MYOB Advanced

Release Notes

2022.1

Contents

Introduction

MYOB Advanced 2022.1 is a major release that adds a wide range of new features across the entire MYOB Advanced system.

New Features

Commerce

Automatically Populated Shipping Options and Payment Methods

Before importing sales orders from a Shopify or BigCommerce store to MYOB Advanced, an administrative user must map the payment methods and shipping options offered in the store to the payment methods and shipping options configured in MYOB Advanced. In previous versions, the user had to first find out the names of the store shipping options and store payment methods and then define the mappings. In many cases, the user learned the exact name only after the synchronisation of a sales order failed because of a missing mapping and the system added a row with it to the mapping table.

Starting in MYOB Advanced 2022.1, the system automatically populates the store payment methods and the store shipping options in the corresponding mapping tables when a connection is first established to a BigCommerce store on the BigCommerce Stores (BC201000) form or to a Shopify store on the Shopify Stores (BC201010) form.

The following screenshot shows the automatic population of the store shipping options for a BigCommerce store in the **Shipping Option Mapping** table on the **Order Settings** tab of the BigCommerce Stores form.

Store Shipping Options Populated for Shopify Stores

The following table shows the shipping options, which are a combination of a store shipping zone and a store payment method, that are populated for Shopify stores in the table on the **Shipping Settings** tab of the Shopify Stores (BC201010) form.

Store Shipping Zone	Store Shipping Method
Domestic	*Custom*
Domestic	*Economy*

Store Shipping Zone	Store Shipping Method
Domestic	*Expedited*
Domestic	*Standard*
Domestic	*UPS*
Domestic	*USPS*
Rest of the World	*CanadaPost*
Rest of the World	*Custom*
Rest of the World	*Economy International*
Rest of the World	*Express International*
Rest of the World	*First Class Package International*
Rest of the World	*Priority Mail Express International*
Rest of the World	*Priority Mail International*
Rest of the World	*Standard International*
Rest of the World	*UPS*
Rest of the World	*USPS*
Rest of the World	*Worldwide*

Store Shipping Options Populated for BigCommerce Stores

The following table lists the shipping options populated for BigCommerce stores in the Shipping Option Mapping table on the **Order Settings** tab of the **BigCommerce Stores** (BC201000) form.

Store Shipping Zone	Store Shipping Method
Rest of the World	*Flat Rate*

Store Shipping Zone	Store Shipping Method
Rest of the World	*Free Shipping*
Rest of the World	*Pickup in Store*
Rest of the World	*UPS*
Rest of the World	*USPS*
United States	*Flat Rate*
United States	*Free Shipping*
United States	*None*
United States	*Pickup in Store*
United States	*Ship by*
United States	*UPS*
United States	*USPS*

Store Payment Methods Populated for Shopify Stores

When a connection is first established to a Shopify store on the Shopify Stores (BC201010) form, the system adds the following store payment methods to the mapping table on the **Payment Settings** tab:

- *AMAZON*
- *AUTHORISENET*
- *BOGUS*
- *BRAINTREE*
- *CASH*
- *CASH ON DELIVERY (COD)*
- *CHEQUE*
- *GIFT_CARD*
- *PAYPAL*
- *SHOPIFY_PAYMENTS*

Store Payment Methods Populated for BigCommerce Stores

When a connection is first established to a BigCommerce store on the BigCommerce Stores (BC201000) form, the system adds the following store payment methods to the mapping table on the **Payment Settings** tab:

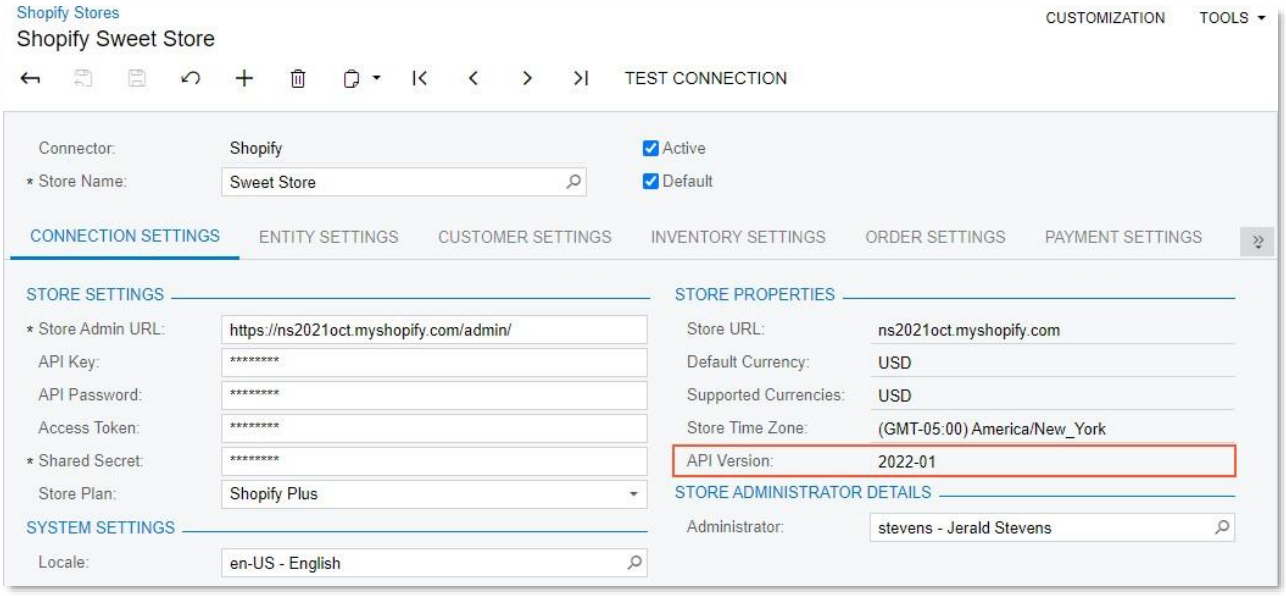
- *AMAZON*
- *AUTHORISENET (CREDIT_CARD)*
- *BRAINTREE*
- *CHEQUE (OFFLINE)*
- *COD (OFFLINE)*
- *CUSTOM (CUSTOM)*
- *GIFTCERTIFICATE (GIFT_CERTIFICATE)*
- *STRIPE*
- *TEST PAYMENT GATEWAY*

Tracking of the Shopify API Version

Shopify releases a new version of the Shopify API every quarter and supports each version for exactly one year.

Each version of MYOB Advanced uses a particular supported version of the Shopify API. To avoid possible issues, a company should upgrade its MYOB Advanced instance to a newer version before the support of the Shopify API version used in its instance is deprecated.

To help users identify which version of the Shopify API is used in their version of MYOB Advanced, on the Connection Settings tab of the Shopify Stores (BC201010) form, a new API Version field has been added (shown in the following screenshot).



Changes to the Activation of Entities

In MYOB Advanced 2022.1, updates have been made to show the dependencies of the entities displayed in the table on the **Entity Settings** tab of the BigCommerce Stores (BC201000) and Shopify Stores (BC201010) forms.

The table below summarises the dependencies of the entities that can be activated or deactivated on the **Entity Settings** tab of the BigCommerce Stores form as follows:

- The **Required Entities** column shows the entities that must be activated as a prerequisite for the current entity (that is, the entity in the current row). Without the activation of the required entities, the synchronisation of the current entity is not possible.
- The **Activated Entities** column lists the entities that the system activates when a user activates the current entity.
- The **Deactivated Entities** column lists the entities that the system deactivates when a user deactivates the current entity.

Entity	Required Entities	Activated Entities	Deactivated Entities
Customer Price Class	None	None	None
Base Sales Price	At least one of the following entities: • *Stock Item* • *Non-Stock Item* • *Template Item*	*Stock Item*	None
Price List	*Customer Price Class* and at least one of the following entities: • *Stock Item* • *Non-Stock Item* • *Template Item*	• *Customer Price Class* • *Stock Item*	None
Customer	None	None	• *Sales Order* • *Customer Location* • *Payment* • *Shipment* • *Refund*
Customer Location	*Customer*	*Customer*	None

Entity	Required Entities	Activated Entities	Deactivated Entities
Sales Category	None	None	None
Stock Item	None	None	*Product Availability* if *Template Item* is not activated
Non-Stock Item	None	None	None
Template Item	None	None	Product Availability if Stock Item is not activated
Product Image	At least one of the following entities: • Stock Item • Non-Stock Item • Template Item	Stock Item	None
Product Availability	At least one of the following entities: • Stock Item • Template Item	Stock Item	None
Sales Order	Customer	Customer	• Payment • Shipment • Refund
Payment	Sales Order	• Sales Order • Customer	Refund
Shipment	Sales Order	• Sales Order • Customer	None
Refund	• Sales Order • Payment	• Sales Order • Payment • Customer	None

The following table summarises the dependencies of entities that can be activated or deactivated on the **Entity Settings** tab of the Shopify Stores form.

Entity	Required Entities	Activated Entities	Deactivated Entities
Customer	None	None	• *Sales Order* • *Customer Location* • *Payment* • *Shipment* • *Refund*
Customer Location	*Customer*	*Customer*	None
Stock Item	None	None	*Product Availability* (if *Template Item* is not activated)
Non-Stock Item	None	None	None
Template Item	None	None	Product Availability (if Stock Item is not activated)
Product Image	At least one of the following entities: • Stock Item • Non-Stock Item • Template Item	Stock Item	None
Product Availability	At least one of the following entities: • Stock Item • Template Item	Stock Item	None
Sales Order	Customer	Customer	• Payment • Shipment • Refund
Payment	Sales Order	• Sales Order • Customer	Refund
Shipment	Sales Order	• Sales Order • Customer	None
Refund	• Sales Order • Payment	• Sales Order • Payment • Customer	None

Other Improvements

In MYOB Advanced 2022.1, multiple improvements to commerce-related functionality have been introduced, as described below.

Changes to the Export of Sales Categories to BigCommerce

Starting in MYOB Advanced 2022.1, the synchronisation of sales categories is no longer required for the export of stock, non-stock, and template items to a BigCommerce store.

Now items can be exported to BigCommerce even if the Sales Category entity has not been activated on the **Inventory Settings** tab of the BigCommerce Stores (BC201000) store.

If the Sales Category entity has been activated, during the synchronisation of a stock, non-stock, or template item, the system does the following:

- If any sales categories are assigned to the item in MYOB Advanced and have been exported to the BigCommerce store (or created there), assigns the exported item to these categories in the BigCommerce store.
- If no sales categories are assigned to the item, the default sales category or categories have been specified on the **Inventory Settings** tab of the BigCommerce Stores store, and the default sales categories have been synchronised with the BigCommerce store, assigns the exported item to these categories in the BigCommerce store.
- If no sales categories are assigned to the item and no default categories have been specified, exports the item and does not assign it to any sales categories in the BigCommerce store.

Note: Any categories that have been assigned to the item in the BigCommerce store become unassigned.

Use of the Sales UOM in Sales Price Export and Order Import

In previous versions of MYOB Advanced, only the sales prices defined for items in the base unit of measure (UOM) could be exported to the BigCommerce store. Also, when an order was imported from a BigCommerce store and a Shopify store, on the **Details** tab of the Sales Orders (SO301000) form, the system inserted the base UOM in the order lines. This could lead to a discrepancy if the sales unit of measure was different than the base unit of measure.

In MYOB Advanced 2022.1, when a user prepares and processes the Base Sales Price or Price List entities, only the sales prices defined for the item in the sales UOM are exported to the BigCommerce store. Similarly, the system now inserts the sales UOM in the sales order lines of imported orders.

Changes to the Export of Non-Stock Items to BigCommerce

In previous versions of MYOB Advanced, when a non-stock item was exported to a BigCommerce store, it was marked in the control panel of the BigCommerce store as a digital product (that is, the **Product Type** field under **Basic Information** was set to Digital). When an

order with these items was created in the BigCommerce store, it did not contain shipping information. After the order was imported to MYOB Advanced and a shipment was created, the shipment could not be exported to the BigCommerce store.

Starting in MYOB Advanced 2022.1, if a non-stock item is marked as not requiring shipping, it is exported to the BigCommerce store as a digital item. Shipping is not required for the non-stock item when the **Require Shipment** checkbox is cleared on the General tab of the Non-Stock Items (IN202000) form. If a non-stock item is marked as requiring shipping, it is exported to the BigCommerce store as a physical item. (In this case, the **Require Shipment** checkbox is selected.)

Improved Export of Product Availability Data

In MYOB Advanced 2022.1, the synchronisation mechanism for the export of product availability data has been reworked to use dynamic BQL to query the database directly, without using generic inquiries. Also, the export of product availability settings to Shopify or BigCommerce stores has been optimised and now works as summarised in the following table. For each row, when the entity (**Entity** column) is synchronised, the settings of the exported items in the BigCommerce or Shopify store are updated based on the settings listed in the **Availability Settings Synced with BigCommerce** or **Availability Settings Synced with Shopify** columns, respectively.

Entity	Availability Settings Synced with BigCommerce	Availability Settings Synced with Shopify
Stock Item, *Non-Stock Item*, and *Template Item*	All product availability settings ex- cept **When Qty Unavailable**	All product availability settings
Product Availability	**Default Availability** and **When Qty Unavailable**	**Default Availability** and **When Qty Unavailable**

The default availability settings are defined on the **Inventory Settings** tab of the BigCommerce Stores (BC201000) or Shopify Stores (BC201010) form. The item-specific availability settings, which take precedence over the default values, are defined on the **eCommerce** tab of the Non-Stock Items (IN202000), Stock Items (IN202500), and Template Items (IN203000) forms.

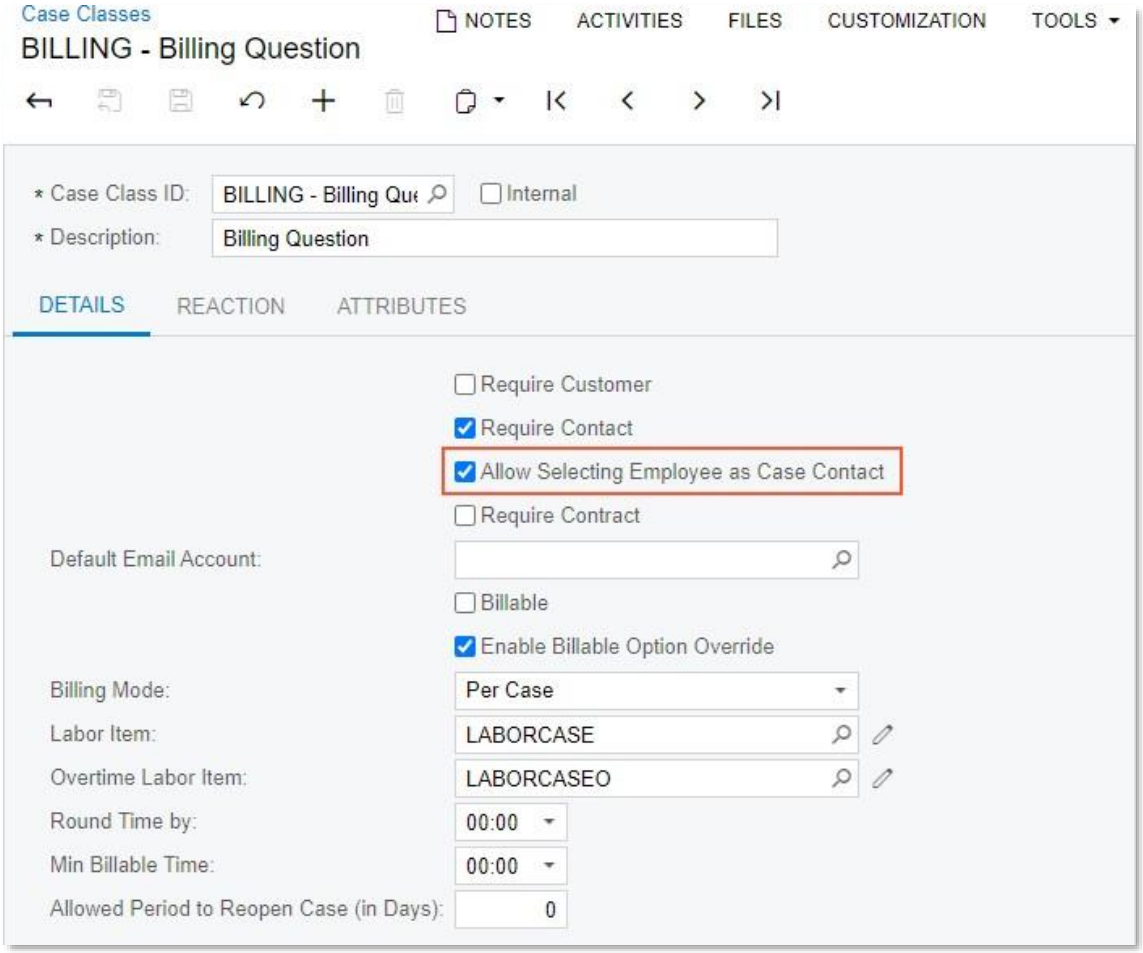
CRM

Selection of Employees as Case Contacts

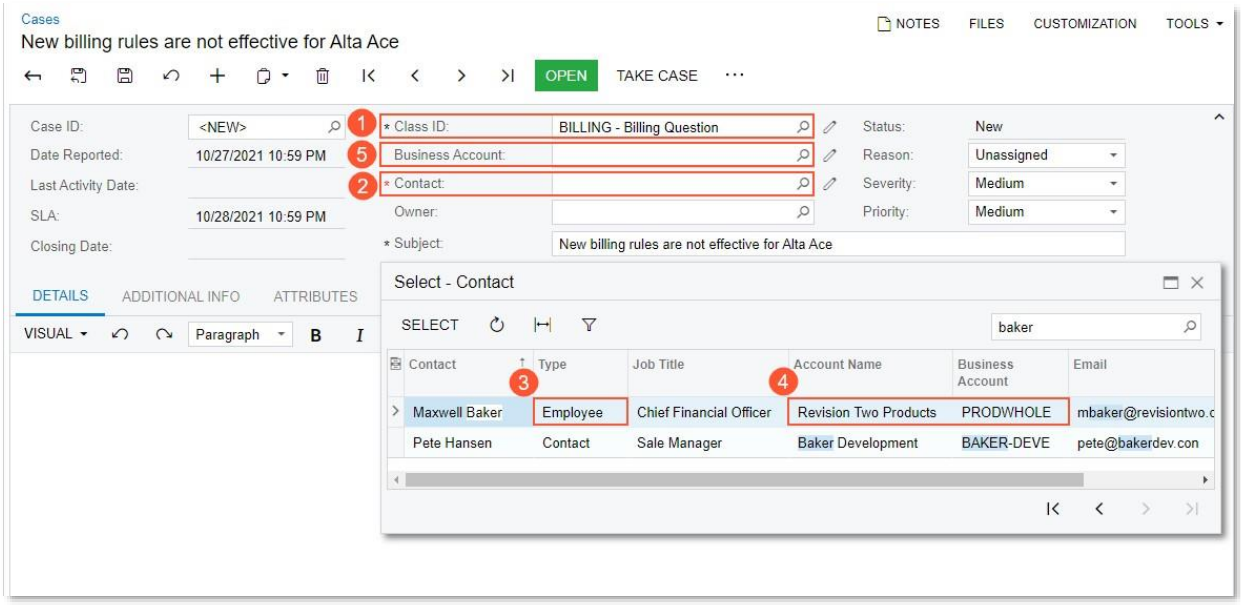
In MYOB Advanced 2022.1, a user who is reporting a case on the Cases (CR306000) form can select an employee of the user's own organisation as the case contact, in addition to being able to select a case contact of a business account. This gives users of MYOB Advanced the ability to submit cases to their organisation's internal IT or legal team. Users can select their own employee accounts as the case contacts.

In previous versions of MYOB Advanced, a user could select a case contact among employees only if the user created the case in the Self-Service Portal. Starting in MYOB Advanced 2022.1, the user can select a case contact among employees both in the system and in the Self-Service Portal.

This ability depends on a new setting for a case class, which determines whether an employee can be a case contact for a case of the class. On the **Details** tab of the Case Classes (CR206000) form, the **Allow Selecting Employee as Case Contact** checkbox has been added, as shown in the following screenshot.



If this checkbox is selected for a class, for a case of the class (see Item 1 in the following screenshot), in the **Contact** field (Item 2) of the Cases (CR306000) form, a user can select a contact of the Employee type (Item 3). The system will insert the name of the employee's company, which is in the **Account Name** column of the lookup table (Item 4), in the **Business Account** field of the form (Item 5). (If the company has multiple branches, the name of the branch will be inserted instead of the company name.)



