM	1.000000	8.000000
WC10	0001	1	1/12/2021	5:30 PM	6:00 PM	1.000000	8.000000
WC100	0001	4	1/12/2021	9:00 AM	11:00 AM	1.000000	8.000000
WC100	0001	2	1/12/2021	11:00 AM	12:00 PM	1.000000	8.000000
WC100	0001	1	1/12/2021	12:00 PM	12:30 PM	1.000000	8.000000
WC100	0001	5	1/12/2021	1:00 PM	3:30 PM	1.000000	8.000000
WC100	0001	1	1/12/2021	5:30 PM	6:00 PM	1.000000	8.000000
WC30	0001	2	1/12/2021	10:00 AM	11:00 AM	1.000000	8.000000
WC30	0001	2	1/12/2021	12:00 PM	1:00 PM	1.000000	8.000000
WC30	0001	2	1/12/2021	5:00 PM	6:00 PM	1.000000	8.000000
WC40	0001	2	1/12/2021	9:00 AM	10:00 AM	1.000000	8.000000
WC40	0001	16	1/12/2021	10:00 AM	6:00 PM	1.000000	8.000000
WC70	0001	2	1/12/2021	10:00 AM	11:00 AM	1.000000	8.000000
WC10	0001	5	1/13/2021	9:00 AM	11:30 AM	1.000000	8.000000
WC100	0001	1	1/13/2021	9:00 AM	9:30 AM	1.000000	8.000000

|< < > >|

New Workflow in Engineering Change Requests, Engineering Change Orders, and Supplier Shipments

The processing of engineering change requests, engineering change orders, and supplier shipments has been redesigned to use the new workflow engine.

The processes that are performed by using the Engineering Change Request (AM210000), Engineering Change Order (AM215000), or Supplier Shipments (AM310000) screens work as they did as in the previous versions. The UI on these screens has been enhanced to support the functionality of the new workflow engine.

UI Enhancements

On the Engineering Change Request (AM210000) and Engineering Change Order (AM215000) screens, the **Hold** check box has been removed and replaced with the **Hold** button and action, which can be selected on the screen toolbar.

On the Supplier Shipments screen (AM310000), the **Hold** check box has been removed and replaced with the **Remove Hold** and **Hold** buttons and actions, which can be selected from the screen toolbar.

On these screens, buttons representing the actions that are most relevant to the current status of the document opened on the screen are displayed directly on the screen toolbar.

The following tables (one is shown for each screen) show the actions that are displayed as buttons on the screen toolbar of the screen for each document type and status.

Note: Information in the following tables is relevant for the out-of-the-box installation of the system.

Document Statuses and the Corresponding Actions on the Engineering Change Request screen

Status	Action
<i>On Hold</i>	Submit
<i>Pending Approval</i>	<ul style="list-style-type: none"> • Approve • Reject
<i>Approved</i>	<ul style="list-style-type: none"> • Create ECO • Hold

Document Statuses and the Corresponding Actions on the Engineering Change Order screen

Status	Action
<i>On Hold</i>	Submit
<i>Pending Approval</i>	<ul style="list-style-type: none"> • Approve • Reject
<i>Approved</i>	<ul style="list-style-type: none"> • Commit Changes to BOM • Hold

Document Statuses and the Corresponding Actions on the Supplier Shipments screen

Status	Action
On Hold	Remove Hold
Open	<ul style="list-style-type: none"> Hold Confirm Cancel

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the Engineering Change Request (AM210000), Engineering Change Order (AM215000), or Supplier Shipments (AM310000) screens, users that work on customisations will need to redesign the automation of the processes related to the applicable screens by using the new workflow engine. Existing workflows can be customised in the Customisation Project Editor, or by extending graphs and workflows in the PX.Objects.AM namespace. Also, actions of the new workflows can be used through the contract-based API.

Other Improvements

Multiple enhancements have been introduced to MYOB Advanced Manufacturing Edition, as described in the following sections.

Enhanced Warehouse Location Settings

In previous versions of MYOB Advanced Manufacturing Edition, to indicate that a warehouse location can be involved in production processes, users selected the **Assembly Allowed** check box in the Location Table tab on the Warehouses screen (IN204000). This check box was also used to indicate that the warehouse location can be involved in kit assembly transactions.

To streamline the configuration of manufacturing processes, a new **Production Allowed** check box has been implemented on the Location Table tab. Users should select the check box in this column for warehouse locations involved in production (see the following screenshot). This column is displayed only if the *Manufacturing* feature is enabled on the Enable/Disable Features screen (CS100000). (The **Assembly Allowed** column remains on the Location Table tab and is displayed when the *Kit Assembly* feature is enabled on the Enable/Disable Features screen; users can select the check box for warehouse locations that will be involved in kit assembly transactions.)

The screenshot shows the 'Warehouses' screen with the 'Location Table' tab selected. The 'Production Allowed' column is highlighted with a red box. The table contains the following data:

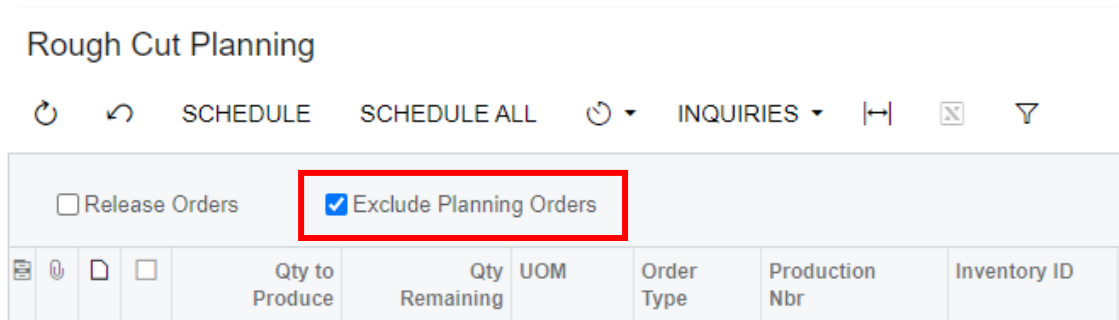
Location ID	Description	Active	Include in Qty. Available	Cost Separatet	Sales Allowed	Receipts Allowed	Transfers Allowed	Assembly Allowed	Productio Allowed	Pick Priority	Primary Item Validation	Primary Item Class
DROPSHIP	DROPSHIP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	No Validation	
R01A01B01	Rack 1 Aisle 1 Bin 1 Put Away	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	No Validation	
R01A01B02	Rack 1 Aisle 1 Bin 2 Put Away	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	No Validation	
R01A02B01	Rack 1 Aisle 2 Bin 1 Put Away	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	No Validation	
R02A01B01	Rack 2 Aisle 1 Bin 1 Put Away	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	No Validation	

For customers who upgrade from the previous versions of MYOB Advanced Manufacturing Edition, the state of the Production Allowed check box is inherited from the state of the **Assembly Allowed** check box. For new installations of MYOB Advanced Manufacturing Edition, the **Production Allowed** check box is selected by default for all warehouse locations.

Exclusion of Planning Orders from Rough-Cut Planning

With the new Capable-to-Promise functionality (see “Capable-to-Promise Functionality” on page 67), a large number of planning orders could be created in the system. In this release, a new **Exclude Planning Orders** check box has been added to the Selection area of the Rough Cut Planning screen (AM501000). When the check box is selected, all planning orders become hidden from the list of orders on the screen. If a planning manager wants to schedule operations for regular production orders only, the manager selects the check box and then does one of the following:

- Clicks **Schedule All** to process all production orders displayed in the list
- Selects the production orders to be processed and clicks **Schedule** on the screen toolbar



Changes in Manufacturing-Related Replenishment Settings on the Item Warehouse Details Screen

On the Item Warehouse Details screen (IN204500), the following elements have been removed from the Replenishments section of the Manufacturing tab: the Source field, Override check box, and Replenishment Warehouse field.

Users can now view and specify the replenishment source and replenishment warehouse to be used in manufacturing-related processes on the Replenishment tab even when the *Inventory Replenishment* feature is disabled on the Enable/Disable Features screen (CS100000) (see the following screenshot).

Item Warehouse Details

* Inventory ID:
 Override Product Manager

* Warehouse:
 Override Preferred Supplier

Status:
 Product Workgroup:

Product Manager:

GENERAL **REPLENISHMENT** SUBITEM REPLENISHMENT INFO PRICE/COST MANUFACTURING

REPLENISHMENT SETTINGS

Replenishment Class:
 Override Replenishment Settings

Seasonality:

Replenishment Source:

Replenishment Method:

Replenishment Wareho...

Max. Shelf Life (Days): Override

Launch Date: Override

Termination Date: Override

Service Level (%): Override

PREFERRED PARAMETERS

Override Preferred Supplier

Preferred Supplier:

Preferred Location:

Default Subitem:

Supplier Lead Time (Da...:

Add. Lead Time (Days):

Min. Order Freq.(Days):

Min. Order Qty.:

Max Order Qty.:

Lot Size:

EQO:

REPLENISHMENT PARAMETERS

Renamed Allocations Buttons, Tabs, and Dialog Boxes

The following changes have been made to multiple manufacturing-related screens:

- The Allocations button has been renamed to Line Details on the following screens:
 - Approve Clock Entries (AM516000)
 - Clock Entry (AM315000)
 - Disassembly (AM301500)
 - Labour (AM301000)
 - Materials (AM300000)
 - Move (AM302000)
 - Production Order Details (AM209000)
 - Supplier Shipments (AM310000)
- The Allocations window, which opened when a user clicked the Allocations button, has been renamed to Line Details (shown in the following screenshot).
- The Allocations tab on the Production Order Maintenance screen (AM201500) has been renamed to Line Details (see the following screenshot).

Distribution

Cross-Company Sales

This release provides the ability to process sales and purchase orders between companies or branches in the same tenant.

The cross-company sales functionality is available in the system if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

All cross-company documents are created one to one. That is, for one cross-company purchase order only one sales order can be generated. For one shipment only one purchase receipt can be generated. The functionality works for purchase orders of the Normal type and for sales orders with order types that have the Sales Order (for sales) or RMA (for returns) automation behaviour.

The Cross-Company Sale Process

Suppose that the Head Office (MHEAD) of the Muffins & Cakes company regularly buys apple and orange jam for muffin toppings from the SweetLife Head Office and Whole Centre (HEADOFFICE) of SweetLife Fruits & Jams. To allow automatic creation of sales documents by the SweetLife's sales managers, the MHEAD branch has been extended to a customer and the HEADOFFICE branch has been extended to a supplier in MYOB Advanced. The following example shows the general steps that users perform while processing a cross-company sale:

1. On the Purchase Orders screen (PO301000), the procurement manager of the purchasing company MHEAD enters a purchase order of the Normal type and specifies the selling company HEADOFFICE as the supplier in the purchase order.
2. On the Details tab, the manager adds two rows with the following details:

Branch	Inventory ID	Warehouse	Quantity	Unit Cost
MHEAD	APJAM96	WHOLESALE	10	25
MHEAD	ORJAM96	WHOLESALE	10	19

3. The procurement manager saves the purchase order and clicks the **Remove Hold** button on the screen toolbar.

The system assigns the "Open" status to the purchase order and makes the **Generate Sales Order** action available in the Actions menu. Also, the purchase order appears on the Generate Intercompany Sales Orders mass-processing screen (SO504000).

4. A sales manager of the HEADOFFICE branch initiates the generation of a sales order for the purchase order on the Generate Intercompany Sales Orders screen. (Alternatively, the **Generate Sales Order** action can be selected on the Purchase Orders screen, or a schedule can be created on the Generate Intercompany Sales Orders screen.)

The system generates a sales order related to the initial purchase order with the Open status for the HEADOFFICE company on the Sales Orders screen

(SO301000) and automatically copies the required details of the purchase order. In the sales order, the MHEAD company is specified as a customer.

On the Sales Orders screen, the system also does the following upon generation of the sales order:

- Copies the purchase order number to the **Customer Order Nbr.** field in the Summary area.
- Specifies the link to the purchase order in the **Related Order Nbr.** field on the Shipping tab.

On the Purchase Orders screen, the system does the following in the originating purchase order:

- Copies the number of the sales order to the **Supplier Ref.** field in the Summary area.
 - Specifies the link to the sales order in the **Related Order Nbr.** field on the Other tab of the purchase order.
5. The sales manager of the HEADOFFICE company verifies that all the data has been inserted correctly, makes changes if necessary, and saves the sales order.
 6. On the Shipments screen (SO302000), a worker of the WHOLESALE warehouse of the HEADOFFICE company creates a shipment for the sales order.

The system saves the shipment details in the sales order, and the sales order gets the Shipping status.

When the worker confirms the shipment, the system does the following:

- Makes the **Generate PO Receipt** action available in the Actions menu of the Shipments screen
 - Displays the shipment on the Generate Intercompany Purchase Receipts mass-processing screen (PO504000)
7. The warehouse worker of the MHEAD company generates a purchase receipt for the shipment on the Generate Intercompany Purchase Receipts screen. (Alternatively, the **Generate PO Receipt** action can be selected on the Shipments screen, or a schedule can be created for the Generate Intercompany Purchase Receipts screen.)

The system creates a purchase receipt on the Purchase Receipts screen (PO302000). The purchase receipt contains the details copied from the shipment.

The system also specifies the following details:

- On the Purchase Receipts screen, the shipment link in the new Related Shipment field on the Other tab
 - On the Shipments screen, the purchase receipt link on the Shipping tab
 - On the Purchase Orders screen (PO301000), the details of the purchase receipt on the PO History tab
8. An accountant of the HEADOFFICE company prepares the SO invoice for the shipment and releases the invoice on the Invoices screen (SO303000). The system assigned the Open status to the invoice.

The AR invoice becomes available on the Generate Intercompany Documents (AP503500) screen.

9. From the open AR invoice, an accountant of the MHEAD company generates the related AP bill on the Generate Intercompany Documents screen (alternatively, by using the **Generate/View AP Document** action on the Invoices and Memos screen (AR301000) or a schedule can be created for the mass-processing screen).

In the generated AP bill, the lines are linked to the related purchase order and receipt. The system also adds details of the generated AP bill on the Billing History tab of the Purchase Receipts screen for the related receipt.

The accountants process the financial documents in the system.

The Cross-Company Return Process

1. On the Purchase Receipts screen (PO302000), a procurement manager of the MHEAD company creates a purchase return for HEADOFFICE company and releases it.
2. A sales manager of the MHEAD company initiates the generation of an SO return for the PO return on the Generate Intercompany Sales Orders screen. (Alternatively, the **Generate Sales Return** action can be clicked on the Purchase Receipts screen or a schedule can be created for the Generate Intercompany Sales Orders screen).
3. When the returned items are received, the warehouse worker of the HEADOFFICE company selects the **Create Receipt** action on the Sales Orders screen, and the system generates a shipment with the Receipt operation and the "Open" status on the Shipments screen (SO302000).
4. The worker confirms the shipment so that the shipment gets the "Confirmed" status.
5. To update the customer's balance in the amount of the returned items, an accountant of the HEADOFFICE company prepares and releases an SO invoice of the Credit Memo type. When the SO credit memo is released, the system automatically generates a corresponding inventory receipt for the returned items and creates and releases an AR credit memo on the Invoices and Memos screen (AR301000). In the AR credit memo, the MHEAD company is specified as a customer so that an intercompany AP debit adjustment can be created.
6. The accountant of the MHEAD company opens the Generate Intercompany Documents screen (AP503500) and generates the debit adjustment on the Bills and Adjustments screen (AP301000). The system adds details of the generated debit adjustment to the Billing History tab of the Purchase Receipts screen for the initial purchase return.
7. The accountants process the financial documents in the system.

Changes to the Sales Orders Preferences Screen

On the Sales Orders Preferences screen (SO101000), the Intercompany Order Settings section has been added. The new section contains the Default Type for Intercompany Sales and the Default Type for Intercompany Returns fields and the Disable Editing Prices and Discounts check box (see the following screenshot). The section is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

The screenshot displays the 'Sales Orders Preferences' window with several tabs: GENERAL SETTINGS, APPROVAL, REPORTING SETTINGS, and WAREHOUSE MANAGEMENT. The 'GENERAL SETTINGS' tab is active. It is divided into several sections: DATA ENTRY SETTINGS, PRICE SETTINGS, POSTING SETTINGS, SALES PROFITABILITY SETTINGS, and INTERCOMPANY ORDER SETTINGS. The 'INTERCOMPANY ORDER SETTINGS' section is highlighted with a red border and contains the following fields:

- * Default Type for Intercompany Sales: SO - Sales Order
- * Default Type for Intercompany Returns: RM - RMA Order
- Disable Adding Items to Orders
- Disable Editing Prices and Discounts

The **Default Type for Intercompany Sales** and the **Default Type for Intercompany Returns** settings define the default type of the sales orders and return sales orders, which the system generates automatically for intercompany purchase orders and PO returns respectively.

The **Disable Editing Prices and Discounts** check box defines whether the users can edit the **Unit Price**, **Manual Price**, **Ext. Price**, **Discount Amount**, **Discount Code**, and **Manual Discount** columns in intercompany sales orders generated from a purchase order, and in related invoices on Sales Orders (SO301000) and Invoices (SO303000) screens. Also, on the Discounts tab of the Sales Orders screen, the **Add Row** and **Delete Row** buttons are disabled, and the Recalculate Prices is not available on the screen toolbar.

Changes to the Order Types Screen

On the Order Types screen (SO201000), an Intercompany Posting Settings section has been added (see the following screenshot). The section is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

The screenshot shows the 'Order Types' screen for 'SO - Sales Order'. The 'GENERAL SETTINGS' tab is active. The 'ORDER SETTINGS' section includes fields for 'Order Numbering Sequence' (SOORDER) and 'Days To Keep' (0). The 'POSTING SETTINGS' section includes fields for 'Use Sales Account from', 'Combine Sales Sub. From', 'Freight Account', 'Use Freight Account from', 'Freight Sub.', 'Combine Freight Sub. from', 'Discount Account', 'Use Discount Account from', 'Discount Sub.', and 'Combine Discount Sub. from'. The 'INTERCOMPANY POSTING SETTINGS' section is highlighted with a red box and contains two fields: 'Use Sales Account from' (Inventory Item) and 'Use COGS Account from' (Inventory Item). The 'FIELD SERVICES SETTINGS' section includes the 'Enable Field Services Integration' checkbox.

The **Use Sales Account From** field defines which account is used to record the intercompany sales transactions:

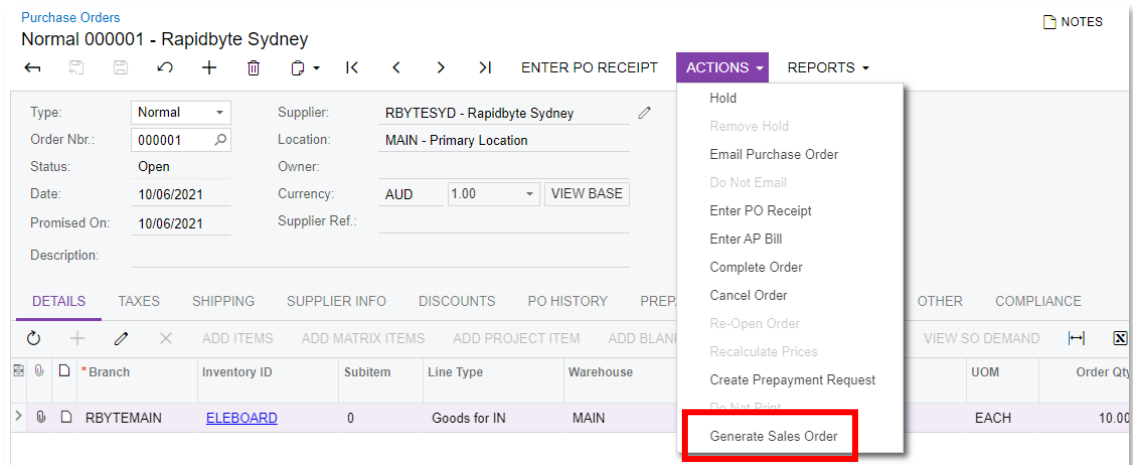
- **Inventory Item:** The account specified in the inventory item settings is used.
- **Customer Location:** The account specified in customer location is used.

The **Use COGS Account From** field defines which account is used to record the intercompany sales transactions:

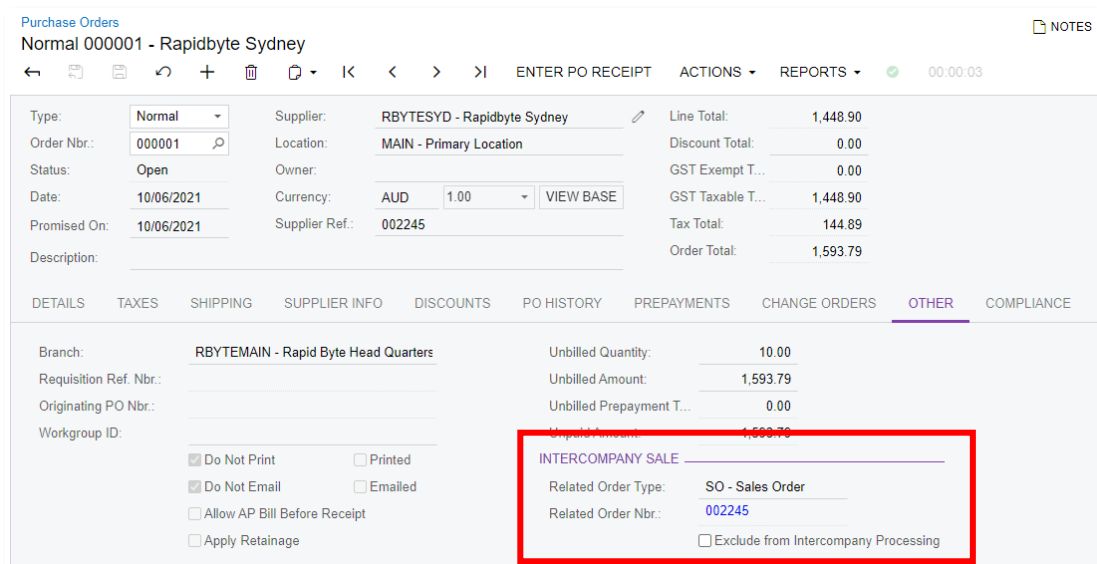
- **Inventory Item:** The account specified in the inventory item settings is used.
- **Customer:** The account specified in customer settings is used.

Changes to the Purchase Orders Screen

On the Purchase Orders screen (PO301000), a **Generate Sales Order** action on the screen toolbar and an Intercompany Sale section on the Other tab have been added (see the screenshots below). The new action and section are displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000) and the selected supplier is a branch or company that has been extended to a supplier.



The **Generate Sales Order** action is available on the Purchase Orders screen (PO301000) if the supplier specified in the purchase order is a related company or branch extended as a supplier. When the user selects the **Generate Sales Order** action, the system creates a sales order, in which the current branch is specified as the customer and the lines of the current purchase order are copied.



The Intercompany Sale section contains the following fields:

- **Related Order Type:** The type of the sales order created for the selected purchase order on the Sales Orders screen (SO301000).
- **Related Order Nbr.:** The link to the sales order created for the selected purchase order in the related company. When the user clicks the link, the system opens the document on the Sales Orders screen.

Changes to the Sales Orders Screen

On the Shipping tab of the Sales Orders screen (SO301000), an Intercompany Purchase section has been added (see the following screenshot). The section is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000) and the selected customer is a branch or company that has been extended to a customer.

The screenshot shows the Sales Orders screen for order SO 002245. The Shipping tab is active, and the Intercompany Purchase section is highlighted with a red box. The section contains the following fields:

INTERCOMPANY PURCHASE	
Related Order Type:	Normal
Related Order Nbr.:	000001

The Intercompany Purchase section contains the following fields:

- **Related Order Type:** The type of the purchase order for which for the sales order has been created.
- **Related Order Nbr.:** The link to the purchase order for which for the sales order has been created. When the user clicks the link, the system opens the document on the Purchase Orders screen (PO301000).

Changes to the Shipments Screen

On the Shipping tab of Shipments screen (SO302000), the Intercompany Purchase section has been added (see the following screenshot). The section is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

The screenshot shows the 'Shipments' screen for '000670 - Rapid Byte Head Quarters'. The 'Shipping' tab is active. The 'INTERCOMPANY PURCHASE' section is highlighted with a red box and contains the following information:

- Related PO Receipt Nbr.: 000002
- Exclude from Intercompany Processing

The Intercompany Purchase section contains a **Related PO Receipt Nbr.** field, in which the system inserts the link to the purchase receipt generated for the shipment.

Changes to the Purchase Receipts Screen

On the Other tab of the Purchase Receipts screen (PO302000), the Intercompany Sale section has been added (see the following screenshot). The section is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

The screenshot shows the 'Purchase Receipts' screen for 'Receipt 000002 - Rapidbyte Sydney'. The 'Other' tab is active. The 'INTERCOMPANY SALE' section is highlighted with a red box and contains the following information:

- Related Shipment Nbr.: 000670

The Intercompany Sale section contains a **Related Shipment Nbr.** field, in which the system inserts the link to the purchase receipt generated for the shipment.

New Generate Intercompany Sales Orders Mass-Processing Screen

The Generate Intercompany Sales Orders screen (SO504000), shown in the following screenshot, has been added for the mass generation of sales orders based on purchase orders from the purchasing company.

<input type="checkbox"/>	Selling Company	Purchasing Company	Document Type	Document Nbr.	Document Date	Promised Date	Currency	Total Amount	Description
<input type="checkbox"/>	RBYTESYD	RBYTEMAIN	Normal	000003	10/06/2021	10/06/2021	AUD	110.00	
<input type="checkbox"/>	RBYTESYD	RBYTEMAIN	Normal	000004	10/06/2021	10/06/2021	AUD	110.00	

In the fields of the Selection area of the screen, the user specifies the selection criteria for the documents to be loaded in the table. The user can also manage the process of generating sales orders by using the **Copy Project Details to Generated Sales Orders** check box. The check box appears only if the *Projects* feature is enabled on the Enable/Disable Features screen (CS100000). If the user selects the check box, the values of the project from the purchase order will be copied to the created sales order.

New Generate Intercompany Purchase Receipts Mass-Processing Screen

The Generate Intercompany Purchase Receipts screen (PO504000), shown in the following screenshot, has been added for the mass generation of purchase receipts based on shipments from the selling company.

<input type="checkbox"/>	<input type="checkbox"/>	Purchasing Company	Selling Company	Shipment Nbr.	Shipment Date	Shipped Quantity	Warehouse ID	Description	Excluded	Related PO Nbr.
<input type="checkbox"/>	<input type="checkbox"/>	RBYTEMAIN	RBYTESYD	000671	10/06/2021	1.00	MAIN		<input type="checkbox"/>	000004
<input type="checkbox"/>	<input type="checkbox"/>	RBYTEMAIN	RBYTESYD	000672	10/06/2021	1.00	MAIN		<input type="checkbox"/>	000003
<input type="checkbox"/>	<input type="checkbox"/>	RBYTEMAIN	RBYTESYD	000673	10/06/2021	10.00	MAIN		<input type="checkbox"/>	000001

In the fields of the Selection area of the screen, the user specifies the selection criteria for the documents to be loaded in the table. The user can also manage the process of generating sales orders by using the **Put Created Receipts on Hold** check box. If the user selects the check box, the generated purchase receipts will be assigned the “On Hold” status on creation. If the check box is cleared, the generated purchase receipts will be assigned the “Balanced” status on creation.

Changes to Customers Screen

On the GL Accounts tab of the Customers screen (AR303000), a **COGS Account** field has been added (see the following screenshot). The field is displayed only if the *Inter-Branch Transactions* feature has been enabled on the Enable/Disable Features screen (CS100000).

The screenshot shows the 'Customers' screen for 'CUST000002 - ABC Studios Inc.' with the 'GL ACCOUNTS' tab selected. The 'COGS Account' field is highlighted with a red box. The following table represents the data visible in the screenshot:

Field	Value
Customer ID:	CUST000002 - ABC Studios Inc.
Customer Status:	Active
Customer Class:	LOCAL - Local Customers
Balance:	-428.00
Prepayment Balance:	0.00
Retained Balance:	-100.00

Account Type	Account Name
AR Account:	100201 - Account Receivable - Local
AR Sub.:	000-000-001 - Head Office
Sales Account:	400000 - Sales
Sales Sub.:	000-000-001 - Head Office
Discount Account:	400000 - Sales
Discount Sub.:	000-000-001 - Head Office
Freight Account:	
Freight Sub.:	000-000-001 - Head Office
Cash Discount Account:	420000 - Cash Discount
Cash Discount Sub.:	000-000-001 - Head Office
Prepayment Account:	216000 - Customer Prepayments
COGS Account:	
Retention Receivable Account:	
Retention Receivable Sub.:	

The system uses the account in the **COGS Account** field as a COGS account for stock items and non-stock items with the **Accrue Cost** check box selected in intercompany documents if the Customer option is selected in the **Use COGS Account From** field of the Intercompany Posting Settings section for the related order type on the Order Types screen (SO201000).

Cross-Company Sales Functionality Restrictions

In the current version, the following restrictions to cross-company functionality exist which are planned to be removed in the future version:

- On the Purchase Orders screen (PO301000), the following actions are disabled:
 - Enter PO Receipt
 - Enter AP Bill
- On the Purchase Receipts screen (PO302000), the following elements are disabled:
 - The Enter AP Bill action
 - In the Summary area, the Create Bill check box.
 - On the Details tab, the Add Row, Delete Row, Add Line, Add PO, and Add PO Line buttons.
- On the Bills and Adjustments screen (AP301000), the Add PO Receipt, Add PO Receipt Line, Add PO, and Add PO Line buttons are disabled on the Document Details tab.
- On the Sales Orders screen (SO301000), the following buttons are disabled on the Details tab:
 - Add Invoice
 - Add Stock Item
 - Add Matrix Item
 - Add Row
 - Delete Row

- The user cannot generate sales orders with the Invoice and Credit Memo automation behaviours on the Generate Intercompany Sales Orders screen (SO504000).
- Non-stock items that have different states of the Require Receipt and Require Shipment check boxes on the Non-Stock Items screen (IN202000), cannot be added to cross-company purchase orders.
- Freight and service lines without an ID cannot be added to cross-company purchase orders.

Dead Stock Detection

This release introduces the Dead Stock (IN405500) inquiry form, which provides the ability to detect dead stock items.

Dead Stock Inquiry Form

The Dead Stock inquiry screen (IN405500) has been added to the Inquiries category of the Inventory workspace. The inquiry form is available if the *Inventory* feature is enabled on the Enable/Disable Features screen (CS100000).