Enhancements to CRM Events

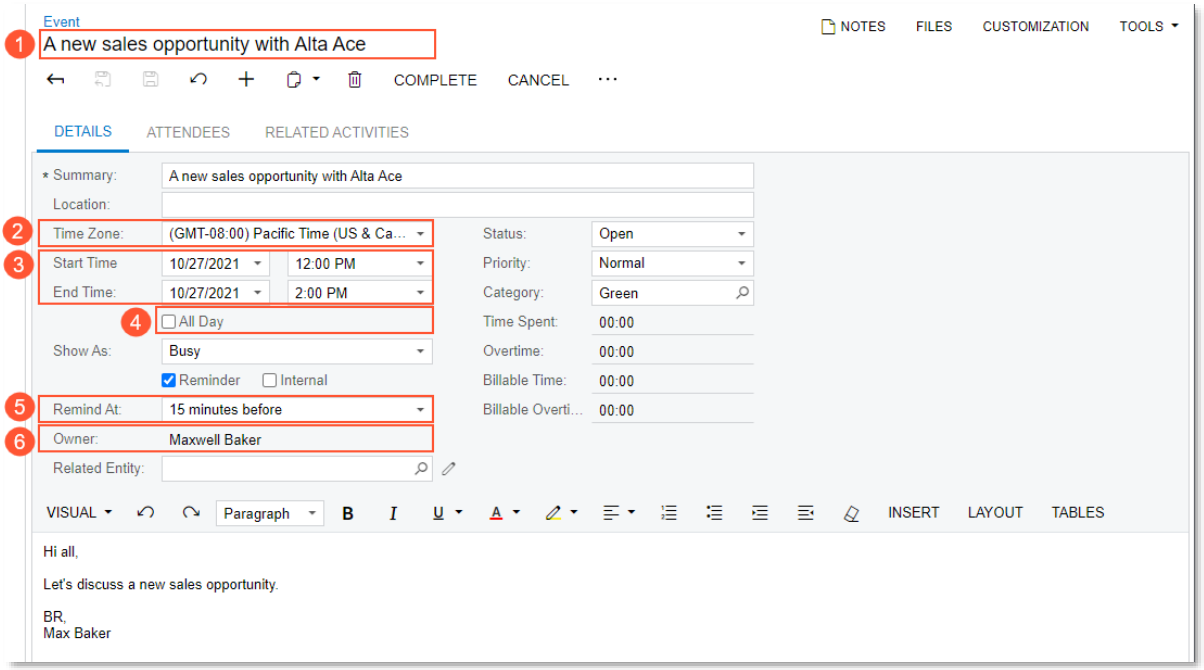
MYOB Advanced 2022.1 introduces a new layout of the Event (CR306030) form to make data entry faster and easier. Also, a new Events (EP4041PL) form has been added, which gives users the ability to view the existing events and to navigate between events more easily.

New Layout of the Event Form for the Owner or Creator

In MYOB Advanced 2022.1, the Event (CR306030) form has a new layout. The form layout is different for the owner (see the following screenshot) than for a potential attendee of the event (see the screenshot in the next section). The form's subtitle (see Item 1 in the following screenshot) contains the description copied from the **Summary** field of the Details tab. Also, the order of the tabs has been changed, and on the **Details** tab, many UI elements have been rearranged or added to improve usability.

The form toolbar has been enhanced as follows:

- The standard **Add New Record** button has been added.
- The standard **Clipboard** button, which a user clicks to open the **Clipboard** menu, has been added.
- The **More** button has been added; a user clicks it to open the **More** menu and access additional commands.



In the new **Time Zone** field (see Item 2 in the previous screenshot), the event creator or owner selects the time zone in which the start and end time are specified. Thus, the event creator or owner can select the time zone relevant to them or the time zone of most event attendees. By default, the **Time Zone** field shows one of the following:

- The default time zone specified for all users in the system, which is located on the Site Preferences (SM200505) form in the **Login Time Zone** field of the **General Defaults** section.
- The default time zone of the user currently signed in to the system if it differs from the default time zone specified for all system users. The user's default time zone is specified on the User Profile (SM203010) form in the **Time Zone** field of the **Personal Settings** section.

The time zone selected in this field can differ from the time zones listed above. If the event owner changes the time zone after the start and end time have already been entered, the **Start Time** and **End Time** (Item 3) are adjusted to the new time zone. For example, if an event takes place in New York, the time zone is Greenwich Mean Time (GMT) minus five hours, the start time is 1:00 PM, and the event owner changes the time zone to fit Arizona, GMT minus seven hours, the event's start time will be 1:00 PM, but according to the new time zone. All the potential event attendees can see the start time and end time of the event in the default time zone of their user account.

If the owner of the event changes the time zone again and saves the changes on the Event form, the system shows a warning message asking if the owner wants to notify the invited attendees about the new time of the event.

If the **All Day** checkbox (Item 4) is selected, the system sets the time zone of an event to the default one for the owner and makes the **Time Zone** field unavailable for editing.

Note: After the upgrade to MYOB Advanced 2022.1 from previous versions, the default time zone of the system (or the user's default time zone if it differs) is specified in the Time Zone field on the Event form for all existing events.

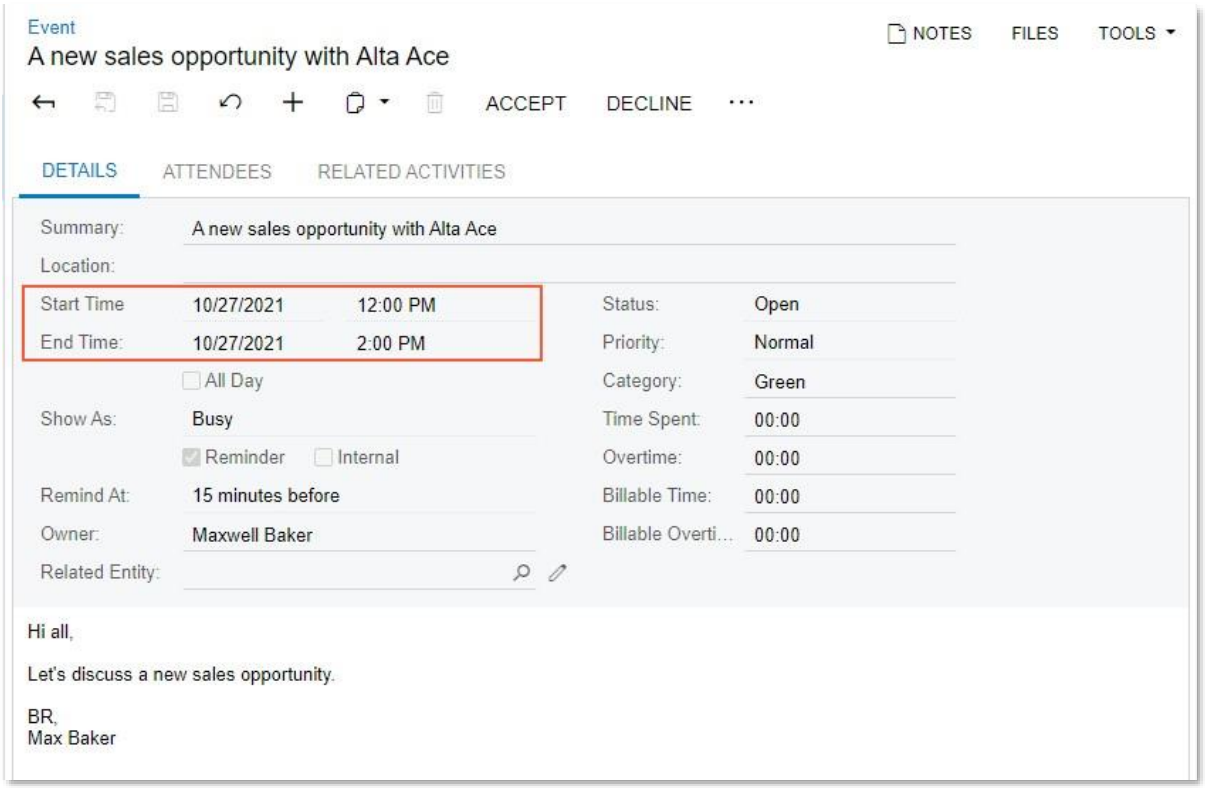
In the **Remind At** field (Item 5), instead of a specific date and time, the event creator or owner now selects an option that describes when attendees should be reminded relative to when the event starts. The options available in this field (such as 15 minutes before, 1 hour before, or 1 day before) depend on whether the event takes the whole working day (that is, the **All Day** checkbox is selected) or a time period making up part of the day.

The new **Owner** field (Item 6) has been added. The event's creator or current owner can specify a value in this field during event creation or later if the owner of the event is not initially specified.

New Layout of the Event Form for a Potential Attendee

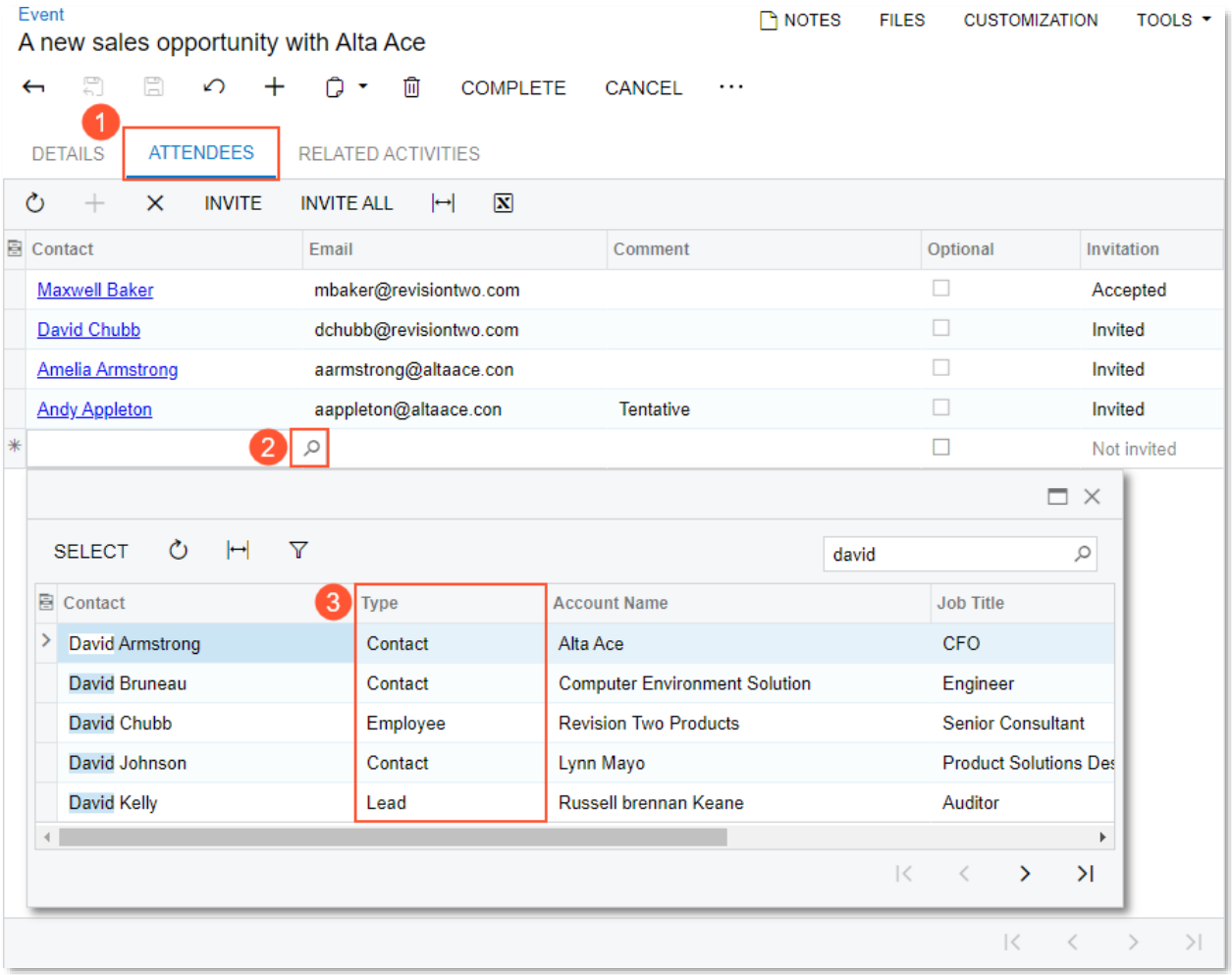
On the **Details** tab of the Event (CR306030) form (shown and described in the previous section), the commands and UI elements available and visible to a potential event attendee differ from those used by the event's creator or owner. The following screenshot shows the Event form as a potential attendee sees it.

The form toolbar and the More menu have the **Accept** and **Decline** commands, which the potential attendee can use to indicate whether they will attend the event. For a potential attendee, the settings on the **Details** and **Attendees** tabs are unavailable for editing. Also, on the **Details** tab, the **Time Zone** field is not displayed, and the times in the **Start Time** and **End Time** fields are adjusted to the attendee's default time zone.



Enhancements Related to Event Attendees

In previous versions, the creator or owner of the selected event could select potential attendees of the event on the **Attendees** tab of the Event (CR306030) form among only employees. If a contact was not an employee, the user could add this contact and the contact's email address to the event only manually. In MYOB Advanced 2022.1, the event's creator or owner can select potential event attendees (see Item 1 in the following screenshot) among all leads, contacts, and employees defined in the system. To select an attendee, the user should add a new row to the table, click the magnifier button in the **Contact** column for the row (Item 2), and in the lookup table that opens, select the attendee. The table lists not only employees, but also leads and contacts (Item 3).

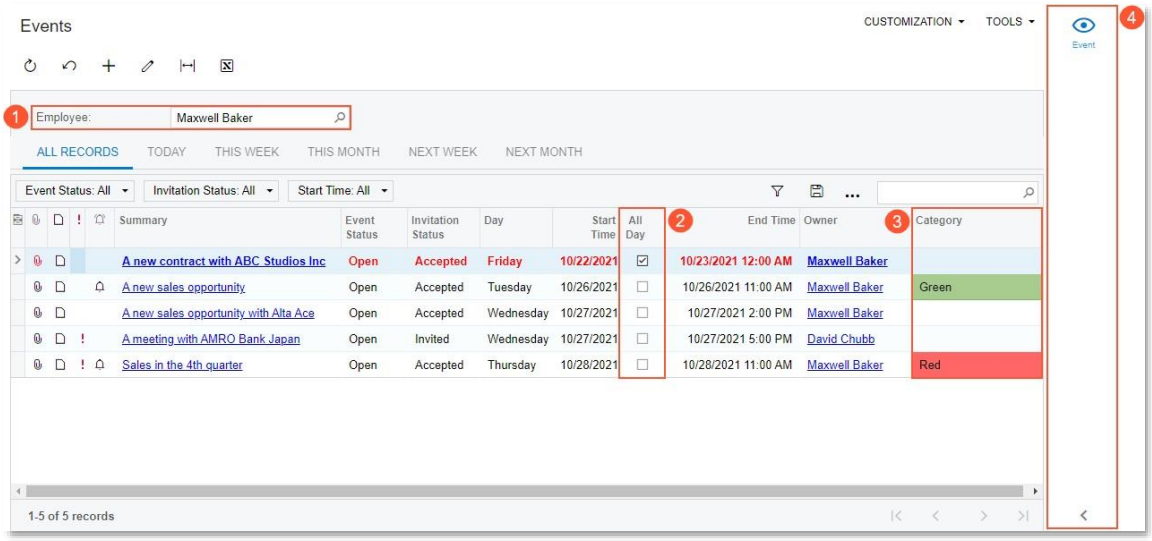


New Events (EP4041PL) Generic Inquiry Form

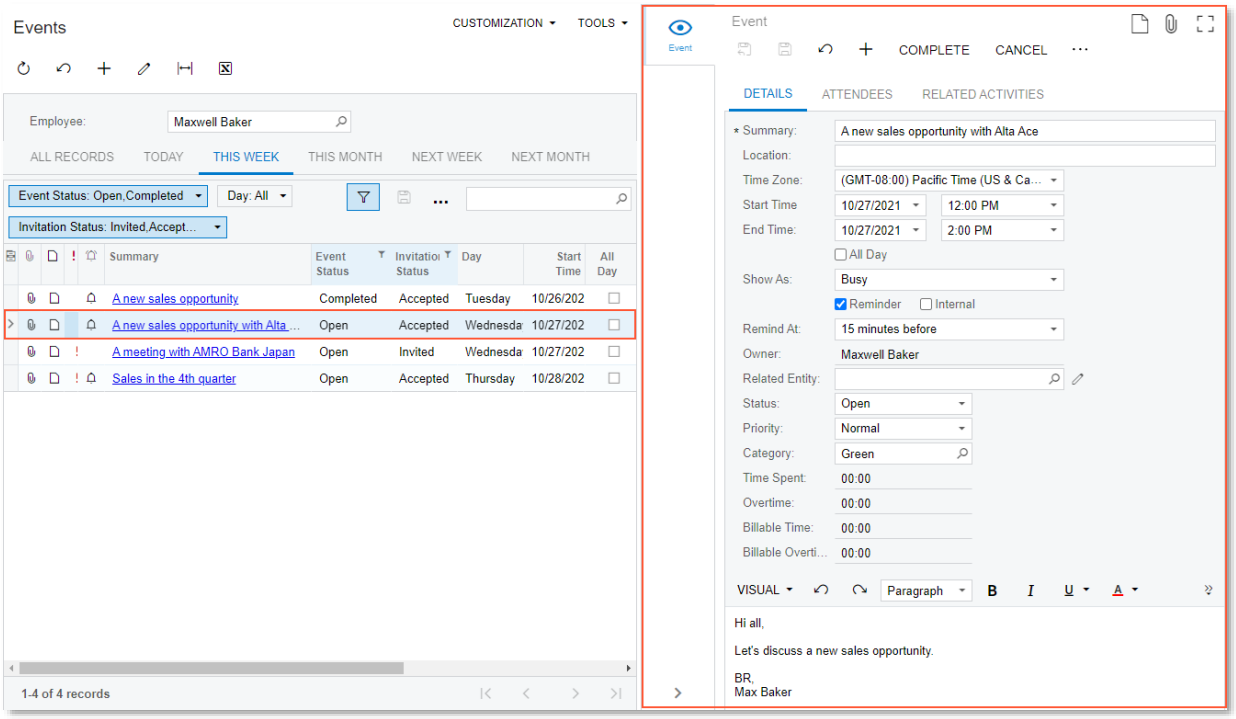
Starting in MYOB Advanced 2022.1, the new Events (EP4041PL) generic inquiry form, shown in the following screenshot, has been added. The new form lists only events owned or attended by the employee selected in the **Employee** field (Item 1 in the following screenshot). By default, the system inserts the name of the employee associated with the user who is currently signed in to the system.

Among other summary information about the events, the form now includes the **All Day** column (Item 2) to show all-day events and the **Category** column (Item 3), which contains the event category to help users prioritise the events. The event categories and highlighting (if applicable) can help a user to easily identify the importance of the event.

The Events (EP4041PL) form is a generic inquiry that can be modified, if needed, through the **Customisation** menu on the form title bar by a customiser or administrative user with the Customiser role assigned.



Also, a side panel has been added to the form (see Item 4 in the previous screenshot). By clicking an event in the list and opening the side panel, a user can quickly find, view, and modify the information related to any listed event (see the following screenshot).

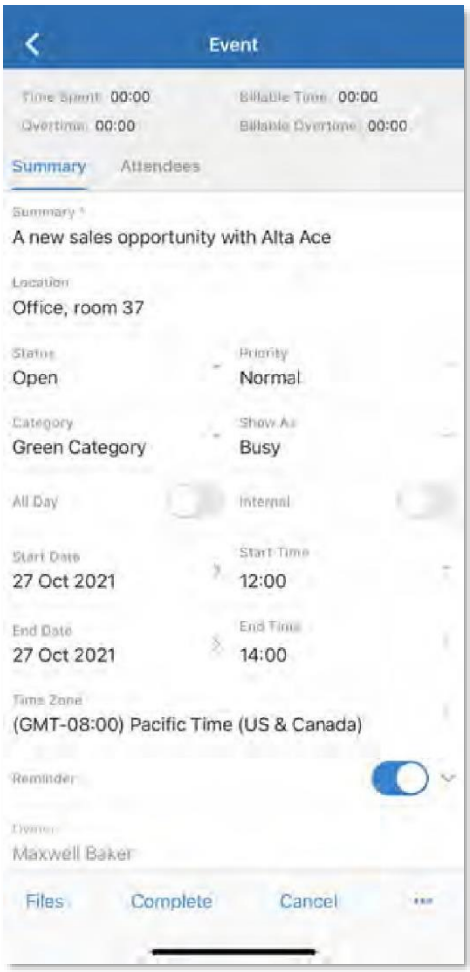


The obsolete Events (EP404100) and Event Attendee Statuses (EP204050) forms have been deleted from the system.

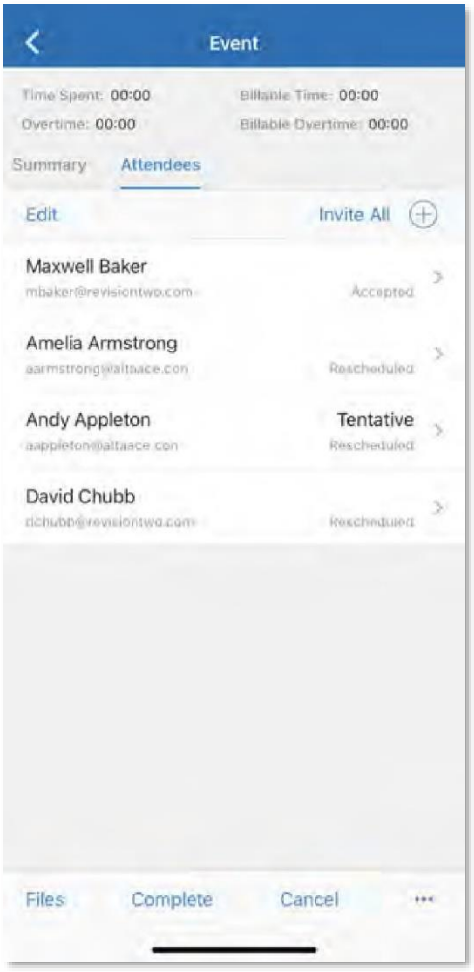
Event-Related Enhancements in the Mobile App

In MYOB Advanced 2022.1, the usability of the Event screen in the MYOB mobile app has been improved. The **Summary** tab of the screen has been enhanced as follows (see the screenshot below):

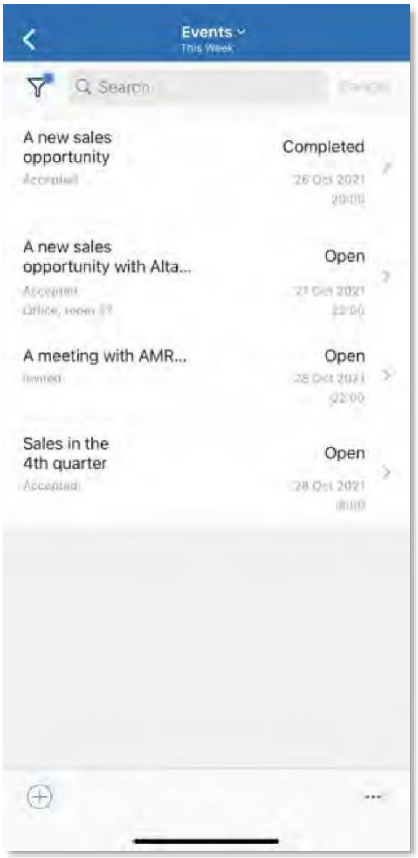
- The **Remind At** field (which the user accesses by expanding the Reminder group of elements) includes such options as **15 minutes before**, **1 hour before**, or **1 day before**.
- The **Time Zone** field has been added.
- The **Owner** field has been placed below the **Reminder** group of elements (at the bottom of the tab).



The updated Attendees tab of the Event screen is shown in the following screenshot. On this tab, users can now select attendees among leads, contacts, and employees.



MYOB Advanced 2022.1 also introduces the new screen, shown in the following screenshot, which lists the events owned or attended by the employee associated with the user who is currently signed in to the system. For each event, it shows the description of the event, the status, the invitation status of an attendee, the start date and time, and the location (if one has been specified).



Enhanced Merging of Duplicates and Association of Records

In MYOB Advanced 2022.1, users can merge duplicate records and associate leads, contacts, and business accounts, including duplicates, faster and more easily. Also, during this association of leads, contacts, and accounts, users can now indicate on the fly which settings should be used for the associated records.

Enhancements to the Duplicates Tab

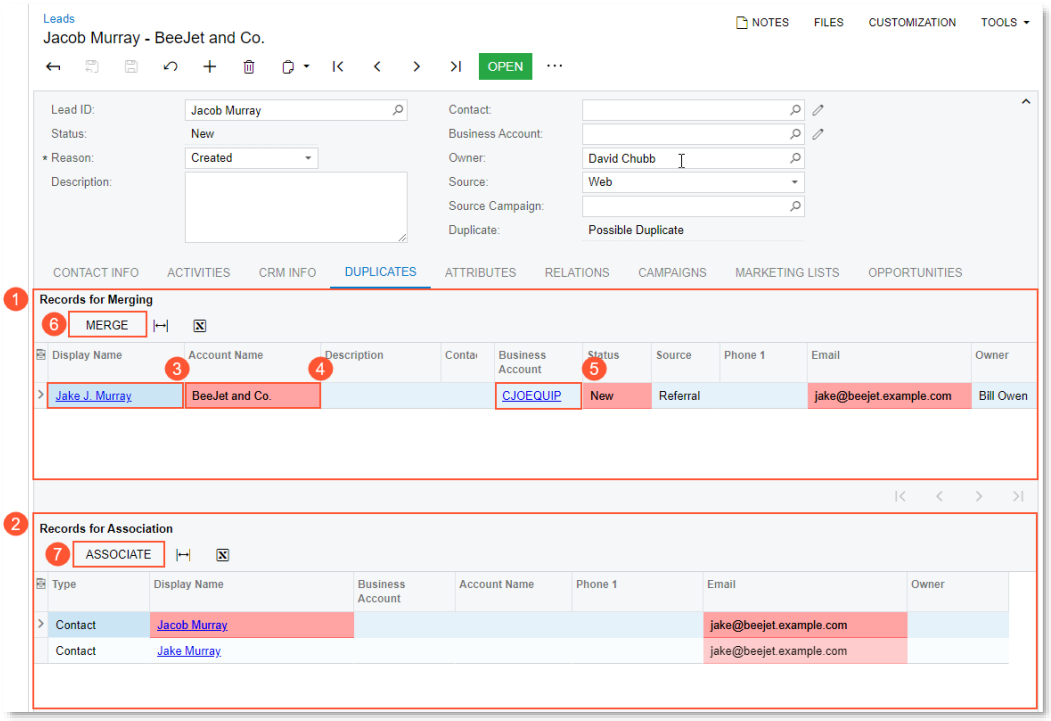
In previous versions of MYOB Advanced, duplicate records that are available for both merging and association were displayed in one table on the **Duplicates** tab of the Leads (CR301000) and Contacts (CR302000) forms.

Starting in MYOB Advanced 2022.1, the **Duplicates** tab of the Leads and Contacts forms has been enhanced to group possible duplicate records of the lead or contact the user is currently viewing by the way they should be processed. Users can merge duplicates in the **Records for Merging** table (see Item 1 in the screenshot below) and associate records in the **Records for Association** table (Item 2).

In both tables of these forms, UI elements that hold duplicate values are highlighted in red (see Item 4). If a user clicks a link in the **Display Name** (Item 3), the corresponding duplicate record opens in a new browser tab. Similarly, a user can click a link in the **Business Account** column (Item 5) to open the corresponding business account in a new browser tab.

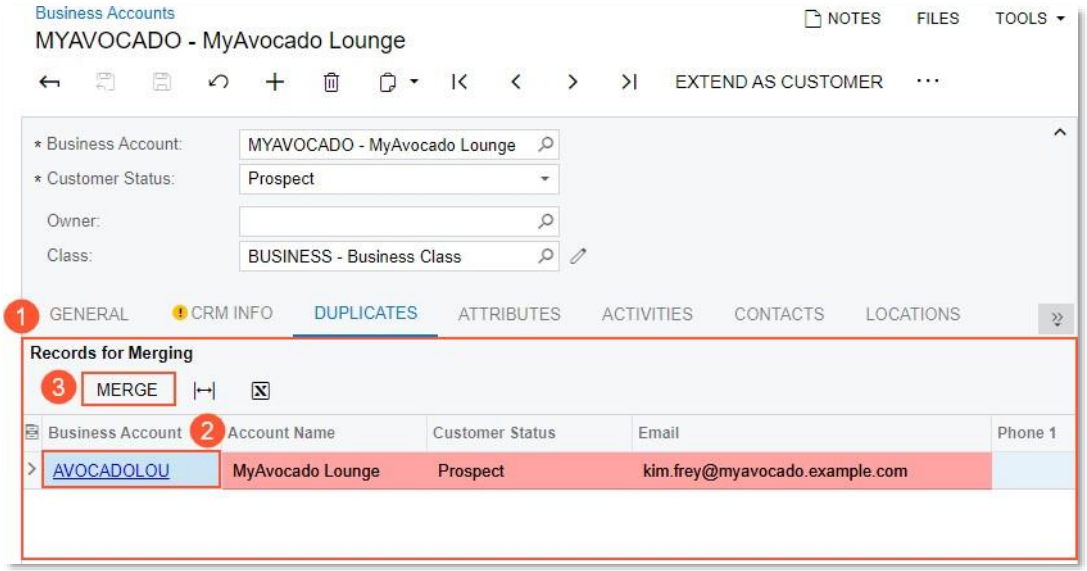
In the **Records for Merging** table, the user can select a duplicate record and click **Merge** on the table toolbar (Item 6) to start merging the current record with the duplicate. This process is described in the following section.

In the **Records for Association** table, the user can select a duplicate record and click **Associate** on the table toolbar (Item 7) to start associating the current record with the duplicate. For details, see the Association of Leads, Contacts, and Business Accounts section.



In MYOB Advanced 2022.1, the **Duplicates** tab on the Business Accounts (CR303000) form (see Item 1 in the following screenshot) the **Records for Merging** label has been added to the table. UI elements that hold duplicate values are highlighted in red. If a user clicks a link in the **Business Account** column (Item 2), the business account opens in a new browser tab.

A user can select a duplicate account and click **Merge** on the table toolbar (Item 3) to start merging the current account with the duplicate account. For details, see the following section.

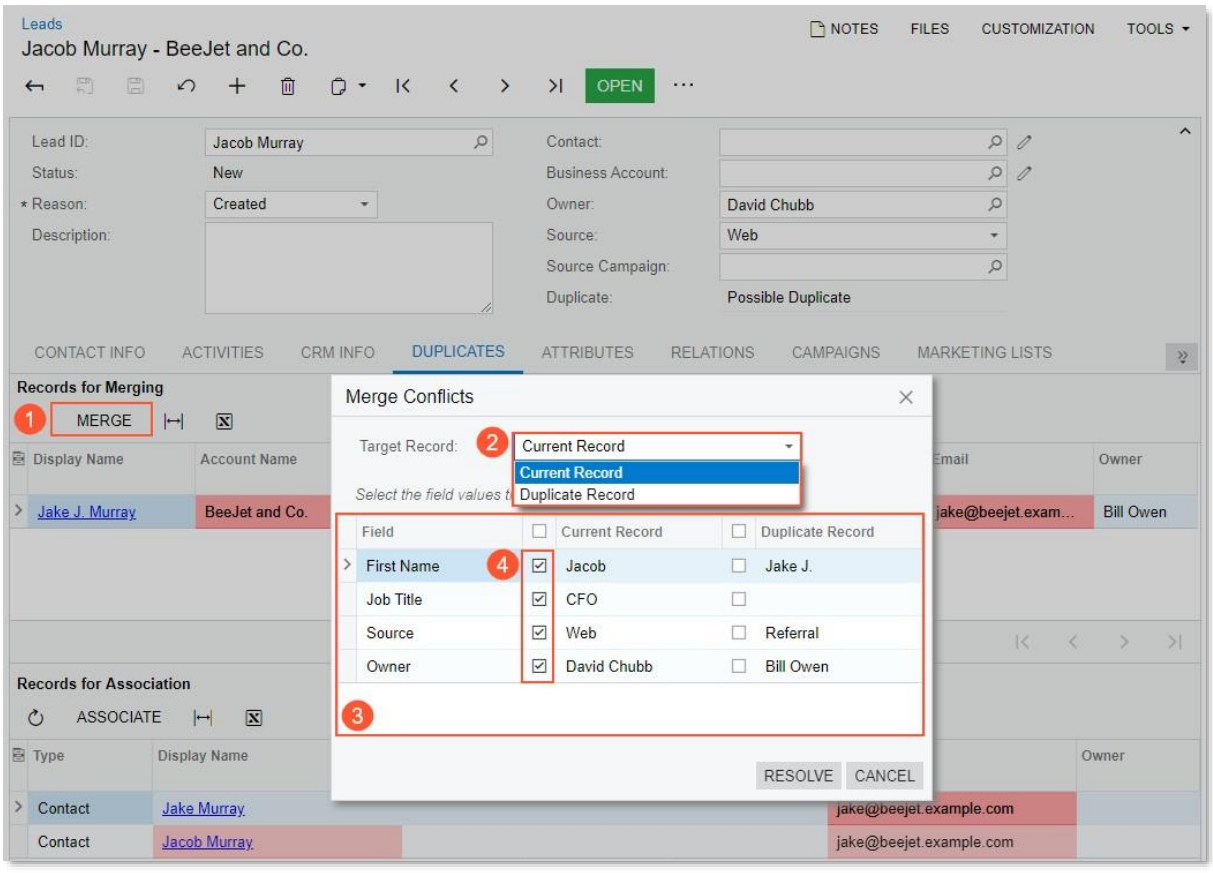


Merging of Duplicate Leads, Contacts, and Business Accounts

In the **Records for Merging** table on the **Duplicates** tab of the applicable form, a user can merge duplicate records as follows:

- The selected lead on the Leads (CR301000) form with a duplicate lead in the table.
- The selected contact on the Contacts (CR302000) form with a duplicate contact in the table.
- The selected account on the Business Accounts (CR303000) form if it has the Business Account type with a duplicate account in the table.

The user can select only one record at a time to be merged with the record currently being viewed on the form. The **Merge** button (see Item 1 in the following screenshot) is available on the table toolbar only if this record has been saved at least once. When the user selects a record in the table and clicks **Merge**, the **Merge Conflicts** dialog window opens. In the **Target Record** field (Item 2), the user can select the record to be kept after the merge, either the record currently being viewed on the form (the **Current Record** option) or the duplicate record selected in the **Records for Merging** table (the **Duplicate Record** option). The table in the dialog window (Item 3) shows field values that differ in these records. Field values are values of elements on the entry form for a record.



If the **Target Record** field contains the **Current Record** option (which is the default setting), the unlabelled checkbox left of each field value of the currently viewed record (see Item 4 in the previous screenshot) is selected by default in either of the following cases:

- The compared fields have different values in the currently viewed record and the duplicate record.
- The field value is empty for the duplicate record.

If the user changes the option in the **Target Record** field to **Duplicate Record**, the checkboxes left of the field values of the duplicate record become selected.

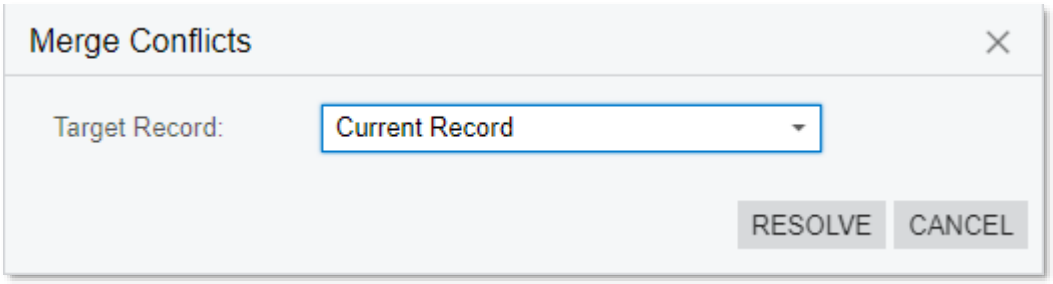
A user can select the field values to be kept in the currently selected record by selecting the needed checkboxes. If the user clears a checkbox, the field value will be empty after the merge.

A particular field is displayed in the table of the **Merge Conflicts** dialog window when the following conditions are met on the corresponding entry form:

- The UI element for the field is displayed in the Summary area of the Leads or Contacts form, on the **CRM Info** tab of either form, on the **Contact Info** tab of the Leads form, or on the **Details** tab of the Contacts form for the contact. (This condition is required.)
- For a contact, the value of the element corresponding to this field on the Contacts form is available for changing. (This condition is required.)
- The field values of the record currently being viewed and the duplicate record are different. (This condition is required.)
- Either value in the pair of the compared fields is empty. (This condition is optional.)

Note: The **Primary Contact** field is shown in the **Merge Conflicts** dialog window. Suppose that a user is attempting to merge two business accounts and the user has selected the business account currently being viewed as the target. If the user selects a primary contact from a duplicate account as the primary contact for the target account, this contact is associated with the target business account and selected as its primary contact.

If after the user clicks **Merge**, no different field values have been found during duplicate validation, the **Merge Conflicts** dialog window has only the **Target Record** field and the **Resolve** and **Cancel** buttons, as shown in the following screenshot. The user can select the target record and complete or cancel the merge of the duplicates.



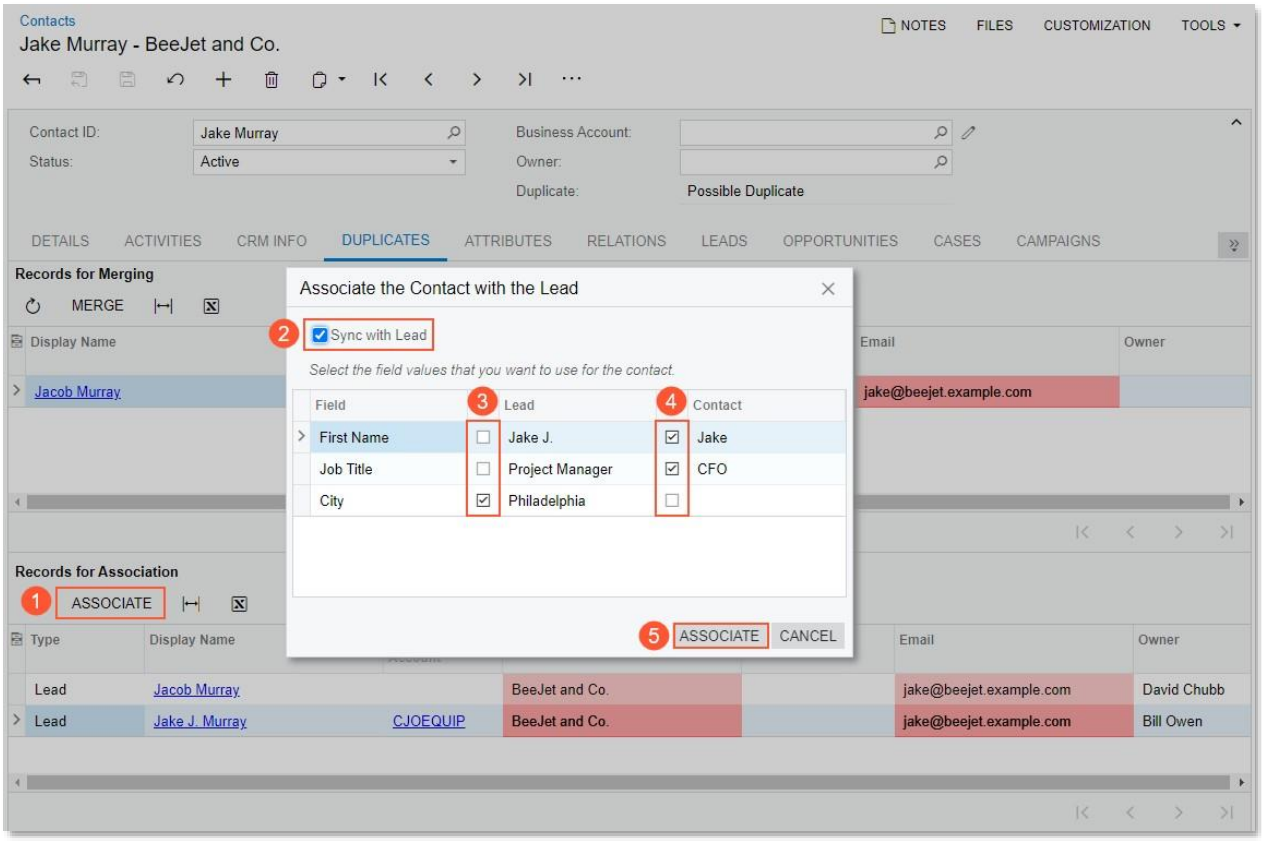
Association of Leads and Contacts

In previous versions of MYOB Advanced, if a user associated a lead with a duplicate contact, the user could not select the field values to be kept in the lead and the associated contact.

Starting in MYOB Advanced 2022.1, in the new **Associate the Contact with the Lead** dialog window, a user can select the contact settings to update in the existing contact when it is associated with a lead.

The dialog window opens if the user does any of the following:

- Selects a contact in the **Contact** field of the *Leads* (CR301000) form for a lead.
- Associates a lead with a duplicate contact on the **Duplicates** tab of the *Leads* form by selecting the duplicate contact and clicking **Associate** on the table toolbar of the **Records for Association** table.
- Associates a contact with a duplicate lead on the **Duplicates** tab of the *Contacts* (CR302000) form by selecting the duplicate lead and clicking **Associate** (see Item 1 in the following screenshot) on the table toolbar of the **Records for Association** table.



The table in the **Associate the Contact with the Lead** dialog window lists the field values (that is, the values of the UI elements) from the **Contact Info** tab on the *Leads* form and the **Details** tab on the *Contacts* forms. By default, the **Sync with Lead** checkbox is selected (see Item 2 in the previous screenshot), meaning that after the lead and the contact have been associated with each other, they will have the same updated contact settings. These settings will be updated as follows:

- The contact's field values will be replaced with the selected lead's field values.
- The lead's field values will be replaced with the selected contact's field values.