Dead Stock

Warehouse: MAIN - Main * Select by: Days
 Item Class: In Stock For: 30
 Inventory ID: No Sales For:

Warehouse	Inventory ID	Subitem	Description	In Stock Qty.	Dead Stock Qty.	Base Unit	In Dead Stock (days)	Last Sale Date	Last Cost	Total Dead Stock Cost	Dead Stock Item Average Cost	Currency
MAIN	ITM0000002	0	Bluetooth Keyboard	135.00	10.00	PIECE	302.00	22/10/2020	150.00	1,372.15	137.22	NZD
MAIN	ITM0000004	0	Kingsbrand Bluetooth Keyboard	2,379.00	2,219.00	PIECE	444.42	24/06/2020	156.00	346,617.78	156.20	NZD
MAIN	ITM0000006	0	Bluetooth Mouse	100.00	100.00	PIECE	335.00		67.00	7,308.54	73.09	NZD
MAIN	ITM0000007	0	Kingsbrand Mouse	90.00	90.00	PIECE	335.00	17/06/2020	33.00	3,239.76	36.00	NZD
MAIN	ITM0000008	0	Kingsbrand Bluetooth Mouse	46.00	46.00	PIECE	335.00	26/03/2020	222.00	11,139.52	242.16	NZD
MAIN	ITM0000009	0	KTEC Bluetooth Gaming Mouse	1,805.00	1,805.00	PIECE	428.52	30/03/2020	37.00	382,546.06	211.94	NZD
MAIN	ITM0000010	0	KTEC Standard Mouse	100.00	100.00	PIECE	335.00		35.00	3,817.89	38.18	NZD
MAIN	ITM0000011	0	KTEC Bluetooth Mouse	100.00	100.00	PIECE	335.00		58.00	6,326.79	63.27	NZD
MAIN	ITM0000013	0	Desktop Office Pro Package A	721.00	721.00	PIECE	611.31	16/06/2020	1,190.07	906,790.01	1,257.68	NZD
MAIN	ITM0000014	0	Desktop Office Pro Package B	4,365.00	4,365.00	PIECE	446.09	23/06/2020	1,042.72	1,159,320.64	265.59	NZD
MAIN	ITM0000015	0	Desktop Editor Pro Package A	328.00	328.00	PIECE	417.00	16/06/2020	1,125.00	369,000.00	1,125.00	NZD
MAIN	ITM0000016	0	Desktop Editor Pro Package B	532.00	532.00	PIECE	565.80	16/06/2020	1,125.00	598,500.00	1,125.00	NZD
MAIN	ITM0000017	0	Desktop Education Package A	755.00	755.00	PIECE	533.23	16/06/2020	820.72	658,041.04	871.58	NZD
MAIN	ITM0000018	0	Desktop Education Package B	443.00	443.00	PIECE	435.65	16/06/2020	968.38	231,123.91	521.72	NZD
MAIN	ITM0000019	0	Keyboard and Mouse Package	5,455.00	5,430.00	PIECE	450.52	16/06/2020	445.96	2,081,828.98	383.39	NZD
MAIN	ITM0000020	0	Keyboard and Mouse Package B	1,701.00	1,651.00	PIECE	413.06	30/06/2020	383.81	631,782.93	382.67	NZD
MAIN	ITM0000021	0	Keyboard and Mouse Package C	338.00	288.00	PIECE	415.52	16/06/2020	340.31	98,788.45	343.02	NZD
MAIN	ITM0000022	0	Keyboard and Mouse Package D	904.00	829.00	PIECE	597.62	16/06/2020	478.00	396,262.00	478.00	NZD
MAIN	ITM0000023	0	Desktop Standard Case	6,802.00	6,702.00	PIECE	501.81	16/06/2020	200.00	1,487,844.00	222.00	NZD

The Dead Stock inquiry form shows inventory items in stock that have not been moved—that is, the items that have not been added to sales orders, transfers, IN issues, kit assemblies, and other documents that affect the quantity on hand—during the period of time specified in the Selection area of the form. To calculate the quantity of dead stock items, the system deducts the quantity of items in sales orders (including field service orders and production orders), shipments, and other documents that affect the quantity on hand from the quantity of items on hand that have remained in stock for the specified time period.

In the Selection area, the user can specify the following criteria to narrow the range of inventory items to be shown:

- **Warehouse:** The warehouse in which the items are situated, by its ID. This box is empty by default. The user must make a selection in this box to view the list of items.
- **Item Class:** The class of the items to be shown.

- **Inventory ID:** The identifier of the item.
- **Selected By:** The mode of filtering. The following options are available:
 - **By Days:** The time period by the number of days for which the items have been in stock.
 - **By Date:** The time period starting from the specified date.
- **In Stock For:** The number of days the stock items to be defined as dead stock have been stored in the warehouse. This field appears if the “By Days” option is selected in the **Selected By** dropdown.
- **No Sales For:** The number of days the stock items to be defined as a dead stock have not been sold. This field appears if the “By Days” option is selected in the **Selected By** dropdown.
- **In Stock Since:** The date from which the stock items defined as a dead stock have been stored in the warehouse. This field appears if the “By Date” option is selected in the **Selected By** dropdown.
- **No Sales Since:** The date from which the stock items defined as a dead stock have not been sold. This field appears if the “By Date” option is selected in the **Selected By** dropdown.

The following limitations apply to the stock items that can be listed on the Dead Stock inquiry form:

- If the **Cost Separately** check box is ticked on the Locations tab of the Warehouses screen (IN204000) for a warehouse, the system calculates the cost of an item for the warehouse, not for the location.
- If a stock item has subitems, the system shows information without subitem details.

Improvements to Drop-Ship Processing

The processing of drop shipments has been significantly improved through the improved functionality related to interconnections between sales orders and drop-ship purchase orders, new actions on the Purchase Orders screen (PO301000), and direct drop-ship returns from a customer to the applicable supplier. Also, the “Awaiting Link” status can now be assigned to purchase orders on the Purchase Orders screen (PO301000).

Improved Interconnection of Sales Orders and Drop-Ship Purchase Orders

On the Purchase Orders screen (PO301000), the following columns have been added to the Details tab for purchase orders of the Drop Ship type:

- **Sales Order Nbr.:** The number of the sales order that was created for this drop-ship purchase order line. The number is a link the user can click to view the sales order on the Sales Orders screen (SO301000).
- **Sales Order Line Nbr.:** The number of the sales order line to which this purchase order line is linked. This is the number displayed in the Line Nbr. column of the Details tab of the Sales Orders.
- **SO Linked:** A check box that indicates whether this line of the drop-ship purchase order has an active link to a line of the sales order. The system selects this check box (and thus considers the link active) if the inventory ID, quantity, and UOMs of the corresponding lines in the drop-ship purchase order and sales order are equal.

The **View SO Demand** button has been removed from the Details tab of the Purchase Orders screen.

A drop-ship purchase order can be linked to only one sales order at a time. In the drop-ship purchase order, the type and number of the related sales order are now displayed in the **Sales Order Type** and **Sales Order Nbr.** read-only fields, respectively, on the of the Shipping tab (Ship To section) of the Purchase Orders screen; see the following screenshot. If the sales orders is unlinked from the drop-ship purchase order, the system clears the **Sales Order Type** and **Sales Order Nbr.** fields automatically.

The screenshot shows the 'Purchase Orders' screen for a drop-ship purchase order. The header includes the title 'Drop Ship 000005 - ABC Studios Inc.' and a 'NOTES' icon. Below the header is a navigation bar with icons for back, forward, and other actions. The main form is divided into several sections: 'Details', 'Shipping', 'Supplier Info', 'Discounts', 'PO History', 'Prepayments', 'Change Orders', 'Other', and 'Compliance'. The 'Shipping' tab is currently selected. In the 'SHIP TO' section, the 'Sales Order Type' is set to 'SO' and the 'Sales Order Nbr.' is '002249'. These two fields are highlighted with a red rectangular box. Other fields in the 'SHIP TO' section include 'Shipping Destination Ty...' (Customer), 'Ship To' (CUST000003 - Active Staffing Service), and 'Shipping Location' (MAIN - Primary Location). The 'Supplier' section shows 'V000000001 - ABC Studios Inc.' and 'Location: MAIN - Primary Location'. A summary table on the right shows 'Line Total: 100.00', 'Discount Total: 0.00', 'GST Exempt T...: 0.00', 'GST Taxable T...: 100.00', 'Tax Total: 10.00', and 'Order Total: 110.00'.

On the Sales Orders screen (SO301000), the following read-only columns (shown in the following screenshot) have been added to the Details tab:

- **Drop-Ship PO Order Nbr.:** The number of the drop-ship purchase order to which this sales order line is linked. The number is a link the user can click to view the sales order on the Purchase Orders screen.
- **Sales Order Line Nbr.:** The number of the drop-ship purchase order line to which this sales order line is linked. This is the number displayed in the **Line Nbr.** column of the Details tab of the Purchase Orders.
- **PO Linked:** A check box that indicates whether this line of the sales order has an active link to the line of the drop-ship purchase order. The system selects this check box (and thus considers the link active) if the inventory ID, quantity, and UOMs of the corresponding lines in the drop-ship purchase order and sales order are equal.

A drop-ship purchase order and sales order can be linked only if the inventory ID, quantity, and UOMs in all corresponding lines of the drop-ship purchase order and sales order are equal. A sales order line can be linked to only one purchase order. When a user creates a drop-ship purchase order from a sales order by using the Create Purchase Orders screen (PO505000), all line links in the created purchase order and the sales order are active by default.

Awaiting Link Status

A new “Awaiting Link” status is now available for drop-ship purchase orders on the Purchase Orders screen (PO301000). The system automatically assigns the “Awaiting Link” status to a drop-ship purchase order in which at least one line with a stock or non-stock item is not linked to a corresponding line of a sales order or at least one line has an inactive link; the system assigns the status when the user removes the “On Hold” status (or the “Pending Approval” status, if approval is required).

When all unlinked lines in the drop-ship purchase order with the “Awaiting Link” status have been linked to lines of a sales order, the drop-ship purchase order will be assigned the “Open” status automatically. If at least one line with a stock or non-stock item in the drop-ship purchase order with the “Open” status becomes unlinked or the link is deactivated, the drop-ship purchase order will again be automatically assigned the “Awaiting Link” status.

For a drop-ship purchase order with the “Awaiting Link” status, the **Enter PO Receipt** action is not available on the screen toolbar of the Purchase Orders screen. If a drop-ship purchase order with the “Open” status has an unreleased purchase receipt and one of the purchase order lines included in this purchase receipt is unlinked from a sales order or has an inactive link, the drop-ship purchase order will be assigned the “Awaiting Link” status, and the release of the purchase receipt will fail.

In the Purchasing Details window, which a user opens by selecting a sales order line on Details tab of the Sales Orders screen (SO301000) and clicking the **PO Link** to link a purchase order to the sales order line, the system now displays only drop-ship purchase orders with the “Awaiting Link” status that have a line with the same item and item quantity as the selected line of the sales order has. The Purchasing Details window can display drop-ship purchase orders with a status different from “Awaiting Link” only if these drop-ship purchase orders are created with the “On Hold” status from a sales order.

New Actions on the Purchase Orders Screen

The following actions, which are shown in the following screenshot and described in detail below, have been added to the Actions menu on the screen toolbar of the Purchase Orders screen (PO301000):

- Unlink from Sales Order
- Convert to Normal
- Create Sales Order

For a drop-ship purchase order linked to a sales order, a user can now click **Actions > Unlink from Sales Order**. This action is available if the purchase order has the Drop Ship type and has values specified in the **Sales Order Type** and **Sales Order Nbr.** fields in the Ship To section on the Shipping tab of the Purchase Orders screen. The **Unlink from Sales Order** action removes the interconnection of the sales order and the drop-ship purchase order. The system clears the values in the **Sales Order Type** and **Sales Order Nbr.** fields.

If the purchase order has the Drop Ship type and the “On Hold”, “Awaiting Link”, or “Open” status, a user can now click **Actions > Convert to Normal** to convert the purchase order to a purchase order of the Normal type. Specifically, when the user clicks the **Convert to Normal** action, the system does the following:

1. Removes the link to a sales order in the originating drop-ship purchase order (that is, the drop-ship purchase order from which the user linked the documents)
2. Cancels the drop-ship purchase order
3. Creates another purchase order of the Normal type
4. Copies all lines from the originating drop-ship purchase order to the new purchase order of the Normal type with the corresponding Goods for IN or Non-Stock line types

The values of the Ship To section on the Shipping tab of the Purchase Orders screen for the created purchase order are populated with the default values for purchase orders of the Normal type based on the selected option in the **Default Ship Dest. Type** field of the Purchase Orders Preferences screen (PO101000). The **Supplier Tax Zone** field on the Supplier Info tab of the Purchase Orders screen is populated with the value of the Tax

Zone field on the Purchase Settings tab of the Suppliers screen (AP303000) for the current supplier. The values of the line discounts are copied from the originating drop-ship purchase order. Also, in the new purchase order, the system inserts a link to the originating drop-ship purchase order in the **Originating PO Nbr.** field on the Other tab; similarly, in the cancelled drop-ship purchase order, the system inserts a link to the created purchase order of the Normal type in the **Normal PO Nbr.** field on the Other tab.

A purchase order of the Drop Ship type cannot be converted to the Normal type if it has at least one document applied.

If a purchase order has the Drop Ship type, a user can click **Actions > Create Sales Order** to create a sales order from this purchase order. The new action is available for drop-ship purchase orders with the “Awaiting Link” status that don’t have a link to a sales order. If the drop-ship purchase order is partially linked to a sales order—that is, some lines of the purchase order are linked to the lines of a sales order and some lines are not, and the system has already inserted the values of the **Sales Order Type** and **Sales Order Nbr.** fields in the Ship To section on the Shipping tab of the Purchase Orders screen—the **Create Sales Order** action is unavailable. The **Create Sales Order** action creates a sales order with the same lines that are in the originating drop-ship purchase order. The lines can contain stock and non-stock items only. The sales order is created with the “On Hold” status, and the **PO Linked** check box is cleared for lines of the new sales order by default.

The system does not allow the creation of a purchase receipt for a drop-ship purchase order if the sales order linked to this purchase order has the “On Hold”, “Pending Approval”, or “Awaiting Payment” status.

Supplier Returns

This release introduces the ability to process returns of drop-shipped goods from the customer directly to the supplier, without the organisation receiving these goods in the warehouse. The **Create Supplier Return** action is available on the Sales Orders screen (SO301000) for sales orders with a sales order type that has the RMA Order automation behaviour.

Note: The automation behaviour is specified in the Automation Behaviour field of the Order Types screen (SO201000) on the Template Settings tab. The predefined RM sales order type has this behaviour; an organisation may have created other order types with the behaviour.

To process a drop-ship supplier return, the following steps must be performed:

1. On the Sales Orders screen, a sales manager creates a return sales order of an order type with the RMA Order automation behaviour.
2. On the table toolbar of Details tab, the sales manager clicks the **Add Invoice** button and adds the invoice with the drop-shipped lines.
3. On the Details tab, the sales manager selects the **Mark for PO** check box for these lines.
4. On the screen toolbar, the sales manager selects **Actions > Create Supplier Return**.

The system creates a direct purchase return to the supplier on the Purchase Receipts screen (PO302000), which is a receipt of the Return type with appropriate settings filled in. On the Shipments tab, the system inserts a link a user can click to navigate to the purchase return.

5. A purchasing manager opens and releases the purchase return on the Purchase Receipts screen.

The system does not generate any batches of transactions on release of the purchase return.

6. On the screen toolbar, the purchasing manager clicks **Actions > Enter AP Bill** to create a debit adjustment to the supplier. The system opens the Bills and Adjustments screen (AP301000) with appropriate settings copied, so that the purchasing manager can create a debit adjustment.
7. On the Bills and Adjustments screen, the purchasing manager releases the debit adjustment.

On release of the debit adjustment, the system debits the Accounts Payable account and credits the Purchase Accrual account.

8. The sales manager returns to the return sales order on the Sales Orders screen.
9. On the screen toolbar, the sales manager selects **Actions > Prepare Invoice** to create a credit memo on the Invoices screen (SO303000).
10. The sales manager releases the credit memo.

On release of the credit memo, the system generates an inventory issue on the Issues screen (IN302000). When the sales manager releases the inventory issue, the system debits the Purchase Accrual account and credits the COGS account.

Matrix Item Enhancements

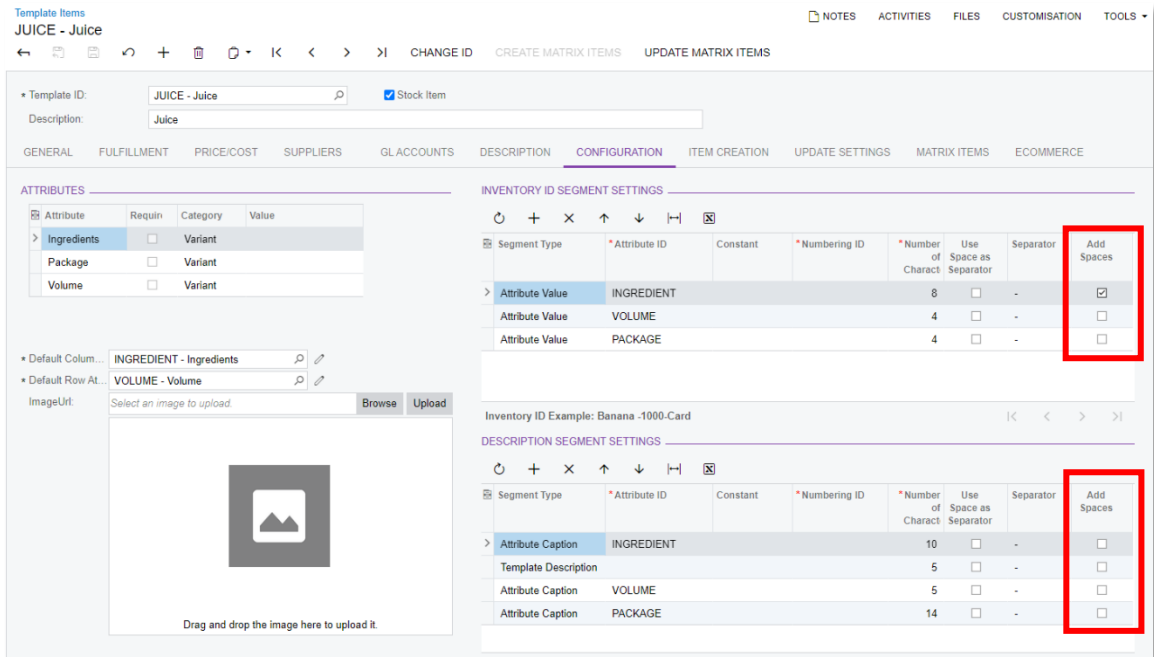
Multiple changes have been made to the matrix item functionality to ease the creation and management of matrix items.

The Add Spaces Check Box

On the Attribute Configuration tab of the Template Items screen (IN203000), an **Add Spaces** column has been added to the Inventory ID Segment Settings and Description Segment Settings tables (see the following screenshot).

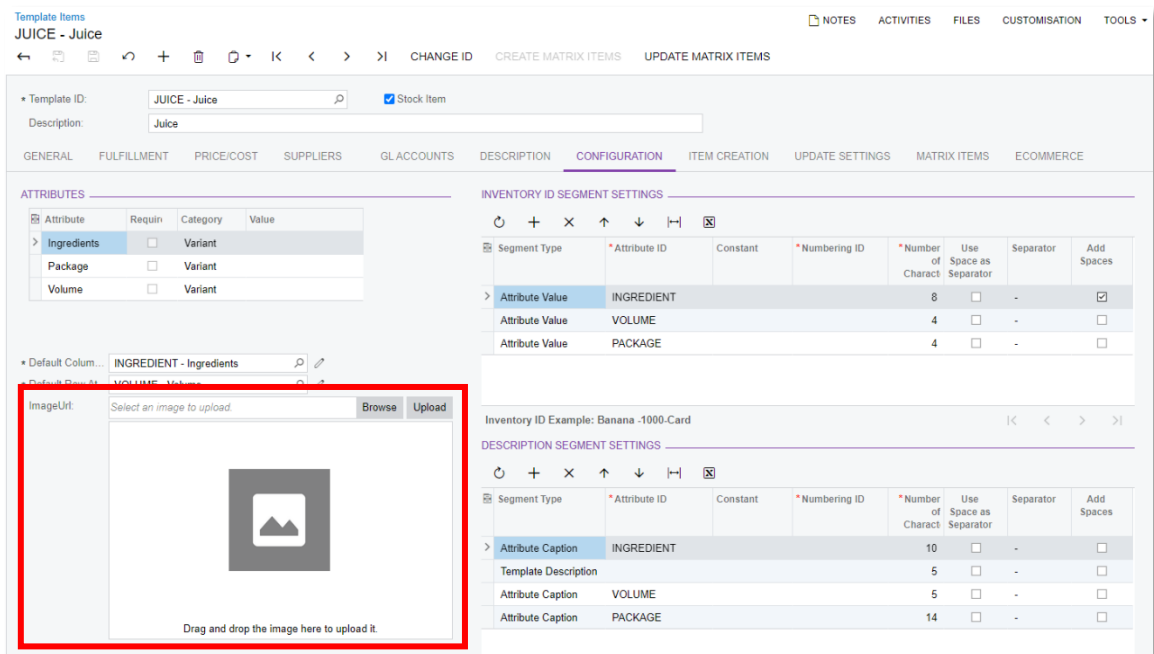
When the user selects a check box in the **Add Spaces** column for a segment, the system adds spaces to the values of the inventory ID or description segment of the matrix items if the values of the segments contain fewer characters than the number specified in the **Number of Characters** column. If the user clears the check box in the **Add Spaces** column for a segment, the system always displays the values of the inventory ID and description segments of matrix items without additional spaces.

For example, the user has the Brand, Size and Colour attributes in the Inventory Segment ID Settings table. For all attributes the Segment Type is Attribute Value and Number of Characters is 6. If the **Add Spaces** check box is selected for all attributes, the **Inventory ID** of the matrix item will be "PUMA -L -RED". If the **Add Spaces** check box is cleared for all attributes, the **Inventory ID** of the matrix item will be "PUMA-L-RED".



The Ability to Add Images to Template Items

On the Attribute Configuration tab of the Template Items screen (IN203000), an **Image** field has been added (see the following screenshot). The user can now upload images that will be used as the template item images when the matrix items are imported to eCommerce stores by using the template item. To upload an image, the user needs to click the **Browse** button and select an image file on the computer or drag the image file to the Image field, and then click the **Upload** button.



Editable Fields on the Matrix Items Tab

On the Matrix Items tab of the Template Items screen (IN203000), the values in the **Description**, **MSRP**, and **Default Price** columns can now be edited (see the following screenshot). The changes will be displayed on the Stock Items screen (IN202500).

Previously, the user could edit these values only by opening the settings of matrix items one by one on the Stock Items screen (IN202500) or for all matrix items created from a template item by changing the corresponding settings of the template item on the Template Items screen.

Inventory ID	Description	Default Warehouse	Ingredients	Package	Volume	Item Class	Tax Category	MSRP	Last Cost	Default Price	Stock Item
BANANA-1	Banana-Juice-1l-Cardboard box	MAIN	Banana	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
BANANA-2	Banana-Juice-200ml-Cardboard box	MAIN	Banana	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
BANANA-3	Banana-Juice-350ml-Cardboard box	MAIN	Banana	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
BANANA-5	Banana-Juice-500ml-Cardboard box	MAIN	Banana	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
STRAWBER-1	Strawberry-Juice-1l-Cardboard box	MAIN	Strawberry	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
STRAWBER-2	Strawberry-Juice-200ml-Cardboard box	MAIN	Strawberry	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
STRAWBER-3	Strawberry-Juice-350ml-Cardboard box	MAIN	Strawberry	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
STRAWBER-5	Strawberry-Juice-500ml-Cardboard box	MAIN	Strawberry	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
WATER-1	Water-Juice-1l-Cardboard box	MAIN	Water	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
WATER-2	Water-Juice-200ml-Cardboard box	MAIN	Water	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
WATER-3	Water-Juice-350ml-Cardboard box	MAIN	Water	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>
WATER-5	Water-Juice-500ml-Cardboard box	MAIN	Water	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input type="checkbox"/>

Enhanced Update of Matrix Items

On the Template Items screen (IN203000), the **Apply to Matrix Items** button on the screen toolbar has been renamed to **Update Matrix Items**, and an Update Settings tab has been added.

Template Items
JUICE - Juice

Template ID: JUICE - Juice Stock Item
Description: Juice

GENERAL FULFILLMENT PRICE/COST SUPPLIERS GL ACCOUNTS DESCRIPTION CONFIGURATION ITEM CREATION **UPDATE SETTINGS** MATRIX ITEMS

FIELDS EXCLUDED FROM UPDATE

Table Name	Field Name	
Inventory Item	Default Price	<input checked="" type="checkbox"/>

ATTRIBUTES EXCLUDED FROM UPDATE

Attribute	Required	Category	Value	
				<input checked="" type="checkbox"/>

On the Update Settings tab, the user can add fields and attributes that will be excluded from the update of matrix items by specifying the required values in the Fields Excluded from Update and Attributes Excluded from Update sections.

The Fields Excluded from Update section contains a table in which the user can list all fields that will be excluded from the update when the user clicks the **Update Matrix Items** button. The table consists of the following columns:

- **Notes:** A note in which the user can specify the reason for excluding the field from the update.
- **Table Name:** The name of a table that is available for the matrix items on the Template Items screen.
- **Field Name:** The database field of the table that can be updated.
- **Selected:** A check box that indicates whether the exclusion is active for the field.

The Attributes Excluded from Update section contains a table in which the user can list all attributes that will be excluded from the update when the user clicks the **Update Matrix Items** button. Only attributes with the Attribute category that are specified for the template item on the Attributes tab of the Item Classes screen (IN201000) can be excluded from the update. The table consists of the following columns:

- **Notes:** A note in which the user can specify the reason for excluding the attribute from the update.
- **Attribute:** The attribute available for this template item. Only attributes with the Attribute category can be selected.
- **Required:** A check box that indicates (if selected) that the attribute value is required for matrix items of the template item.
- **Category:** The attribute category. The category can only be Attribute.
- **Value:** The value of the attribute for the template item.
- **Selected:** A check box indicates whether the exclusion is active for the attribute.

On the table toolbar of the Matrix Items tab of the Template Items screen, an **Update Only Selected Items with Template Changes** check box has been added (see the following screenshot). If the user selects this check box, only the selected matrix items—that is, the matrix items for which the unlabelled check box is selected in the table—are updated when the user clicks the **Update Matrix Items** button on the screen toolbar. If the user clears this check box, all matrix items in the list are updated when the user clicks the **Update Matrix Items** button.

The screenshot shows the 'Template Items' screen for 'JUICE - Juice'. The 'MATRIX ITEMS' tab is active. A red box highlights the checkbox 'Update Only Selected Items with Template Changes' in the toolbar. Below the toolbar is a table with the following data:

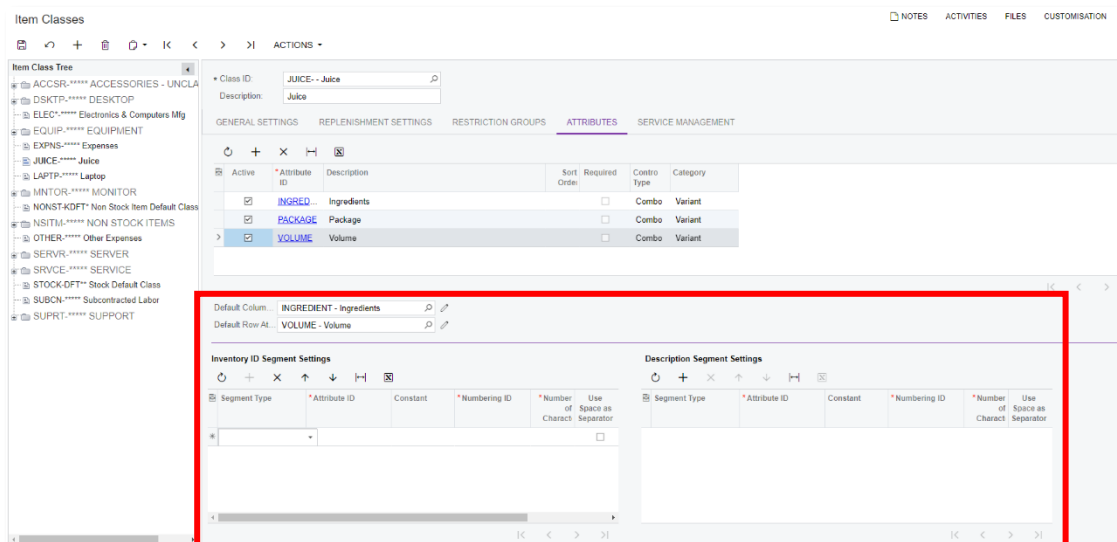
Inventory ID	Description	Default Warehouse	Ingredients	Package	Volume	Item Class	Tax Category	MSRP	Last Cost	Default Price	Stock Item
<input checked="" type="checkbox"/> BANANA-1	Banana-Juice-1l-Cardboard box	MAIN	Banana	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> BANANA-2	Banana-Juice-200ml-Cardboard box	MAIN	Banana	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> BANANA-3	Banana-Juice-350ml-Cardboard box	MAIN	Banana	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> BANANA-5	Banana-Juice-500ml-Cardboard box	MAIN	Banana	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> STRAWBER-1	Strawberry-Juice-1l-Cardboard box	MAIN	Strawberry	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> STRAWBER-2	Strawberry-Juice-200ml-Cardboard box	MAIN	Strawberry	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> STRAWBER-3	Strawberry-Juice-350ml-Cardboard box	MAIN	Strawberry	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> STRAWBER-5	Strawberry-Juice-500ml-Cardboard box	MAIN	Strawberry	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> WATER-1	Water-Juice-1l-Cardboard box	MAIN	Water	Cardboard box	1l	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> WATER-2	Water-Juice-200ml-Cardboard box	MAIN	Water	Cardboard box	200ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> WATER-3	Water-Juice-350ml-Cardboard box	MAIN	Water	Cardboard box	350ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>
<input type="checkbox"/> WATER-5	Water-Juice-500ml-Cardboard box	MAIN	Water	Cardboard box	500ml	JUICE-	DEFAULTD	0.00	0.00	0.00	<input checked="" type="checkbox"/>

With the new update options, the user updates matrix items by updating their template item as follows:

1. To exclude certain fields from the update of matrix items, the user opens the Update Settings tab of the Template Items screen and selects these fields in the Fields Excluded from Update table.
2. To exclude certain attributes of the Attribute type from the update of matrix items, on the same tab, the user selects these attributes in the Attributes Excluded from Update table.
3. To update a certain list of matrix items, the user opens the Matrix Items tab on the same screen, selects the **Update Only Selected Items with Template Changes** check box, and selects the matrix items that should be updated in the table below.
4. The user clicks the **Update Matrix Items** button on the screen toolbar.

Attribute Configuration on the Item Classes Screen

On the Attributes tab of the Item Classes screen (IN201000), **Default Column Attribute ID** and **Default Row Attribute ID** fields have been added. Also, Inventory ID Segment Settings and Description Segment Settings tables have been added to the same tab (see the following screenshot).



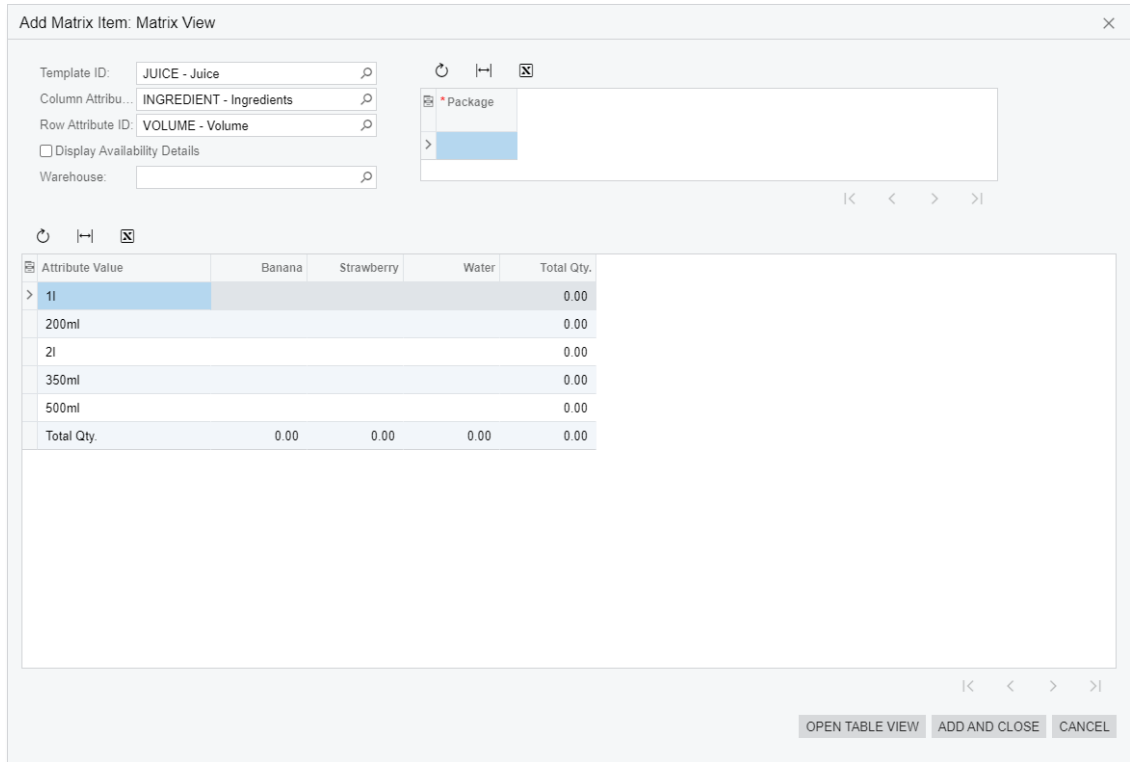
The functionality of the added fields and tables duplicates the functionality of the fields and tables of the same name on the Attribute Configuration tab of the Template Items screen (IN203000). The specified settings will be propagated to new template items of the item class for which the attribute configuration has been performed on the Item Classes screen.