The unlabeled checkboxes left of the field values are also available for selection (Item 3 and Item 4). For each field listed in the dialog window, a field value is selected by default as follows:

- If values are specified for the field for both the lead and the contact, the checkbox left of the contact's field value is selected.
- If a field value is empty for the contact and is specified for the lead, the checkbox left of the lead's field value is selected.

Note: If a user clears the **Sync with Lead** checkbox, the checkboxes in the table become unavailable for changing. In this case, after the lead has been associated with the contact, the contact settings on the *Leads* form remain unchanged, and the contact's settings on the *Contacts* form are not updated with values from the associated lead.

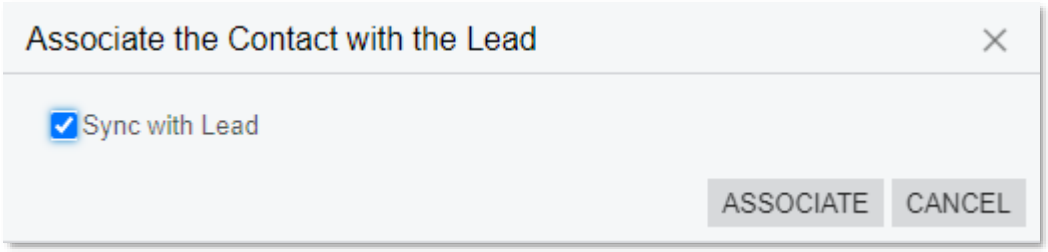
A particular field is displayed in the table of the **Associate the Contact with the Lead** dialog window when the following conditions are met:

- The UI element for the field is displayed on the **Contact Info** tab of the *Leads* form for the lead or the **Details** tab of the *Contacts* form for the contact. (This condition is required.)
- For a contact, the value of the element corresponding to this field on the *Contacts* form is available for changing. (This condition is required.)
- The field values of the lead and the contact are different. (This condition is required.)
- The field value on the *Leads* form is not empty. (This condition is optional.)

In the **Associate the Contact with the Lead** dialog window, a user can do any of the following:

- Leave the **Sync with Lead** checkbox selected, synchronise the contact and address settings in the lead and contact, and associate the lead with the contact by clicking **Associate** (Item 5 in the screenshot above). The **Override** checkbox on the **Contact Info** tab of the *Leads* form remains cleared.
- Associate the lead with the selected contact without the synchronisation of the contact and address settings by clearing the **Sync with Lead** checkbox and clicking **Associate**. The **Override** checkbox on the **Contact Info** tab of the *Leads* form becomes selected.

If after the user clicks **Associate**, no different field values have been found, the **Associate the Contact with the Lead** dialog window has only the **Sync with Lead** checkbox and the **Associate** and **Cancel** buttons, as shown in the following screenshot. The table that lists lead's and contact's settings to be compared is not displayed.



The user can do any of the following:

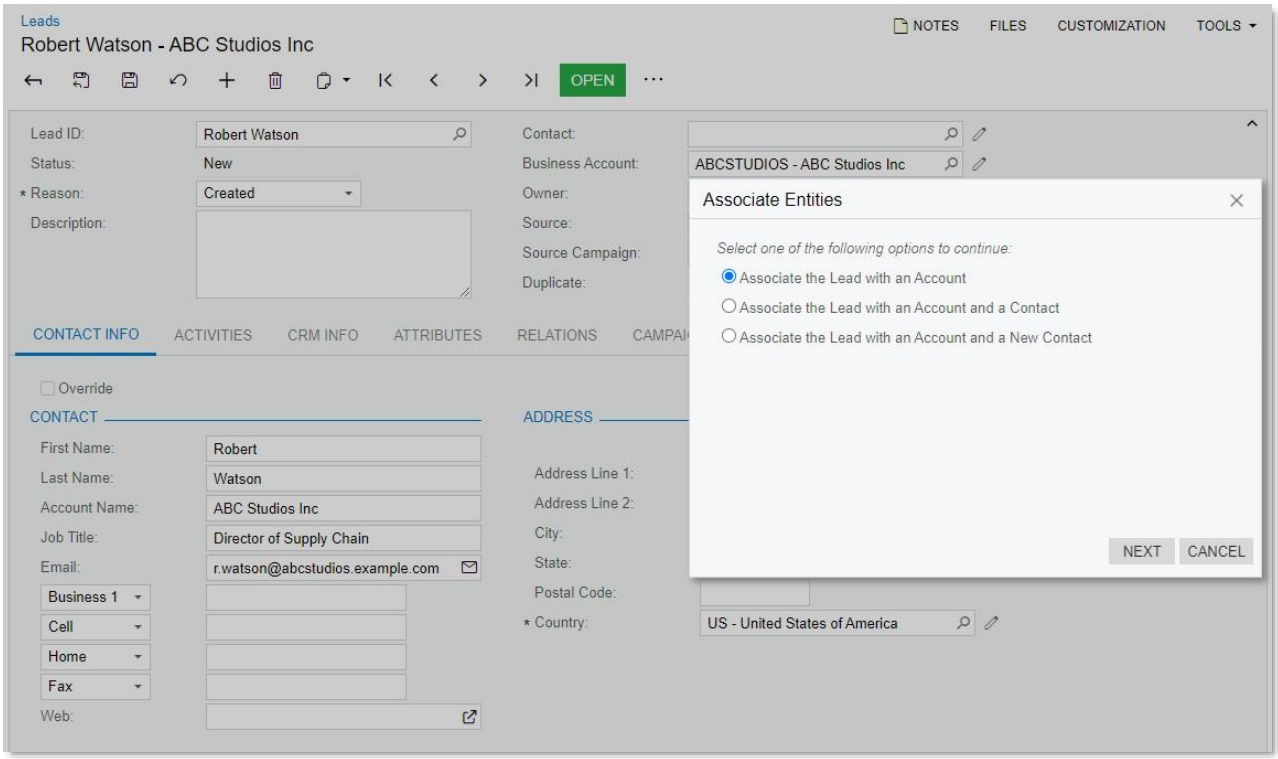
- Synchronise the contact and address settings in the lead and the contact, and associate the records by clicking **Associate**
- Associate the contact and the lead without the synchronisation of settings by clearing the **Sync with Lead** checkbox and clicking **Associate**
- Cancel the operation

Association of Leads, Business Accounts, and Contacts

Starting in MYOB Advanced 2022.1, with the new Associate Entities wizard (see the following screenshot), during the association of a lead with a business account, a user can update specific contact settings in the associated contact, create a new contact and associate it with the lead, or associate the lead with a business account without contact creation.

The Associate Entities wizard opens when a user does either of the following:

- When the **Contact** field is empty, selects an account in the lookup table in the **Business Account** field on the *Leads* (CR301000) form
- Selects a duplicate business account in the **Records for Association** table on the **Duplicates** tab of the *Leads* form and clicks **Associate** on the table toolbar



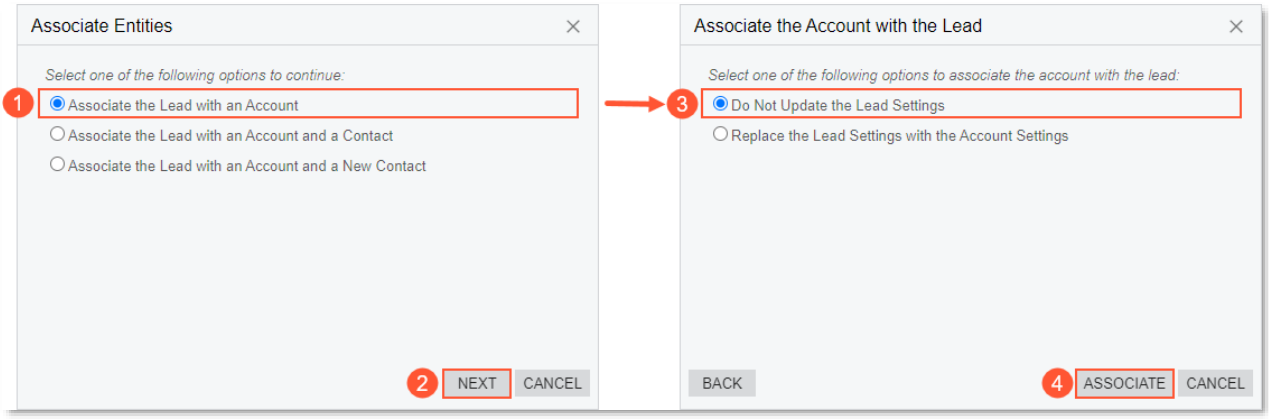
The wizard presents option buttons the user can click to do the following:

- Associate the account with the lead (the **Associate the Lead with an Account** option button, see the previous screenshot)
- Select the contact associated with the account and associate this contact with the lead (the **Associate the Lead with an Account and a Contact** option button)
- Create a new contact associated with the account and associate this contact with the lead (the **Associate the Lead with an Account and a New Contact** option button)

In the wizard, if the user selects **Associate the Lead with an Account** (Item 1 in the following screenshot) and clicks **Next** (Item 2), the user can do either of the following on the Associate the Account with the Lead page:

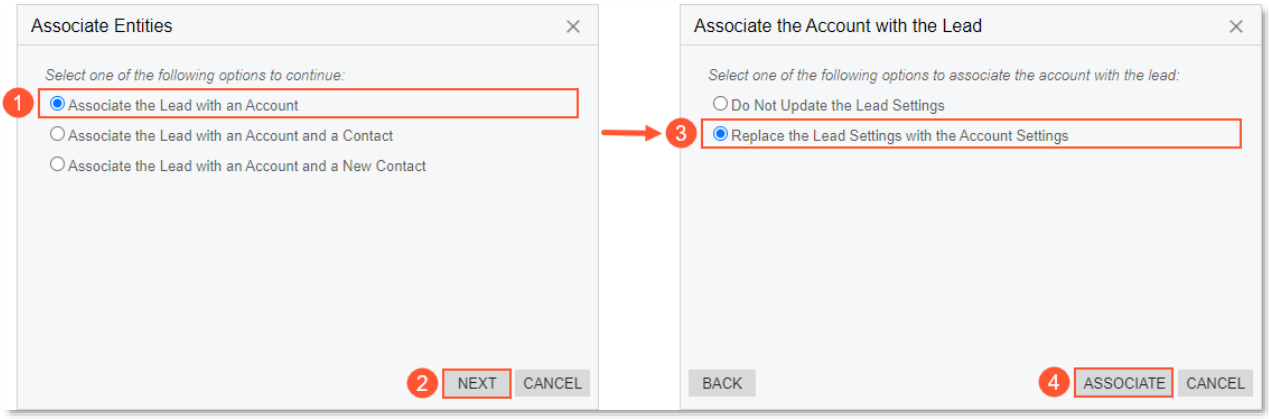
- Associate the account with the lead and leave the lead's contact settings unchanged (Item 3).

When the user clicks **Associate** (Item 4), the wizard is closed. After the user saves the changes on the currently opened form, the lead is associated with the business account. In this case, the contact and address settings of the lead remain unchanged.



- Associate the account with the lead and replace the lead's contact settings with the settings of the business account (Item 3 in the following screenshot).

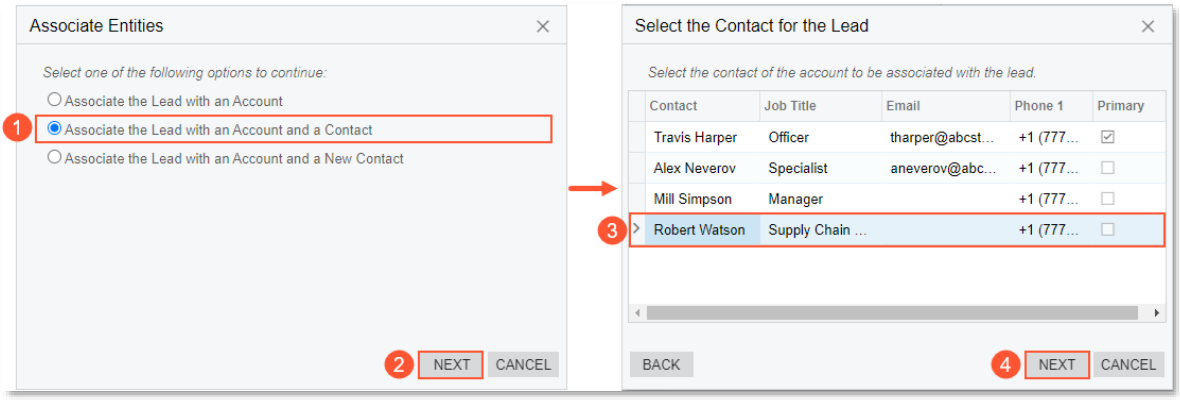
When the user clicks **Associate** (Item 4), the wizard is closed. After the user saves the changes on the currently opened form, the lead is associated with the business account. In this case, the contact and address settings of the lead will be updated with the settings of the associated business account.



In the wizard, if the user selects **Associate the Lead with an Account and a Contact** (Item 1 in the following screenshot) and clicks **Next** (Item 2), the Select the Contact for the Lead page opens.

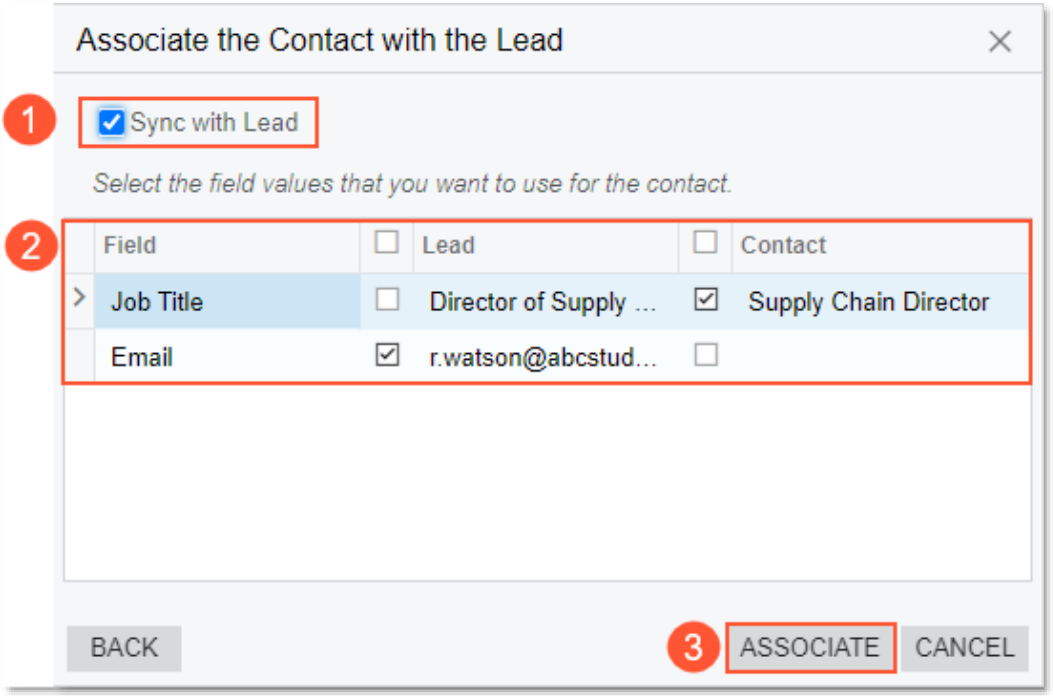
On the Select the Contact for the Lead page, the user can do the following:

1. Select the contact to be associated with the lead (Item 3) and click **Next** (Item 4).

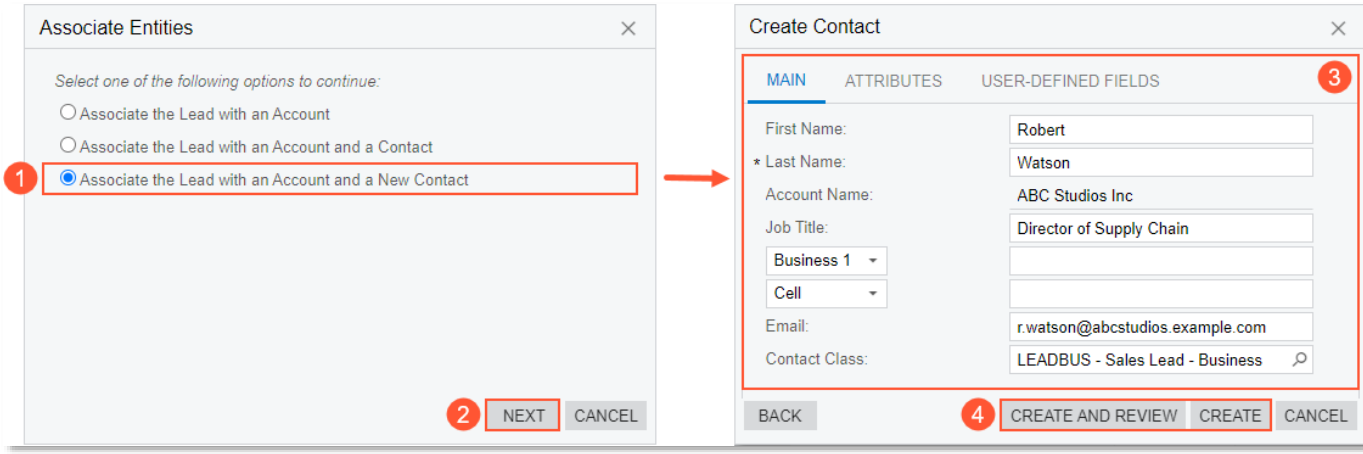


2. On the Associate the Contact with the Lead page, which opens, associate the lead with the selected contact of the business account as follows:

   - Synchronise the contact settings in the lead and the associated contact by leaving the **Sync with Lead** checkbox selected (Item 1 in the following screenshot), selecting the needed settings in the table (Item 2), and clicking **Associate** (Item 3). The wizard is closed. After the user saves the changes on the currently opened form, the lead is associated with the contact and the business account. In this case, the contact and address settings in the lead and the associated contact will be synchronised.
   - Clear the **Sync with Lead** checkbox and click **Associate**. The wizard is closed. After the user saves the changes on the currently opened form, the lead is associated with the contact and the business account. In this case, the contact settings of the lead and the associated contact remain unchanged.



In the wizard, if the user selects **Associate the Lead with an Account and a New Contact** (Item 1 in the following screenshot) and clicks **Next** (Item 2), the user can specify the settings of the contact (Item 3) and create the contact on the Create Contact page by clicking **Create** or **Create and Review** (Item 4).



The system creates the contact and associates this contact with the lead and the business account.

Association of Leads, Contacts, and Business Accounts in the MYOB Mobile App

Due to the changes in MYOB Advanced 2022.1, on the Leads screen in the MYOB mobile app, if a user does any of the following and saves the lead, the settings' values of the lead are not updated with the settings' values of the associated record, and the **Override** checkbox becomes selected on the Leads screen:

- The user selects a contact in the **Contact** field.
- The **Contact** field is empty, and the user selects a business account in the **Business Account** field.
- A business account is specified in the **Business Account** field, the contact is specified in the **Contact** field, and the user clears the value in the **Contact** field.

API Changes Related to Association of Leads, Contacts, and Business Accounts

In MYOB Advanced 2022.1, if a lead record is updated via an API, the settings' values of the lead are not updated with the settings' values of the associated record, and the **Override** checkbox becomes selected on the *Leads* (CR301000) form in any of the following cases:

- The **Contact** value is specified.
- The **Business Account** value is specified. (A contact has not been specified yet.)
- The **Contact** value is cleared. (A business account and the contact had already been specified.)

Support of Multiple Base Currencies

The *Multiple Base Currencies* feature was implemented in MYOB Advanced 2021 R1, although in that release, it was not compatible with multiple other features, including *Customer Management*. Starting in MYOB Advanced 2022.1, the CRM functionality can be used with the *Multiple Base Currencies* feature enabled. With the *Multiple Base Currencies* feature enabled on the *Enable/Disable Features* (CS100000) form, companies with different base currencies can be configured within one tenant; the system now verifies that the base currency specified in the CRM-related documents corresponds to the base currency of the branch.