Matrix Items with Only One Variant Attribute

On the Attribute Configuration tab of the Template Items screen (IN203000), users can now create matrix items with only one variant attribute. Previously, at least two variant attributes were required to fill in the **Default Column Attribute ID** and **Default Attribute Row ID** fields. Now one of these fields can be left blank.

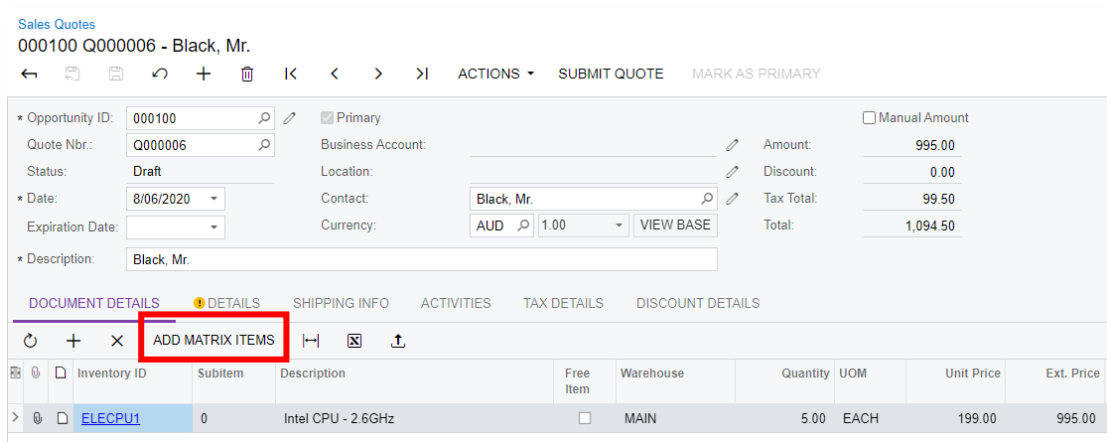
Changed Default View for Add Matrix Items Dialog Box

On the Sales Orders (SO301000) and Purchase Orders (PO301000) screens, when a user clicks the **Add Matrix Item** button on the table toolbar, the **Add Matrix Items** window is now opened in the matrix view by default instead of the table view. Also, an **Open Table View** button has been added to the bottom of the Add Matrix Items window in the matrix view (see the following screenshot).



Add Matrix Item Button on Sales Quotes and Opportunities Screens

Matrix items can now be added to documents on the following screens: Sales Quotes (CR304500) and Opportunities (CR304000). An **Add Matrix Item** button has been added to the Document Details tab of both screens.



Multi-Currency in Purchase Returns

In previous versions of Acumatica ERP, when a user created a purchase return from the original purchase receipt which had a non-base currency, the purchase return was created in the base currency and the Currency and Exchange Rate boxes were unavailable for editing—that is, the user could not change the currency and the exchange rate of the document. In Acumatica ERP 2021 R1, the purchase return created from a purchase receipt can inherit the currency of the original purchase receipt, and the ability to change the currency rate depends on the Cost of Inventory Return From drop-down list settings.

Cost of Inventory Return From Drop-Down List

On the Purchase Receipts screen (PO302000), a **Cost of Inventory Return From** drop-down list has been added instead of the **Process Return with Original Cost** check box as shown on the following screenshot.

The screenshot displays the 'Purchase Receipts Return' form. The 'Cost of Invent...' field is open, showing a dropdown menu with three options: 'Original Cost from Receipt' (highlighted), 'Cost by Issue Strategy', and 'Manual Cost Input'. Other fields include 'Type: Return', 'Receipt Nbr.: <NEW>', 'Status: Balanced', 'Date: 31/05/2021', 'Currency: NZD 1.00', and 'Supplier Ref.: Original Cost from Receipt'. Summary statistics on the right show 'Total Qty.: 0.00', 'Unbilled Quant...: 0.00', and 'Total Cost: 0.00'. The bottom of the screen shows a table header with columns: Branch, Inventory ID, Line Type, Subitem, Warehouse, Location, and Transaction Descr.

The drop-down list defines the way in which the cost of items is determined in a return document. The following options are available:

- Original Cost from Receipt:** The items are returned at the cost at which they have been purchased. The currency rate is inherited from the original purchase receipt and is unavailable for editing. The system copies the values in the **Unit Cost** and **Ext. Cost** columns on the Details tab of the Purchase Receipts form from the original purchase receipt line. In the purchase return, the **Unit Cost** and **Ext. Cost** columns cannot be edited.
- Cost by Issue Strategy:** The items are returned at the cost calculated according to the valuation method specified for the item in the **Valuation Method** field on the General Settings tab of the Stock Items screen (IN202500). The currency rate is set according to the purchase return date and the effective currency rate specified on the Currency Rates screen (CM301000). The currency rate can be overridden if the **Enable Rate Override** check box is selected on the Vendors screen (AP303000) and the **Allow Changing Currency Rate on Receipt** check box is selected on the Purchase Orders Preferences screen (PO101000).
- Manual Cost Input:** The currency rate is set according to the purchase return date and the effective currency rate specified on the Currency Rates form. The currency rate can be overridden if the **Enable Rate Override** check box is selected on the Vendors form and the **Allow Changing Currency Rate on Receipt** check box is

selected on the Purchase Orders Preferences screen (PO101000). The system copies the values of the **Unit Cost** and **Ext. Cost** columns on the Details tab of the Purchase Receipts form from the original purchase receipt line. In the purchase return, the **Unit Cost** and **Ext. Cost** columns can be edited. In case the user changes the values of the **Unit Cost** or **Ext. Cost** columns, the system recalculates the value of the **Estimated IN Ext. Cost** column accordingly and copies this value to the inventory issue on the Issues screen (IN302000) when the user releases the purchase return.

On the Purchase Receipts form, in purchase returns that contain stock item lines without a link to the purchase receipt lines, only Cost by Issue Strategy option can be used in the **Cost of Inventory Return From** drop-down list.

On the Purchase Receipts form, the **Currency** field is available for editing until any line is added to the purchase receipt or return. The user can add purchase receipt lines to the purchase return document with the currency defined in the purchase return.

If the user creates a purchase return on the Purchase Receipts form, the currency rate is set according to the date of the created purchase return and the effective currency rate specified on the Currency Rates form:

- If the “Original Cost from Receipt” option is selected in the **Cost of Inventory Return From** dropdown, a user can add lines from different purchase receipts with defined currency and the same currency rate, effective dates, and currency rate types. The currency of the purchase return will be overridden by the currency rate in the selected purchase receipt.
- For other options, the user can select lines from different purchase receipts with specified currency. The currency rate of the purchase return cannot be overridden. The user cannot select the “Process Return with Original Cost” option if the purchase return contains lines in non-base currency from purchase receipts with different currency rates, effective dates, or rate types.

New Workflow in Order Management Documents

The processing of purchase orders, purchase receipts, landed cost and inventory documents has been redesigned to use the new workflow engine.

The processes that are performed by using the Purchase Orders (PO301000), Purchase Receipts (PO302000), Landed Costs (PO303000), Requests (RQ301000), Requisitions (RQ302000), Receipts (IN301000), Issues (IN302000), Adjustments (IN303000), Transfers (IN304000), and Kit Assembly (IN307000) screens work as they did as in the previous versions. The UI on these screens has been enhanced to support functionality of the new workflow engine.

Note: Because the implementation of the new workflow engine entails changes to DACs and business logic, it may affect custom generic inquiries, customisation projects, import and export scenarios, and API integrations. For the complete list of changes, see the MYOB Advanced 2021.1.1 Technical Release Notes.

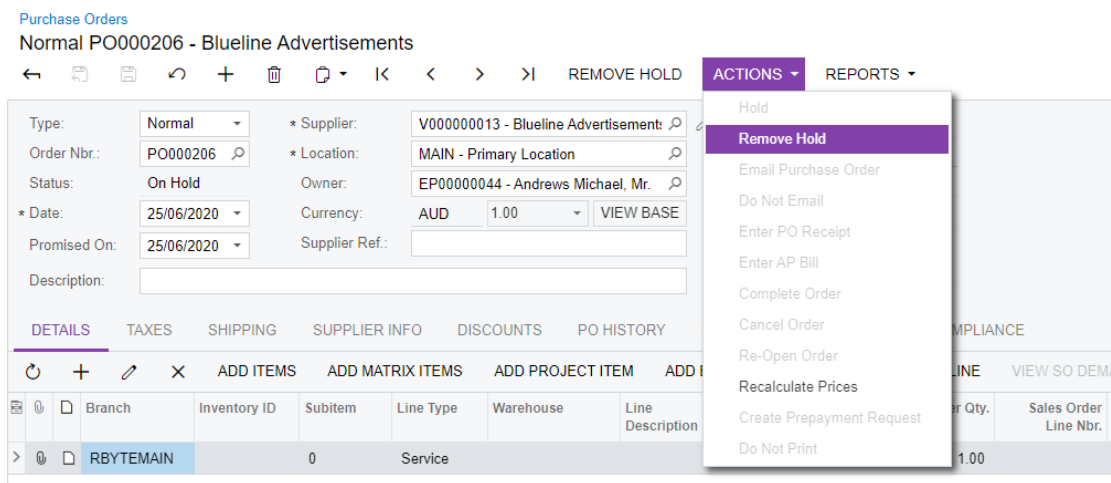
UI Enhancements

On the Purchase Orders (PO301000), Purchase Receipts (PO302000), Landed Costs (PO303000), Requests (RQ301000), and Requisitions (RQ302000) screens, the **Hold** check box has been removed and replaced with the **Remove Hold** and **Hold** actions, which can be selected from the screen toolbar or the Action menu.

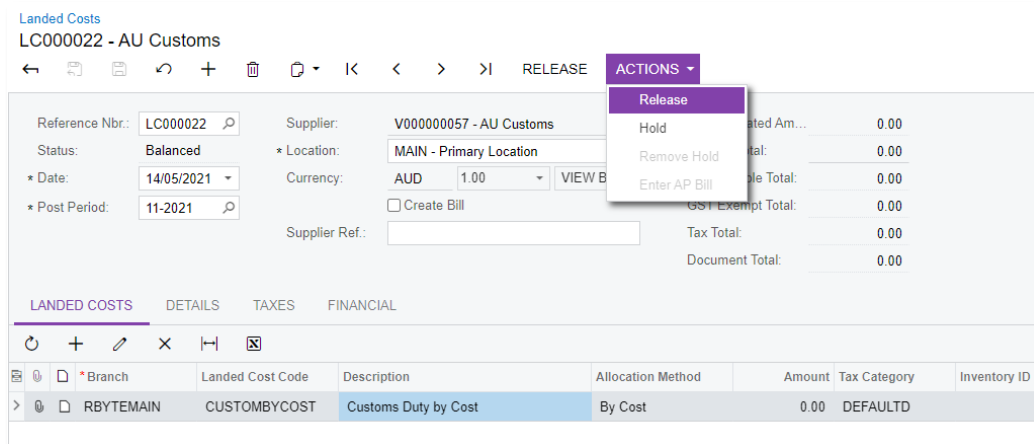
On the Receipts (IN301000), Issues (IN302000), Adjustments (IN303000), Transfers (IN304000), and Kit Assembly screens, the **Hold** check box has been removed and replaced with the **Remove Hold** and **Hold** actions, which can be selected from the screen toolbar or the Action menu.

On these screens, the buttons representing the actions that are the most relevant to the current status of the document opened on the screen are displayed directly on the screen toolbar in addition to being included as menu commands in the Actions menu.

For example, in the following screenshot, a purchase order with the “On Hold” status on the Purchase Orders screen is shown. The **Remove Hold** button is displayed on the screen toolbar and the corresponding menu command is included in the Actions menu.



In the following screenshot, a landed costs document with the “Balanced” status on the Purchase Orders screen is shown. The **Release** button is displayed on the screen toolbar and the corresponding menu command is included in the Actions menu.



The following tables (a table is shown for each screen) show the actions that are displayed as buttons on the toolbar of the screen for each document type and status.

Note: Information in the following tables is relevant for the out-of-the-box installation of the system.

Document types, Statuses and the Corresponding Actions on the Purchase Orders screen

Document Type	Status	Action
Normal	On Hold	Remove Hold
	Open	<ul style="list-style-type: none"> • Enter PO Receipt • Enter AP Bill
	Completed	Enter AP Bill
Drop Ship	On Hold	Remove Hold
	Open	<ul style="list-style-type: none"> • Enter PO Receipt • Enter AP Bill
	Completed	Enter AP Bill
Blanket	On Hold	Remove Hold
	Open	Email Purchase Order
Standard	On Hold	Remove Hold
	Open	Email Purchase Order
All types	Pending Approval	<ul style="list-style-type: none"> • Hold • Approve • Reject
All types	Rejected	Hold
All types	Pending Printing	<ul style="list-style-type: none"> • Print Order • Do Not Print
All types	Pending Email	<ul style="list-style-type: none"> • Email Order • Do Not Email

Document Statuses and the Corresponding Actions on the Purchase Receipts screen

Document Type	Status	Action
Receipt	On Hold	Remove Hold
	Balanced	Release
	Released	Enter AP Bill
Return	On Hold	Remove Hold
	Balanced	Release
	Released	Enter AP Bill
Transfer	On Hold	Remove Hold
	Balanced	Release

Released

Create LC Document

Document Statuses and the Corresponding Actions on the Landed Costs screen

Status	Action
<i>On Hold</i>	Remove Hold
<i>Balanced</i>	Release
<i>Released</i>	Enter AP Bill

Document Statuses and the Corresponding Actions on the Requests screen

Status	Action
<i>On Hold</i>	Remove Hold
<i>Pending Approval</i>	<ul style="list-style-type: none"> • Approve • Reject • Hold
<i>Rejected</i>	Hold

Document Statuses and the Corresponding Actions on the Requisitions screen

Status	Action
<i>On Hold</i>	Remove Hold
<i>Pending Approval</i>	<ul style="list-style-type: none"> • Approve • Reject • Hold
<i>Rejected</i>	Hold
<i>Bidding</i>	<ul style="list-style-type: none"> • View Bidding • Send Request for Proposal
<i>Pending Quotation</i>	Create Quote
<i>Open</i>	Create Orders

Document Statuses and the Corresponding Actions on the Receipts, Issues, Adjustments, and Transfers screens

Status	Action
<i>On Hold</i>	Release from Hold
<i>Balanced</i>	Release

Document Statuses and the Corresponding Actions on the Kit Assembly screen

Status	Action
<i>On Hold</i>	Release from Hold
<i>Balanced</i>	Release
<i>Released</i>	Review Batch

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the Purchase Orders (PO301000), Purchase Receipts (PO302000), Landed Costs (PO303000), Requests (RQ301000), Requisitions (RQ302000), Receipts (IN301000), Issues (IN302000), Adjustments (IN303000), Transfers (IN304000), or Kit Assembly (IN307000) screens, users that work on customisations will need to redesign the automation of the processes related to the applicable screens by using the new workflow engine.

Purchase Receipts for Non-Stock Items Without the Inventory Feature

This provides users with the ability to process non-stock items by using purchase receipts and purchase returns when the *Inventory* feature is disabled on the Enable/Disable Features screen (CS100000).

The Purchase Receipts Without Inventory Feature

On the Enable/Disable Features screen (CS100000), a **Purchase Receipts Without Inventory** check box has been added to the Inventory and Order Management group of features.

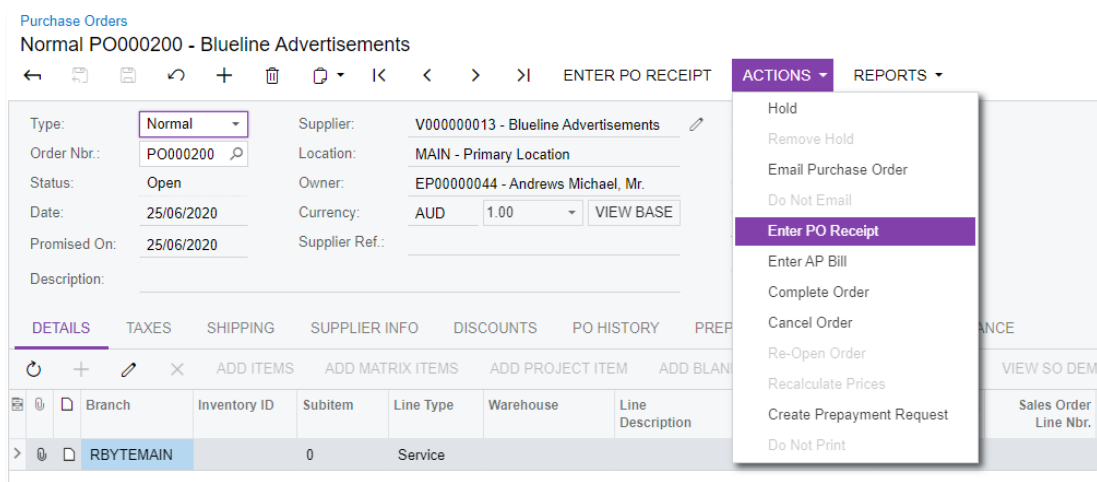
The *Purchase Receipts Without Inventory* and *Inventory* features are mutually exclusive. That is, a user cannot enable one of these features if the other is enabled; if you attempt to select the check box on the Enable/Disable Features screen corresponding to one of these features and the check box corresponding to the other feature is selected, the system displays an error indicating that you must disable the other feature first.

Note: If a company has the *Inventory* feature enabled and has any unprocessed documents with stock items, we strongly recommend that these documents be processed before the company disables the “*Inventory*” feature and enables the “*Purchase Receipts Without Inventory*” feature.

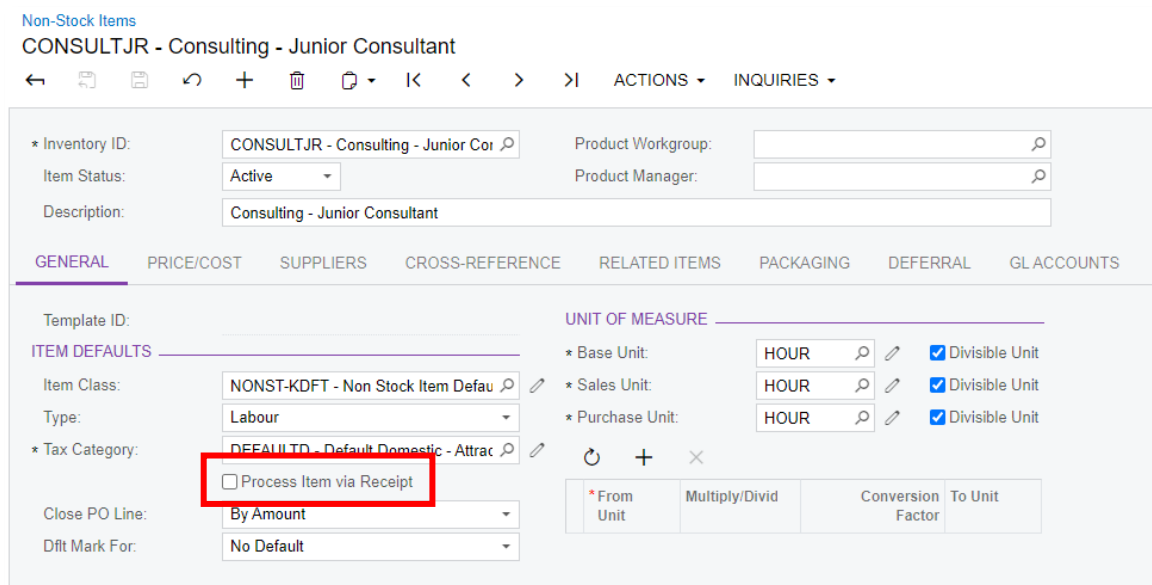
When the *Purchase Receipts Without Inventory* feature is enabled and the *Inventory* feature is disabled on the Enable/Disable Features screen, the following screens can be used:

- Purchase Receipts (PO302000)
- Release Purchase Receipts (PO501000)
- Purchase Receipt (PO646000)
- Purchase Receipt Summary (PO620500)
- Purchase Receipt Unbilled Summary (PO631020)
- Purchase Order Receipt and Billing History (PO643000)
- Purchase Receipt Details by Supplier (PO621000)

When the “Purchase Receipts Without Inventory” feature is enabled, on the Purchase Orders screen (PO301000), the **Enter PO Receipt** menu command becomes available in the Actions menu if the selected purchase order has non-stock items (see the following screenshot).



On the Non-Stock Items screen (IN202000), a **Process Item via Receipt** check box appears on the General Settings tab (see the following screenshot), and the **Require Shipment** and **Require Receipt** check boxes have been removed from the same tab. When the **Process Item via Receipt** check box is selected for a non-stock item, the purchases of this non-stock item must be processed by using a purchase receipt.



The non-stock items with the **Process Item via Receipt** check box selected on the Non-Stock Items screen can be added to a purchase receipt directly on the Purchase Receipts screen (PO302000) or if the user clicks **Action > Enter PO Receipt** on the Purchase Orders screen (PO301000).

Note: If any stock items were added to the system before the “Purchase Receipts Without Inventory” feature was enabled, these stock items can be added to purchase orders on the Purchase Orders screen or purchase receipts on the Purchase Receipts screen along with non-stock items. We strongly recommend that users do not add stock items to purchase orders and purchase receipts when the “Purchase Receipts Without Inventory” feature is enabled.

Posting Rules for Non-Stock Items with the Process Item via Receipt Check Box Selected

When a purchase receipt has non-stock items with the **Process Item via Receipt** check box selected on the Non-Stock Items screen (IN202000) and then the purchase receipt is released, the system does not post any GL transactions. The transactions are posted on release of the corresponding AP bill. The GL accounts for transactions are derived from the settings of the non-stock items.

If the **Accrue Cost** check box is selected on the Price/Cost Information tab of the Non-Stock Items screen for a non-stock item that also has the **Process Item via Receipt** check box selected on the General Settings tab, the posting rules will be the same as those for non-stock items with the **Accrue Cost** check box selected when the “Inventory” feature is enabled.

Processing of Purchase Returns for Non-Stock Items with the Process Item via Receipt Check Box Selected

When the Purchase Receipts Without Inventory feature is enabled, users can process purchase returns on the Purchase Receipts screen (PO302000) that include non-stock items with the Process Item via Receipt check box selected on the Non-Stock Items screen (IN202000). If a purchase return is processed for lines of a purchase receipt, the value of the **Unit Cost** column for the purchase return line is derived from the **Unit Cost** value of the original purchase receipt line.

If a non-stock item with the **Process Item via Receipt** check box selected on the Non-Stock Items screen is added directly to the purchase return on the Purchase Receipts screen, the value of the **Unit Cost** column in the purchase return line will be derived from the value of the **Last Supplier Price** column on the Supplier Details tab of the Non-Stock Items screen. If there is no value in the **Last Supplier Price** column, the system instead uses the value of the **Current Cost** field on the Price/Cost Information tab (the Standard Cost section).

Inheritance of Non-Stock Item Settings

For a non-stock item that was created when the *Inventory* feature was enabled on the Enable/Disable Features screen (CS100000), the state of the **Require Receipt** check box on the Non-Stock Items screen (IN202000) is inherited by the **Process Item via Receipt** check box on the Non-Stock Items screen if the “Purchase Receipts Without Inventory” feature is instead enabled.

For a non-stock item created when the “Purchase Receipts Without Inventory” feature is enabled, the **Process Item via Receipt** check box is cleared by default. If the “Inventory” feature is then enabled instead, the **Require Receipt** check box does not inherit the value of the **Process Item via Receipt** check box.

If the “Purchase Receipts Without Inventory” feature is enabled, if any documents with non-stock items for which the **Process Item via Receipt** check box is selected on the Non-Stock Items screen are created, if you instead enable the Inventory feature, these documents will be processed as documents with non-stock items of the Service type.

Purchase Receipt Unbilled Summary Report

A new Purchase Receipt Unbilled Summary report (PO631020) has been added. On this report screen, a user can generate a report displaying items that have already been received but not billed yet or billed partially. The user specifies the date range and any of the following parameters: receipt number, supplier ID, and inventory ID.

The Purchase Receipt Unbilled Summary report is available only if the *Purchase Receipts Without Inventory* feature is enabled on the Enable/Disable Features screen (CS100000).

UI Changes in Inventory and Order Management Screens

Multiple UI changes and enhancements have been introduced to provide a better experience for users.

Changes on the Sales Orders Screen

Various changes have been made to the Sales Orders screen (SO301000). The tabs of this screen have been renamed as follows.

Old Name	New Name
Document Details	Details
Tax Details	Taxes
Financial Settings	Financial
Shipping Settings	Shipping
Discount Details	Discounts

A **Contact** field has been added to the Summary area of the Sales Orders screen (see the following screenshot).

The screenshot shows the Sales Orders screen for SO 001702 - AMRO Bank N.V. The Contact field is highlighted in red. The field contains the text "Bradshaw Wayne, Mr." and has a selection icon to its right. The screen also displays various order details such as Order Type (SO), Order Nbr. (001702), Status (Open), Date (13/05/2021), Requested On (13/05/2021), Customer (CUST000005 - AMRO Bank N.V.), Location (MAIN - Primary Location), Currency (AUD), Project (X - Non-Project Code), and a summary of totals including Ordered Qty (1.00), Discount Total (0.00), GST Exempt Total (0.00), GST Taxable Total (0.00), Tax Total (0.00), and Order Total (0.00). The bottom of the screen features a navigation bar with tabs for DETAILS, TAXES, COMMISSIONS, FINANCIAL, SHIPPING, ADDRESSES, DISCOUNTS, SHIPMENTS, PAYMENTS, and TOTALS.

In the **Contact** field, the user can select or add a contact person for the current customer. If a contact is specified, when the user selects **Actions > Email Sales Order/Quote** on the Sales Orders screen, the system automatically inserts the selected contact as the recipient of the email.

If the user creates a sales order on the Sales Orders screen, the **Contact** field is empty by default. If the user generates a sales order from the Opportunities (CR304000) or Sales Quotes (CR304500) screens by selecting the **Create Sales Order** action on the screen

toolbar of one of these screens, the system copies the value of the **Contact** field (if any value is specified) to the sales order.

The following changes have been implemented related to the buttons on the table toolbar of the Details tab of the Sales Orders screen:

- The **Add Stock Items** button has been renamed to **Add Items**.
- The **Allocations** button has been renamed to **Line Details**.
- The order of the buttons on the table toolbar has been changed to the following: **Add Items, Add Matrix Items, Add Invoice, Line Details, PO Link, and Item Availability**.
- The **Inventory Summary** button has been removed.
- When a user clicks a sales order line on the tab and then clicks the **Item Availability** button, the system now opens the Inventory Allocation Details screen (IN402000) in a new browser tab. In the **Inventory ID** and **Warehouse** fields of this screen, the system inserts the values from the **Inventory ID** and **Warehouse** columns, respectively of the Details tab of the selected sales order line of the Sales Orders screen.

A new Addresses tab (see the following screenshot) has also been added to the Sales Orders screen. The tab contains the Ship-To Contact and Ship-To Address sections (which were formerly on the Shipping tab), as well as the Bill-To Contact and Bill-To Address sections (which were previously on the Financial tab).

The screenshot shows the 'Sales Orders' screen for 'SO 001702 - AMRO Bank N.V.'. The 'ADDRESSES' tab is selected, displaying four sections: 'SHIP-TO CONTACT', 'BILL-TO CONTACT', 'SHIP-TO ADDRESS', and 'BILL-TO ADDRESS'. Each section includes an 'Override' checkbox and fields for Company Name, Attention, Phone 1, Email, Address Line 1, Address Line 2, City, Country, State, and Postal Code. The 'SHIP-TO' and 'BILL-TO' sections are populated with the same information: AMRO Bank N.V., Sydney, Australia, NSW - New South Wales, 2000.

The Financial tab (see the following screenshot) of the Sales Orders screen has been changed as follows:

- The arrangement of sections has been changed.
- A new Ownership section has been added, which contains the Workgroup and Owner fields (previously in the Financial Information section).

- A new Other Information section has been added to the Financial tab (shown in the following screenshot). It contains the **Orig. Order Type** and **Orig. Order Nbr.** fields and the **Emailed** check box, which were previously in the Financial Information section.

Sales Orders
SO 001702 - AMRO Bank N.V.

ORDER SUMMARY:

* Order Type:	SO	* Customer:	CUST000005 - AMRO Bank N.V.	Ordered Qty.:	1.00
Order Nbr.:	001702	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:	Bradshaw Wayne, Mr.	GST Exempt T...:	0.00
* Date:	13/05/2021	Currency:	AUD 1.00	GST Taxable T...:	0.00
* Requested On:	13/05/2021	* Project:	X - Non-Project Code.	Tax Total:	0.00
Customer Ord...:				Order Total:	0.00
External Refer...:		Description:			

DETAILS TAXES COMMISSIONS **FINANCIAL** SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

FINANCIAL INFORMATION

* Branch: RBYTEMAIN - Rapid Byte Head Quar

Override Tax Zone

Customer Tax Zone: DOMESTIC - Domestic

Tax Calculation Mode: Tax Settings

Bill Separately

Invoice Nbr.:
Invoice Date:

* Terms: 30THMONTH - 30th of Month

Due Date:
Cash Discount Date:
Post Period:

PAYMENT INFORMATION

Override Prepayment

Prepayment Percent: 10.00

Prepayment Amount: 0.00

Prepayment Requirements Satisfied

Payment Method: CASH - Cash Payment

Cash Account: 100016 - AU WBC Bank Corp Account

OWNERSHIP

Workgroup:
Owner: Andrews Michael, Mr.

OTHER INFORMATION

Orig. Order Type:
Orig. Order Nbr.:

Emailed

Changes have also been made to the Shipping tab (see the following screenshot) of the Sales Orders screen, including the addition of Delivery Settings and Order Shipping Settings sections. These two new sections hold the UI elements of the now-removed Shipping Information section.

Sales Orders
SO 001702 - AMRO Bank N.V.

ORDER SUMMARY:

* Order Type:	SO	* Customer:	CUST000005 - AMRO Bank N.V.	Ordered Qty.:	1.00
Order Nbr.:	001702	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:	Bradshaw Wayne, Mr.	GST Exempt T...:	0.00
* Date:	13/05/2021	Currency:	AUD 1.00	GST Taxable T...:	0.00
* Requested On:	13/05/2021	* Project:	X - Non-Project Code.	Tax Total:	0.00
Customer Ord...:				Order Total:	0.00
External Refer...:		Description:			

DETAILS TAXES COMMISSIONS FINANCIAL **SHIPPING** ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

DELIVERY SETTINGS

Ship Via: PACKAGES

Will Call

FOB Point:
Priority: 0
Shipping Terms:
Shipping Zone:

Residential Delivery
 Saturday Delivery
 Insurance
 Use Customer's Account

ORDER SHIPPING SETTINGS

Sched. Shipment: 13/05/2021

Ship Separately

Shipping Rule: Cancel Remainder

Cancel By: 13/05/2021 Canceled

Preferred Warehouse ID:

Finally, on the Totals tab of the Sales Orders screen, the column widths have been adjusted to match the column widths on the Financial tab.

Changes on the Invoices Screen

The tabs on the Invoices screen (SO303000) have been renamed as follows.

Old Name	New Name
Document Details	Details
Tax Details	Taxes
Freight Details	Freight
Address Details	Addresses

The Assigned To section on the Financial tab has been renamed to Ownership.

Changes on the Purchase Orders Screen

The tabs on the Purchase Orders screen (PO301000) have been renamed as follows.