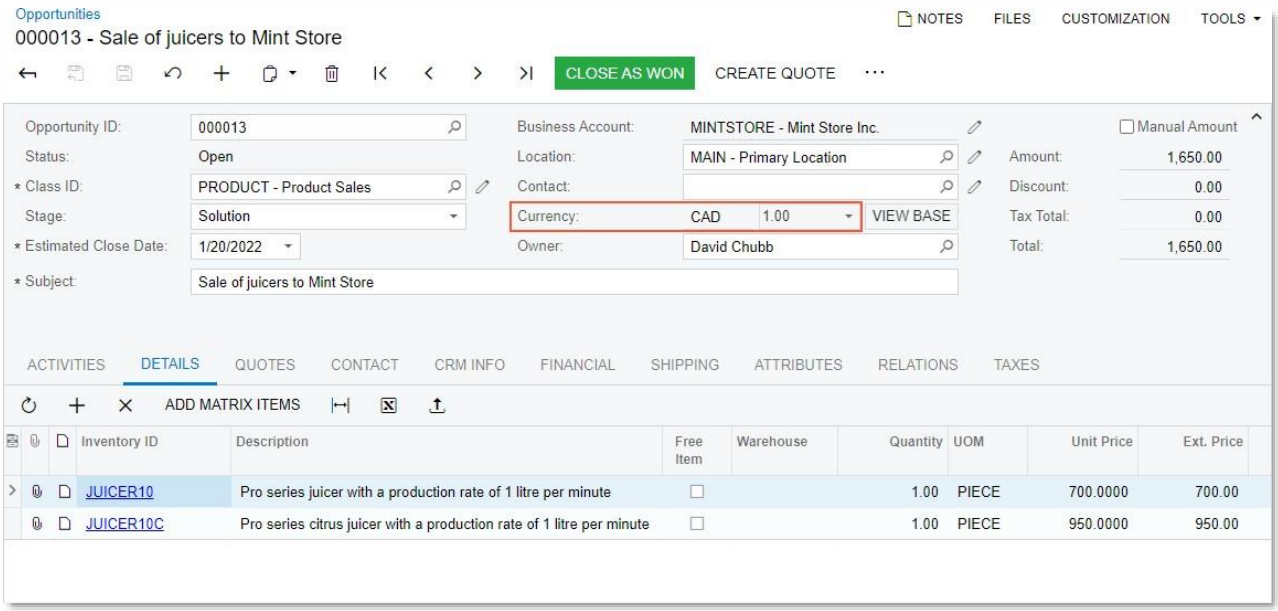
Changes to the Enable/Disable Features Form

On the *Enable/Disable Features* (CS100000) form, the *Multiple Base Currencies* feature can be enabled if the

Customer Management feature is enabled.

Multiple Base Currencies in Opportunities, Sales Quotes, and Project Quotes

If the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* (CS100000) form, a user can create opportunities for company branches that have various base currencies. The branch's base currency is shown in the **Currency** field on the *Opportunities* (CR304000) form (see the following screenshot).



The base currency of the opportunity is the currency of the branch specified in the **Branch** field on the **Financial** tab of the *Opportunities* form.

If a user creates a sales quote on the *Sales Quotes* (CR304500) form or a project quote on the *Project Quotes* (PM304500) form and the quote is based on an opportunity, the system

uses the base currency of the opportunity as the base currency of the sales quote or the project quote.

For an item specified in the **Inventory ID** field on the **Details** tab of the *Opportunities* form, in the **Warehouse** field, the user can specify a warehouse of a branch that uses the same base currency as the opportunity's branch does.

Selection of Customers in Opportunities

In the **Business Account** field on the *Opportunities* (CR304000) form, a user can select only the following customers for an opportunity:

- A customer that is restricted to the opportunity branch
- A customer that is not restricted to any entity but has the same customer base currency as the base currency of the branch specified in the opportunity

This restriction does not apply to business accounts of potential customers because these business accounts do not belong to any branch.

Note: After the system upgrade, all existing customers are set to the base currency same as the base currency set in the tenant before the upgrade.

Known Limitations

The system currently does not support multiple base currencies in CRM if the *Customer Portal* feature is enabled on the *Enable/Disable Features* (CS100000) form.

New Import Scenarios

In MYOB Advanced 2022.1, new CRM import scenarios are available in the out-of-the-box system. With these basic import scenarios, users can more easily import new leads, contacts, business accounts, opportunities, and cases into the system and update existing records. Also, users can create new import scenarios based on the new import scenarios, which may be faster than configuring import scenarios from the ground up.

New Predefined Import Scenarios

In previous versions of MYOB Advanced, preconfigured import scenarios for creating leads, contacts, cases, and opportunities were included in the *Sales Demo* dataset but were not available in the out-of-the-box system. The template files for the import scenarios had a limited number of settings. Also, no import scenario was included for adding business accounts to the system.

Starting in MYOB Advanced 2022.1, on the *Import Scenarios* (SM206025) form, the following predefined import scenarios based on the *Excel Provider* (PX.DataSync.ExcelSYProvider) data provider are available:

- Import Leads from Excel
- Import Contacts from Excel
- Import Business Accounts from Excel
- Import Opportunities from Excel

- Import Cases from Excel

On the *Data Providers* (SM206015) form, for each import scenario, a template file in XLSX format has been added. Each template file lists examples of how the data for import should be specified, and the required settings are highlighted. In the template files, users can specify various settings for the records to be imported, such as a primary contact for a business account, or items for sale for an opportunity. Users can download the template files, modify their settings, and use new files (based on the templates) for record import.

On the *Import by Scenario* (SM206036) form, in the **Name** field, a user can select any of the import scenarios listed above and click **Prepare** on the form toolbar. On the **Prepared Data** tab, the user can see the settings of the test records to be imported from the file to the system. The user can import the test records and then view the newly imported records on the *Leads* (CR301000), *Contacts* (CR302000), *Business Accounts* (CR303000), *Opportunities* (CR304000), or *Cases* (CR306000) form corresponding to the import scenario.

The new import scenarios give users the ability to specify various workflow statuses for business accounts, leads, contacts, opportunities, and cases to be imported.

By using the new template files, users can also import notes related the records. The users can find the notes by clicking **Notes** on the form title bar of the *Leads*, *Contacts*, *Business Accounts*, and *Opportunities*, *Cases* forms.

For details about each import scenario, see the following sections.

Import of Leads from Excel

The *Import Leads from Excel* import scenario gives users the ability to import leads with various statuses, such as

New, *Open*, *Sales-Ready*, *Sales-Accepted*, *Converted*, and *Disqualified*.

Based on the predefined settings specified for this import scenario on the *Import Scenarios* (SM206025) form, if a lead is associated with an existing contact as a result of the import, the lead's contact and address settings are synchronised with the contact's settings. The system can be configured to not perform this synchronisation. In this case, the contact and address settings of the record that existed are not changed, and the contact and address settings of the imported record are those specified in the data source. To cause the system to not synchronise these settings, on the **Mapping** tab of the *Import Scenarios* form for this import scenario, the user does the following:

1. In the **Source Field/ Value** column, clears the **Active** checkbox for the *=Iif([Lead.RefContactID]=Null, 'True', 'False')* field.
2. Saves the import scenario.

The Import Leads from Excel Template.xlsx template file has the following test leads, which can be imported to the system:

- A lead that has the *Open* status and is not associated with a contact or business account.
- A lead associated with a contact from the *Sales Demo* dataset. The lead's contact information will be synchronised with the information from the contact as a result of the import.

- A lead associated with a business account from the *Sales Demo* dataset. The lead's contact information differs from the contact information of the business account.

Import of Contacts from Excel

The *Import Contacts from Excel* import scenario gives users the ability to import contacts with the *Active* status. A user can modify the import scenario so that during the import, a new contact will be associated with a business account that already exists in the system. During the import, the address settings of the contact can be synchronised with the address settings of the business account.

The Import Contacts from Excel Template.xlsx template file has the following test contacts, which can be imported to the system:

- A contact associated with a business account.
- A contact associated with a business account from the *Sales Demo* dataset. The contact's address settings differ from the address settings of the business account.
- A contact associated with a business account from the *Sales Demo* dataset. The contact's address settings are copied from the business account.

Import of Business Accounts from Excel

The *Import Business Accounts from Excel* import scenario gives users the ability to create a business account and create the primary contact associated with the account, if needed.

The Import Business Accounts from Excel Template.xlsx template file can include such data as contact settings of a business account, address settings, CRM-related settings, and settings of a primary contact. The template file has the following test business accounts, which can be imported to the system:

- A business account that has a primary contact
- A business account that has no primary contact

Import of Opportunities from Excel

The *Import Opportunities from Excel* import scenario gives users the ability to import opportunities that have items for sale. As a result of the import, these items for sale will be added to the **Details** tab on the *Opportunities* (CR304000) form.

The Import Opportunities from Excel Template.xlsx template file has column names that include the following:

- Inventory ID
- Warehouse
- Quantity
- Unit Price
- Discount, %
- Project Task
- Cost Code

For each item for sale, a user can specify values in the columns listed above. In the import scenario, these columns are mapped to the fields on the *Opportunities* form. A new row is added to the template file for each item included in an opportunity. As a result of the import, the values in these columns will be inserted in the appropriate elements of the form for each imported record. For some opportunity-specific columns, multiple items of an opportunity will have the same values and can be copied by the user. These values might include the values in the *Opportunity ID*, *Status*, *Business Account*, or *Subject* column in the file.

The template file has the following test opportunities, which can be imported to the system:

- An opportunity that has the *Open* status and a few items for sale (products or services) from the *Sales Demo* dataset.
- An opportunity that is associated with a business account and has a few items for sale (products or services) from the *Sales Demo* dataset.

Users can import opportunities that have various statuses, such as *New*, *Open*, *Won*, and *Lost*.

Import of Cases from Excel

The *Import Cases from Excel* import scenario gives users the ability to import cases that have various statuses, such as *New*, *Open*, *Pending Customer*, *Closed*, and *Released*.

The Import Cases from Excel Template.xlsx template file has the following test cases, which can be imported to the system:

- A case associated with a contact from the *Sales Demo* dataset.
- A case that has the *Closed* status and is associated with a business account from the *Sales Demo* dataset.

Enhanced Support of User-Defined Fields for Activities, Tasks, and Events

In MYOB Advanced 2022.1, user-defined fields can be added to activities, tasks, and events. Also, values of user- defined fields can be copied between activities, tasks, events, and the entity that they have been created from if the user-defined fields have been added to the entry form of the entity.

User-Defined Fields in Activities, Tasks, and Events

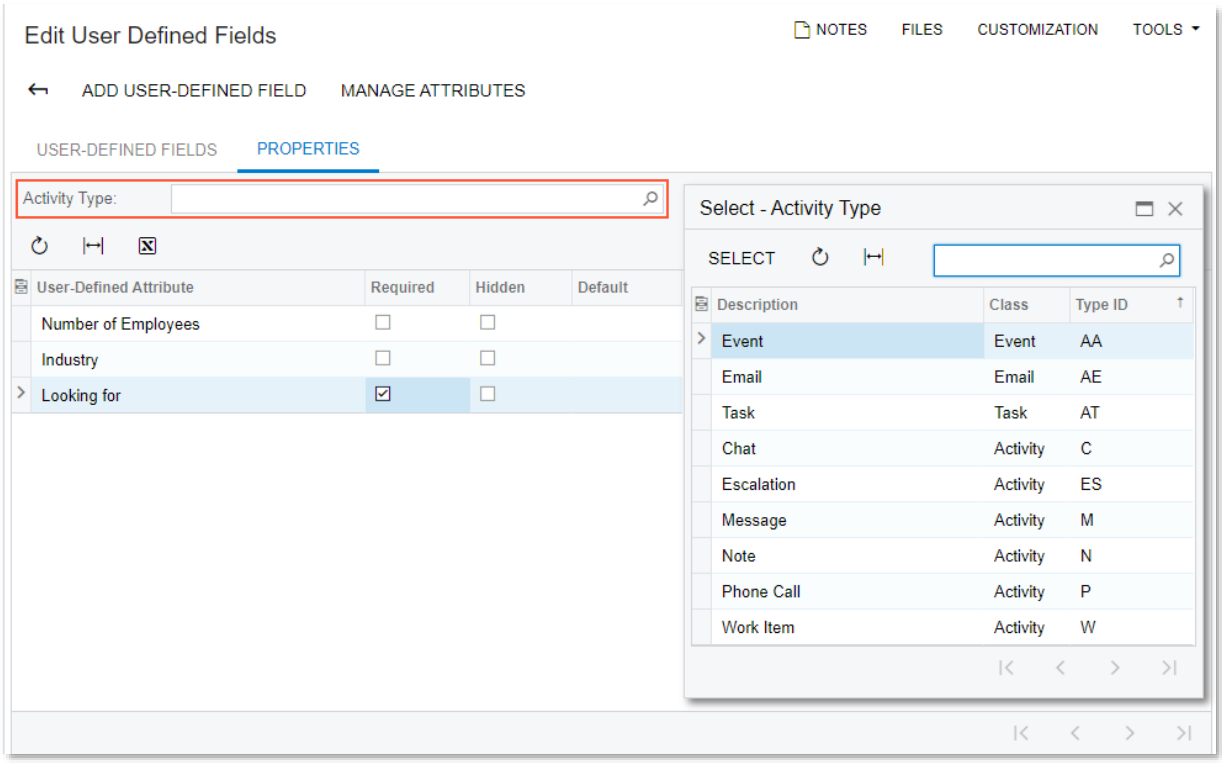
Starting in MYOB Advanced 2022.1, users can add user-defined fields to the **User-Defined Fields** tab of the Summary area of the following forms:

- *Activity* (CR306010)
- *Task* (CR306020)
- *Event* (CR306030)

To add or modify user-defined fields from any of these forms, on the form title bar, a user clicks **Customisation > Manage User-Defined Fields** to open the *Edit User Defined Fields* (CS205020) form. For each user-defined field to be added, the user clicks **Add User Defined Field** and specifies its parameters, including the **Attribute ID**. Before they can be added on a particular form, user-defined fields must be defined as attributes on the *Attributes* (CS205000) form.

On the **Properties** tab of this form, the **Activity Type** field has been added (see Item 1 in the following screenshot). This field is shown only when a user opens this form from the *Activity*, *Task*, or *Event* form.

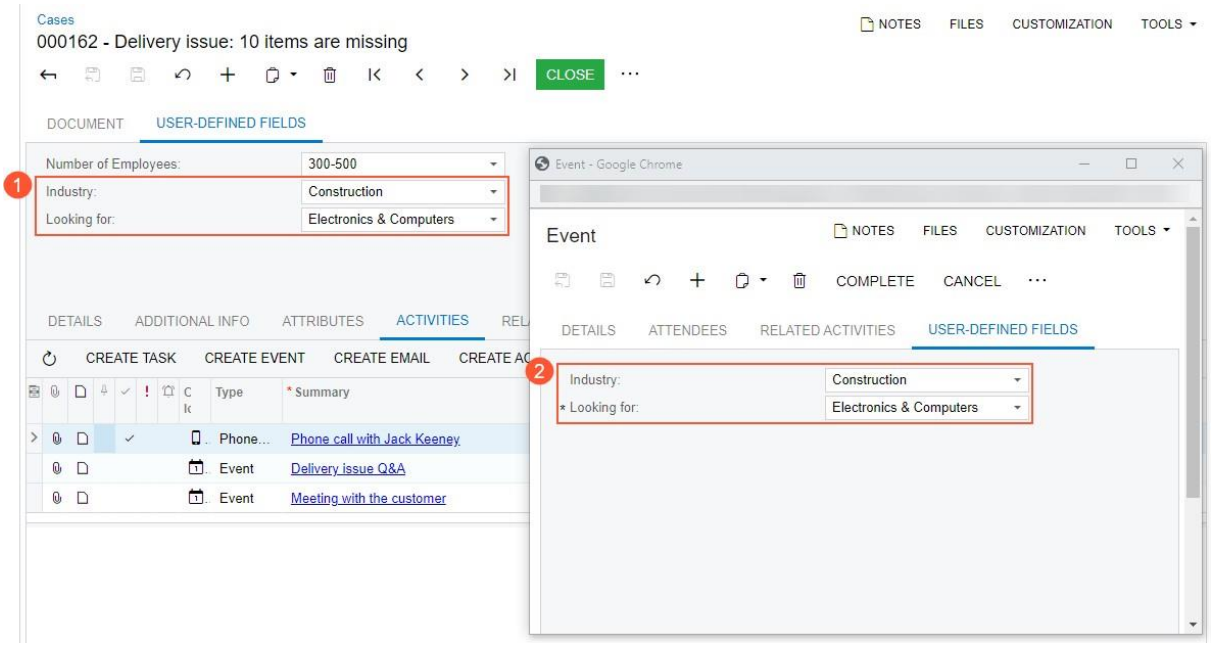
The **Activity Type** field lists all the types of activities for which the **Active** checkbox is selected on the *Activity Types* (CR102000) form. The activity types defined in a company's system might include custom activities, tasks, and events. If a user wants to specify a default value for a user-defined field for a task, event, or activity of a particular type, the user must select this type in the **Activity Type** field. Then in the **Default** column of the table (Item 2), this user can specify the default value for each of the listed attributes. The system saves these default values for the form for which the user-defined fields are being defined and the activity type. The default settings apply to only the selected type.



Copying of User-Defined Field Values

In MYOB Advanced 2022.1, if a user creates an activity, task, or event from another task, event, or any entity in the system to which user-defined fields can be added, and both the original entity and the new activity, task, or event has any of the same user-defined fields, the values of these user-defined fields are automatically copied to the new entity.

For example, suppose that the *Cases* (CR306000) form and the *Event* (CR306030) form have the same two user- defined fields and the user has filled in the values for the case (see Item 1 in the following screenshot). If the user creates a new event by using the *Cases* form as a starting point, on the *Event* (CR306030) form, which opens in a pop-up window, the values of the case are copied to the corresponding fields on the **User-Defined Fields** tab (Item 2).



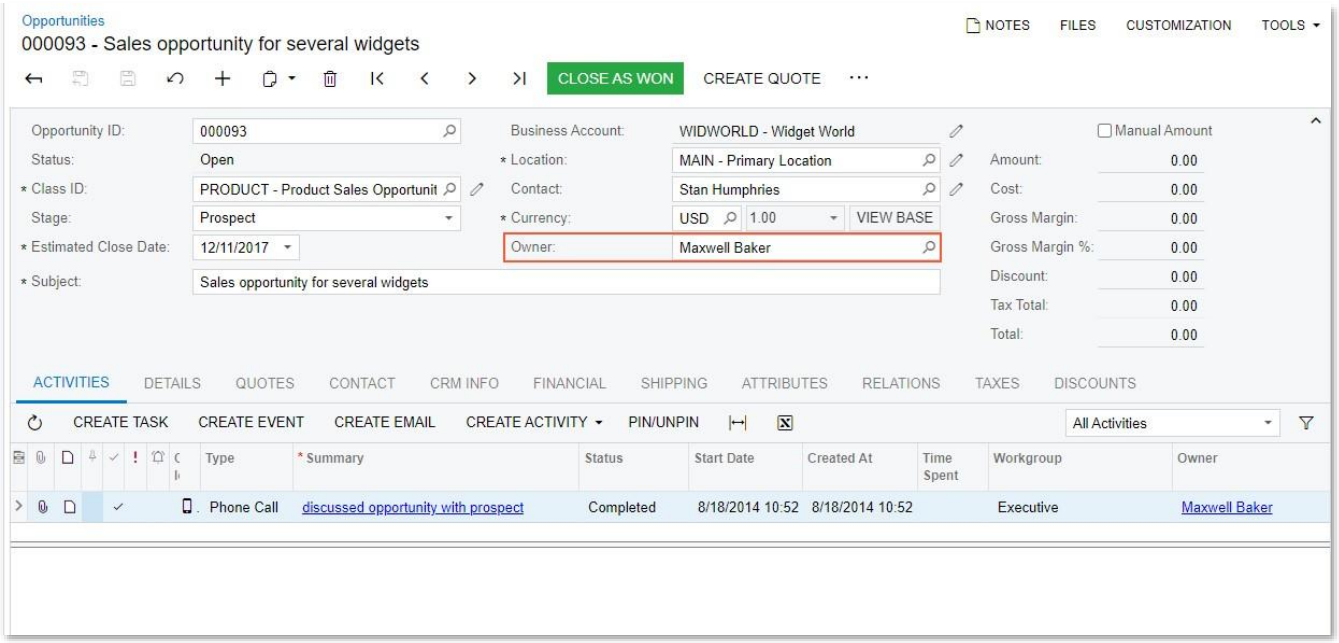
If both the new entity (activity, task, or event) and the entity that is used as a starting point for the creation of the new entity have default values defined for the same user-defined field, the field value from the original entity is copied to the corresponding field of the new entity.

If a user creates an activity, task, or event from another entity's form and the new entity has any user-defined field that is defined as required on the new entity's form, the user must fill in the value in this field before saving the entity.

Other Improvements

Improvements to the Selection of Owner

In previous versions of MYOB Advanced, only an employee that was linked to a user account could be specified as an owner in the **Owner** field on the data entry form of a record. See the following screenshot, which shows the field on the *Opportunities* (CR304000) form.



Starting in MYOB Advanced 2022.1, an employee can be specified in the **Owner** field even if a user with the *Active*

status is not linked with the employee on the **User Info** tab of the *Employees* (EP203000) form.