Old Name	New Name
Document Details	Details
Tax Details	Taxes
Shipping Instructions	Shipping
Approval Details	Approvals
Discount Details	Discounts
Other Information	Other

The following changes have been implemented on the Details tab of the Purchase Orders screen, as shown in the following screenshot:

- The **Add Item** button has been renamed to **Add Items**.
- The **Add Matrix Item** button has been renamed to **Add Matrix Items**.
- The order of the buttons on the table toolbar is now the following: **Add Items**, **Add Matrix Items**, **Add Project Item**, **Add Blanket PO**, **Add Blanket PO Line**, and **View SO Demand**

The screenshot shows the 'Purchase Orders' screen for 'Normal PO000071 - ABC Studios Inc.'. The 'DETAILS' tab is active. The toolbar contains several buttons, with the following ones highlighted in a red box: 'ADD ITEMS', 'ADD MATRIX ITEMS', 'ADD PROJECT ITEM', 'ADD BLANKET PO', 'ADD BLANKET PO LINE', and 'VIEW SO DEMAND'. Below the toolbar is a table with columns for Branch, Inventory ID, Subitem, Line Type, Warehouse, Line Description, Sales Order Nbr., Order Qty., Sales Order Line Nbr., Unit Cost, SO Linked, and Ext. Cost. The table contains three rows of data for 'RBYTEMAIN' items.

Other Changes in the Inventory and Order Management Screens

Tabs have been renamed on other inventory and order management screens, as detailed in the following table.

Old Name	New Name
Shipments (SO302000)	
Document Details	Details
Shipping Settings	Shipping
Picking Worksheets (SO302500)	
Document Details	Details
Purchase Receipts (PO302000)	
Document Details	Details
Purchase Orders	Orders
Put Away History	Put Away
PR History	History
Billing History	Billing
Other Information	Other
Landed Costs (PO303000)	
Document Details	Details
Tax Details	Taxes
Financial Details	Financial
Requests (RQ301000) and Requisitions (RQ302000)	
Document Details	Details
Shipping Instructions	Shipping
Approval Details	Approvals
Budget Details	Budget
Other Information	Other
Receipts (IN301000), Issues (IN302000) and Adjustments (IN303000)	
Transaction Details	Details
Financial Details	Financial
Manufacturing Details	Manufacturing
Transfers (IN304000)	

Old Name	New Name
Transaction Details	Details
Financial Details	Financial
Kit Assembly (IN307000)	
Kit Allocations	Kit Line Details
Financial Details	Financial
Stock Items (IN202500) and Non-Stock Items (IN202000)	
General Settings	General
Price/Cost Info	Price/Cost
Warehouse Details	Warehouses
Supplier Details	Suppliers
Replenishment Info	Replenishment
Deferral Settings	Deferral
Item Warehouse Details (IN204500)	
General Settings	General
Replenishment Info	Replenishment
Price/Cost Information	Price/Cost
Warehouses (IN204000)	
Location Table	Locations
Address Information	Address
Warehouse Buildings (IN204010)	
Address Information	Address
Template Items (IN203000)	
General Settings	General
Price/Cost Info	Price/Cost
Supplier Details	Suppliers
Attribute Configuration	Configuration
Create Matrix Items	Item Creation

Also, on the following screens, the **Allocation** button on the table toolbar of the Details tab and the Allocations window has been renamed to **Line Details**:

- Sales Orders (SO301000)
- Shipments (SO302000)
- Picking Worksheets (SO302500)
- Purchase Receipts (PO302000)
- Receipts (IN301000)
- Receive and Put Away (PO302020)
- Issues (IN302000)
- Transfers (IN304000)
- Kit Assembly (IN307000)

The **Release from Hold**, **Put on Hold**, **Put on Credit Hold**, and **Remove from Credit Hold** actions (and buttons, when applicable) have been renamed to **Remove Hold**, **Hold**, **Credit Hold**, and **Remove Credit Hold**, respectively, on the following screens:

- Purchase Orders (PO301000)
- Purchase Receipts (PO302000)
- Landed Costs (PO303000)
- Requests (RQ301000)
- Requisitions (RQ302000)
- Sales Orders (SO301000)
- Shipments (SO302000)
- Invoices (SO303000)

Platform

SMS Messaging for Business Events

This release adds the ability to automatically send SMS messages to mobile phones when business events are triggered.

To use these features, the *MYOB SMS* feature must be enabled under Monitoring and Automation on the Enable/Disable Features screen (CS100000).

Licensing SMS Messaging

To send SMS messages from MYOB Advanced, your organisation must purchase *licensing bundles* that determine your SMS message allowance—each bundle allows the sending of 500 SMS messages per month. Two types of bundles are available:

- **Subscribed bundles** are paid for in advance. They are available to all tenants. Once you have decided on the number of subscribed bundles you want to be billed for, this number cannot be changed.

Flexible bundles are paid for at the end of each month, depending on how many you use. Flexible bundles are specific to each tenant, and are only used once the subscribed bundles have been used up. You can change the number of flexible bundles available to you at any time during the month (see “SMS Messaging Settings” on page 119) and you will only be billed for the bundles you actually use.

The intention of this licensing arrangement is that your organisation should purchase enough subscribed bundles to cover the normal amount of SMS messages you expect to send in a month. If you are running low on messages in a month, you can purchase flexible bundles as necessary to be able to continue sending SMS messages that month. System alerts will warn you when the SMS allowance is close to being used up and when it has been reached—see “SMS Allowance Alerts” on page 121.

(Because you only pay for the flexible bundles that you use, it is possible to set the number of flexible bundles to a very high number to be sure that you will never run out of messaging; however, if a misconfiguration or other unexpected event results in a large number of messages being sent in a short time, you would have to pay for them all. Keeping the number of flexible bundles to a minimum guards against this.)

Note: When you run out of messages, no more will be sent. If the allowance was reached part way through sending a batch of SMS messages, the remaining messages will not be sent, even if the allowance is increased after the fact by adding flexible bundles.

Examples

An organisation is configured with:

- two subscribed bundles (1,000 messages)
- no flexible bundles

In one month, the site sends 400 SMS messages. The organisation is billed for two subscribed bundles.

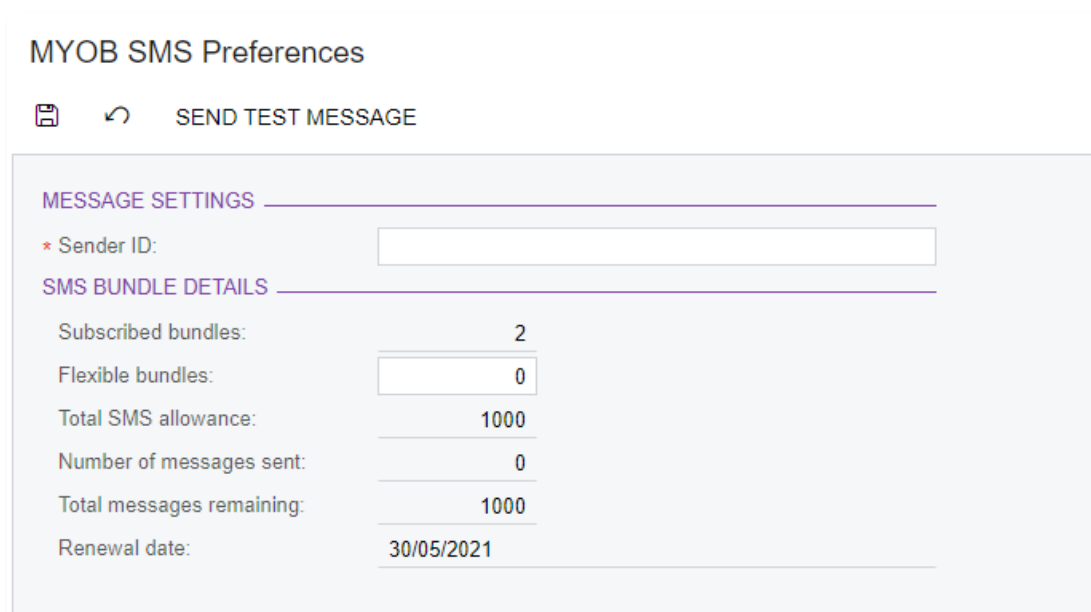
An organisation is configured with:

- two subscribed bundles (1,000 messages)
- three flexible bundles (an extra 1,500 messages)

In one month, the site sends 1,100 SMS messages. The organisation is billed for one flexible bundle in addition to the two subscribed bundles. The remaining two flexible bundles were not used this month, so the organisation is not billed for them.

SMS Messaging Settings

The SMS messaging functionality is set up on the new MYOB SMS Preferences screen (MYSM1000). This screen displays your messaging allowances and your current usage.



Note: A user account with the “Administrator” role is required to access this screen.

The **Sender ID** field is only used in Australian companies. It lets you enter text that will be displayed as the sender of SMS messages on recipients’ devices. (In New Zealand, the sender ID is always a four-digit number defined by mobile service providers.)

The fields in the SMS Bundle Details section show your SMS message allowances and current usage:

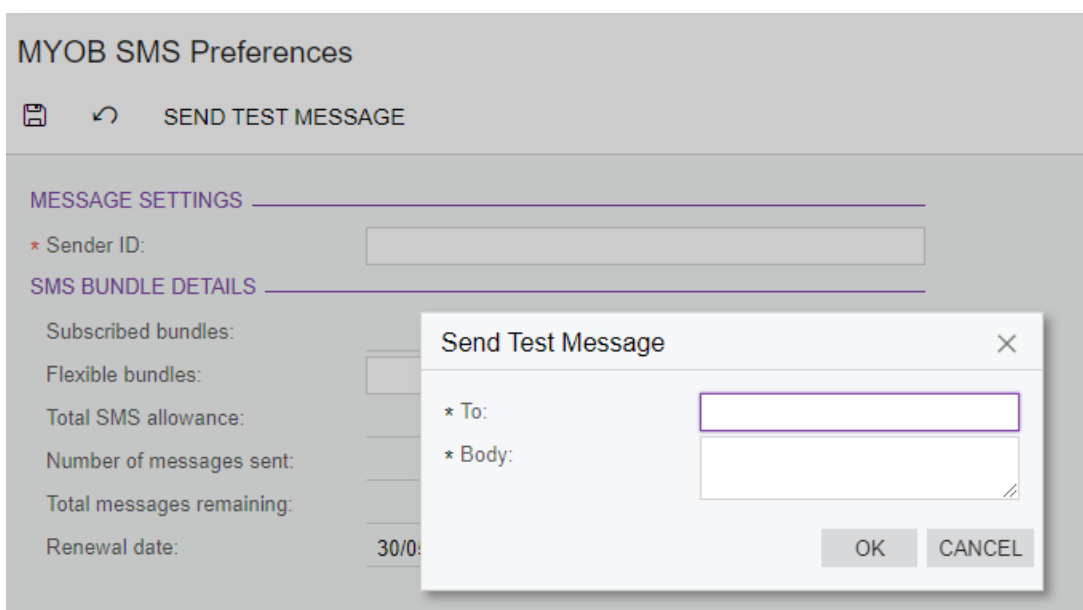
Field	Description
Subscribed bundles	A read-only field displaying the number of pre-paid messaging bundles available to <u>all tenants</u> , based on your licence.
Flexible bundles	This field allows you to specify the number of flexible bundles available <u>to this tenant only</u> . You can increase or decrease the number of flexible bundles available each month as necessary. You are only billed for the flexible bundles you use.
Total SMS allowance	A read-only field showing the total number of messages that can be sent this month. This is the total of subscribed bundles and flexible bundles. (As flexible bundles are tenant-specific, this total can differ from tenant to tenant.)
Number of messages sent	A read-only field showing how many messages have been sent this month from <u>this tenant</u> .

Total messages remaining A read-only field showing how many messages can be sent from this tenant before your bundles are used up.

Note: Because this total includes the subscribed bundles, which are available to all tenants, this value can go down even if no messages have been sent from this tenant.

Renewal date The date when your organisation’s messaging allowance next renews – this is based on the date when you first purchased a licence for SMS messaging. At this date, your bundle allowances are refreshed and the **Number of messages sent** value is reset to zero.

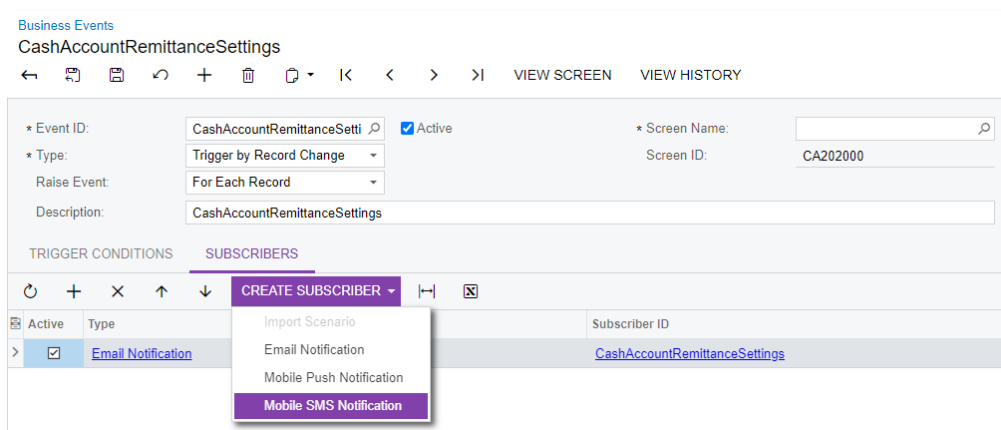
Clicking **Send Test Message** lets you test the SMS messaging configuration. When you click this button, a small window opens where you can enter the mobile number to send the message to and some message text. Click **OK** to send the message.



Note: Test messages count against your SMS allowance for the month.

Sending SMS Messages from a Business Event

Once SMS messaging has been enabled and set up, you can use them with business events. When adding a subscriber to a business event on the Subscribers tab of the Business Events screen (SM302050), select **Create Subscriber > Mobile SMS Notification**.



This opens the Mobile Notifications screen (SM204004). On this screen, enter a description for the subscriber, then enter a mobile number or numbers into the **To** field and select “MYOB SMS Global Provider” in the **From** field. Enter the text of the message to be sent on the Message tab, then click **Save & Close**.

The screenshot shows the 'Mobile Notifications' application window. At the top, it says 'New Record'. There are navigation icons and menu options: NOTES, FILES, CUSTOMISATION, and TOOLS. The main form contains the following fields:

- Notification ID: <NEW>
- Delivery Method: SMS
- Screen: Cash Accounts
- Screen ID: CA202000
- Description: (empty)
- To: (empty)
- From: (empty)

Below the form is a 'MESSAGE' section with two buttons: 'INSERT DATA FIELD' and 'INSERT PREVIOUS DATA FIELD'.

When the business event is triggered, SMS messages will be sent to the number(s) set up in the subscriber.

SMS Allowance Alerts

The system uses business events to alert you when you are close to running out of SMS messages and when you have reached your allowance. In an upgrade to MYOB Advanced 2021.1.1, two pre-configured business events are added:

- **SMS allowance at 90%** – this event is triggered when your number of messages sent is at 90% of your total SMS allowance.
- **SMS allowance reached** – this event is triggered when you have run out of messages to send this month.

These business events are set up to send email notifications by default. After upgrading to MYOB Advanced 2021.1.1, you should review these events on the Business Events screen (SM302050) and set up subscribers as necessary to ensure that the alerts are sent to the right people.

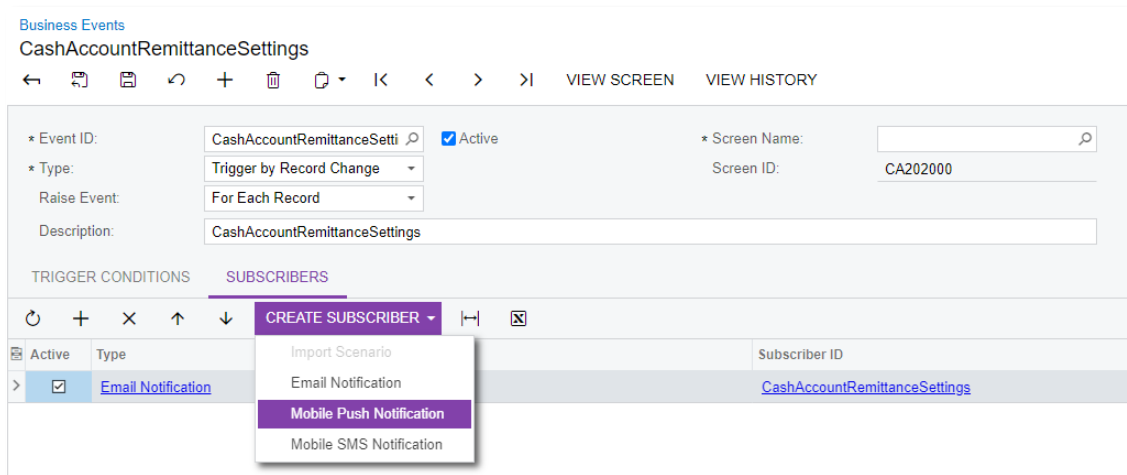
Note: If SMS messages fail to send (due to the SMS allowance being reached or any other reason), this failure and the reason for it will be shown on the Business Event History screen (SM502030).

Mobile Push Notifications for Business Events

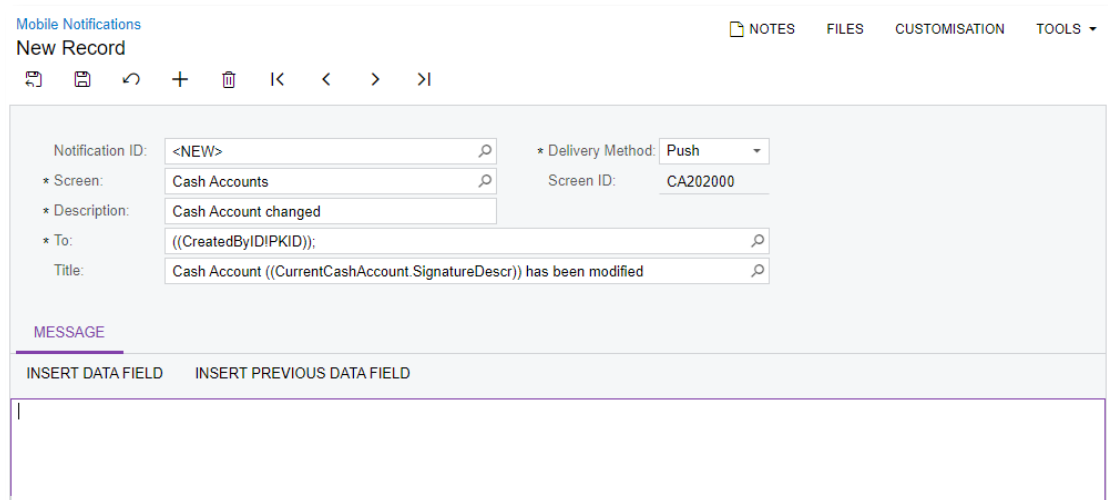
This release adds the ability to automatically send messages to users via the MYOB Advanced mobile app when business events are triggered.

New Subscriber Type

A new Mobile Notification subscriber type has been added to the Create Subscriber menu on the Subscribers tab of the Business Events screen (SM302050). (See the following screenshot.) A user selects this type to configure a push notification sent to a mobile device.



After the user selects the new subscriber type, the system navigates to the Mobile Notifications screen (SM204004), where the user can configure details for the push notification. These details include the users who will receive the notification and the record that should be opened after a user taps the notification.



Once the push notification has been configured, the specified users will receive a push notification when the configured conditions are met.

Receiving Push Notifications

A user will receive a push notification if push notifications are allowed for the Acumatica ERP mobile application. If the user taps the notification, the system redirects the user to the record that triggered the notification.

Improvements to Business Events and Notification Configuration

Business Events and Notifications menu commands have been added to the Tools menu of the screen title bar of entry screens—for example, Invoices and Memos (AR301000), Customers (AR303000), and Sales Orders (SO301000)—and generic inquiry screens. For the entry or generic inquiry screen you are viewing, a customiser can now view the notifications and business events that trigger them.

Also, the Send by Events tab has been added to the Notification Templates (SM204003) and Mobile Notifications (SM204004) screens. On the tab, the customiser can view the business events that trigger each notification.

Updated Tools Menu

The following screenshot shows the updated Tools menu of the screen title bar of the Invoices and Memos screen (AR301000).

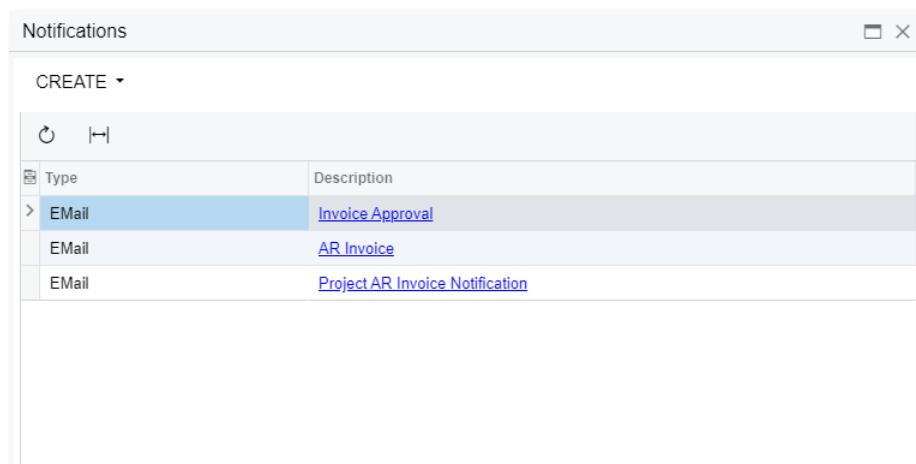
The screenshot displays the 'Invoices and Memos' screen for 'Invoice 001464 - Euro Hair Fashion'. The 'TOOLS' menu is open, showing a list of options. The 'Notifications...' and 'Business Events...' options are highlighted with a red box. The background shows the invoice details, including the customer 'CUST000012 - Euro Hair Fashion', location 'MAIN - Primary Location', and various financial totals.

DOCUMENT	USER-DEFINED FIELDS	DETAILS	TOTALS
Type: Invoice	Customer: CUST000012 - Euro Hair Fashion	Detail Total: 2,800.00	
Reference Nbr: 001464	Location: MAIN - Primary Location	Discount Total: 0.00	
Status: Open	Currency: AUD 1.00	GST Taxable T...: 2,800.00	
Date: 15/07/2020	Terms: 30THMONTH - 30th of Month	GST Exempt T...: 0.00	
Post Period: 01-2021	* Due Date: 30/08/2020	Tax Total: 280.00	
Customer Ord...	* Prompt Payme...: 30/08/2020	Balance: 3,080.00	
Description:	Project/Contract: X - Non-Project Code	Rounding Diff.: 0.00	
		Amount: 3,080.00	
		Prompt Payme...: 0.00	

DOCUMENT DETAILS	FINANCIAL DETAILS	ADDRESS DETAILS	TAX DETAILS	SALESPERSON COMMISSION	APPROVAL DETAILS	DISCOUNT DETAILS						
*Branch	Inventory ID	Subitem	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Retainage Amount	Manual Discount	D C
RBYTEMAIN	ITM0000025	0	Desktop Motherboa...	250.00	EACH	11.20	2,800.00	0.000000	0.00	0.00		

Viewing Notifications

To view the notifications that are specified for the selected data entry or generic inquiry screen, the customiser clicks **Tools > Notifications** on the screen title bar. In the Notifications window, which opens, the customiser can view the notifications that are configured for the screen (see the following screenshot).

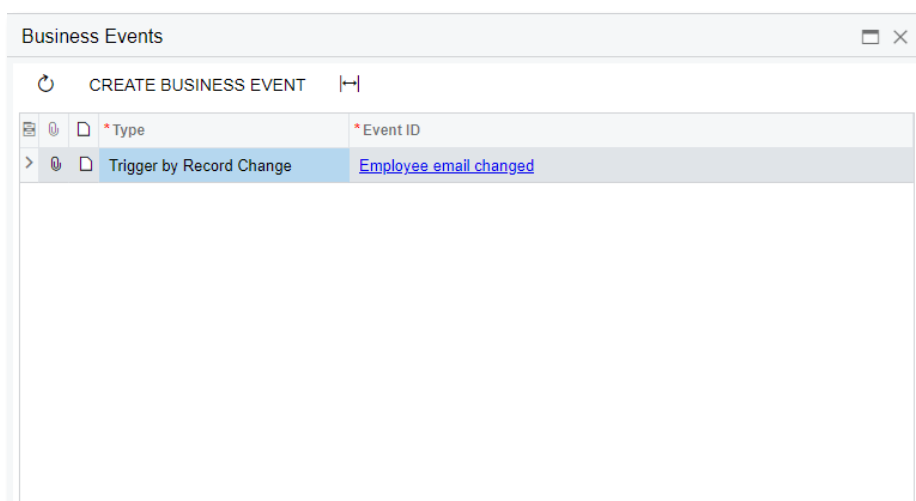


Depending on the type of the selected notification, the customiser can click the link in the **Description** column of the Notifications window to open the Notification Templates (SM204003) or Mobile Notifications (SM204004) screen.

The customiser can also create new notifications by clicking **Create** in the Notifications window and selecting the needed type: Email Notification, Push Notification, or SMS Notification.

Viewing Business Events

To view the business events that are specified for the selected data entry or generic inquiry screen, the customiser clicks **Tools > Business Events** on the screen title bar. The Business Events window, which opens, is shown in the following screenshot.



The customiser can click the link in the **Event ID** column in the Business Events window to open the Business Events screen (SM302050) for the selected event.

The customiser can also create new business events by clicking **Create Business Event** in the Business Events window.

Send By Events Tab on the Notification Templates Screen

This release adds Send by Events tab to the Notification Templates screen (SM204003) screen, which a customiser uses to view business events that trigger the selected email notification.

The screenshot shows the 'Notification Templates' screen for 'Project AR Invoice Notification'. The 'SEND BY EVENTS' tab is active. The form includes fields for Notification ID, Description, From, To, CC, BCC, Subject, Screen Name, Screen ID, and Attach Activity. Below the form is a table with columns for Event ID, Description, Active, and Type.

Event ID	Description	Active	Type
New invoice		<input checked="" type="checkbox"/>	Trigger by Record Change

If the customiser clicks the link in the **Event ID** column on the tab, the system opens the Business Events screen (SM302050) for the selected event. The customiser can also create an event by clicking **Create Business Event** on the table toolbar, or add a link to an existing event by clicking **Add Row** on the table toolbar.

Send By Events Tab on the Mobile Notifications Screen

The Send by Events tab of the Mobile Notifications screen (SM204004), which a customiser uses to view business events that trigger the selected push or SMS notification, is shown in the following screenshot.

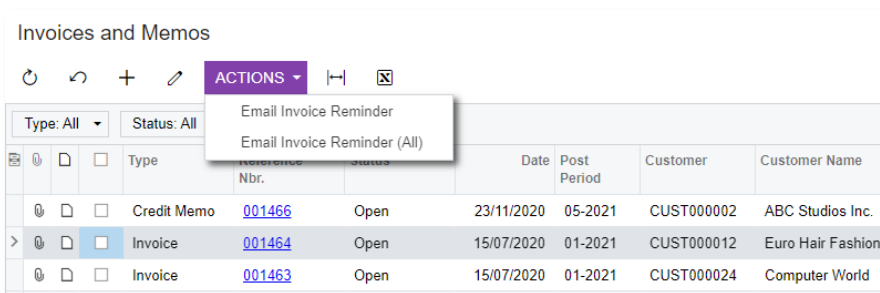
The screenshot shows the 'Mobile Notifications' screen for 'Opportunity assigned to salesperson'. The 'SEND BY EVENTS' tab is active. The form includes fields for Notification ID, Screen, Description, To, Title, Delivery Method, and Screen ID. Below the form is a table with columns for Event ID, Description, Active, and Type.

Event ID	Description	Active	Type
Opportunity - Salesperson assigned	Send push notification when opportunity assigned to salesperson	<input checked="" type="checkbox"/>	Trigger by Record Change

If the customiser clicks the link in the Event ID column on the tab, the system also opens the Business Events screen (SM302050) for the selected event.

Business Events Triggered by an Action

This release introduces a new type of business events that are triggered by an action. An event of this type can be set up if a generic inquiry is used as a source for data monitoring. With a business event of this type configured for a generic inquiry, a user will be able to launch the event for the list of all, selected, or filtered records of the inquiry. For example, a sales manager might filter pending invoices by using a corresponding generic inquiry and initiate the sending of reminders to customers about the invoices.



Configuration of an Event Triggered by an Action

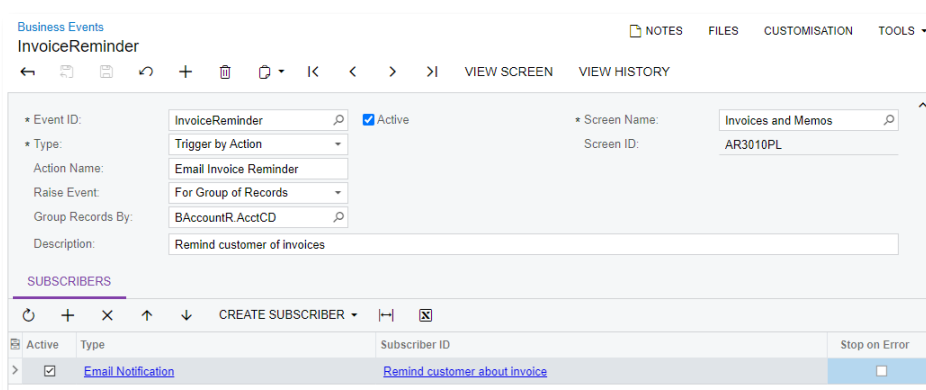
A system administrator uses the Business Events screen (SM302050) to configure business events. A new “Trigger by Action” option has been added to the **Type** drop-down list in the Summary area of the screen.

Note: The “Trigger by Action” option is available only if a generic inquiry is selected in the **Screen Name** field on the screen.

With this option selected, the new **Action Name** field becomes available on the screen. In this field, the system administrator specifies an action name, which will be displayed in two commands on the Actions menu on the screen toolbar of the generic inquiry: **<Action Name>** and **<Action Name> (All)**. The actions are used similarly to the actions available on the mass processing screens. For example, a user might click **Actions > Email Invoice Reminder** to send reminders of only the selected records of an inquiry or the user can click **Actions > Email Invoice Reminder (All)** to email reminders for all records returned by the inquiry.

As the last step of the configuration, the system administrator needs to configure the event subscribers to be processed when a user clicks the action on the inquiry toolbar. All types of event subscribers are available for this type of business event.

The following screenshot demonstrates the configuration of a business event to be used to send invoice reminders to customers from the Invoices and Memo screen (AR3010PL), which is a generic inquiry that lists invoices.



Key Performance Indicator (KPI) Widget

In MYOB Advanced, users can add different types of widgets to their dashboards. By using these widgets, users can present information on dashboards in various formats, such as trends, key performance indicators (KPIs), tables, or even embedded content.

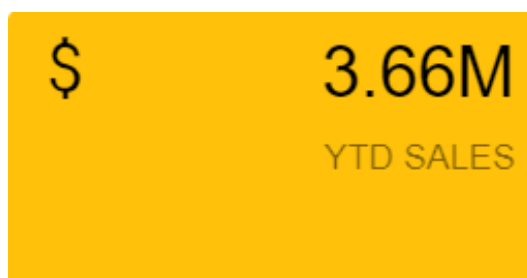
This release adds the following enhancements to widgets:

- A Link widget has been introduced. For more information, see “Link Widgets for Dashboards” on page 130.
- A Key Performance Indicator (KPI) widget has been introduced with the Scorecard and Meter visualisation types.
- The former Scorecard KPI widget is now the Scorecard visualisation of the Key Performance Indicator (KPI) widget.
- For the Key Performance Indicator (KPI) widget, **Normal Level Type** and **Alarm Level Type** fields have been added.
- For Key Performance Indicator (KPI) widget, the following options have been added to the **Normal Level Type** and **Alarm Level Type** fields:
 - Absolute Value
 - Percent Value
 - Inquiry Field

Key Performance Indicator Widgets

KPI widgets are used to monitor data that is critical for particular business processes in the organisation. With the new KPI widget in MYOB Advanced, the user defining each KPI widget specifies what data will be displayed: the inquiry screen which the data is extracted from and the particular field on that screen (that is, the column of the inquiry screen whose data is used). The user also selects one of the following types of visualisation for the KPI widget:

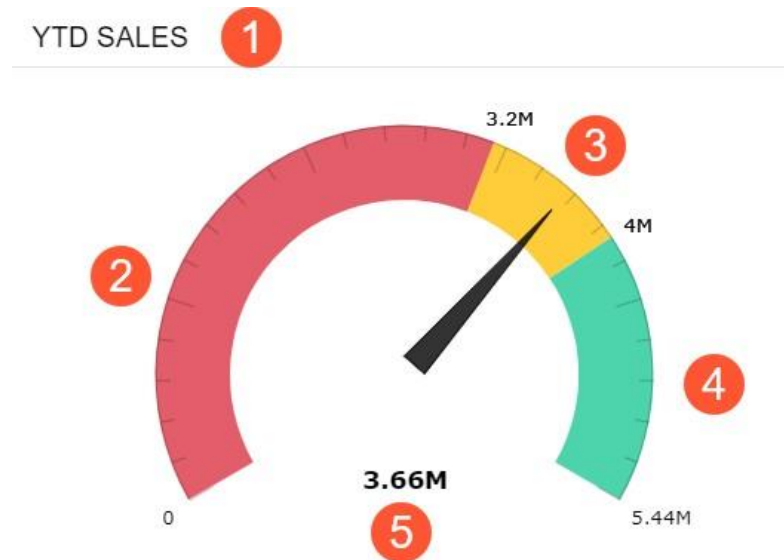
- **Scorecard:** Data is presented in the screen of a card with a single parameter (that is, a single value of the selected field of the specified inquiry screen) displayed, such as YTD sales. The colour of the card corresponds to the colour the user has selected for the specific level—normal, warning, or alarm. Users can also add names and icons to these cards. The following screenshot shows an example of this type of visualisation showing year-to-date (YTD) sales.



- **Meter:** Data is presented in the screen of a gauge, where dashboard users can view all levels of the data (normal, warning, and alarm), with the colours and values that the user designing the widget has assigned to each level. The name that is specified for the widget is presented as the widget header.

The system builds the view of each widget automatically, based on the properties specified for the widget in the Widget Properties window. If the numbers defining the ranges of the normal, warning, and alarm levels (for the selected field of the specified screen) are positive, then the starting point of the gauge is 0; if any

number defining the levels is negative, then the starting point of the gauge is a negative number. See the following screenshot for an example of this type of visualisation; the labelled items are described below.



1. **Widget header:** The text that is specified in the Caption field of the Widget Properties window
2. **Alarm level:** The alarm range of the widget, whose lower bound is specified in the Alarm Level field of the Widget Properties window
3. **Warning level:** The warning range, which is automatically calculated by the system based on the values the user designing the widget has specified in the Alarm Level and Normal Level fields of the Widget Properties window.
4. **Normal level:** The normal range of the widget, an upper bound of which is specified in the Normal Level field of the Widget Properties window.
5. **Current value:** The current value of the parameter whose data is displayed, which is determined by the options selected in the Field to Aggregate and Aggregate Function fields of the Widget Properties window. These values indicate, respectively, the field from the selected inquiry whose data is displayed on the widget, and the function that is used to aggregate the values of the selected inquiry column (which can be the average, count, maximum, minimum, or sum of the values in the column).

The system uses the default colours for the level, but a dashboard designer can easily override these default settings when needed.

Key Performance Indicator (KPI) Widget Properties

When the user designing a dashboard selects Key Performance Indicator (KPI) in the Add Widget window, the system opens the Widget Properties window for this type of widget. In this window (shown in the following screenshot), the user can specify the properties of the KPI widget.

The screenshot shows the 'Widget Properties' dialog box with the following fields and values:

- Inquiry Screen:** [Empty text box]
- Shared Filter to Apply:** All Records
- Refresh Data:** Every 5 Min
- Field to Aggregate:** [Empty dropdown]
- Aggregate Function:** Count All
- Normal Level Type:** Absolute Value
- Normal Level:** 0
- Alarm Level Type:** Absolute Value
- Alarm Level:** 0
- Normal Color:** MYOB ...
- Warning Color:** MYOB ...
- Alarm Color:** MYOB ...
- Visualization Type:** Scorecard (dropdown menu is open showing Scorecard and Meter)
- Icon:** [Empty dropdown]
- Caption:** [Empty text box]

The set of parameters for the new Key Performance Indicator (KPI) widget is similar to those for the old Scorecard KPI widget. In the new widget, the following fields have been introduced:

- **Normal Level Type:** The type of the value for the normal level.
- **Alarm Level Type:** The type of the value for the alarm level.
- **Visualisation Type:** The type of the KPI widget to be displayed on the dashboard. The following two widgets are available: Scorecard or Meter.

In the **Normal Level Type** and **Alarm Level Type** fields, the user designing the dashboard can select one of the following options:

- **Absolute Value:** The value to be specified for the level is any positive or negative integer or decimal number. If this option is selected in the **Normal Level Type** or **Alarm Level Type** field (or both fields), then the user needs to specify the number in the **Normal Level** or **Alarm Level** field (or both fields), respectively.
- **Inquiry Field:** The value to be specified for the level is any inquiry field (that is, a field represented by a column in the inquiry screen selected in the Inquiry Screen field) that contains numeric values. If this option is selected in the **Normal Level Type** or **Alarm Level Type** field (or both fields), then the user needs to select the

field to be used in the **Normal Level** or **Alarm Level** field (or both fields), respectively. In the **Normal Level** and **Alarm Level** fields, the system will display only those fields whose data is represented numerically, such as amounts or totals. The system will sum the values of the selected field (that is, the field values shown in the corresponding inquiry column) and display the result in the widget.

- **Percent Value:** The value to be specified for the level is any positive or negative integer or fractional number that represents the percent value (without %). If this option is selected in the **Normal Level Type** or **Alarm Level Type** field, then the user needs to specify the number in the **Normal Level** or **Alarm Level** field respectively. The user can select the “Percent Value” option in only one of the levels. So if user has selected the “Percent Value” option in the **Normal Level Type** field, then in the **Alarm Level Type** field, the user can select only the “Absolute Value” or “Inquiry Field” option.

Previously, users could specify absolute values only. If business priorities changed and the normal and alarm levels changed, users had to change them manually. Moreover, it could happen that some values (like annual sales quota or number of processed cases) can be specific for a particular person, customer, or supplier, so having a fixed number for all of them was not acceptable. With the newly added options in the **Normal Level Type** and **Alarm Level Type** fields, users can now build widgets with greater flexibility: Instead of manually calculating what the alarm level is, they can specify the percent value or the field value from the inquiry.

Applicable Scenarios of Using the Inquiry Field Option in the Widget Properties

As mentioned above, for the **Normal Level Type** and **Alarm Level Type** fields of the Key Performance Indicator (KPI) widget, a user can select **Inquiry Field**. If a user selects this option, then the inquiry screen selected in the **Inquiry Screen** field must contain columns with numeric values, such as amount or totals.

For instance, suppose that a company has multiple salespersons. Each salesperson has an annual sales quota that must be reached by the end of the year. The inquiry that will be used in the KPI widget must have columns with the annual quota and the current sales volume by salesperson. So for the **Field to Aggregate** field, the user can select the field that contains the current sales volume, and in the **Normal Level** field, the user can select the field that holds the annual quota. In the **Alarm Level Type** field, user can select either of the available options and then specify the **Alarm Level**. After the user saves the changes, the system will calculate the levels and display the result with associated colour for the level.

Link Widgets for Dashboards

In previous versions of MYOB Advanced as well as the current version, a user designs a dashboard to provide dashboard users with a view of key information in MYOB Advanced as well as a single point of navigation to MYOB Advanced items. By adding different types of widgets on a dashboard, the

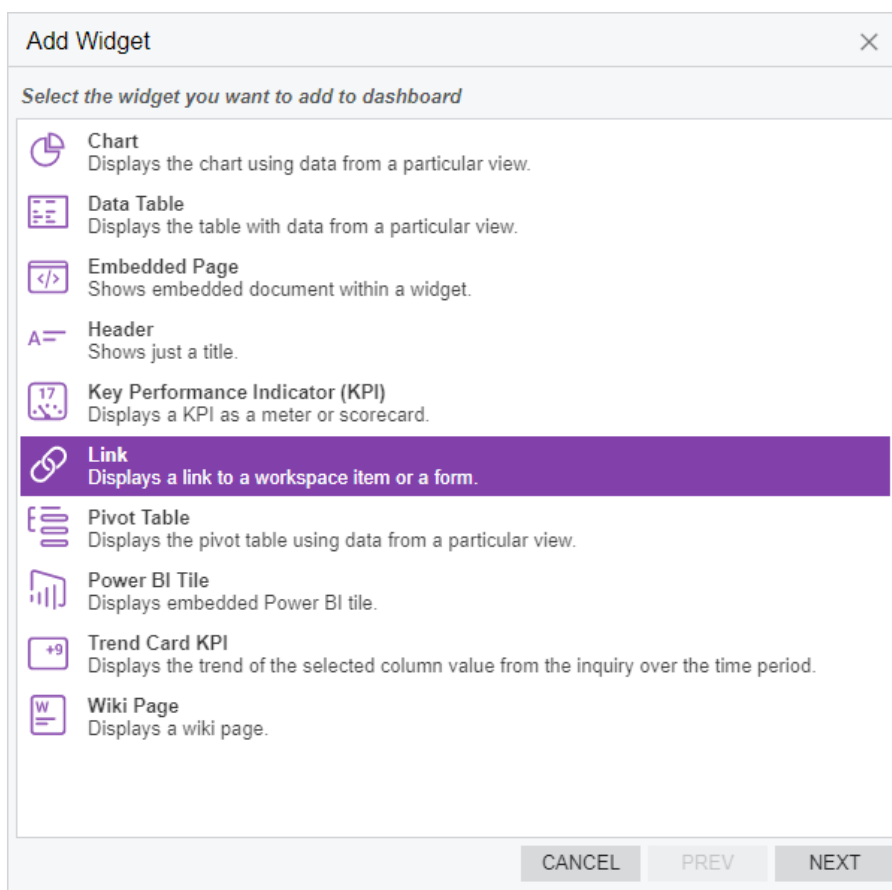
dashboard designer can display data and configure navigation that is especially useful for users with a particular type of job or user role.

In previous versions of MYOB Advanced, a dashboard designer could not give dashboard users the ability to navigate with one click from a dashboard to an MYOB Advanced screen or another dashboard. As of this release, a user designing a dashboard can add a

new type of widget—a link widget—to dashboards with links to MYOB Advanced screens and dashboards.

Changes in the Add Widget Wizard

In the Add Widget wizard, which is opened when a user switches to design mode of a dashboard, a new type of widget named Link has been added, as the following screenshot demonstrates.



Adding a Link Widget to a Dashboard

The user designing a dashboard selects the Link type widget and then specifies the following properties in the Widget Properties window (as shown in the screenshot below):

- **Icon**: The icon that is displayed left of the widget's caption. This property is required.
- **Form**: The name of the MYOB Advanced screen that can be selected from the list of screens. This property is required.
- **Parameters**: The parameters that are applied to the specified screen when it is opened. This property is specified exactly the same way as the properties of the workspace tiles in the UI are. To find the parameter that corresponds to a field in the Summary area of a screen, the user designing a dashboard should open the screen, select the value in the field, and look at the screen URL. The parameter follows the screen number. The user can add multiple parameters, with each separated by an ampersand (&). If a dashboard is specified in the **Form** property, the Parameters property is not applicable.

- **Description:** A description of the widget.
- **Caption:** The caption to be used for the widget.

The following screenshot demonstrates the properties specified for the Link widget type.

In view mode of the dashboard, when a user clicks the link with the pen frame icon and the New Invoice description, the system opens Invoices and Memos screen (AR301000) for the user to add a new record with the Invoice type.

Changing the Title of a Generic Inquiry

This release introduces the capability to change a generic inquiry title on the Generic Inquiry screen (SM208000) for both predefined generic inquiries (those provided with MYOB Advanced) and custom generic inquiries (those developed within your company).

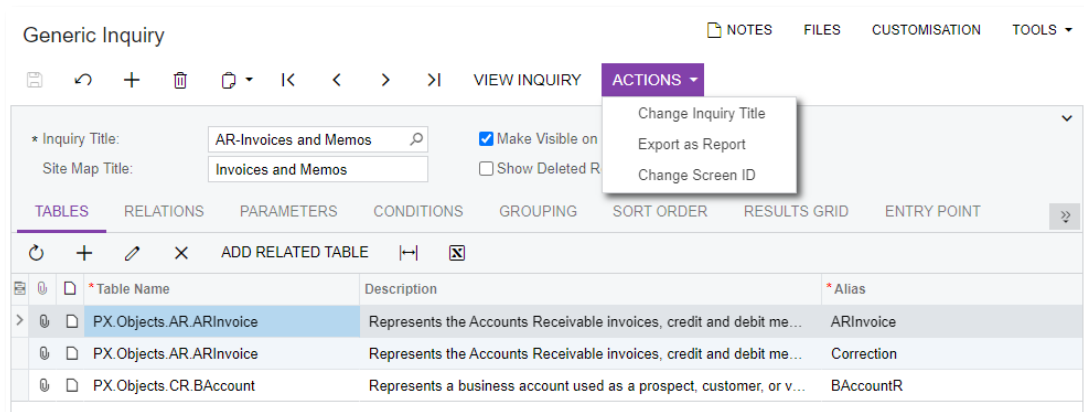
In previous versions of MYOB Advanced, a user could not change a generic inquiry title, which is specified in the **Inquiry Title** field of the Summary area of the Generic Inquiry screen. Starting in MYOB Advanced 2021.1.1, a user can change the title of a generic inquiry directly on the Generic Inquiry screen while designing the generic inquiry or modifying its design. This ability can be useful when the user wants to do the following:

- Organize generic inquiries by categories. For example, predefined generic inquiries related to the accounts receivable category have names that start with AR, such as AR-Invoices and Memos, AR-Customers, and AR-Salespersons.
- Assign more precise names to the generic inquiries that are exposed by using OData.

Changes on the Generic Inquiry Screen

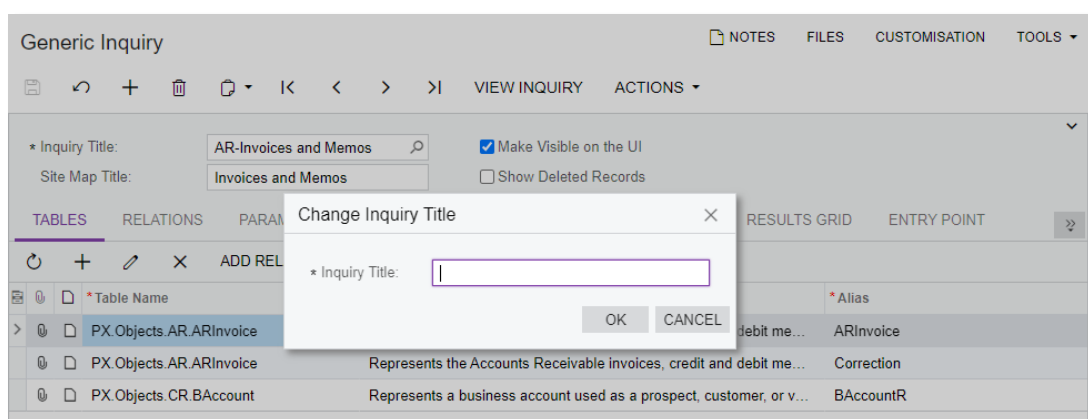
To implement the ability to change a title of a generic inquiry, on the screen toolbar of the Generic Inquiry screen, the following changes have been made:

- The **Export as Report** and **Change Screen ID** buttons have been removed, with these actions becoming menu commands on the Actions menu.
- An Actions menu has been added with **Change Inquiry Title**, **Export as Report**, and **Change Screen ID** menu commands (as shown in the following screenshot).



Change to the Generic Inquiry Title

In previous versions of MYOB Advanced as well as the current version, the user who creates a generic inquiry on the Generic Inquiry screen (SM208000) assigns a title to the generic inquiry. Previously, this title could not be changed. To change the title of a generic inquiry, a user can now click the **Change Inquiry Title** menu command on the Actions menu of the screen toolbar of the Generic Inquiry screen. In the window that opens, the user enters the new title for the generic inquiry and clicks **OK**. If the specified title is not unique, the system displays an error and prompts the user to enter another title. After the user saves the generic inquiry screen, the new title is inserted in the **Inquiry Title** field.

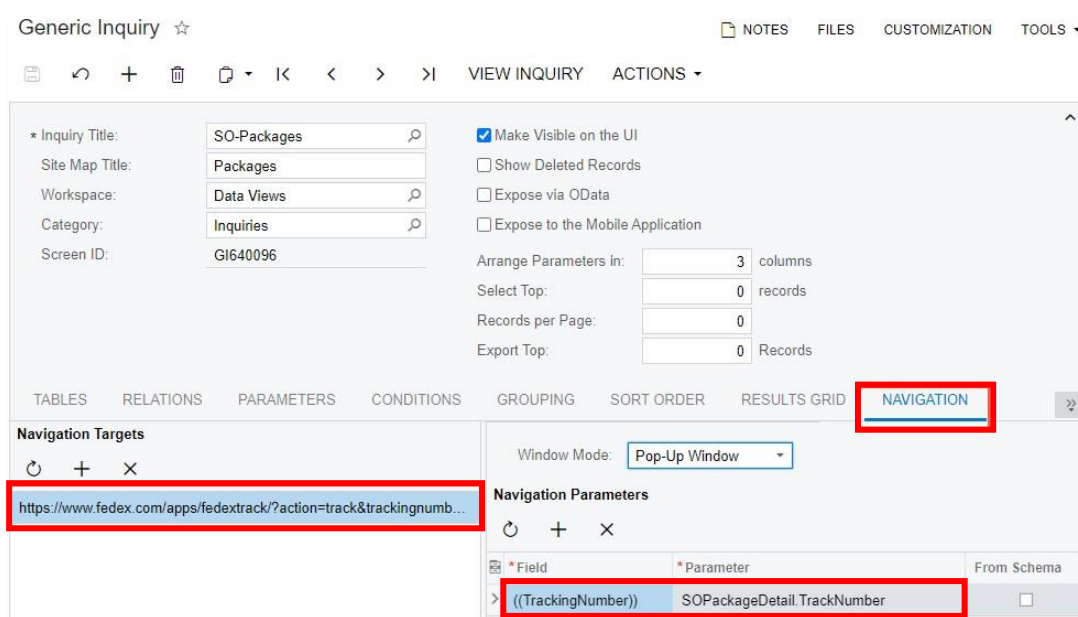


Navigating from a Generic Inquiry to an External URI

In previous versions of MYOB Advanced, on the Generic Inquiry screen (SM208000), the user creating or modifying the generic inquiry could configure navigation from the generic inquiry screen to another MYOB Advanced screen. As of this release, on the Navigation tab of the Generic Inquiry screen, a user can configure navigation from the generic inquiry screen to an external link (URI) with dynamic parameters from multiple columns in a row of the generic inquiry results. This ability can be very useful, for example, in e-commerce solutions to monitor items whose state can change.

Changes on the Generic Inquiry Screen

To implement the ability to navigate to an external URI, on the Generic Inquiry screen (SM208000), on the Navigation tab, the Screens pane has been renamed to Navigation Targets, as shown in the following screenshot.



The screenshot shows how the Generic Inquiry screen is used to configure navigation for the SO-Packages generic inquiry (which has the Packages site map title) to a page on the site of the FedEx delivery services company. In the Navigation Targets pane, the external URI is specified. In the Navigation Parameters table, the **Field** column contains the parameter corresponding to the tracking number from the URI, and the Parameter column of the row contains the field of the data access class specified on the Tables tab.

Navigation Target for an External URI

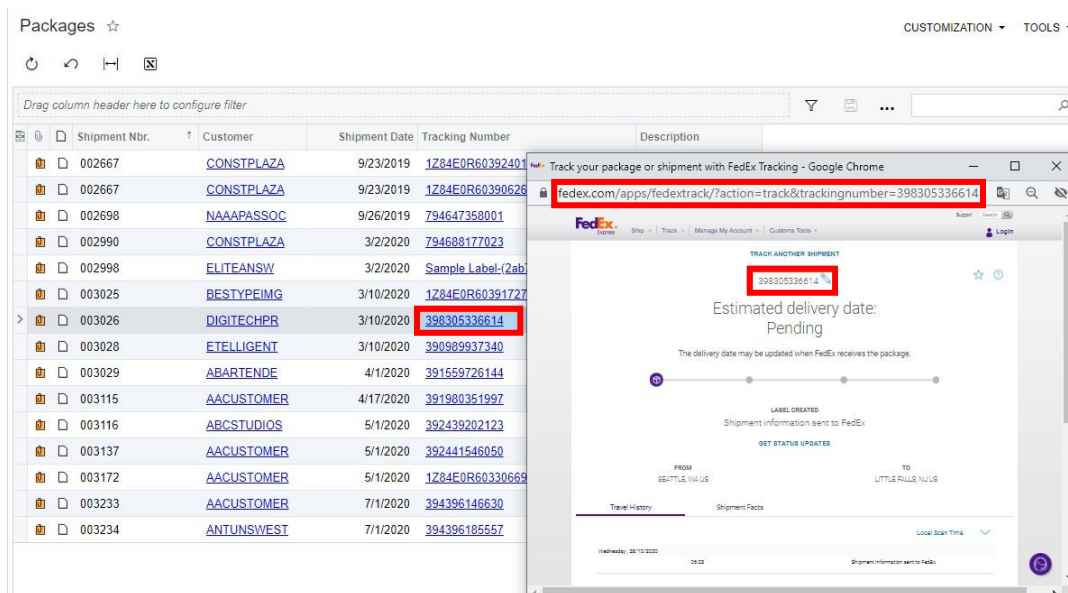
A user designing a generic inquiry needs to construct the template of the URI that a user can open by clicking the links in a column of the resulting generic inquiry screen. To do this, in the original URI of the target resource, the designer of the generic inquiry surrounds the parameter with double parentheses, and when the user clicks the link, the parameter is replaced by its actual value in the row. Returning to the FedEx example from the previous section, the user designing the generic inquiry enters:

`https://www.fedex.com/apps/fedextrack/?action=track&trackingnumber=((TrackingNumber))`

in the Navigation Target pane. When the user clicks the link with the 398305336614 delivery item identifier, the system navigates to the URI:

<https://www.fedex.com/apps/fedextrack/?action=track&trackingnumber=398305336614>.

The following screenshot shows the resulting generic inquiry screen with the tracking numbers that are links. As you can see in the screenshot, when a user clicks the link in the generic inquiry results, the system opens the window with the FedEx tracking information based on the tracking number.



Improvements to Generic Inquiry Side Panels

A number of improvements have been made that affect the design and display of generic inquiries with a side panel. These improvements are described in detail in the following sections.

Changes on the Generic Inquiry Screen

Various changes have been made to the Generic Inquiry screen (SM208000) related to the functionality of side panels of generic inquiries that have been developed on the screen. On the Navigation tab, the Screens pane has been renamed to Navigation Targets. The table in this pane has the following columns:

- **Active:** A check box that is used to activate (when it is selected) or deactivate (when it is cleared) navigation to the navigation target specified in the Link column of this row).
- **Link:** The navigation target, which is either the ID and name of the screen (which can be a dashboard), or the URI of the page to be shown.
- **Window Mode:** The navigation mode for the screen, dashboard, or URI specified in the Link column of this row. If Side Panel is selected in this column, the selected screen or dashboard can be viewed in the side panel of the resulting generic inquiry screen.

Note: If the Navigation Targets pane contains multiple active rows with the Side Panel window mode, each of these rows is represented as a tab on the side panel.

In all the columns, the user designing the generic inquiry can filter and sort values. The user can click any column header to open the Sorting and Filtering Settings window and sort or filter rows by this column.

In the right pane of the Navigation tab, settings can be specified for the row selected in the Navigation Targets pane. This pane contains the **Icon** field, where the designer can select the icon that the user can click on the side panel of the generic inquiry screen to view the screen or dashboard. The pane also contains the following tabs, where settings can be specified for the row selected in the Navigation Targets pane:

- **Navigation Parameters:** This tab contains the same table with navigation parameters as was shown on the Navigation tab in previous versions of MYOB Advanced.
- **Visibility Conditions:** This tab, which is displayed only if Window Mode is set to Side Panel for the selected navigation target, can be used to specify conditions for the specification of the side panel or side panel tab.

Deactivating a Side Panel or Side Panel Tab

A user designing a generic inquiry may need to deactivate a side panel tab temporarily—for example, while editing its settings. As of this release, this user can easily deactivate a side panel or side panel tab that has been configured.

To do this, on the Navigation tab of the Generic Inquiry screen (SM208000), in the Navigation Targets pane, the user designing the generic inquiry clears the check box in the **Active** column of the row whose side panel tab should be deactivated. This check box is available only for the navigation targets for which **Window Mode** is set to “Side Panel”. Once the generic inquiry designer saves these changes to the generic inquiry, when a user opens the resulting generic inquiry screen, the side panel is no longer displayed (if there are no other active rows with the “Side Panel” window mode in the Navigation Targets pane) or the icon corresponding to the now-deactivated side panel tab is not displayed (if there are other active rows with the “Side Panel” window mode). Thus, the user cannot view the corresponding navigation target in the side panel.

The following screenshot demonstrates the cleared **Active** check box to deactivate the side panel; in this example, the side panel that displays the Invoices screen (SO303000) is deactivated for the generic inquiry with the AR-Invoices and Memos title and the Invoices and Memos site map title. The generic inquiry designer can later select the check box to quickly reactivate the side panel.

The screenshot shows the 'Generic Inquiry' configuration interface. The 'Navigation Targets' pane is active, displaying a table with columns for 'Active', 'Link', and 'Window Mode'. The row 'SO303000 - Invoices' is highlighted with a red box, and its 'Active' checkbox is unchecked. The 'Window Mode' for this row is 'Side Panel'. The 'Icon' field for this row is set to 'receipt'. Below the table, the 'NAVIGATION PARAMETERS' and 'VISIBILITY CONDITIONS' tabs are visible. The 'NAVIGATION PARAMETERS' tab shows a table with columns for 'Field', 'Parameter', and 'From Schema'. The 'VISIBILITY CONDITIONS' tab is currently empty.

Active	Link	Window Mode
<input checked="" type="checkbox"/>	AR301000 - Invoices and...	Inline
<input type="checkbox"/>	SO303000 - Invoices	Side Panel

Field	Parameter	From Schema
DocType	Correction.DocType	<input type="checkbox"/>
RefNbr	Correction.RefNbr	<input type="checkbox"/>

Reordering Icons on a Side Panel

As mentioned previously, during the design of a generic inquiry, the designer can specify the icon for each tab to be shown on the side panel to be displayed if the icons are clicked. A user of the generic inquiry screen can click any icon to view the tab with the screen or dashboard to which navigation has been defined. The icons in the side panel have tooltips with the names of the screens to be displayed if the icons are clicked; the tooltips help the user to navigate to the targets.

A user designing a generic inquiry can now quickly reorder the icons for the tabs in the side panel if multiple navigation targets have been configured to be displayed there. Thus, the generic inquiry designer can easily display the icons for the navigation targets in the order that corresponds to the order in which users usually work with the navigation targets, based on the company's business processes.

To reorder icons in the side panel, on the Navigation tab of the Generic Inquiry screen (SM208000), in the Navigation Targets pane, the user designing the generic inquiry drags the rows in the list to the needed place; the user then saves the generic inquiry. In the resulting generic inquiry screen, the icons in the side panel are displayed in the order that corresponds to the order of the navigation targets in the table on the Navigation Targets pane.

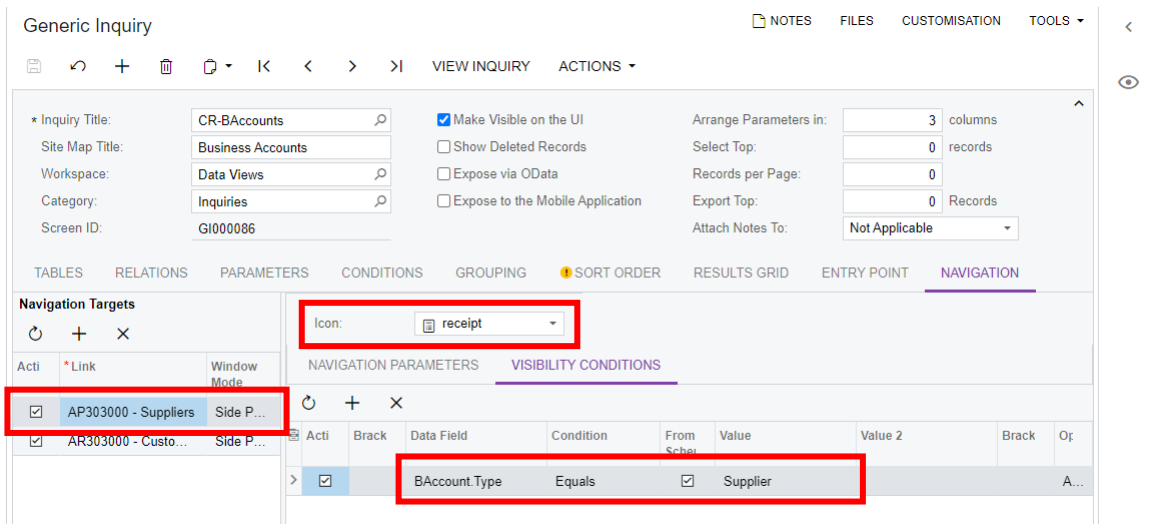
Visibility Conditions of a Side Panel

A user designing a generic inquiry can now specify the conditions that must be met for a side panel to be visible.

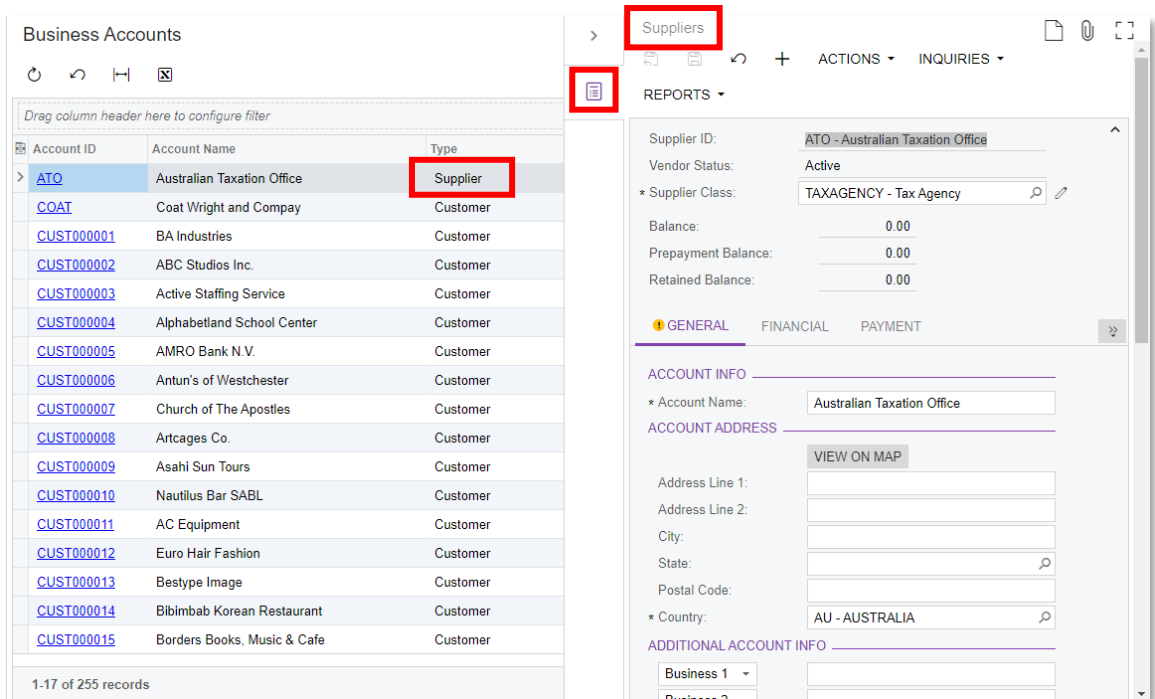
In the Navigation Targets pane on the Navigation tab of the Generic Inquiry (SM208000) screen, the generic inquiry designer can click any row with "Side Panel" selected in the **Window Mode** column, which makes the Visibility Conditions tab available in the right pane. On this tab, this user can specify a condition or a set of conditions that must be met for the side panel to be visible for users. The table on the Visibility Conditions tab has the same structure as the table on the Conditions tab of the same screen. That is, the table has the following columns:

- **Active:** A check box that the generic inquiry designer selects to activate the condition in the row or clears to deactivate the condition. By default, the check box is selected.
- **Brackets:** An optional open parenthesis to enclose a complex condition that is specified in more than one row of the table.
- **Data Field:** The data field (from the data access classes specified for the generic inquiry) to which the condition is applied.
- **Condition:** The logical condition that is applied to the specified data field and a value from the Value column (or values from the Value and Value 2 columns). Values do not need to be specified for some logical conditions, such as Is Empty and Is Not Empty, do not need values.
- **From Schema:** A check box that the generic inquiry designer can select to select a predefined value of the specified data field in the Value and Value 2 columns.
- **Value:** The value to be used in the condition, which can be entered or selected (if the check box in the From Schema column is selected).
- **Value 2:** The second value to be used in the condition, if the logical operator requires two values for the condition.
- **Brackets:** An optional closing parenthesis if this is a complex condition.
- **Operation:** The logical operator to be used to join conditions if this is a complex condition specified in more than one row of the table.