An employee that is not linked with a user can be specified in the **Owner** field on the following forms:

- *Leads* (CR301000)
- *Contacts* (CR302000)
- *Business Accounts* (CR303000)
- *Marketing Lists* (CR204000)
- *Marketing Campaigns* (CR202000)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Project Quotes* (PM304500)
- *Shipments* (SO302000)
- *Activity* (CR306010)
- *Task* (CR306020)

- *Event* (CR306030)
- *System Email Accounts* (SM204002)

Change of Tabs' Names

In MYOB Advanced 2022.1, the **General Settings** tab has been renamed to **General** on the following forms:

- *Customer Management Preferences* (CR101000)
- *Business Account Classes* (CR208000)
- *Employee Classes* (EP202000)

Also, the **Mailing Settings** tab has been renamed to **Mailing & Printing** on the following forms:

- *Customer Management Preferences*
- *Business Account Classes*

Documentation

Improvements in User Guides

In MYOB Advanced 2022.1, multiple improvements have been made to the content and structure of the guides that make up the documentation, as described in the following sections.

Customer Relationship Management Guide

The following changes and enhancements have been made in the Customer Relationship Management guide:

- A new chapter, Submitting Internal Cases to IT, has been added. This chapter gives users an understanding of how to create cases to their organisation's internal IT or legal team.
- In the Managing Emails and Activities chapter, the following topics have been significantly updated:
    - Emails and Activities: Events
    - Emails and Activities: To Create an Event (By completing this activity, users will learn how to create an event and invite leads, contacts, employees, and persons whose data has not been entered in the system.)
- The Validating Records for Duplicates chapter has been significantly updated. In this chapter, the following topics have been added:
    - Validating Records for Duplicates: Merging of Duplicate Records
    - Validating Records for Duplicates: Association of Leads and Contacts
    - Validating Records for Duplicates: Association of Leads with Business Accounts and Contacts

Also, the Validating Records for Duplicates: To Validate a Lead for Duplicates activity has been updated.

Financial Management Guides

The following changes have been made in the financial management guides:

- A new chapter, Maintaining Prices and Costs in Different Base Currencies, has been added to the Prices and Discounts guide. By completing the activity in this chapter, users will learn how to maintain the default prices of non-stock items in multiple base currencies used by companies in the same tenant. Users will also process an invoice with a non-stock item for which the default price in the base currency has been defined.
- A new chapter, Processing Documents Between Companies with Different Base Currencies, has been added to the Currency Management guide. By completing the

activities in this chapter, users will learn how to process an AR invoice and an AP bill involving branches of companies with different base currencies.
- A new chapter, Preparing a Consolidated Financial Statement, has been added to the Currency Management guide. By completing the activities in this chapter, users will learn how to translate the account balances of a subsidiary company into the base currency of the parent company. Users will then learn how to prepare and run an ARM report based on a predefined Profit & Loss report; this new report will consolidate the financial data of both companies.

The Manufacturing Guide and the Implementing Manufacturing Chapter in the Implementation Guide

In the Manufacturing guide, the following new chapters have been added:

- Producing Items with Outside Processing: Users will learn how to process production orders that contain outside operations.
- Producing Items with Backflushing: Users will learn how to process production orders with operations for which material and labor costs will be backflushed.

The Implementing Manufacturing chapter has been added to the Implementation guide. The guide now contains the following new chapters and chapters and topics that have been moved from the Manufacturing guide:

- Preparing the System for Manufacturing Implementation
- Implementing Bills of Material: General Process
- Configuring Production Order Types
- Configuring MRP
- Implementing Production of Lot- or Serial-Tracked Items
- Implementing Outside Processing
- Implementing Item Production with Backflushing

Projects and Construction Guides

The following changes have been made in the Project Accounting and Construction guides:

- New activities have been added to the Purchasing Materials to the Project Site and Purchasing Materials to the Project Site with Receipt chapters. By completing the activities, users will learn how to configure a project to purchase items that are drop-shipped to a project site, and how to process the drop-shipment of items with the processing of a receipt and without the processing of a receipt.
- A new chapter, Managing Multicurrency Projects, has been added to the Project Accounting guide. By reading the topics in this chapter, users will learn how to track projects in a project currency that differs from the base currency of the company that manages the project.
- A new chapter, Tracking Changes to Commitments, has been added to the Project Accounting guide. By reading the topics in this chapter and completing the activity, users will learn how to process change orders for project commitments.

- A new chapter, Tracking Changes in Construction Projects, has been added to the Construction guide. By reading the topics in this chapter and completing the activities, users will learn how to process cost and revenue changes to a construction project. Also, these users will learn how to track changes in the project budget forecast.
- A new chapter, Managing the Construction Project Budget, has been added to the Construction guide. By reading the topics in this chapter and completing the activities, users will learn how to populate and track the budget of a construction project, capture project costs, and track project budget overrun.

Field Service Guides

The following changes have been made in the field service guides:

- In the Equipment Management guide, all topics related to service contracts have been combined in the Managing Service Contracts chapter.
- New activities have been added to the Managing Service Contracts chapter of the Equipment Management guide. By completing the activities, users will learn how to process service contracts of different billing types, how to copy a service contract, and how to renew a service contract.
- In the Route Management guide, the Processing Route Service Contracts chapter has been renamed to Managing Route Service Contracts. The content of the chapter has been reorganised and updated.
- A new activity has been added to the Managing Route Service Contracts chapter. By completing the activity, users will learn how to create a route service contract, create route service contract schedules, and generate and review route appointments.

Field Services

Renewal of Service Contracts

Starting in MYOB Advanced 2022.1, the service contract functionality has been extended and enhanced. The following new capabilities are available in MYOB Advanced:

- A service contract can be renewed, which moves its expiration date forward by the specified duration. Once the service contract is renewed, it maintains most of the settings it previously had, including the schedules that have been generated. A service contract can be renewed before or after the expiration date as long as its status is *Active*.
- A service contract can be copied. The copied contract is assigned the *Draft* status so that some contract settings (such as start date, expiration date, customer, and project) can be modified. This capability can be used when a customer is due for renewal but some settings of the existing contract should be changed; in this case, the user prepares a service contract quote for the replacement contract. A user can also copy a service contract when another contract with similar settings is needed.
- The *Service Contract Quote (FS660000)* report can be generated and emailed to the customer before the expiration of the contract. This report shows the quantity of visits and the prices expected to occur during the forecast contract duration. The report can also be used as a quote when a user is creating a contract.

These capabilities apply to the following types of service contracts:

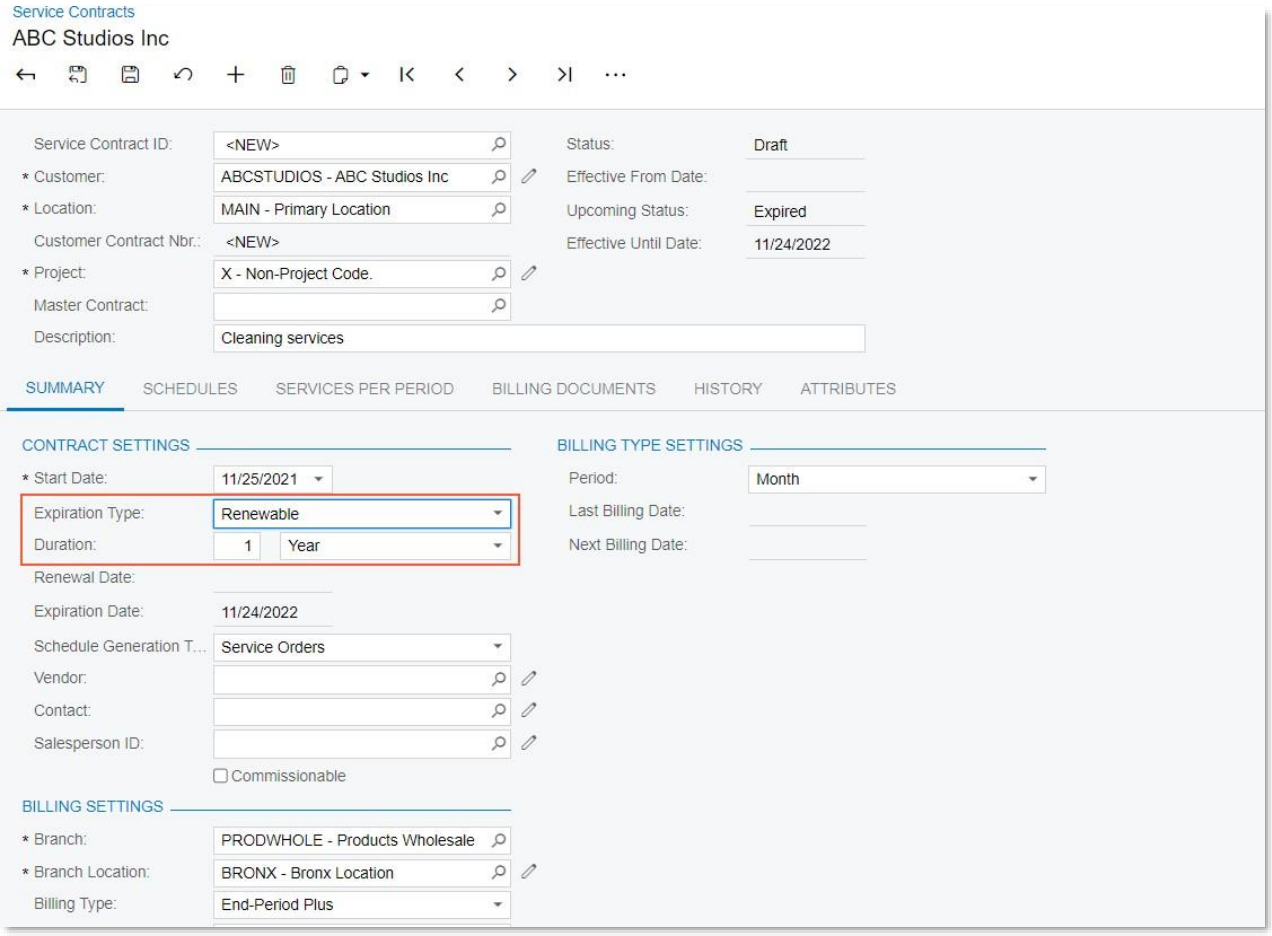
- Service contracts created on the *Service Contracts* (FS305700) form if the *Equipment Management* feature is enabled on the *Enable/Disable Features* (CS100000) form
- Route service contracts created on the *Route Service Contracts* (FS300800) form if the *Route Management* feature is enabled on the *Enable/Disable Features* form

In the following sections of this topic, these capabilities are described in detail for service contracts created on the *Service Contracts* form. The capabilities work similarly for route service contracts created on the *Route Service Contracts* form.

Creation of a Renewable Service Contract

To create a service contract that can be renewed, on the *Service Contracts* (FS305700) form, a user selects *Renewable* in the **Expiration Type** field of the **Contract Settings** section. The user also specifies the period until the expiration date in the **Duration** field (as the following screenshot shows).

Note: The **Duration** field appears on the form when the user selects *Expiring* or *Renewable* in the **Expiration Type** field.



The following options are available in the **Duration** drop-down: *Month*, *Quarter*, *Year*, and *Custom (days)*. The user can select *Month*, *Quarter*, or *Year*, and specify the number of months, quarters, or years (depending on the selected option) in the adjacent field. After the user specifies these settings, the system calculates the expiration date and inserts it in the **Expiration Date** field. If the user selects *Custom (days)*, the **Expiration Date** field becomes available for editing. When the user manually selects the expiration date, the system calculates the number of days before the expiration date and inserts it in the **Duration** field.

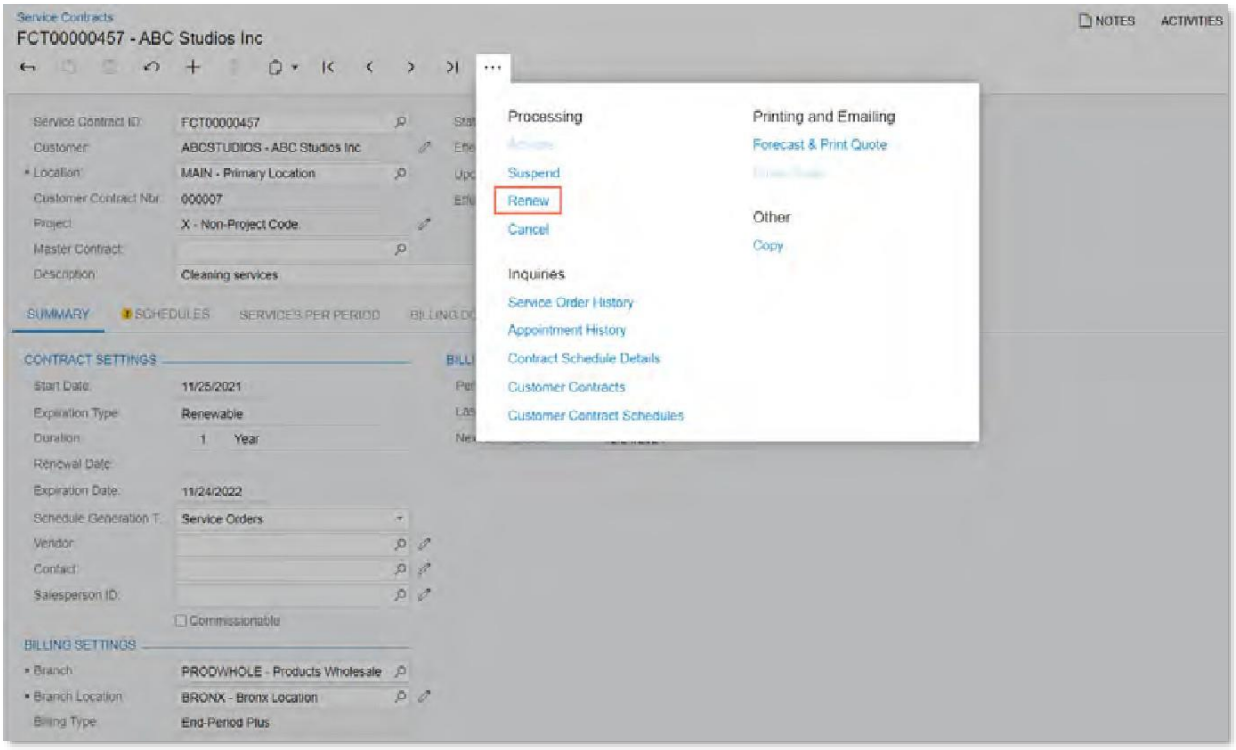
On the *Service Contracts* form for the service contract, if *Expiring* has been selected in the **Expiration Type** field before the upgrade of MYOB Advanced to the 2022.1 version, then after the upgrade, *Custom (days)* will be automatically selected in the **Duration** field, and will be calculated based on the expiration date specified before the upgrade.

After MYOB Advanced has been upgraded to version 2022.1, for the contracts created before the upgrade, the expiration type will stay unchanged (either *Expiring* or *Unlimited*) because for the active service contracts, the expiration type and expiration date cannot be modified. If a user wants to change the expiration type of a contract created before the upgrade from *Expiring* to *Renewable*, we recommend that the user copy the contract and change the expiration type in the new contract. (The new capability of copying the contract is described further in this topic.) For example, suppose that a user has a service contract with a start date of January 1, 2021, and an expiration date of December 31, 2021, and the

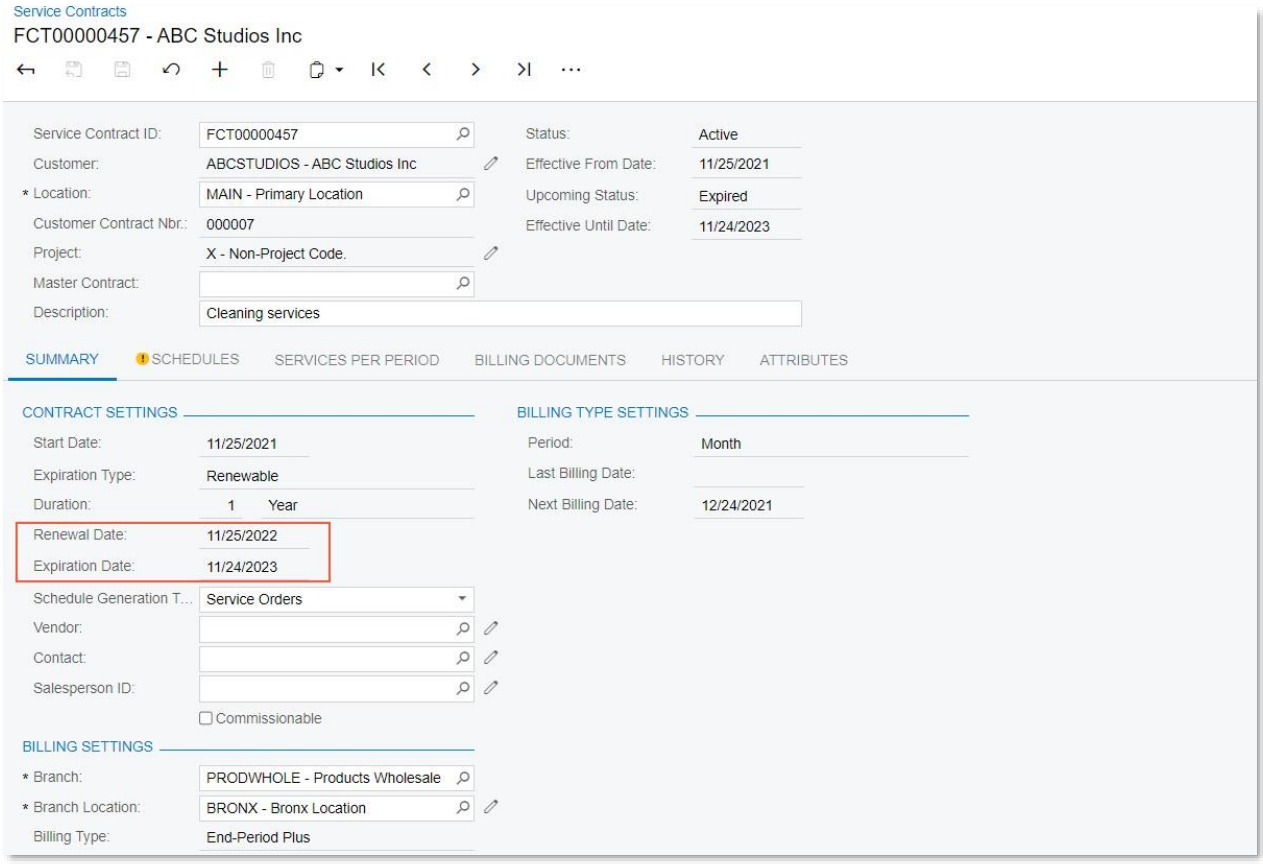
user wants to have a renewable contract. In this case, the user copies the contract and specifies January 1, 2022, as the contract's start date.

Renewal of a Service Contract

A user can renew a service contract with the *Active* status before or after its expiration date. On the More menu of the *Service Contracts* (FS305700) form, the **Renew** command (under **Processing**) has been added; see the following screenshot. The command becomes available when a renewable service contract—one with *Renewable* selected in the **Expiration Type** field in the **Contract Settings** section—has been activated.



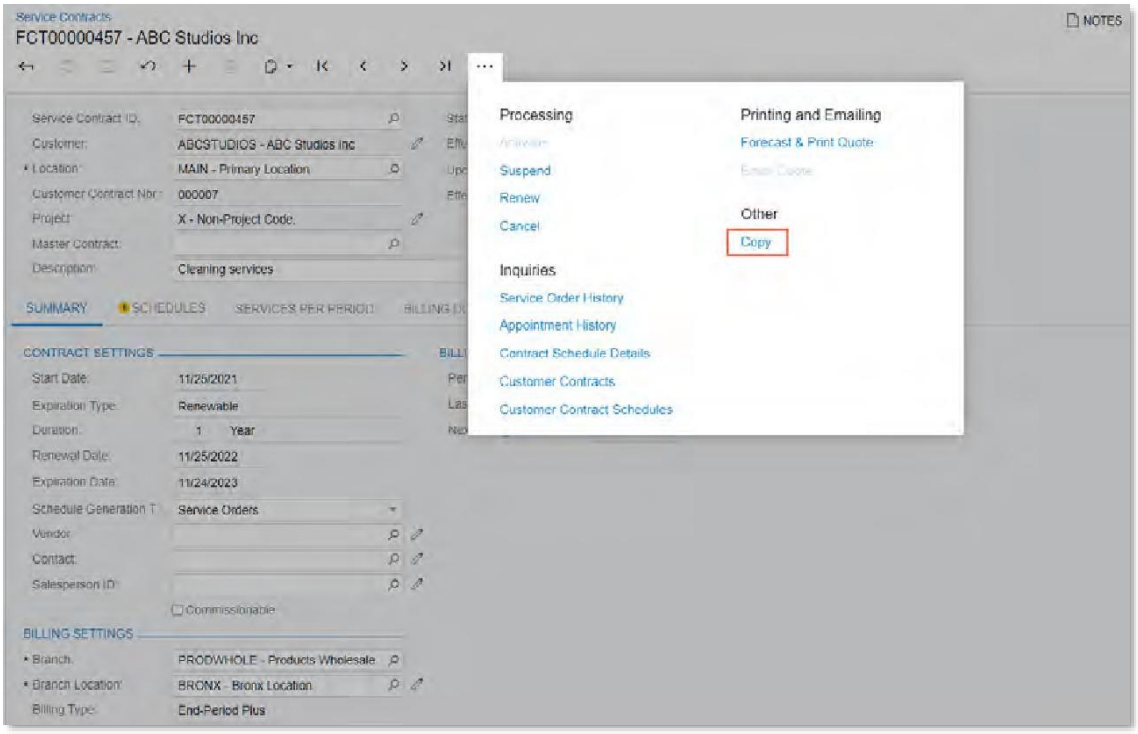
When a user clicks **Renew**, the system determines the contract renewal date based on the expiration date before the command is clicked (*11/24/2022* in this example, as shown in the screenshot above). The new renewal date is the day after the previous expiration date. The system inserts this date in the **Renewal Date** field and updates the date in the **Expiration Date** field based on the period specified in the **Duration** field (see the following screenshot).