For example, consider the CR-BAccounts generic inquiry (which has the Business Accounts site map title), which is defined on the Generic Inquiry screen and has two side panels defined on the Navigation Targets pane of the Navigation tab. One side panel is designed to display the Suppliers screen (AP303000) if in the grid of the generic inquiry screen, a user clicks a business account of the supplier type. The second panel is designed to display Customers screen (AR303000) if in the grid of the resulting generic inquiry screen, a user clicks a business account of the customer type. Different icons are specified to display these screens in the side panel. The following screenshot demonstrates an example of the configuration of a visibility condition for the first side panel listed in the Navigation Targets pane two side panels.



The following screenshot shows the resulting generic inquiry screen. In the list of business accounts, a user has clicked a business account of the Supplier type. As a result, only one icon, which corresponds to the Suppliers screen, is displayed; when the user clicks the icon, in the side panel, the Suppliers screen is displayed with information about the selected business account.



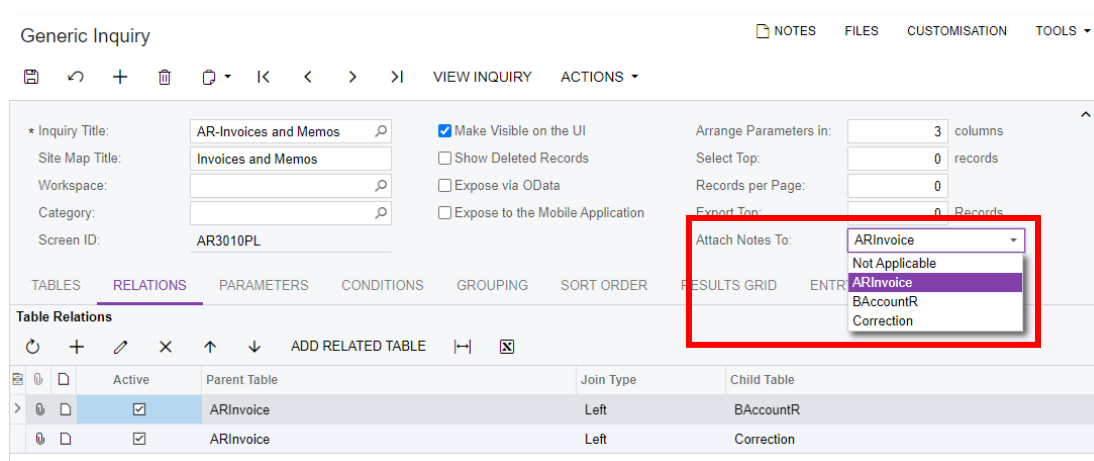
Selecting the Table for Notes and File Attachments

While working with a list of records on a generic inquiry screen, a user can attach a file, such as a scanned document with a signature, and a note, such as important information for colleagues about a customer, to a record (that is, to a particular row of the grid). In previous versions of MYOB Advanced, in some scenarios, the files and notes were attached to a record of a different internal table instead of the record that the user expected.

To prevent misplaced attachments, on the Generic Inquiry screen (SM208000), the user designing or modifying a generic inquiry can now select the table to which notes and files will be attached if a user attaches these to a record in the resulting generic inquiry screen.

Changes on the Generic Inquiry Screen

In the Summary area of the Generic Inquiry screen (SM208000), an **Attach Notes To** drop-down list has been added. In this list, a user designing or modifying a generic inquiry can select the table to which files and notes should be attached in the resulting generic inquiry screen; the designer can instead disable any attachments by selecting the “Not Applicable” option. In addition to “Not Applicable”, this drop-down list includes only the tables listed on the Relations tab of the Generic Inquiry screen, as shown in the following screenshot.



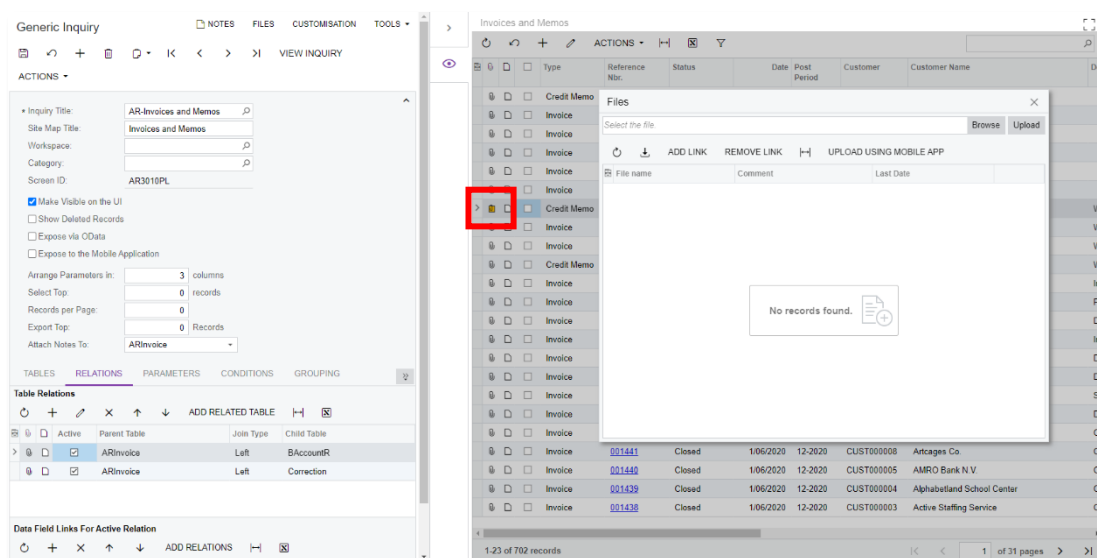
The screenshot shows the selection of the ARInvoice table for attachments and the drop-down list screened by the system based on the tables listed on the Relations tab. In the resulting generic inquiry, when a user attaches a note or file to any record on the grid, the record will be selected in the ARInvoice table.

Attaching Files and Notes on the Generic Inquiry Screen

After the generic inquiry has been designed and saved, a user who is working with the grid of a generic inquiry screen can attach a file or note to any of the listed records, and the file or note will be attached to the correct record of the expected table. To attach the file or note, the user can do the following:

- Click the paperclip icon in a row of the grid; then in the Files window, the user attaches a file to the record of the table that is selected on the Generic Inquiry screen.
- Click the note icon in a row of the grid; then in the Enter Record Note window, the user attaches a note to the record of the table that is selected on the Generic Inquiry screen.

The following screenshot demonstrates attaching a file to a record on the Invoices and Memos screen (AR3010PL), whose settings on the Generic Inquiry screen were shown earlier in the topic. The file will be attached to a record in the ARInvoice table, based on the settings of the generic inquiry.



Expanded Search and Recently Viewed Records

In MYOB Advanced, a user can perform a search within the system by using the **Search** field on the top pane of the MYOB Advanced screen. In MYOB Advanced 2021.1.1, the following entities can be searched in addition to those previously available for searching:

- Generic inquiries
- Pivot tables
- Business events
- Dashboards
- Filters
- Report definitions including column sets, row sets, and unit sets
- Email accounts
- Notifications
- Users
- Customisation projects

The Recently Viewed workspace has also been expanded to include more information about these entities. Also, a user cannot now delete an entity from the list above if it is already used somewhere else in the system.

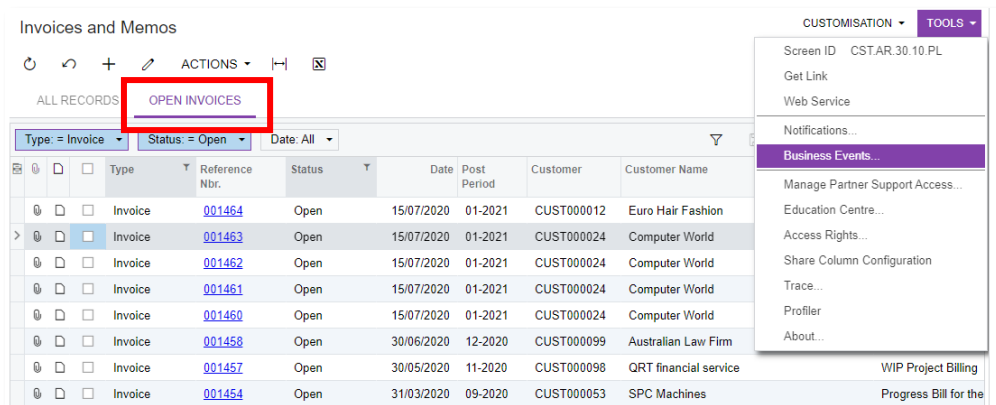
Creating Business Events from an Inquiry Screen

A Business Events menu command has been added to the Tools menu of the screen title bar of generic inquiry screens. By clicking the command, a customiser can view existing business events based on the generic inquiry being viewed and create new business events; for a new business event, the system inserts the generic inquiry identifier and name into the respective fields on the Business Events screen (SM302050).

Also, for a generic inquiry that has shared filters saved as tabs, when a customiser creates a business event from the generic inquiry, the system fills in the **Shared Filter to Apply** field on the Business Events screen (SM302050) with the active shared filter (that is, the filter tab the customiser was viewing).

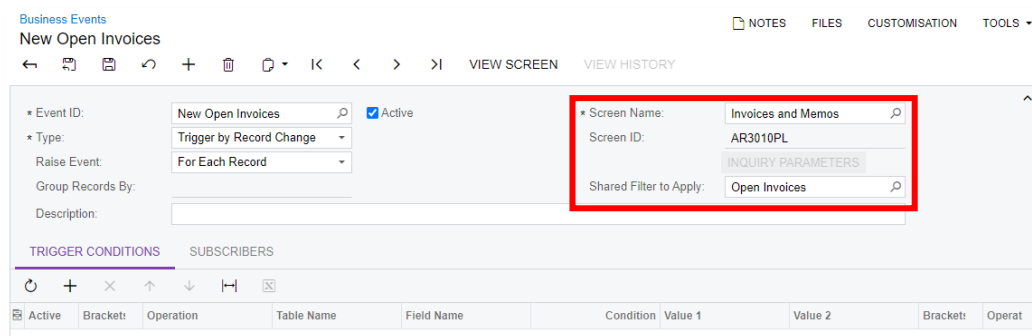
Creating a Business Event Based on a Shared Filter

If a particular generic inquiry has any shared filter as filter tabs, a customiser can create a business event based on the shared filter if its conditions suit the requirements of a business event. To create the business event, the customiser opens the tab and then clicks **Tools > Business Events** on the screen title bar.



The system opens the Business Events window, where the customiser clicks **Create Business Event** on the toolbar. The system opens the Create Business Event window, where the user enters a name for the new business event and clicks **OK** (see the following screenshot).

The system opens the Business Events screen (SM302050) with the Screen Name and Screen ID fields populated with the values of the generic inquiry for which the business event has been created. Also, the **Shared Filter to Apply** field is populated with the shared filter that was active when the user created the event (see the following screenshot).



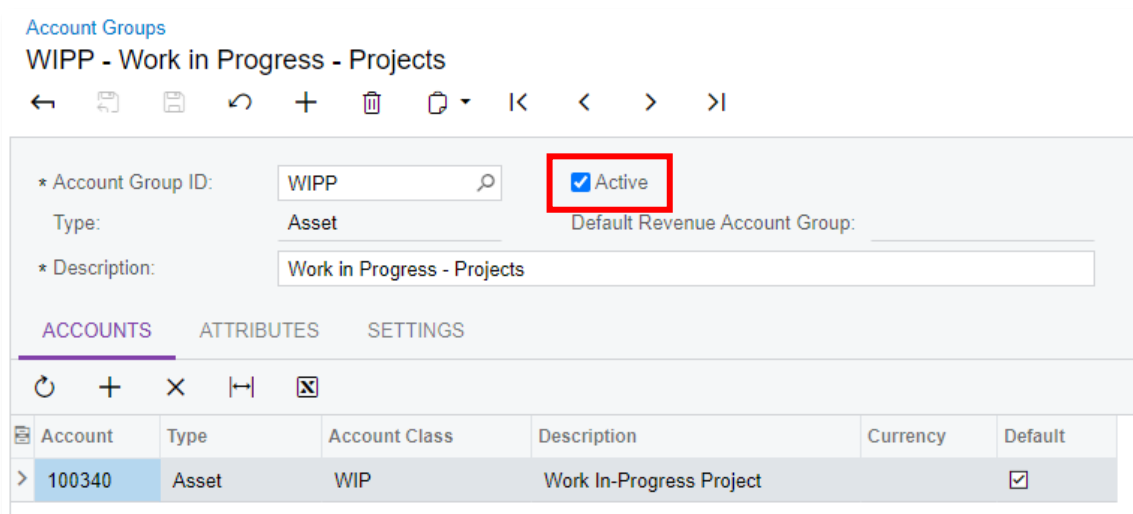
The customiser can now proceed to configuring the business event.

Project Management

Account Groups

This release adds the ability to make an account group inactive. Inactive account groups cannot be selected on data entry screens, and the system cannot generate project transactions or create project budget lines with inactive account groups.

To make an account group inactive, for the account group, a user clears the **Active** check box in the Summary area of the Account Groups screen (PM201000), as shown in the following screenshot. The account group can be inactivated if it has no associated accounts on the Accounts tab.



The screenshot shows the 'Account Groups' screen for 'WIPP - Work in Progress - Projects'. The 'Active' checkbox is checked and highlighted with a red box. Below the form, the 'ACCOUNTS' tab is selected, showing a table with one account entry.

Account	Type	Account Class	Description	Currency	Default
> 100340	Asset	WIP	Work In-Progress Project		<input checked="" type="checkbox"/>

As a result of the upgrade to MYOB Advanced 2021.1.1, all the existing accounts groups become active—that is, for all the account groups, the **Active** check box is selected on the Account Groups screen.

Closing Commitments

The logic related to the closing of commitments has been reviewed; this release implements a consistent solution. The solution covers all of the identified scenarios, including partial billing, receiving, and closing the corresponding line by quantity or by amount.

Changes to the User Interface

On the Commitments screen (PM306000), the following columns have been added to the table:

- **Status:** The status of the commitment, which depends on the status of the Closed check box of the corresponding purchase order line or subcontract line on the Document Details tab of the Purchase Orders (PO301000) or Subcontracts (SC301000) screen, respectively. The status can be one of the following options:
 - **Open:** The Closed check box is cleared in the corresponding purchase order line or subcontract line.
 - **Closed:** The Closed check box is selected in the corresponding purchase order line or subcontract line.

- **Committed Variance Quantity:** The difference between the values in the Committed Revised Quantity and Committed Invoiced Quantity columns.
- **Committed Variance Amount:** The difference between the values in the Committed Revised Amount and Committed Invoiced Amount columns.

Changes to the Calculation of Committed Values

The calculation of the following columns in the table of the Commitments screen (PM306000) has been changed (with the descriptions reflecting the current calculation of the committed values):

- **Committed Received Quantity:** The received quantity of the corresponding purchase order line or subcontract line.
- **Committed Invoiced Quantity:** The billed quantity of the corresponding purchase order line or subcontract line.
- **Committed Invoiced Amount:** The billed amount of the corresponding purchase order line or subcontract line.

For multicurrency accounting, when the project currency and the billing currency differ, the committed invoiced amount equals the sum of the amounts of all the related AP document lines multiplied by the rate, where the rate is the conversion rate from the currency of the purchase order or subcontract from which the commitment originates to the project currency.

- **Committed Open Quantity:** The lowest value of the following differences:
 - Committed Revised Quantity – Committed Received Quantity
 - Committed Revised Quantity – Committed Invoiced Quantity

The committed open quantity becomes zero when the commitment is assigned the Closed status.

- **Committed Open Amount:** A value whose calculation for non-stock items is based on the option selected in the Close PO Line field on the General Settings tab of the Non-Stock Items screen (IN202000) for the inventory item of the purchase order line or subcontract line from which the commitment originates.

For stock items and for the non-stock items with the By Quantity option selected in the Close PO Line field, the committed open amount is calculated as follows:

- $\text{Committed Revised Amount} / \text{Committed Revised Quantity} * \text{Committed Open Quantity}$ if the committed revised quantity is greater than zero

The Committed Received Amount is the unit cost multiplied by the received quantity of the corresponding purchase order line or subcontract line.

- Committed Revised Amount - Committed Invoiced Amount if the committed revised quantity equals zero
- For the non-stock items with the By Amount option selected in the Close PO Line field, the committed open amount equals the lowest value of the following differences:
 - Committed Revised Amount - Committed Received Amount
 - Committed Revised Amount - Committed Invoiced Amount

The committed open amount becomes zero when the commitment is assigned the Closed status.

If the received and billed quantity and amount are greater than the ordered ones, then the release of the change order that increases the original ordered values of the corresponding purchase order or subcontract does not lead to the closing of the document line, and the commitment status remains “Open” even if the Committed Revised Quantity and Committed Revised Amount equal the Committed Invoiced Quantity and Committed Invoiced Amount, respectively, on the Commitments screen. The purchase order line or the subcontract line can be closed manually if a user puts the purchase order or subcontract on hold, selects the **Closed** check box for the line, and then takes the purchase order or subcontract off hold.

Changes to the Validation of the Original Values

On the Document Details tab of the Purchase Orders screen (PO301000), if the inventory item of a purchase order line from which a commitment originates has the **By Quantity** option selected in the **Close PO Line** field and the **Require Receipt** check box cleared on the General Settings tab of the Non-Stock Items screen (IN202000), the value in the Order Qty. column of the purchase order line must be greater than zero.

On the Document Details tab of the Subcontracts screen (SC301000), the same validation is implemented for the subcontract lines from which commitments originate.

Default Accounts and Subaccounts

In earlier versions, projects and project tasks had a default account and default subaccount that could be used as a source of accounts and subaccounts for documents related to both the project income and project costs. In MYOB Advanced 2021.1.1, the default account and subaccount have been replaced with separate default accounts and subaccounts for sales and costs.

Defining Sales and Cost Accounts and Subaccounts

On the Settings tab of the Projects screen (PM301000), instead of the **Default Account** and **Default Subaccount** fields, the following fields have been added (see the screenshot below):

- Default Sales Account
- Default Sales Subaccount
- Default Cost Account
- Default Cost Subaccount

The screenshot shows the 'Settings' tab for a project. The 'DEFAULT VALUES' section is expanded, showing the following fields:

Field	Value
Default Sales Account:	400000 - Sales
* Default Sales Subaccount:	000-000-001 - Head Office
Default Cost Account:	500100 - Cost of Goods Sold
Default Cost Subaccount:	000-000-001 - Head Office
Accrual Account:	
Accrual Subaccount:	
Time Activity Approver:	EP00000032 - Manu Junior, Mr.

On the Summary tab of the Project Tasks screen (PM302000), instead of the **Default Account** and **Default Subaccount** fields, the **Default Sales Account**, **Default Sales Subaccount**, **Default Cost Account**, and **Default Cost Subaccount** fields have also been added (see the following screenshot).

The screenshot displays the 'Project Tasks' screen for 'PR00000084 0005 - Implementation WIP - Software Implementation'. The 'SUMMARY' tab is active, showing the following details:

- Project ID:** PR00000084 - WIP - Software Implem
- Task ID:** 0005 - Implementation
- Status:** Active
- Default:**

The 'TASK PROPERTIES' section includes:

- Planned Start Date: (empty)
- Planned End Date: (empty)
- Start Date: 7/05/2020
- End Date: (empty)
- Completion Method: Manual
- Completed (%): 0.00
- Approver: (empty)

The 'DEFAULT VALUES' section includes:

- Default Sales Account: 400000 - Sales
- Default Sales Subaccount: 000-000-001 - Head Office
- Default Cost Account: 500410 - COGS - Direct Labour Costs
- Default Cost Subaccount: 000-000-001 - Head Office
- Accrual Account: (empty)
- Accrual Subaccount: (empty)
- Tax Category: (empty)

On the Settings tab of the Project Templates screen (PM208000) and on the Summary tab of the Project Template Tasks (PM208010) and Common Tasks (PM208030) screens, the Default Account and Default Subaccount fields have also been replaced with the Default Sales Account, Default Sales Subaccount, Default Cost Account, and Default Cost Subaccount fields.

If the *Subaccounts* feature is enabled on the Enable/Disable Features screen (CS100000), a user must specify the default sales subaccount for a project and each project task. If the default cost account is selected for a project or project task, a user must also specify the default cost subaccount.

Using Sales Accounts and Subaccounts in Project Billing

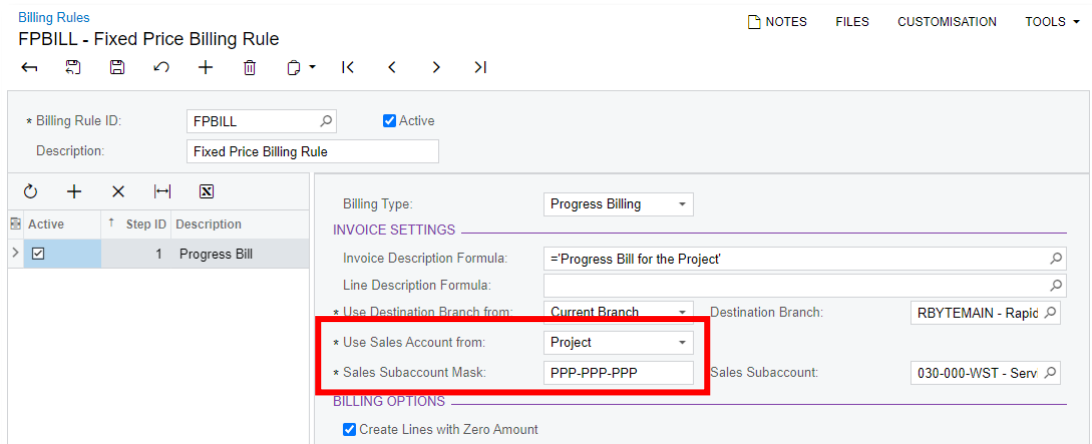
When a project is billed, the system uses the sales account and subaccount based on the settings of the corresponding step of the billing rule specified in the right pane of the Billing Rules screen (PM207000) (see the screenshot below).

The sales account the system uses is determined by the option selected in the **Use Sales Account From** field, which is one of the following:

- **Project:** The default sales account of the project
- **Task:** The default sales account of the project task

The segment of the sales subaccount the system uses is determined by the option specified in the **Sales Subaccount Mask** field, which is one of the following:

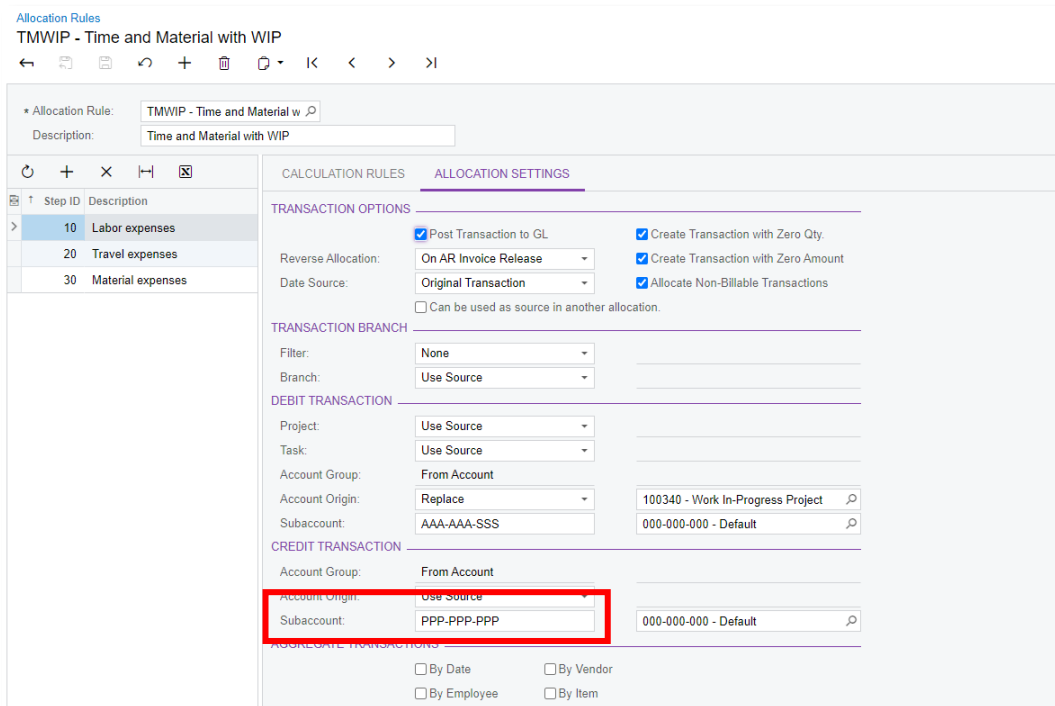
- **PPP**: The default sales subaccount of the project
- **TTT**: The default sales subaccount of the project task



Using Sales and Cost Subaccounts in Project Allocations

When a project is allocated, for the created allocation transaction that is posted to the general ledger, the system uses the debit and credit subaccounts that are combined based on the following options specified in the **Subaccount** field in the Debit Transaction and Credit Transaction sections, respectively, on the Allocation Settings tab in the right pane of the Allocation Rules screen (PM207500) (see the screenshot below):

- **CCC**: The default cost subaccount of the project
- **DDD**: The default cost subaccount of the project task
- **PPP**: The default sales subaccount of the project
- **TTT**: The default sales subaccount of the project task



Using Cost Accounts and Subaccounts in Time Activities

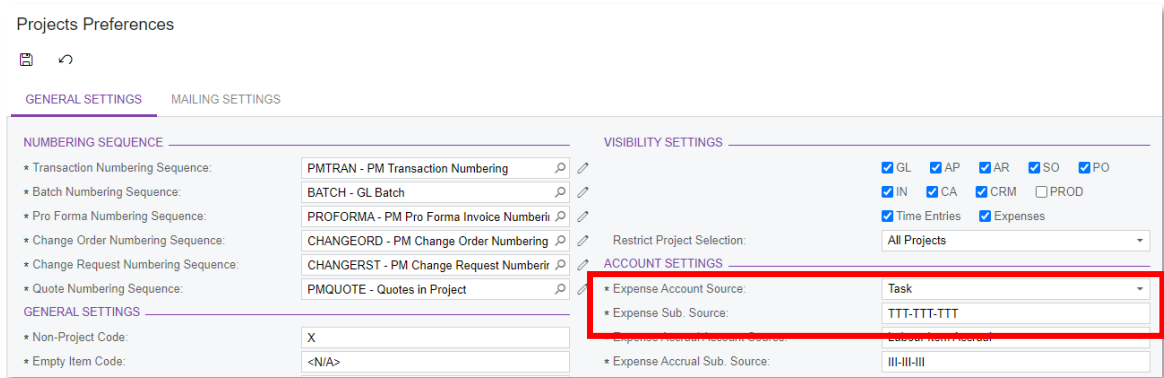
When project transactions are created on release of time activities and time cards, the system uses the expense account and subaccount based on the settings specified on the General Settings tab of the Projects Preferences screen (PM101000), as shown in the screenshot below.

The expense account the system uses is determined by the option selected in the **Expense Account Source** field, which is one of the following:

- **Project:** The default cost account of the project
- **Task:** The default cost account of the project task

The segment of the sales subaccount the system uses is determined by the option specified in the **Expense Sub. Source** field, which is one of the following:

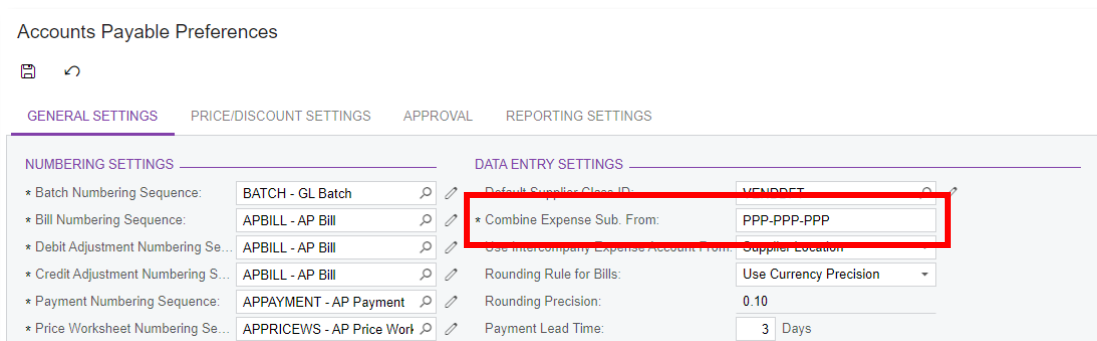
- **PPP:** The default cost subaccount of the project
- **TTT:** The default cost subaccount of the project task



Using Cost Subaccounts in Accounts Payable Documents

When a non-stock item is selected on data entry screens for accounts payable entities and documents, the way the system combines the expense subaccount is based on the option specified in the **Combine Expense Sub. From** field on the General Settings tab the Accounts Payable Preferences screen (AP101000), which is one of the following (see the screenshot below):

- **PPP:** The default cost subaccount of the project
- **TTT:** The default cost subaccount of the project task



Using Sales and Cost Subaccounts in Expense Claims

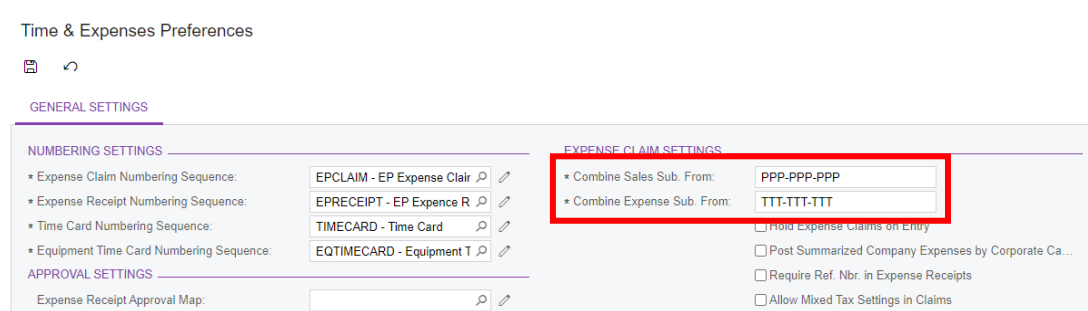
For an expense claim, the way the system combines subaccounts is based on the settings specified on the General Settings tab of the Time and Expenses Preferences screen (EP101000), as shown in the screenshot below.