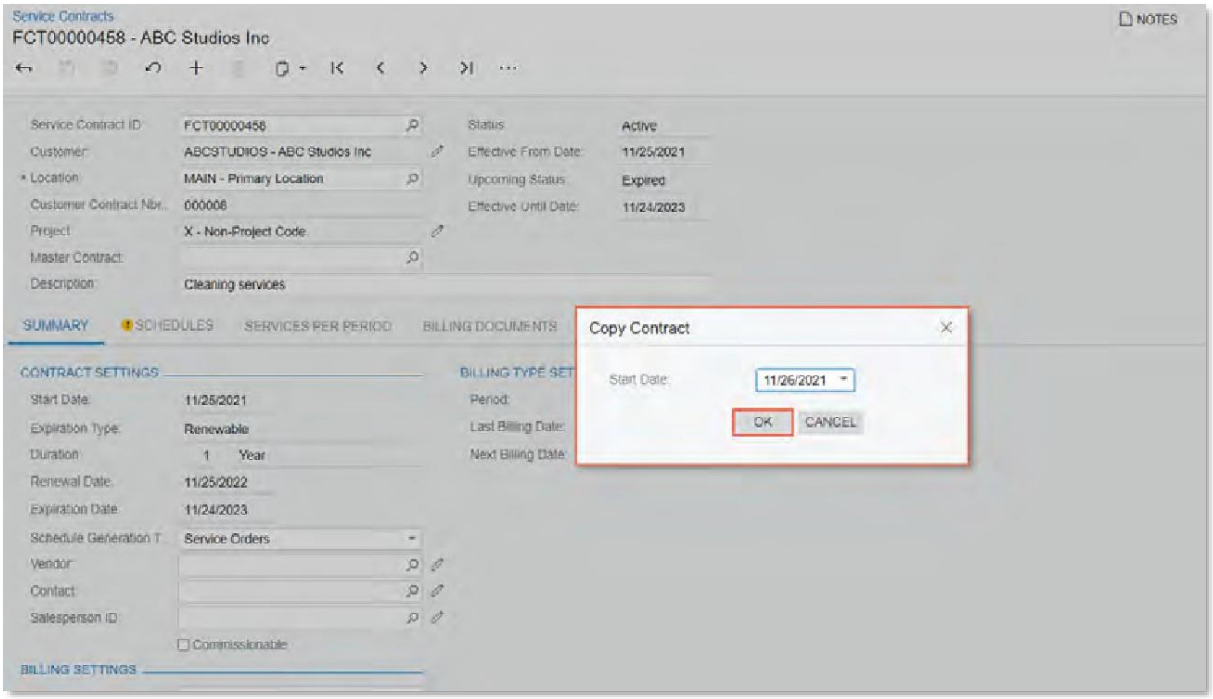
A service contract can be renewed multiple times. Each time a user clicks **Renew**, the renewal and expiration dates will be moved forward by the amount of time specified in the **Duration** field.

Copying of a Service Contract

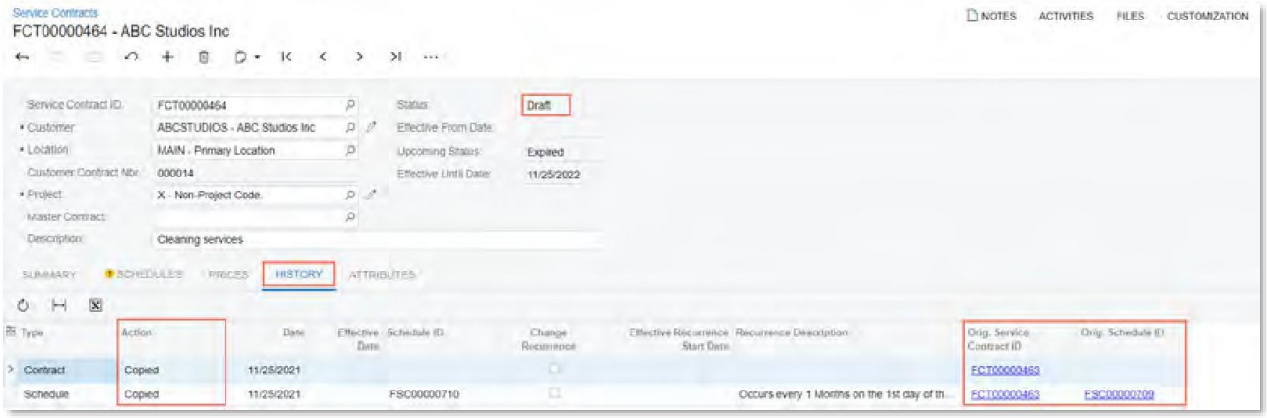
MYOB Advanced now provides the capability to copy a service contract. If a user needs a contract with similar settings to those of an existing contract, the user can now click the new **Copy** command on the More menu of the *Service Contracts* (FS305700) form, as the following screenshot shows.



Once the user clicks **Copy**, the **Copy Contract** dialog window opens, as shown in the following screenshot. In the dialog window, the user specifies the start date that will be inserted in the copy of the service contract and in the copies of any schedules that are associated with the service contract. The expiration date of the new contract will be calculated based on the start date and the duration, and will be inserted in this service contract as well as in the copies of the schedules.



When the **Copy** command is used, a new contract with the *Draft* status is created with most of the same settings (and similar generated schedules) as those specified in the original one. On the **History** tab (shown in the following screenshot), a user can review which actions have been performed for the contract and when, as well as view the reference numbers of the original service contract and schedule.

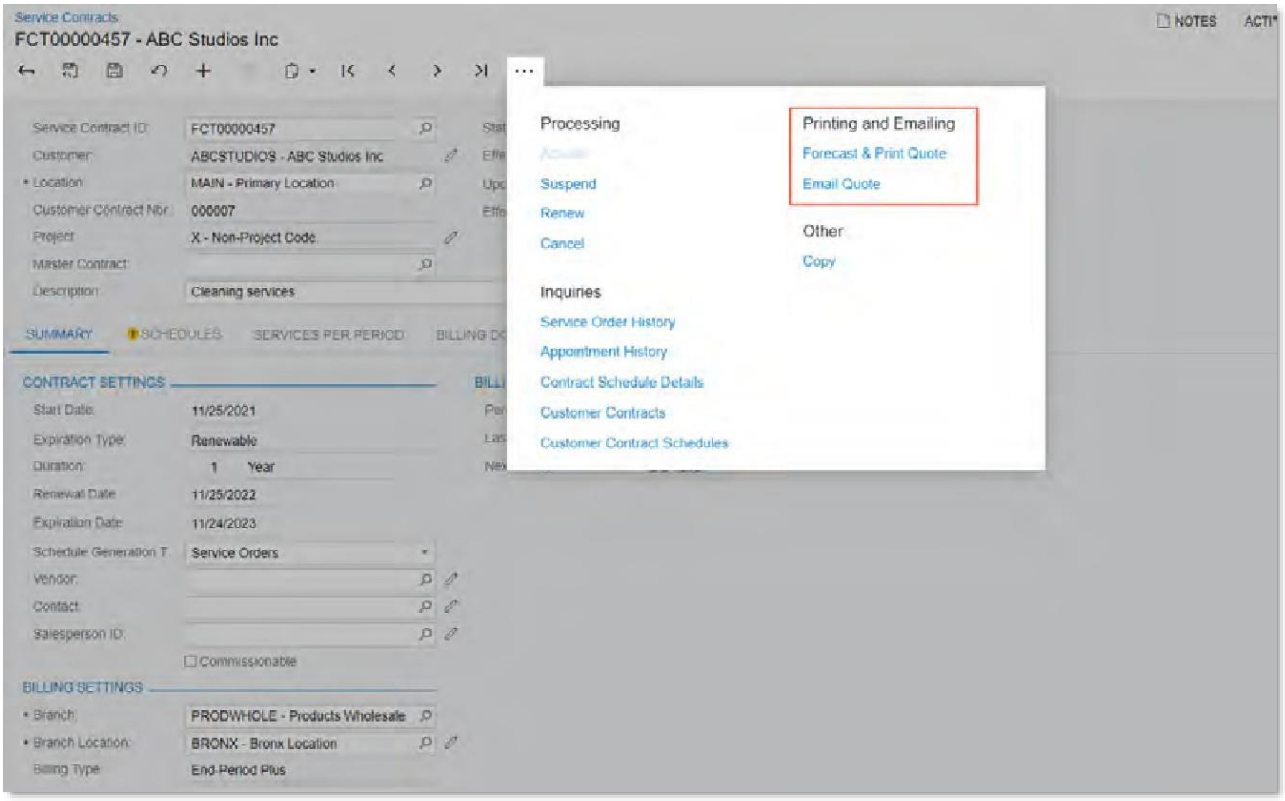


Now a user can modify the following settings of the service contract with the *Draft* status (even if the service contract has schedules associated with it): **Customer**, **Location**, **Billing Customer**, **Billing Location**, **Project**, **Start Date**, **Expiration Type**, and **Expiration Date**.

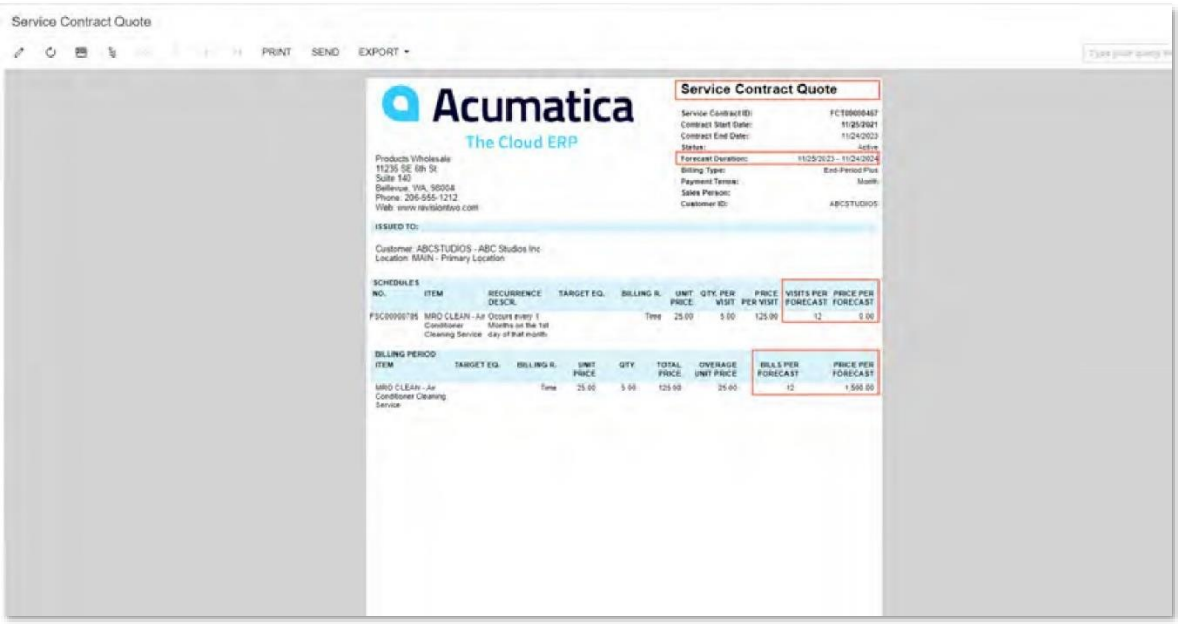
After the contract is saved, if a user changes the contract start date or end date (or both), the schedule start date or end date (or both) will be updated accordingly if the contract start date is equal to the schedule start date, and the contract end date is equal to the schedule end date. If the contract start date differs from the start date of the schedule, or the contract end date differs from the contract end date, then a user should ensure that the new contract start date is not later than the schedule start date, and the contract end date is not earlier than the schedule end date.

Preparation and Emailing of a Service Contract Quote

A user can now generate a report that is a print-friendly service contract quote based on an existing service contract. On the More menu of the *Service Contracts* (FS305700) form, the **Forecast & Print Quote** command is now available under **Printing and Emailing**, as shown in the following screenshot. When a user clicks this command, the system opens a dialog window in which the user specifies the start and end date of forecasting, and then the system generates and opens the print-friendly *Service Contract Quote (FS660000)* report.



This report (see the following screenshot) shows the expected quantity of visits that should occur during the forecast contract duration, the price for each scheduled visit, the total price of all expected visits, and the expected number of billing documents to be generated during the contract duration. Note that the taxes and discounts are not included in the quote report. (Depending on the billing type specified for the service contract, some of these settings may not be shown in the report.)



Once this report has been generated, the user can email it to the customer by clicking the **Send** button on the report toolbar or by clicking the new **Email Quote** command (under **Printing and Emailing**) on the More menu on the *Service Contracts* form.

Note: The **Email Quote** command is available if the selected service contract has at least one service contract quote report generated.

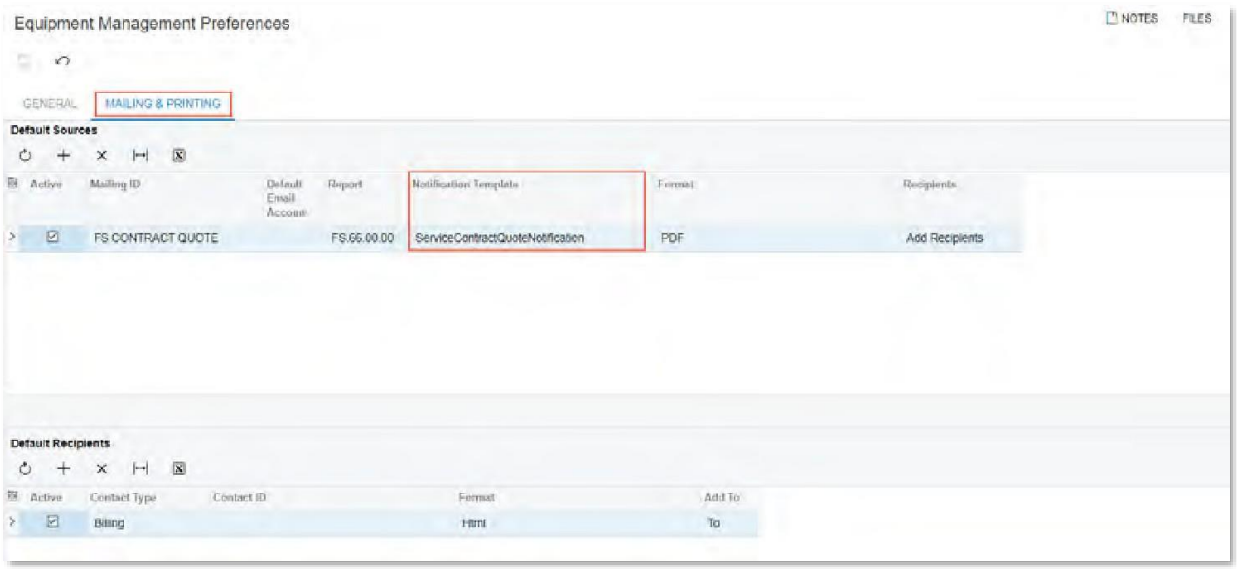
The quote report can be emailed immediately after generation or at any later time. If the service contract settings (for example, prices or schedule settings) have been changed after the quote generation, a user should regenerate the quote report before emailing it.

For service contracts with a billing type other than *At Time of Service*, and with *Regular Price* selected in the **Take Prices From** field on the **Summary** tab of the *Service Contracts* form, the quote report reflects the prices specified on the *Stock Items* (IN202500) or *Non-Stock Items* (IN202000) form. These princes are specified in the **Default Price** field of the **Price/Cost** tab of either form. Thus, the prices in the quote reports may vary during the contract duration if the default prices of the items change.

If *Contract* is selected in the **Take Price From** field, the system will use the prices specified on the **Prices** tab of the *Service Contracts* form.

Configuration of the Notification Template for the Report

On the *Notification Templates* (SM304003) form, the new *ServiceContractQuoteNotification* notification template has been predefined. This template is designed for sending emails with the *Service Contract Quote (FS660000)* report when a user clicks **Email Quote** on the More menu of the *Service Contracts* (FS305700) form. This template is listed in the **Default Sources** table of the new **Mailing & Printing** tab on the *Equipment Management Preferences* (FS100300) and *Route Management Preferences* forms. (See the *Equipment Management Preferences* form in the following screenshot.)



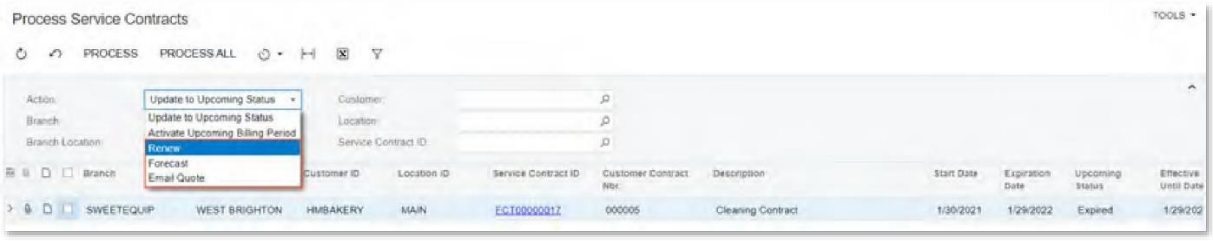
This tab contains the **Default Sources** table, where a user can activate any predefined mailing, and the **Default Recipients** table, where the user can review the default types of recipients for the mailing selected in the **Default Sources** table and add rows for additional

recipients, if needed. For each row, in the **Contact Type** column, the user selects one of the following options, which represent the types of recipients in the row:

- *Billing* (default): With this option selected, the system sends the notification email to the customer specified in the **Billing Customer** field of the **Summary** tab (**Billing Settings** section) of the *Service Contracts* form. For this customer, the system uses the email address specified in the **Email** field on the **Billing** tab (**Bill-To Info** section) of the *Customers* (AR03000) form.
- *Employee*: With this option selected, the **Contact ID** column of the current table becomes available for editing. The system sends the notification email to the employee the user specifies in the **Contact ID** column of the current row. The system uses the email address specified for this contact in the **Email** field on the **General Info** tab (**Contact Info** section) of the *Employees* (EP203000) form.
- *Customer*: With this option selected, the system sends the notification email to the customer specified in the **Customer** field in the **Summary** area of the *Service Contracts* form. The system uses the email address specified in the **Email** field on the **Billing** tab (**Bill-To Info** section) of the *Customers* form.
- *Supplier*: With this option selected, the system sends the notification email to the supplier specified in the **Supplier** field of the **Summary** tab (**Contract Settings** section) of the *Service Contracts* form. For the supplier, the system uses the email address specified in the **Account Email** field on the **General** tab (**Additional Account Info** section) of the *Suppliers* (AP303000) form.
- *Salesperson*: With this option selected, the system sends the notification email to the salesperson specified in the **Salesperson ID** field on the **Summary** tab (**Contract Settings** section) of the *Service Contracts* form. The salesperson account should be associated with an employee account; that is, for an employee, the salesperson ID should be selected in the **Salesperson** field on the **General Info** tab (**Employee Settings** section) of the *Employees* form. The system uses the email address specified in the **Email** field on the **General Info** tab (**Contact Info** section).
- *Contact*: With this option selected, the system sends the notification email to the contact specified in the **Contact** field on the **Summary** tab (**Contract Settings** section) of the *Service Contracts* form. The system uses the email address specified for the contact in the **Email** field of the **Details** tab (**Contact** section) of the *Contacts* form.