The segment of the sales subaccount the system uses is determined by the option specified in the **Combine Sales Sub. From** field, which is one of the following:

- **PPP**: The default sales subaccount of the project
- **TTT**: The default sales subaccount of the project task

The segment of the expense subaccount the system uses is determined by the option specified in the **Combine Expense Sub. From** field, which is one of the following:

- **PPP**: The default cost subaccount of the project
- **TTT**: The default cost subaccount of the project task



New Workflow Support on Project Entry Screens

Multiple screens that used automation steps—including those related to projects, construction, and time and expenses—have been redesigned to support the new workflow engine. The processes that are performed on these screens work as they did in the previous version. The UI on these screens has been enhanced to support the functionality of the new workflow engine.

Note: Because the implementation of the new workflow engine entails changes to DACs and business logic, it may affect custom generic inquiries, customisation projects, import and export scenarios, and API integrations. For the complete list of changes, see Release Notes for Developers.

UI Enhancements

On multiple screens related to projects, construction, and time and expenses, the buttons representing the actions that are most relevant to the current status of the document opened on the screen are displayed as buttons on the screen toolbar, in addition to being included as menu commands on the Actions menu.

The **Hold** check box has been removed from the Summary area of these screens and replaced by the **Hold** and **Remove Hold** actions, which can be clicked on the screen toolbar as well as on the Actions menu.

With the new workflow, the value in the **Status** field of the Summary area cannot be selected manually. The system changes it automatically as users perform the corresponding actions, which have been included as menu commands on the Actions menu and can be also clicked on the screen toolbar.

The order of commands on the Actions menu has been rearranged. Now the commands related to the document workflow are located at the top of the menu, and the commands not related to the workflow have been moved to the bottom of the menu. Also, the **Put on Hold** and **Re-open** actions have been renamed to **Hold** and **Reopen**, respectively.

The following table summarises the UI enhancements that have been introduced on the screens.

Screen	Hold check box	Status field	Existing actions
Projects (PM301000)	Removed	Updated	Updated
Project Tasks (PM302000)		Updated	
Pro Forma Invoices (PM307000)	Removed		
Change Orders (PM308000)	Removed		
Change Requests (PM308500)	Removed		
Project Templates (PM208000)		Updated	
Cost Projection (PM305000)	Removed		
Request for Information (PJ301000)		Updated	Updated
Project Issue (PJ302000)		Updated	
Daily Field Report (PJ304000)	Removed		
Expense Claim (EP301000)			Updated
Expense Receipt (EP301020)			Updated
Employee Time Card (EP305000)			Updated
Equipment Time Card (EP308000)			Updated

Example of the UI Changes to the Projects Screen

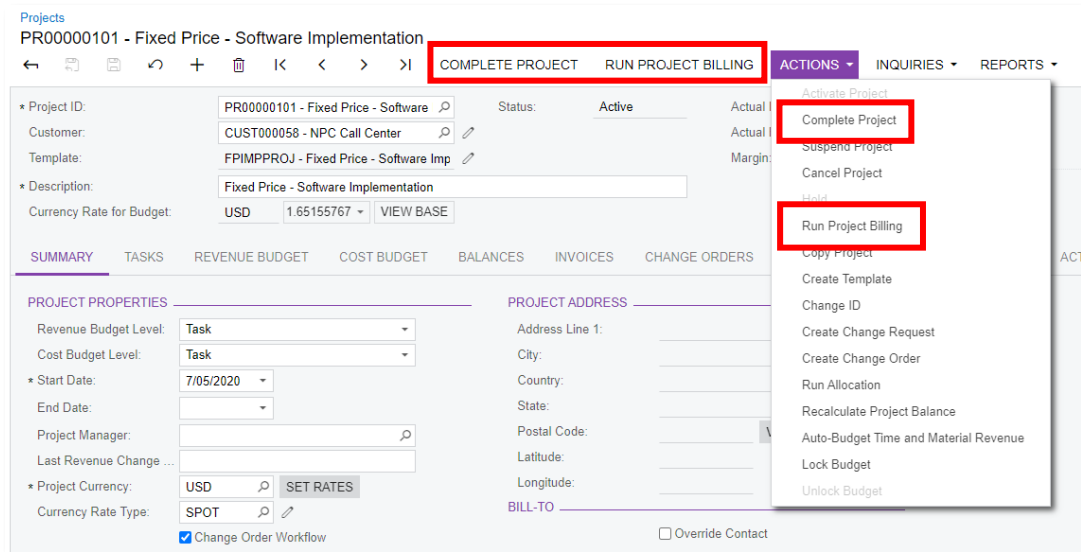
On the Projects screen (PM301000), the following changes have been introduced:

Note: Similar UI changes, which support the new workflow, have been made on the other screens, as listed in the previous section.

- The **Hold** check box has been removed from the Summary area.
- The **Status** field in the Summary area has become read-only.
- The **Activate Project**, **Complete Project**, **Suspend Project**, **Cancel Project**, and **Hold** menu commands have been added to the Actions menu.
- The **Run Project Billing** menu command, which duplicates the functionality of the button with the same name, has been added to the Actions menu.
- The **Create Change Order** and **Create Change Request** buttons have been removed from the screen toolbar, and the menu commands with the same name have been added to the Actions menu.

The following screenshot shows an example of a project with the “Active” status on the Projects screen. The **Complete Project** and **Run Project Billing** buttons are displayed on the screen toolbar, and the corresponding menu commands are included on the Actions

menu. Other menu commands that can be invoked for the project with this status are available for selection on the menu.



Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the screens listed above, users who work on customisations will need to redesign the automation of the processes related to the applicable screens by using the new workflow engine. For more information, see the “Creating Workflows” chapter in the MYOB Advanced Customisation Guide.

Users can still import documents with one of their possible initial statuses (such as In “Planning” and “On Hold”) on the following screens where the **Hold** check box has been removed:

- Projects (PM301000)
- Pro Forma Invoices (PM307000)
- Change Orders (PM308000)
- Change Requests (PM308500)
- Cost Projection (PM305000)
- Daily Field Report (PJ304000)

On the following screens, to support the import of documents with a particular status except the status of an initially created document (such as “In Planning” or “On Hold”), the existing import scenarios should be updated to use the functionality of the corresponding actions:

- Projects
- Project Tasks (PM302000)
- Project Templates (PM208000)
- Request for Information (PJ301000)
- Project Issue (PJ302000)

Service Management

Customisation Improvements to Calendar Boards

The ability to customize the functionality for screens with calendar boards—Calendar Board (FS300300), Staff Calendar Board (FS300400), and Room Calendar Board (FS300700) screens—has been improved and extended.

The new Calendar Preferences screen (FS100500) has been designed. The Calendar Preferences screen (FS100200), which had the same name but less functionality related to customising the calendar board screens, has been removed.

On the new Calendar Preferences screen, a user sets up the colour layout of the appointment fields that the system shows on dashboards on the calendar board screens—that is, the fields representing appointments and showing when they occur. The user also specifies the visibility of the appointment fields for each appointment status.

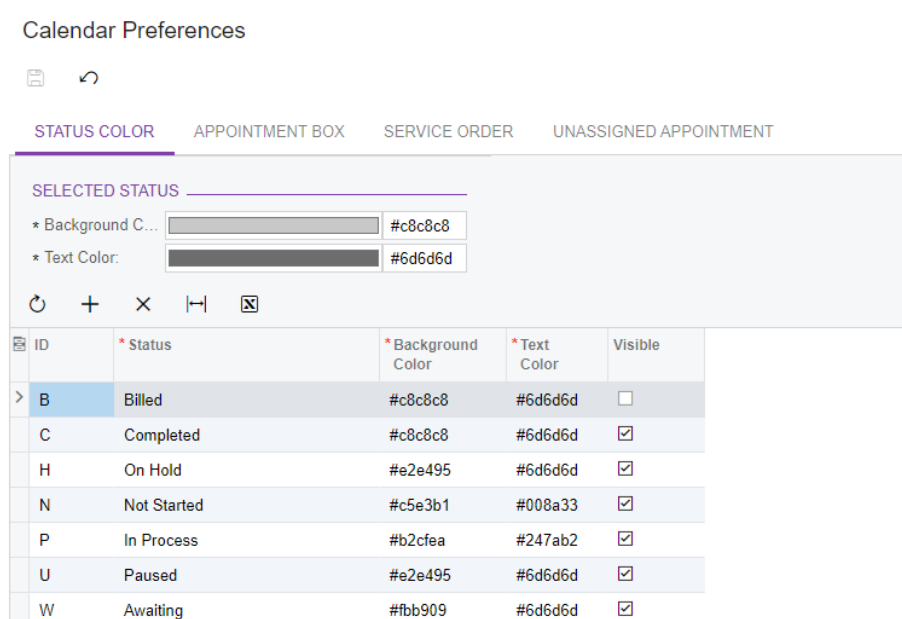
On this screen, a user can also add or delete the columns to be displayed on the Service Orders and Unassigned Appointments tabs of the calendar board screens. The user can add custom columns, specify the order of these columns, and define the column visibility options.

The screen is shown and described in more detail in the following section.

The New Calendar Preferences Screen

The new Calendar Preferences screen (FS100500) has been designed to give the user control over the columns displayed on the Service Orders and Unassigned Appointments tabs of the calendar board screens. A user can add custom columns to the table, and hide or show any column. The user also specifies the desired order of these columns.

On this screen, a user can define the background and text colours of the appointment fields for each appointment status. The user can also modify the visibility of the appointment field (that is, whether it is visible or hidden in the calendar) for each status. Additionally, the user customises the information to be shown on appointment fields, specifying the fields whose values will be displayed in each appointment field. For each field, the user specifies an appropriate field name and adds a custom icon.



The user specifies the needed settings on the following tabs of the Calendar Preferences screen:

- Status Colour:** On this tab, the user, specifies the background and text colours of the appointment fields that the system shows on the calendar dashboard so that the colours are based on the predefined statuses. The user selects a row with the status in the table; then in the Summary area of the tab, the user selects a colour in the **Background Colour** field or the **Text Colour** field (or both fields).

A user can also specify the background and text colour for appointment fields for new statuses that can be defined in the system through customisation, if applicable. In this case, the user adds new rows to the table on the Calendar Preferences screen and then specifies the custom colours for appointment fields for each of these statuses.

- Appointment Box:** On this tab, the user modifies the fields that will be displayed in the appointment fields on the dashboard on the calendar board screens. The user adds any number of custom fields (by adding each row to this table, selecting the object reference and entering field name, and defining an appropriate icon for this field). Also, the user can change the default order of the fields to be displayed by moving the rows up or down in this table.
- Service Order:** On this tab, the user specifies the columns to be displayed on the Service Orders tab of the calendar board screens. To add a column, the user adds a row to this table and selects the object reference and column name for each row. The user specifies whether each column is visible or hidden by selecting or clearing the **Visible** check box. Also, the user can change the default order of the columns to be displayed by moving the rows up or down in this table.
- Unassigned Appointment:** On this tab, the user specifies the columns to be displayed on the Unassigned Appointment tab of the calendar board screens. To add a column, the user adds each row to this table and selecting the object reference and column name for the row, and specifies whether a column is visible or hidden by selecting or clearing the **Visible** check box. Also, the user can change the default order of the columns to be displayed by moving the rows up or down in this table.

Addition of AP Bills to Appointments and Service Orders

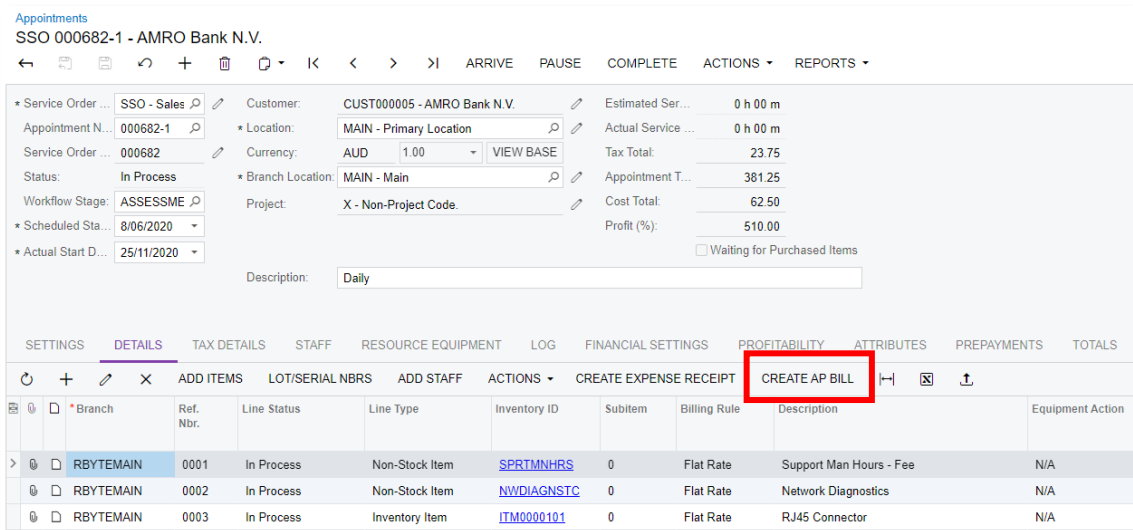
It is now possible to add an accounts payable bill to an appointment or a service order. A user can do this in two ways:

- On the Appointments (FS300200) or Service Orders (FS300100) screen, the user initiates the creation of an AP bill so that this bill will be linked to an appointment or a service order.
- On the Bills and Adjustments screen (AP301000), the user creates an AP bill and links an item or multiple items of the bill to an appointment or a service order.

To perform these operations, improvements have been made on the Appointments, Service Orders, and Bills and Adjustments screens.

Ability to Create an Accounts Payable Bill from an Appointment or a Service Order

On the Appointments (FS300200) and Service Orders (FS300100) screens, a user can now initiate the creation of an AP bill related to the appointment or service order, respectively. For this purpose, the **Create AP Bill** button has been added to the table toolbar of the Details tab on both screens. (The following screenshot shows this button on the Appointments screen.)



When the user clicks this button, the system opens the Bills and Adjustments screen (AP301000). The user specifies the details of the bill and saves it. In the **Related Svc. Doc. Type** and **Related Svc. Doc. Nbr.** columns of the Document Details tab of a bill, the user can see the document type and reference number, respectively, of the appointment or service order associated with each line of the bill.

If a user clicks the reference number link, the system opens the corresponding appointment document, in which the Details tab contains a new line for an item from the bill.

Note: When an AP bill is saved, the system always creates a new line in the service order or appointment, regardless of whether the same item has already been added to the document.

Ability to Link an Accounts Payable Bill to an Appointment or a Service Order

A user can now associate an accounts payable bill with an appointment or a service order. To do so, while creating an AP bill on the Bills and Adjustments screen (AP301000), for each line of the bill on the Document Details tab, the user selects the field service document (Appointment or Service Order) with which the AP bill will be associated in the **Related Svc. Doc. Type** column, and then selects the document's reference number from the list in the **Related Svc. Doc. Nbr** column. The user then saves the bill.

When the bill is saved, the system adds the line with the non-stock item from the AP bill to the appointment or service order details on the Details tab of the Appointments (FS300200) or Service Orders (FS300100) screen.

Synchronisation Between an AP Bill and the Related Appointment or Service Order

A user will not be able to change the details of any AP bill item on the Appointments (FS300200) or Service Orders (FS300100) screen. To change the details, the user has to open the bill on the Bills and Adjustments screen (AP301000) and make the necessary corrections there. When the changes to the bill are saved, the system updates the applicable lines of the related appointment or service order with the changes made to these lines of the bill.

It is possible to add a bill to an appointment or a service order with the "Closed" or "Completed" status. In this case, the item or items of the bill affects the cost of the appointment or service order but is not reflected in the billing document.

Changes in the Mobile App

In the mobile app, on the Details tab of the Appointments screen, the Create Bill action has been added to the Actions menu to give users the ability to create the bills related to an appointment or a service order.

Ability to Make Corrections in a Field Service Document

A user can now correct data in field service documents—appointments, service orders, and service contracts—even if billing documents (sales orders, SO invoices, AR invoices, or AP bills) have already been generated from the corresponding field service document and released. Additionally, improvements have been made to the process of correcting a field service document that has a billing document generated from this service document but not yet released.

The options of correcting field service documents are described in the next several sections of this topic.

Updating a Service Document if an AR Invoice Has Been Generated and Released

Once an AR invoice has been generated from a service document (for example, an appointment) and released, a user may decide that some corrections should be made to the service document; in this case, an AR invoice should be generated again with the new information and released. Corrections may be the following: changing stock items or non-stock items, updating some values (such as a quantity or a price), adding or removing detail lines, or changing tax information.

As of this release, the process of making these corrections to a field service document is the following: For an AR invoice that has been generated for a service document, the user creates an AR credit memo by using the **Reverse and Apply to Memo** action on the Actions menu on the Invoices and Memos screen (AR301000), and releases this credit memo.

Then in the previously generated invoice on the Invoices and Memos screen, the user clicks the link in the new **Related Svc. Doc. Nbr.** column of any line of the Document Details tab. The system opens the document on the Appointments (FS300200), Service Orders (FS300100), or Service Contracts (FS305700) screen. The user makes needed corrections to the service document and then generates a new AR invoice.

Updating a Service Document if an SO Invoice Has Been Generated and Released

Once an SO invoice has been generated from a service document (for example, an appointment) and released, a user may decide that some corrections should be made to the service document; in this case, an SO invoice should be generated again with the new information and released. Corrections may be the following: changing stock items or non-stock items, updating some values (such as a quantity or a price), adding or removing detail lines, or changing tax information.

As of this release, when corrections must be made to a field service document after an SO invoice has been generated and released, the process has been changed. Now on the Invoices screen (SO303000), a user should create a document of the "Credit Memo" type, and manually enter all the details from the original invoice that has been generated for a service document in the Summary area. On the Details tab of the screen, the user adds the detail lines by clicking the **Add Return Line** button on the table toolbar (which opens a window where the user can select the lines of the needed SO invoice). Once the information is entered, a user saves and releases this SO credit memo.

Then in the original invoice, on the Invoices screen, the user clicks the link in the new **Related Svc. Doc. Nbr.** column of any line of the Details tab to open the service document on the appropriate screen. The user makes needed corrections to the service document and then generates a new SO invoice.

Updating a Service Document if a Time Activity Has Been Generated and Released

Once a time activity has been generated from the Appointments screen (FS300200) and then released, a user can make the following corrections to the appointment on the Log tab of the Appointments screen: reducing or increasing the duration of the service tracked in the log lines, or changing any value in a log line (for example, the values specified in the **Earning Type**, **Start Time**, and **End Time** columns).

To make these corrections, the user identifies the number of the appointment associated with the released time activity on the Employee Time Activities screen (EP307000) in the **Appointment Nbr.** column. Then on the Appointments screen, the user makes the needed corrections in the appointment on the Log tab (in this release, the user can now add a negative value in the **Duration** column of the log line), save the appointment, and release new time activities.

Updating a Service Document if Project Documents Have Been Generated but Not Released

This section is applicable only if the *Projects* feature is enabled on the Enable/Disable Features screen (CS100000) in MYOB Advanced.

This release includes improvements to the process of correcting a service document (such as an appointment) if a project transaction (and an inventory issue, if applicable) is generated from the service document but not released. Now a user deletes the project transaction (and any inventory issue); the user can then make the required corrections to the related service document. The system reallocates any stock items from the deleted project transaction to the initial service document (the system also saves serial numbers if the serialised stock items have been used), so that they can be used in when another project transaction is generated.

Updating a Service Document if Project Documents Have Been Generated and Released

This sections is applicable only if the *Projects* feature is enabled on the Enable/Disable Features screen (CS100000) in MYOB Advanced.

After a project transaction (and an inventory issue, if any) has been generated from a service document and released, a user might decide that some corrections should be made to the service document, and the new project transaction (and any inventory issue) should be generated and released.

In this case, a user now needs to use the new actions that are available on the Actions menu of the screen toolbar of the Appointments (FS300200) and Service Orders (FS300100) screens—**Run Appointment Bill Reversal** and **Run Service Order Bill Reversal**, respectively. For the released project transaction associated with the service document for which you have selected one of these actions, the system generates one reversed project transaction (a project transaction with similar settings but a negative amount and quantity) and releases the transaction. For the released inventory issue associated with the service document, the system generates a credit memo issue and releases it.

After that, the user makes the needed corrections to the service document and runs the billing process, which causes the system to create the new project transaction (and inventory issue, if applicable).

Updating a Service Document if a Billing Document Has Been Generated but Not Released

This release includes improvements to the process of correcting a service document if the billing document (sales order, SO invoice, AR invoice, or AP bill) generated from this service document is not released. Now when a user deletes an unreleased billing document that contains stock items with unique serial numbers, the system reallocates these stock items to the initial service document, so that the serial numbers are saved and can be used when another billing document is generated.

Once a user has deleted a billing document, the user can find the service document related to the deleted billing document by using the new Service Billing History screen (FS405000) (shown in the following screenshot). This screen shows the list of billing documents that have been generated from the field service documents, including deleted billing documents.

Service Billing History

[↻](#)
[ACTIONS ▾](#)
[⏪](#)
[🔍](#)
[⏩](#)

Svc. Doc. Type	Svc. Ref. Nbr.	Doc. Type	Referen. Nbr.	Doc. Date	Doc. Status	Amount	Service Contract Billing Period
> Appointment	NSQ_0011	AR Invoice	INV_0009	31/03/2020	Closed	825.00	
Appointment	NSQ_0011	AR Invoice	INV_0010	31/03/2020	Closed	660.00	
Appointment	NSQ_0011	AR Invoice	INV_0010	31/03/2020	Closed	720.00	
Appointment	NSQ_0011	AR Invoice	INV_0009	31/03/2020	Closed	600.00	
Appointment	NSQ_0011	AR Invoice	INV_0010	31/03/2020	Closed	660.00	
Appointment	NSQ_0011	AR Invoice	INV_0010	31/03/2020	Closed	825.00	

Modified UI Elements on Some MYOB Advanced Screens

The following changes have been made on the Document Details or Details tab of the Invoices and Memos (AR301000), Invoices (SO303000), Bills and Adjustments (AP301000), and Sales Orders (SO301000) screens:

- The **Appointment Nbr.**, **Service Order Nbr.**, **Location**, and **Service Appointment Date** columns have been removed.
- The **Related Svc. Doc. Nbr.** column has been added. When a billing document is generated from a service document, the system inserts the related appointment, service order, or service contract document number in this column; the user can later click the link to navigate to the appropriate screen and view the service document quickly.

The following changes have been made on the Appointments (FS300200), Service Orders (FS300100), and Service Contracts (FS305700) screens:

- A new Billing Documents tab has been added (as shown in the following screenshot). The tab displays the list of all billing documents related to the appointment, service order, or service contract, respectively.

Appointments

SSO 000364-1 - Euro Hair Fashion

[NOTES](#)
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[FILES](#)
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[📄](#)
[⏪](#)
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* Service Order ...	SSO - Sales	Customer:	CUST000012 - Euro Hair Fashion	Estimated Ser...	0 h 00 m
Appointment N...	000364-1	Location:	MAIN - Primary Location	Actual Service ...	0 h 00 m
Service Order ...	000364	Currency:	AUD 1.00	Tax Total:	23.75
Status:	Billed	Branch Location:	MAIN - Main	Appointment T...	381.25
Workflow Stage:	ASSESSMENT	Service Contract:		Cost Total:	62.50
Scheduled Sta...	8/06/2020	Project:	X - Non-Project Code.	Profit (%):	510.00
Actual Start D...	8/06/2020	<input type="checkbox"/> Waiting for Purchased Items			
Description: Specific Date in a Month					

[SETTINGS](#)
[DETAILS](#)
[TAX DETAILS](#)
[STAFF](#)
[RESOURCE EQUIPMENT](#)
[LOG](#)
[FINANCIAL SETTINGS](#)
[PROFITABILITY](#)
[BILLING DOCUMENTS](#)

Doc. Type	Referen. Nbr.	Description	Date	Status
> Sales Order	IN_00144	Specific Date in a Month	8/06/2020	Completed
SO Invoice	INV_0014	Specific Date in a Month	8/06/2020	Open

- The Billing Info section has been removed from the Other Information tab.

On the Service Orders screen (FS300100), the **Allocation** buttons on the table toolbar of the Details tab and the Allocations window have been renamed to **Line Details**.

Changes to the Mobile App

The following changes have been made to the Appointments screen in the MYOB Advanced mobile app:

- On the Other Information tab, the Billing Info section has been removed.
- On the Additional tab, a new Billing Documents section has been added.

Integration with Workflow Engine

The processing of service orders and appointments has been redesigned to use the improved MYOB Advanced workflow engine. New automated service order and appointment workflows have been developed based on this workflow engine.

With the new workflow, the state of a service order or an appointment—which is reflected in the Status field of the Service Orders (FS300100) or Appointments (FS300200) screen, respectively—is automatically changed by the system based on the actions a user clicks. These actions may be buttons on the screen toolbar or menu commands in the Actions menu.

The set of actions available on the Actions menu of the Service Orders and Appointments screens has also been updated, and the system dynamically displays the most relevant actions as buttons on the toolbar, in addition to showing them on the Actions menu.

For the processing of service orders and appointments, the system provides default workflow types, each of which provides a particular set of statuses to dynamically update the state of each service order or appointment. These workflow types are based on the user-selected behaviour of the service order type associated with a particular service order or appointments; the behaviour is a category that determines how service orders and appointments of the service order type are processed.

Default Workflow Types

As mentioned, the system provides default workflow types, which in turn provide particular service order and appointment workflows.

On the Preferences tab (General Settings section) of the Service Order Types screen (FS202300), the system inserts a workflow type in the **Service Order Workflow Type** and **Appointment Workflow Type** fields depending on the behaviour that a user selects in the **Behaviour** field. If the user selects the “Regular”, “Route”, or “Internal” behaviour, the system inserts “Simple” in both the **Service Order Workflow Type** field and the **Appointment Workflow Type** field. (Because the “Simple” workflow type is associated with different statuses in service orders than in appointments, we will describe these workflow types separately.) If the user selects “Quote” in the **Behaviour** field, the system inserts “Quote” in only the **Service Order Workflow Type** field.

Thus, the following workflow types are available by default, based on the settings specified for the service order type on the Service Order Types screen:

- **Service Order Workflow Type is set to Simple for the service order type:** During the processing of a service order of the service order type, the system may assign the following statuses, which are predefined for the workflow type, to the service order: Open, On Hold, Awaiting, Completed, Closed, and Cancelled. The Awaiting status is new in this release.
- **Appointment Workflow Type is set to Simple for the service order type:** During the processing of an appointment of the service order type, the system may assign the following statuses, which are predefined for the workflow type, to the

appointment: Not Started, On Hold, Awaiting, In Process, Paused, Completed, Closed, Billed, and Cancelled. The Awaiting and Billed statuses are new in this release.

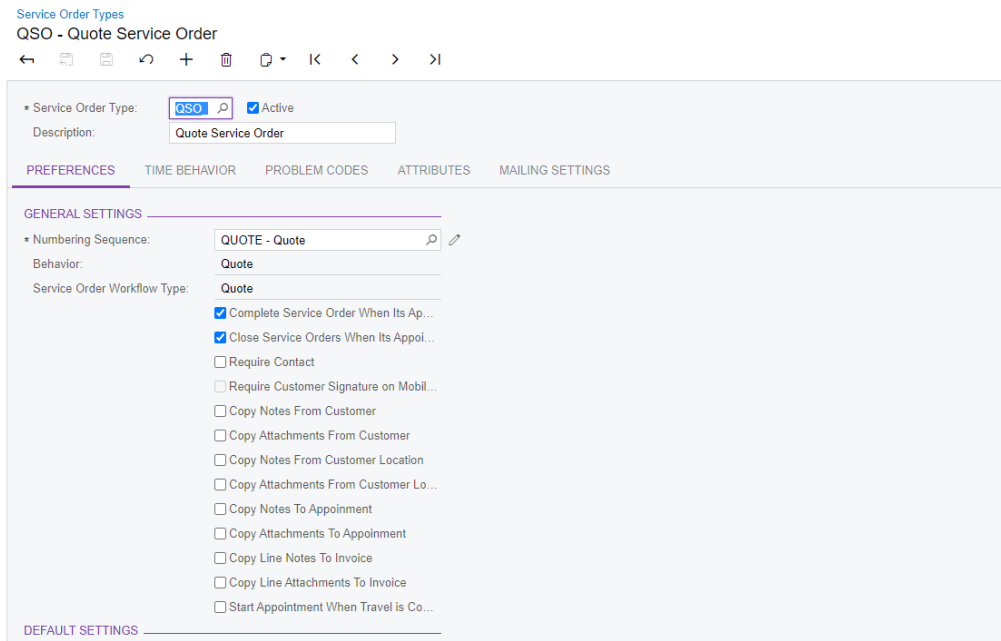
The following screenshot shows a service order type for which “Simple” is specified as the **Service Order Workflow Type** and as the **Appointment Workflow Type**.

The screenshot displays the configuration for a service order type named "NSO - Normal Service Order". Key settings include:

- Service Order Type:** NSO - [Active]
- Description:** Normal Service Order
- Service Order Workflow Type:** Simple
- Appointment Workflow Type:** Simple
- GENERAL SETTINGS:**
 - Numbering Sequence: SOORDER - SO Order
 - Behavior: Regular
 - Checkboxes: Complete Service Order When Its Ap..., Close Service Orders When Its Appoi..., Require Contact, Require Customer Signature on Mobil..., Copy Notes From Customer, Copy Attachments From Customer, Copy Notes From Customer Location, Copy Attachments From Customer Lo..., Copy Notes To Appointment, Copy Attachments To Appointment, Copy Line Notes To Invoice, Copy Line Attachments To Invoice, Start Appointment When Travel is Co...
- BILLING SETTINGS:**
 - Generated Billing Documents: AR Documents
 - Default Terms for AR and SO: NET30DAYS - Net 30 Days
 - Default Terms for AP: [Empty]
 - Use Sales Account From: Customer/Supplier Location
 - Combine Sales Sub. From: PPP-PPP-PPP
 - General Subaccount: [Empty]
 - Bill Only Closed Appointments: [Checked]
- INTEGRATING WITH TIME & EXPENSES:**
 - Require Time Approval to Close Appoi...: [Unchecked]
 - Automatically Create Time Activities fr...: [Checked]
 - Default Earning Type: RG

- **Service Order Workflow Type is set to Quote for the service order type:** During the processing of a service order of the service order type, the system may assign the following statuses, which are predefined for the workflow type, to the service order: Open, Confirmed, Copied, and Cancelled. The Confirmed and Copied statuses are new in this release.

The following screenshot shows a service order type for which “Quote” is specified as the **Service Order Workflow Type**.



Note: A customiser can modify these sets of statuses and create new workflow types for service orders and appointments through the customisations process.

Status-Based Colours of Appointment Fields

A user can specify the background and text colours of the appointment fields that the system shows on the calendar dashboard so that the colours are based on the predefined statuses. To do this, on the Status Colour tab of the Calendar Preferences screen (FS100500), the user selects a row with the status in the table; then in the Summary area of the tab, the user selects a colour in the **Background Colour** field and/or the **Text Colour** field.

Calendar Preferences

STATUS COLOR APPOINTMENT BOX SERVICE ORDER UNASSIGNED APPOINTMENT

SELECTED STATUS _____

* Background C... #c8c8c8

* Text Color: #6d6d6d

ID	* Status	* Background Color	* Text Color	Visible
> B	Billed	#c8c8c8	#6d6d6d	<input type="checkbox"/>
C	Completed	#c8c8c8	#6d6d6d	<input checked="" type="checkbox"/>
H	On Hold	#e2e495	#6d6d6d	<input checked="" type="checkbox"/>
N	Not Started	#c5e3b1	#008a33	<input checked="" type="checkbox"/>
P	In Process	#b2cfea	#247ab2	<input checked="" type="checkbox"/>
U	Paused	#e2e495	#6d6d6d	<input checked="" type="checkbox"/>
W	Awaiting	#fbb909	#6d6d6d	<input checked="" type="checkbox"/>
X	Canceled	#ebb6bf	#b1505a	<input type="checkbox"/>
Z	Closed	#c8c8c8	#6d6d6d	<input checked="" type="checkbox"/>

A user can also specify the background and text colour for appointment fields for new statuses that have been defined in the system through customisation, if applicable. In this case, the user adds new rows to the table on the Calendar Preferences screen and then specifies the custom colours for appointment fields for each of these statuses.

To improve and ease the process of customising the calendar board screens, especially modification of the appointment fields on dashboards, the new Calendar Preferences screen (FS100500) was designed. The Calendar Preferences screen (FS100200), which had the same name but less functionality related to customising the calendar board screens, has been removed.

Controlling the Workflow Stage Functionality

Because of the development of the new automated workflow functionality, which allows users to define an expanded set of statuses, the previous functionality of workflow stages now can be turned off (and turned on again, if needed) in the system. To control this functionality, the user can select or clear the new **Enable Workflow Stages** check box on the Service Management Preferences screen (FS100100).

Once the check box is cleared and the settings on the screen are saved, the workflow stages functionality is disabled in the system, and the Workflow Stages field disappears from the Summary area of the Service Orders screen (FS300100) and the Appointments screen (FS300200).

Note that with the workflow stages functionality enabled (that is, if the **Enable Workflow Stages** check box is selected), the settings specified for the workflow stages on the Workflow Stages screen (FS202100) (such as **Allow Complete, Allow Cancel, Allow Reopen, Allow Close, Allow Update, and Allow Delete**) will no longer be supported. The configuration of these settings will be available on the screen to support users in migrating to the new workflow.

UI Enhancements On Service Orders and Appointments Screens

The processes that are performed on the Appointments (FS300200) and Service Orders (FS300100) screens work as they did in the previous version. The UI on these screens has been enhanced to support the functionality of the new workflow engine.

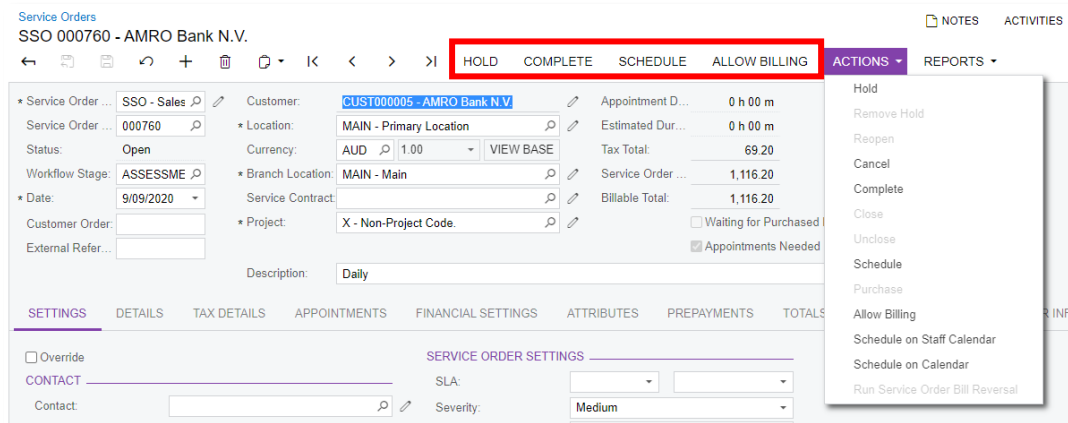
The buttons representing the actions that are most relevant to the current status of the document opened on the screen are displayed as buttons on the screen toolbar, in addition to being included as menu commands on the Actions menu.

The **Hold** check box has been removed from the Summary area of these screens and replaced by **Hold** and **Remove Hold** actions, which can be clicked on the screen toolbar (when they appear there as buttons) as well as on the Actions menu.

With the new workflow, the value in the **Status** field of the Summary area is changed automatically by the system as users click actions, which have been included as menu commands on the Actions menu and can be also clicked on the screen toolbar.

The order of commands on the Actions menu has been rearranged. Also, most of the names of commands in the Actions menu were renamed or shortened.

The following screenshot shows a service order with the “Open” status on the Service Orders screen. It illustrates the buttons that appear on the screen toolbar for this status, and the corresponding menu commands included on the Actions menu.



The following tables summarize the renamed actions on the Appointments and Service Orders screens.

Actions renamed on the Service Orders screen

Previous action name	New action name
Put on Hold	Hold
Complete Order	Complete
Cancel Order	Cancel
Reopen Order	Reopen
Close Order	Close
Unclose Order	Unclose
Run Service Order Billing	Run Billing
Copy to Service Order	Copy
Create Purchase Order	Purchase
Schedule Appointment	Schedule
Schedule on Calendar Board	Schedule on Calendar
Schedule on Staff Calendar Board	Schedule on Staff Calendar

Actions renamed on the Appointments screen

Previous action name	New action name
Put on Hold	Hold
Start Travel	Depart
Complete Travel	Arrive

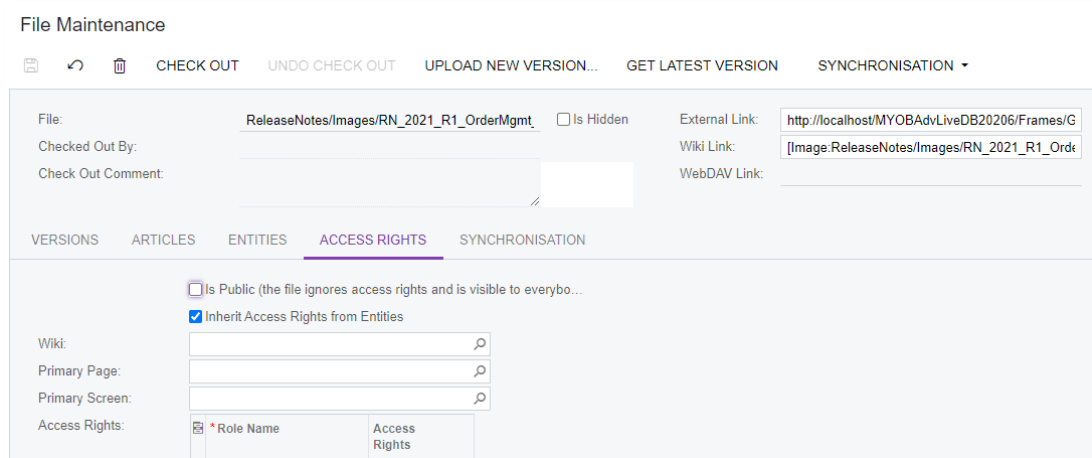
Start Appointment	Start
Pause Appointment	Pause
Resume Appointment	Resume
Complete Appointment	Complete
Cancel Appointment	Cancel
Reopen Appointment	Reopen
Close Appointment	Close
Unclose Appointment	Unclose
Clone Appointment	Clone
Run Appointment Billing	Run Billing
Create Purchase Order	Purchase
Schedule on Calendar Board	Schedule on Calendar
Schedule on Staff Calendar Board	Schedule on Staff Calendar
Send Email with Signed Appointment	Email Signed Appointment
Send Email Confirmation to Customer	Email Confirmation to Customer
Send Email Confirmation to Staff Member	Email Confirmation to Staff
Send Email Notification to Service Area Staff	Email Notification to Service Area Staff

Other Improvements

File Security Enhancements

In previous versions, the system calculated access rights to a file attachment by combining the access rights a user has to a screen (which was used when a file was uploaded) and to the entities linked to the file—for example, a file was uploaded by using the Sales Orders screen (SO301000) and then linked to a purchase order on the Purchase Orders screen (PO301000). In this case, users will have access to the file if they have access to at least one of the mentioned screens.

To make the configuration of file access more strict, an **Inherit Access Rights from Entities** check box has been added to the Access Rights tab of the File Maintenance screen (SM202510) (see the following screenshot). The check box is selected by default to preserve the previous system behaviour.



If a system administrator clears the check box for a file, then users will have access to the file only if they have access to the screen specified for the file in the Primary Screen field on this tab.

Enhancements Related to Deleting Attachments

In MYOB Advanced, a user can attach multiple files to multiple entities and their details in the system. When an entity is deleted or some of its details are deleted, the entity's attached files remain in the database taking up space.

As of this release, the system will remove attached files and all their versions along with the entity they were attached to if there are no other links for these files in the system. If an attachment has links to other entities in the system, then the system deletes only the link to the entity that is to be deleted.

For example, suppose that the file **ABC.png** was uploaded and attached to a sales order using the Sales Orders screen (SO301000), and the same file was then linked to a purchase order. The system displays both entities the file is linked to on the Entities tab of the File Maintenance screen (SM202510).

Further suppose that a user deletes the sales order. The system deletes the link to the sales order for the **ABC.png** file, but keeps the file in the system because it is linked to the purchase order. If a user deletes the purchase order, then the system deletes the link for the file, verifies that the file has no other links on the Entities tab, and then deletes the file from the database.

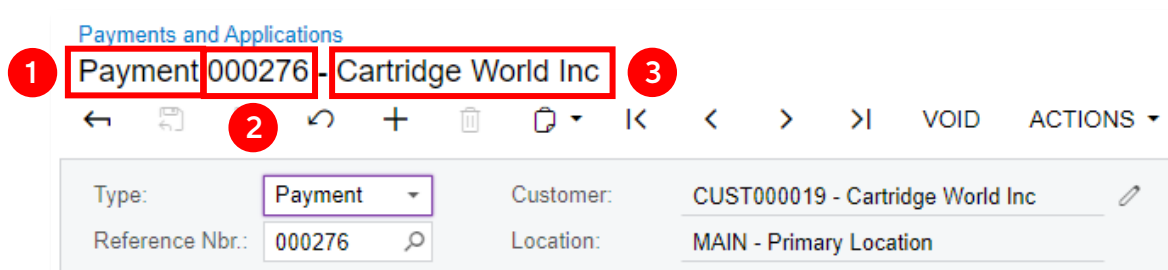
User Interface

Screen Subtitles

As of this release, on the screen title bar of some screens, users can now view a screen subtitle under the screen title. A screen subtitle provides users with additional information about the entity they work with. For instance, upon opening any supplier record, a user will see the supplier ID and account name divided by a hyphen.

UI Changes to Screen Titles

A screen subtitle represents the record ID and name, description, or additional information. A subtitle is located under the screen title on the screen title bar and is shown for all data entry screens, as shown in the screenshot below. Depending on the screen, a subtitle may consist of two or more parts.



1. Record type, which is shown if the type is a key element for the type of record
2. Record ID
3. Additional information about the record

For a new record, the system may display “New Record” as the subtitle. If the required screen fields are not empty when the screen is opened, the system will display the limited record details. For example, if you create an AP bill on the Bills and Adjustments screen (AP301000), the system will display “Bill” as the screen subtitle because the required **Type** field is filled by default with the “Bill” option. If you change the value of the **Type** field to “Credit Adj.”, the system will change the subtitle to “Credit Adj.”. However, if you create a task on the Task screen (CR306020), the system will display “New Record” in the screen subtitle because all required elements needed for creating a caption are empty by default.

Creation Logic for the Screen Subtitle

To create the screen subtitle, the system searches for the record information based on predetermined logic that is tailored to the particular record and displays the parts of the subtitle as follows:

- The key information of the record, which is presented on the Summary area of the screen, such as the record type if it is a key element for the record, the record number or ID, or both of these. Key information can be taken from one element or multiple elements, depending on the screen. Key information is followed by a hyphen.
- The record description, or additional information, which is selected from the elements development has deemed most important to users.

Examples of Screen Subtitles

Depending on the screen, the system may construct the subtitle from one setting or multiple settings. See the following examples of screen subtitles:

- Bills and Adjustments (AP301000):** Because the **Type** and **Reference Nbr.** settings are both key elements, both of these settings are used before the hyphen (Bill 002608 in the example). For the description part of the subtitle, the supplier name (Empire BlueCross BlueShield) is used because it was determined to be important information for a user.

Bill 000411 - Munich Electronics

Bill and Adjustments

Bill 000411 - Munich Electronics

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Type:	Bill	Supplier:	VSFP000002 Munich Electronics	Detail Total:	1,070.00
Reference Nbr.:	000411	Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Currency:	USD 1.5588586 VIEW BASE	GST Taxable Total:	0.00
Date:	1/06/2020	Terms:	NET30DAYS - Net 30 Days	GST Exempt Total:	0.00
Post Period:	12-2020	* Due Date:	1/07/2020	Tax Total:	0.00
Supplier Ref.:	673563	* Prompt Payme...:	1/06/2020 <input type="checkbox"/> Pay by Line <input type="checkbox"/> Track for TPAR	With. Tax:	0.00
		<input type="checkbox"/> Joint Payees		Balance:	1,070.00

- Customers (AR303000):** The key element of the customer record is the customer ID (ASBLBAR in the example) which is used for the first part of the subtitle, before the hyphen. For the additional info that goes after the hyphen, the system uses the account name (Nautilus Bar SABL).

CUSTOM000002 - ABC Studios Inc.

Customers

CUSTOM000002 - ABC Studios Inc.

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* Customer ID:	CUSTOM000002 - ABC Studios Inc.	Balance:	-428.00
Customer Status:	Active	Prepayment Balance:	0.00
* Customer Class:	LOCAL - Local Customers	Retained Balance:	-100.00

GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS CONTACTS SALESPERSONS ATTRIBUTES

ACCOUNT INFO

* Account Name:	ABC Studios Inc.	PRIMARY CONTACT	Name:	Simpson Mill, Mr.
ACCOUNT ADDRESS		Job Title:	Marketing Manager	
		Email:	mill.simpson@abcstudios.com	

VIEW ON MAP

- Warehouses (IN204000):** The key element of the record on this screen is the warehouse ID (RETAIL in the example), which is placed; the additional information for this type of record is the description of the selected warehouse (Retail Warehouse).

MAIN - Main Warehouse

Warehouses

MAIN - Main Warehouse

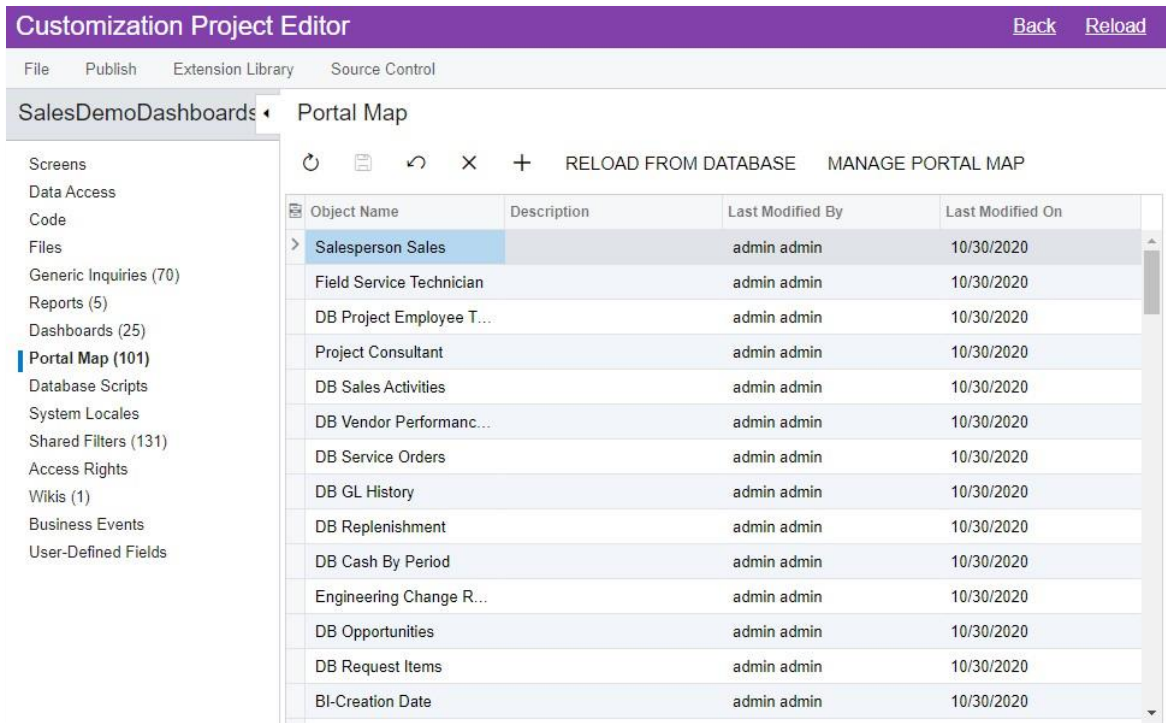
← + ↻ ↺ ⌂ 🔍 K < > >| ACTIONS ▾ REPORTS ▾

* Warehouse ID:	MAIN	Location Entry:	Do Not Allow On-the-Fly En...
* Branch:	RBYTEMAIN - Rapid	Avg. Default Returns C...:	Average
Replenishment Class:	PURCHASE - Purchi	FIFO Default Returns C...:	Average
	<input checked="" type="checkbox"/> Active		
Description:	Main Warehouse		

Customisation

Customising Screens of the Self-Service Portal

A developer can now customize MYOB Advanced Self-Service Portal by using the Customisation Project Editor. To open the Customisation Project Editor and start customising a screen, a developer should open the editor from the Publish Customisation screen (SM204505) or by using the Element Inspector. The Customisation Project Editor for the MYOB Advanced Self-Service Portal looks as shown in the following screenshot.



Developers can customize the screens of the MYOB Advanced Self-Service Portal using the same techniques as they use for MYOB Advanced, which are described in the Customisation Guide.

The following items can be customised and added to a customisation project in the Customisation Project Editor for the Self-Service Portal:

- Screens
- Data access classes
- Code items
- Custom files
- Generic inquiries
- Reports
- Dashboards
- Elements of the portal map
- System locales
- Shared filters
- Access rights
- Wiki pages
- Business events

- User-defined fields

Note: Only items related to screens used on the portal are available in the Customisation Project Editor for the Self-Service Portal. That is, a developer can customize only the screens and system entities that are added to the Portal Map page of the Customisation Project Editor or related to screens added to the Portal Map page.

The following entities are not available for customisation in the Customisation Project Editor for the Self-Service Portal:

- Import and export scenarios
- Mobile site map
- Web service endpoints
- Push notifications
- Analytical reports
- Webhooks

Default Values of User-Defined Fields

For each screen that has user-defined fields configured, a customiser can now specify the default value for each user-defined field. Also, the Visibility tab of the Edit User Defined Fields screen (CS205020) has been renamed to Properties.

Specifying the Default Values

To specify the default values of user-defined fields, the customiser opens a screen where user-defined fields are available (see User-Defined Fields) and then selects **Customisation > Manage User-Defined Fields** on the screen title toolbar. On the Edit User Defined Fields screen (CS205020), which opens, the customiser opens the Properties tab (shown in the screenshot below).

In the **Document** field, the customiser selects the document type to which the settings should be applied. In the table, the customiser specifies the default values of the required attributes in the **Default** column. These values will be displayed on the screen when the user edits the user-defined fields.

The following screenshot shows the Properties tab with the Invoice document type selected and the default values specified in the **Default** column specified for the **Resolution Code** and **Workgroup ID** attributes.

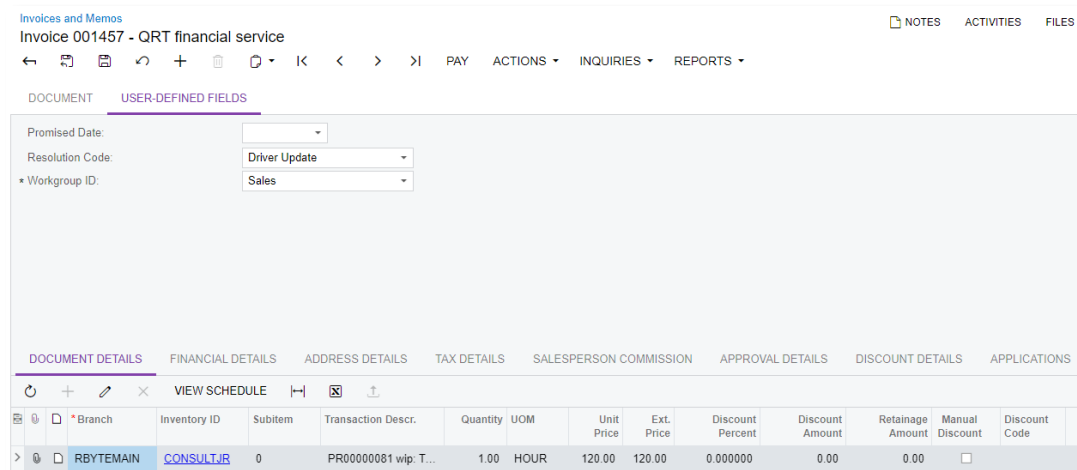
User-Defined Attribute	Required	Hidden	Default
Promised Date	<input type="checkbox"/>	<input type="checkbox"/>	
Resolution Code	<input type="checkbox"/>	<input type="checkbox"/>	Driver Update
Workgroup ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales

After the customiser has specified the appropriate settings for the screen and document types on the Edit User Defined Fields screen, the customiser then clicks the Back arrow

button on the screen toolbar to save the changes and go back to the screen that supports user-defined fields.

Displaying the User-Defined Fields of the Document

On the User-Defined Fields tab of the screen to which the customiser returns, the fields for which the customiser has specified the Default values now contain these values. The following screenshot shows the default values specified for the User-Defined Fields tab of the Invoices and Memos screen (AR301000). When a user is entering values on this tab for a particular invoice or memo, they can change the default values, if needed.

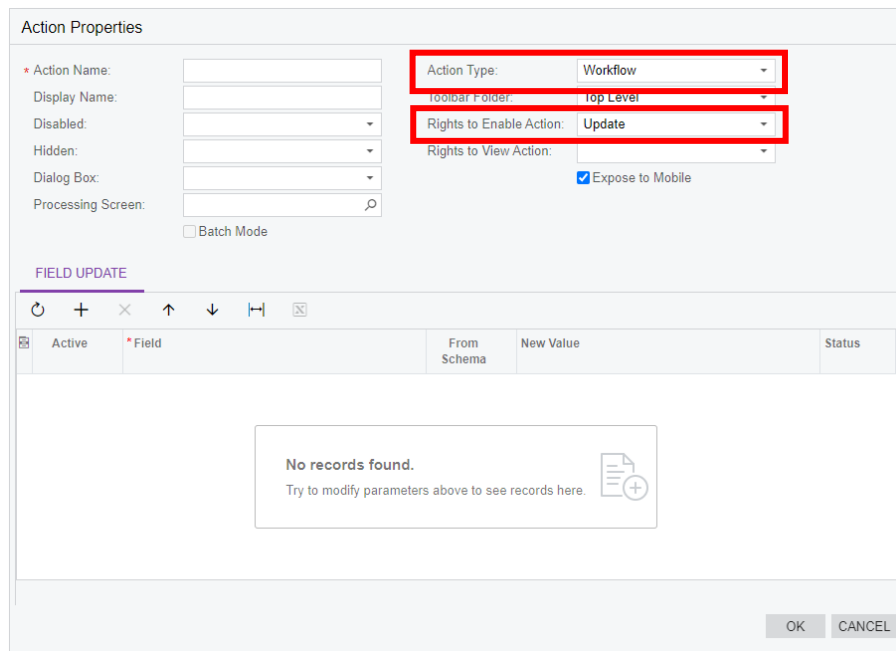


Improvements in Workflows

Improvements have been made to the workflow engine. These improvements are described in detail in the sections below.

Mapping Workflow Actions

When a customiser creates a new action of the Workflow type on the Actions page of the Customisation Project Editor, the **Rights to Enable Action** field of the Action Properties window is populated with “Update” by default. (This window, which is shown in the screenshot below, can be invoked on the Actions page.) This means that for the action to be available on the screen, a user should have the access rights to edit the screen.



Disabling Legacy Automation Steps

If a workflow that uses the new workflow engine is configured for a screen, automation steps are disabled and cannot be used, even if the new workflow has been published as code customisation. If a customiser tries to use the old automation steps on such a screen, the following warning is displayed on the Automation Steps screen (SM205000) for the **Screen ID** field: This screen uses the new workflow engine. All automation steps will be ignored.

Prohibiting the Customisation of Some of the Workflows

For some of the workflows, customisation may be prohibited by MYOB Advanced developers. In this case, for the State Identifier field of the Workflows page of the Customisation Project Editor, the following message is displayed: The predefined workflow for this screen cannot be customised.

Exposing Actions to the Mobile App

In the Action Properties window of the Customisation Project Editor, an **Expose to Mobile** check box has been added (shown in the screenshot below). If a customiser selects this check box, the selected action becomes available on the corresponding mobile screen. The check box is cleared by default.

To expose certain actions on the mobile screen, the customiser needs to make sure the **Expose to Mobile** check box is selected for each of these actions.

Action Properties

* Action Name: Action Type:

Display Name: Toolbar Folder:

Disabled: Rights to Enable Action:


Hidden: Rights to View Action:

Dialog Box:

Processing Screen: Expose to Mobile

Batch Mode

FIELD UPDATE

Active	*Field	From Schema	New Value	Status
<p>No records found. Try to modify parameters above to see records here.</p> 				

OK CANCEL

Upgraded Automated Warehouse Operations Engine

Developers can now use the upgraded automated warehouse operations engine. This section describes the steps a developer should perform to enable the engine.

Note: MYOB Advanced will switch to the new automated warehouse operations engine in future versions. To make the customisation packages related to the warehouse management system (WMS) compatible with the new engine, the developers will need to rework them if the packages were based on the old engine.

The upgraded engine provides the following features:

- Improved customisation capabilities
- More structured, modular code that is easier to read and write

Note: The current version of MYOB Advanced uses the old engine, and the new engine is switched off by default. Customisation projects based on the old engine will publish successfully in the current version. We recommend that independent software suppliers (ISVs) and partners who have customised screens related to automated warehouse operations enable the new engine and rework their customisation packages within the current version.

To enable the new automated warehouse operations engine, a developer should perform the following steps:

1. Open the aspx file of any screen related to automated warehouse operations.
2. Locate the code that is similar to the following code.

```
<px:PXDataSource ID="ds" runat="server" Visible="True" Width="100%"
TypeName="PX.Objects.SO.PickPackShipHost" PrimaryView="HeaderView">
<%--<px:PXDataSource ID="ds" runat="server" Visible="True" Width="100%"
TypeName="PX.Objects.SO.WMS.PickPackShip+Host" PrimaryView="HeaderView">--%>
```

3. Delete the first <px:PXDataSource> tag from this code block.

Note: Commenting out the tag is not enough; a developer should delete it completely.

4. Remove comments from the second <px:PXDataSource> tag.

The resulting code block should look as follows.

```
<px:PXDataSource ID="ds" runat="server" Visible="True" Width="100%"
TypeName="PX.Objects.SO.WMS.PickPackShip+Host" PrimaryView="HeaderView">
```

5. Refresh the page.

Mobile Development

Mapping Smart Panels to the Mobile App

A customiser can now map smart panels to the MYOB Advanced mobile app by using MSDL. (A smart panel is a complex window, as described in Dialog Box (PXSmartPanel).)

In the MYOB Advanced mobile app, smart panels are displayed as common screens.

For the mapping of smart panels, the following changes in MSDL have been made in this release:

- A new object named “dialog” has been introduced. A customiser should add this object inside the screen object to map a smart panel. Inside the dialog object, a customiser can map container and action objects.
- A new object named “action” has been introduced. A customiser should add this object inside the dialog object to map an action of a smart panel.
- The container object has been extended with the Boolean includeDialogActions property, which indicates whether a container includes an action of a smart panel.
- The recordAction, containerAction, selectionAction, and listAction objects have been extended with the redirectToDialog property. A customiser should assign the property the name of the window that the action should open.

Example: Adding a Smart Panel on the Sales Orders Screen

The following code demonstrates how to map the Inventory Lookup smart panel, which is implemented in the Details tab of the Sales Orders screen (SO301000).

```
update screen SO301000 {
  update container "OrderSummary" {
    formActionsToExpand = 3
    add recordAction "AddInvBySite" {
      displayName = "Add Stock Item"
      redirect = true
      redirectToDialog = "SO301000D1"
    }
  }

  add dialog SO301000D1 {
    type = FilterListScreen
    openAs = List
    add action "Ok" {
      DisplayName = "Add&Close"
      DialogAnswer = "OK"
      closeDialog = true
    }
    add action "Cancel" {
      DisplayName = "Cancel"
      DialogAnswer = "Cancel"
      closeDialog = true
    }
    add action "AddInvSelBySite"
    {
      DisplayName = "Add"
      closeDialog = false
    }
    add container "InventoryLookupInventory"
    {
      add field "Inventory"
      ...
    }
  }
}
```

```

    add field "HistoryDate"
  }

  add container "InventoryLookup"{
    type = SelectionActionList
    includeDialogActions = true
    add field "QtySelected"
    add field "Selected" {
      special = "ListSelection"
    }
    add field "Warehouse"
    ...
    add field "AlternateDescription"

    add listAction "AddInvSelBySite" {
      DisplayName = "Add"
    }
    add containerAction "Cancel" {
      displayName = "Cancel"
    }
    add listAction "Ok"
    {
      DisplayName = "Add&close"
      after = Close
    }
  }
}
}
}

```

Platform API

Moved Functionality

As of this release, some functionality has been moved as follows:

- The PXLogin class of the PX.Data namespace has been marked with the PXInternalUseOnly attribute, which means that this class is not intended for use by developers. Two services have been introduced that provide some of the functionality of the PXLogin class:
 - The service that implements the ILoginUIService interface: This service can be used from a customised login page to interact with the platform.
 - The service that implements the ILegacyCompanyService interface: With this service, developers can use some company-related methods that were previously available via the PXLogin class.
- Many members of the PXAccess class (which belongs to the PX.Data namespace) have been marked with the PXInternalUseOnly attribute, which means that they are not intended for use by developers. The service that implements the ICurrentUserInfoProvider interface has been introduced. This service provides the developers with some of the functionality of the PXAccess class.

Note: Some members of ICurrentUserInfoProvider are also marked with the PXInternalUseOnly attribute.

Resolved Issues

The following tables detail the issues that are addressed by this release.

Finance

Problem ID	Description
CE00013426 CE00012114 CE00013260 CE00013401	In some cases, Allocation Reversals posted to the original transaction period, even though transaction date belonged to a later period, resulting in an error. This has been resolved.
CE00011817 CE00010773 CE00016537	On the Production Order Details screen (AM209000), when selecting a config key on a new production order, items for the configuration were not added to the BOM. (When clicking Configure and recreating the configuration, the items were added.) This has been resolved.
CE00014549 CE00014481	In some cases, an error could occur when attempting to release Debit Adjustments on the Release AP Documents screen (AP501000). This has been resolved.
174466370635 173733720291	It was not possible to select a Source Branch on the Consolidation screen (GL103000) if the Ledger type was "Budget". This has been resolved.

Distribution

Problem ID	Description
CE00009659 CE00009592 CE00011038 CE00012203 CE00012480	The error message "The given key was not present in the dictionary" could occur when adding lines to a sales order. This has been resolved.
CE00013431 CE00012183	An error message occurred when attempting to correct an invoice, if an item was sold from a Warehouse location that had Receipt Allowed unticked. This has been resolved.
CE00013506 CE00011887	Sales Orders of type TR (transfer) did not display details in some of the columns on the Inventory Transfers list screen (IN3040PL). This has been resolved.
CE00014277 CE00014051	In some cases, payment references were not inserting/updating via the API when assigning a payment to a sales order. This has been resolved.
CE00015128 CE00014371	When copying a Stock Item, if the original stock item had an image on the Attributes tab, the new stock item will have the same ImageUrl as the original, but the image would not appear. This has been resolved.

Project Management

Problem ID	Description
CE00013385 CE00012902 CE00015005	In some cases, the PM History balances were always out, requiring the Validate Project Balances to be run regularly. This has been resolved.
CE00013996 CE00012735	In some cases, project costs were converted incorrectly based on the UOM on the Project Quotes screen (PM304500). This has been resolved.

Service Management

Problem ID	Description
CE00012994 CE00012924	In some cases, Service Orders were not allocating stock, even though stock was still available. This has been resolved.

People and Self-Service

Problem ID	Description
-	This release improves the system's performance when updating entitlements.

Customer Portal

Problem ID	Description
CE00013973 CE00013802	Customer Portal did not observe the Apply Line Discounts to Prices Specific to: option selected on the Accounts Receivable Preferences screen (AR101000). This has been resolved.

System and Platform

Problem ID	Description
CE00013441 CE00013414	This release includes performance improvements to the Generate Recurring Transactions screen (GL504000).
CE00013970 CE00014018	This release improves performance when moving transactions on the Move screen (GL504000).