Mass Processing of Service Contracts

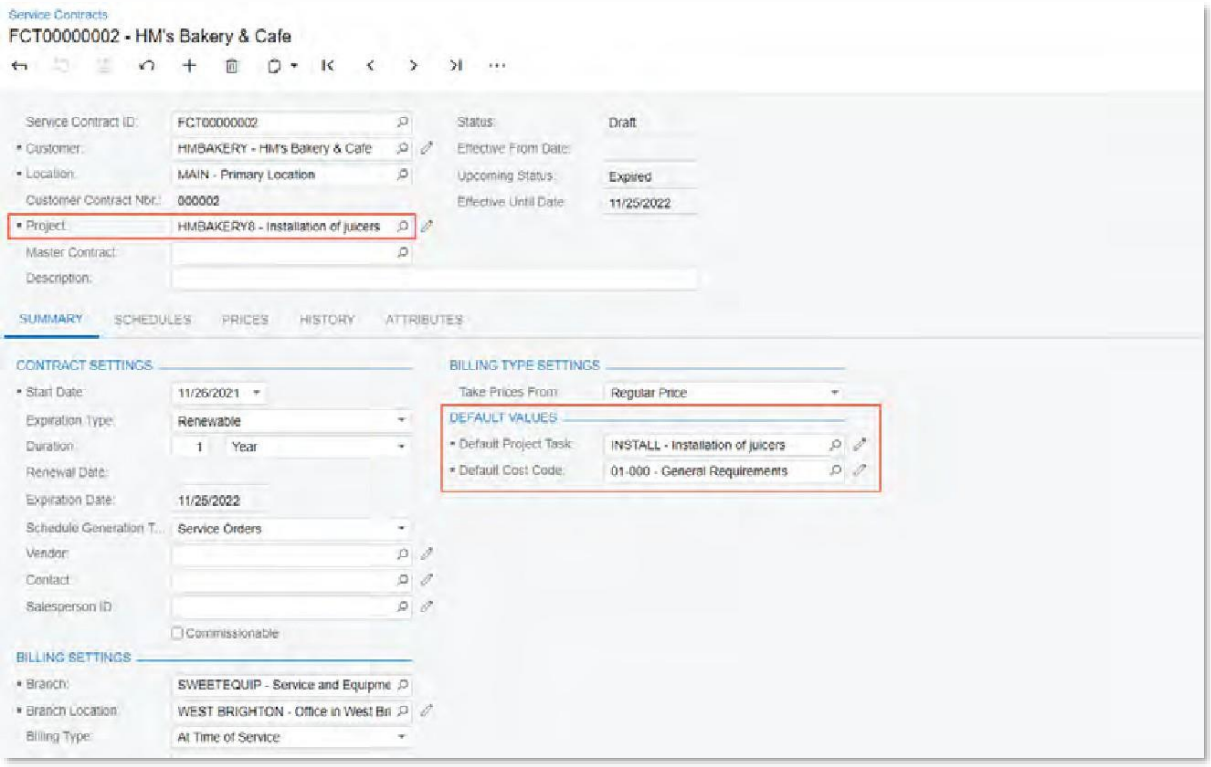
A user can process multiple service contracts at once by using the *Process Service Contracts* (FS501200) form. The following options have been added to the **Action** field of the Selection area of the form: *Renew*, *Forecast*, and *Email Quote*. (See the following screenshot.)



The user specifies the needed settings in the Selection area of the form, and then processes all of the listed contracts or only those the user selects by using the unlabeled checkboxes in the table.

Improvements to Project Settings on the Service Contracts Form

On the **Summary** tab of the *Service Contracts* (FS305700) form, the new **Default Values** section has been added. The section is available if in the **Project** field of the Summary area of the form, a specific project is specified (that is, a project that is different than the non-project code, which by default is *X* but may be different in a particular system), as shown in the example in the following screenshot.



This section now contains the **Default Project Task** field, which has been moved from the Summary area. Also, the **Default Cost Code** field has been added to the section. This field is available if the *Cost Code* feature is enabled on the *Enable/Disable Features* (CS100000) form. The **Default Cost Code** setting is required if a specific project is selected in the **Project** field. The system inserts the default cost code in the **Cost Code** column of the following tabs:

- The **Services per Period** tab of the *Service Contracts* form for the lines a user adds to a service contract.
- The **Details** tab of the *Service Contract Schedules* (FS305100) form for the lines a user adds to a schedule.

Note: During an upgrade to MYOB Advanced 2022.1, the upgrade script will not fill in the **Default Cost Code** field for the existing service contracts created for projects; thus, a user must specify a default cost code before modifying each particular service contract.

A project's default task is the task specified as the default one for the selected project on the **Tasks** tab of the *Projects* (PM301000) form. If a user changes the project in the **Project** field of the Summary area on the *Service Contracts* form, then the system inserts the project's default task in the following elements:

- The **Default Project Task** field on the **Summary** tab of the *Service Contracts* form
- The **Project Task** column on the **Services Per Period** tab of the *Service Contracts* form
- The **Default Project Task** field in the Summary area of the *Service Contract Schedules* form.
- The **Project Task** column on the **Details** tab of the *Service Contract Schedules* form

After a service contract is saved and has the *Draft* status, if a user needs to specify a project task that is different than the default project task specified on the *Projects* form, the user should do one of the following:

- Manually specify the task in the **Project Task** column on the **Services Per Period** tab of the *Service Contracts* form and on the **Details** tab of the *Service Contract Schedules* form.
- Temporarily change the default project task for the selected project on the *Projects* form.
- On the *Service Contracts* form, temporarily change the project identifier to the non-project code, and save your changes. Then change the project back to the previous identifier, and specify the needed project task in the **Default Project Task** field.

When a user changes a specific project to another specific project in the **Project** field on the Summary area on the *Service Contracts* form, the cost code will not be changed in the **Default Cost Code** field of the **Summary** tab. If a user changes the cost code in the **Default Cost Code** field, the cost code will not be updated in the existing lines on the **Services per Period** tab of the *Service Contracts* form or on the **Details** tab of the *Service Contract Schedules* form. However, if the user adds new lines, the updated default cost code will be inserted.

If a user needs to change the cost code of the service contract and its schedules to another one, the user should do one of the following:

- Manually specify the cost code in the **Cost Code** column on the **Services Per Period** tab of the *Service Contracts* form, and on the **Details** tab of the *Service Contract Schedules* form.
- On the *Service Contracts* form, temporarily change the project identifier to the non-project code, and save your changes. Then change the project back to the previous identifier, and specify the needed cost code in the **Default Cost Code** field.

Finance

Mass-Processing of Bank Transactions

In previous versions of MYOB Advanced, it was not possible to automatically match a large number of bank transactions or create an automation schedule for the matching and processing of bank transactions.

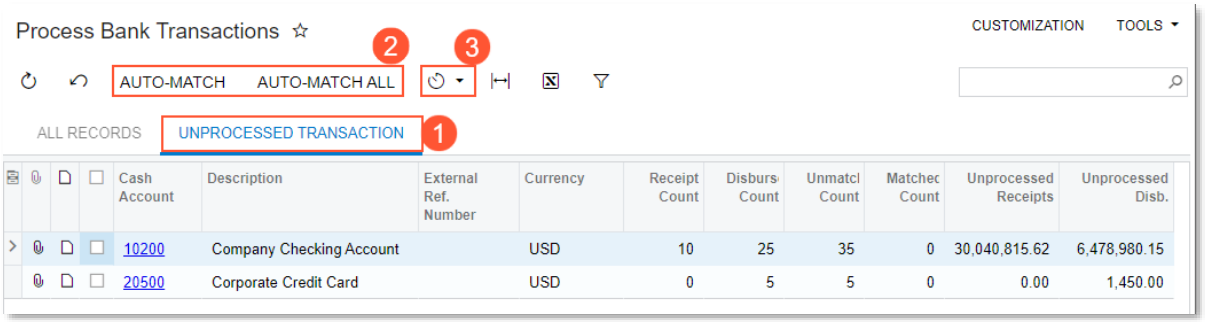
In MYOB Advanced 2022.1, the *Process Bank Transactions (CA3060PL)* form has been replaced with the *Process Bank Transactions* (CA501000) form, which is shown in the screenshot below.

The new form contains the following filter tabs:

- **All Records**: Lists all cash accounts
- **Unprocessed Transactions** (see Item 1 in the following screenshot): Lists cash accounts with nonzero amounts of unprocessed receipts or disbursements

The form toolbar contains the following buttons (Item 2):

- **Auto-Match**: Initiates the process of matching bank transactions for the cash accounts selected in the table
- **Auto-Match All**: Initiates the process of matching bank transactions for all cash accounts in the table



The results of the matching are saved automatically and need to be processed by the user manually on the *Process Bank Transactions* (CA306000), as was the case before.

Users can now schedule the automated processing of bank transactions on this form by using automated schedules. A user can initiate the scheduling process from the *Process Bank Transactions* (CA501000) form by clicking **Schedules > Add** on the form toolbar (Item 3), or from the *Automation Schedules* (SM205020) form.

Matching of Bank Transactions to Multiple AR and AP Documents

The functionality of matching bank transactions to multiple documents was introduced in MYOB Advanced 2021 R2. Users could match a bank account to multiple invoices and bills, but to apply a credit memo or a debit adjustment, a user had to create a new document on the **Create Payment** tab of the *Process Bank Transactions* (CA306000) form. The creation of new documents could be time-consuming if users had many documents to be matched.

Starting in MYOB Advanced 2022.1, bank transactions can be matched to multiple AR documents (invoices and credit memos) and multiple AP documents (bills and debit adjustments) on the **Match to Invoices** tab of the *Process Bank Transactions* (CA306000) form.

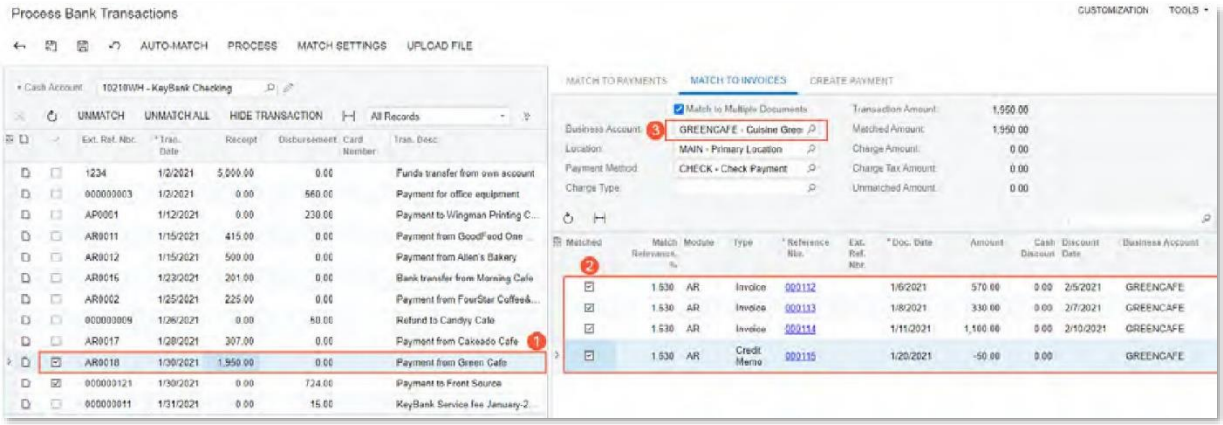
On the **Match to Invoices** tab, the following settings should be specified to make it possible for a user to match a *Receipt* bank transaction to invoices and credit memos and a *Disbursement* bank transaction to bills and debit adjustments:

- The **Match to Multiple Documents** checkbox should be selected.
- The **Business Account** field should be filled in with a customer or supplier. If a customer is selected, the bank transaction can be matched to multiple invoices and credit memos. If a supplier is selected, the bank transaction can be matched to multiple bills and debit adjustments.

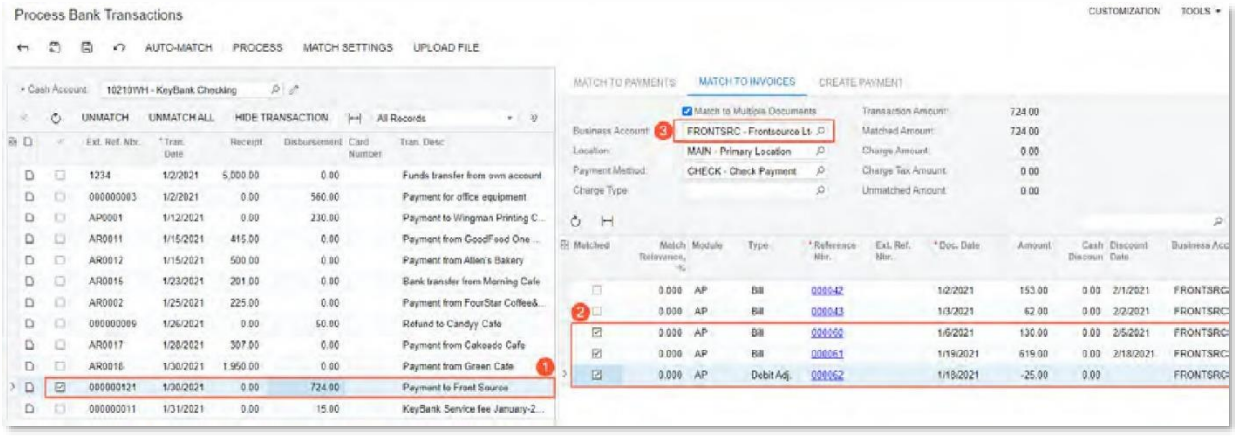
If these conditions are met, the system loads all AR and AP documents for the specified business account, regardless of the document amount.

In the lookup table that opens when a user clicks the magnifier button in the **Business Account** field on the **Match to Invoices** tab of the *Process Bank Transactions* form, the user can select any type of business account.

The following screenshot shows a *Receipt* transaction (Item 1) that is matched to multiple invoices and a credit memo (Item 2) of a specific customer (Item 3). When a user clicks **Process** on the form toolbar, the system creates a payment for these invoices and applies the credit memo to this payment.



The following screenshot shows a *Disbursement* transaction (Item 1) that is matched to multiple bills and a debit adjustment (Item 2) of a specific supplier (Item 3). When a user clicks **Process** on the form toolbar, the system creates a payment for these bills and applies the debit adjustment to this payment.



Matching of Bank Transactions to Prepayments with Charges

In previous versions of MYOB Advanced, on the *Process Bank Transactions* (CA306000) form, unreleased AR payments and prepayments with deducted charges were shown with the full amount (without the charge being deducted). As a result, users could not match these payments or prepayments to the corresponding bank transaction.

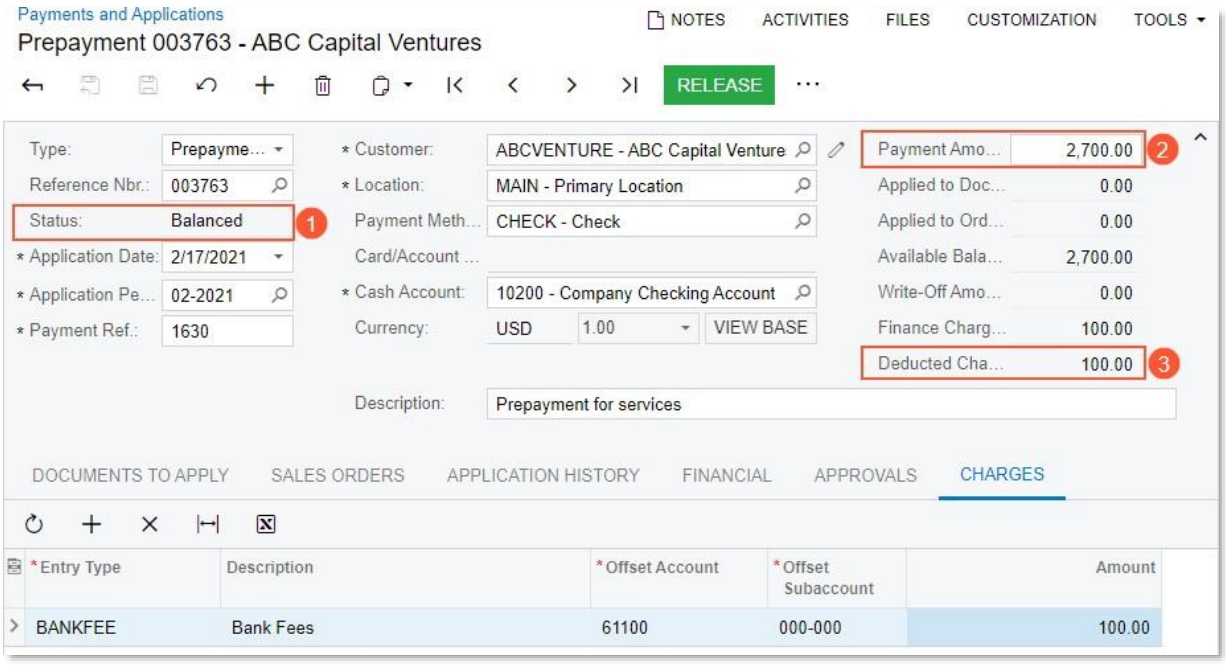
Starting in MYOB Advanced 2022.1, on the **Match to Payments** tab of the *Process Bank Transactions* form, the system shows unreleased payments and prepayments with deductible charges applied to them, which can be matched to bank transactions.

Usage Example

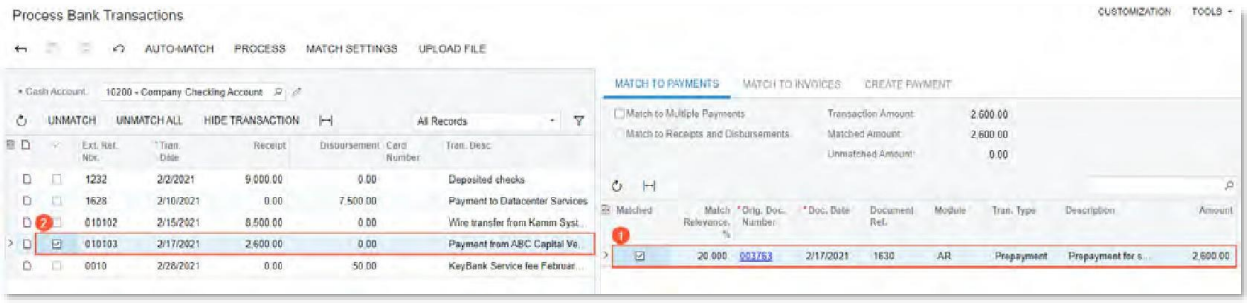
For example, suppose that a bank statement uploaded on the *Process Bank Transactions* (CA306000) form includes a $2600 receipt transaction.

In the system, a prepayment of $2700 (Item 1) with the *Balanced* status (Item 2) has been created with a deductible charge of $100 applied (Item 3), as shown in the following screenshot.

Note: The entry type of the deductible charge must have the **Deduct from Payment** checkbox selected on the *Entry Types* (CA203000) form.



On the *Process Bank Transactions* form, this prepayment of $2700 with the charge of $100 (Item 1) can be matched by a user or auto-matched by the system to the $2600 bank transaction (Item 2), as shown in the following screenshot.



Multiple versions of a Tax Report

In previous versions of MYOB Advanced, only one version of a tax report could be created for a tax agency. If the format of a tax return was changed by tax authorities, users had to modify the tax reporting settings based on the new requirements. These modifications could not be prepared in advance and became valid on a specified date, usually on January 1 of the upcoming year. Consequently, it was not possible to prepare an amendment of the tax report for previous periods in which the old reporting settings were used. The reports and inquiries that used the modified reporting settings showed inaccurate data if users ran them for previous periods.

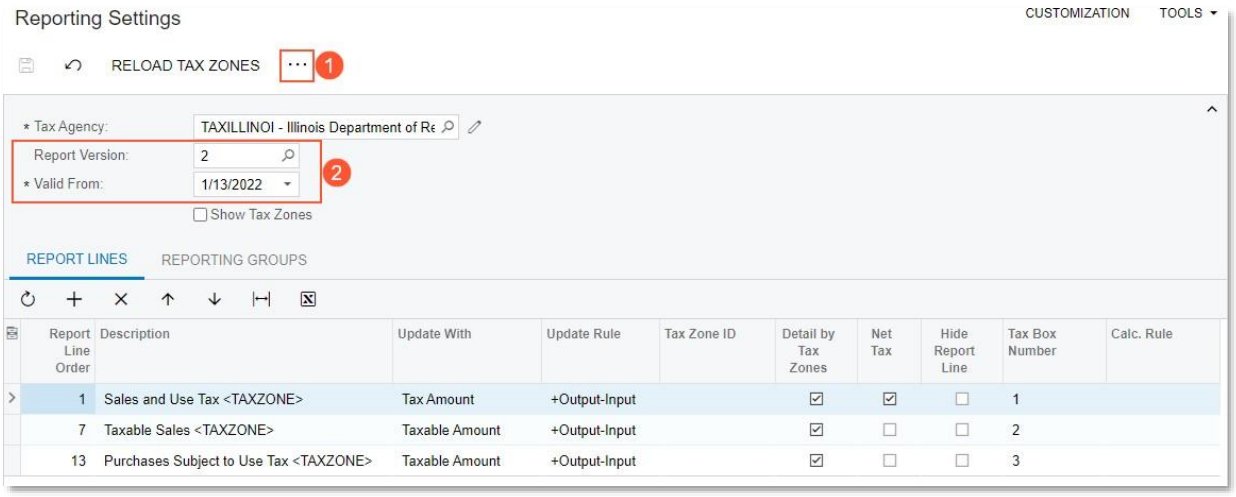
Starting in MYOB Advanced 2022.1, users can create an amended version of any tax report in advance. The new version of the tax report can be used starting in January 2022.

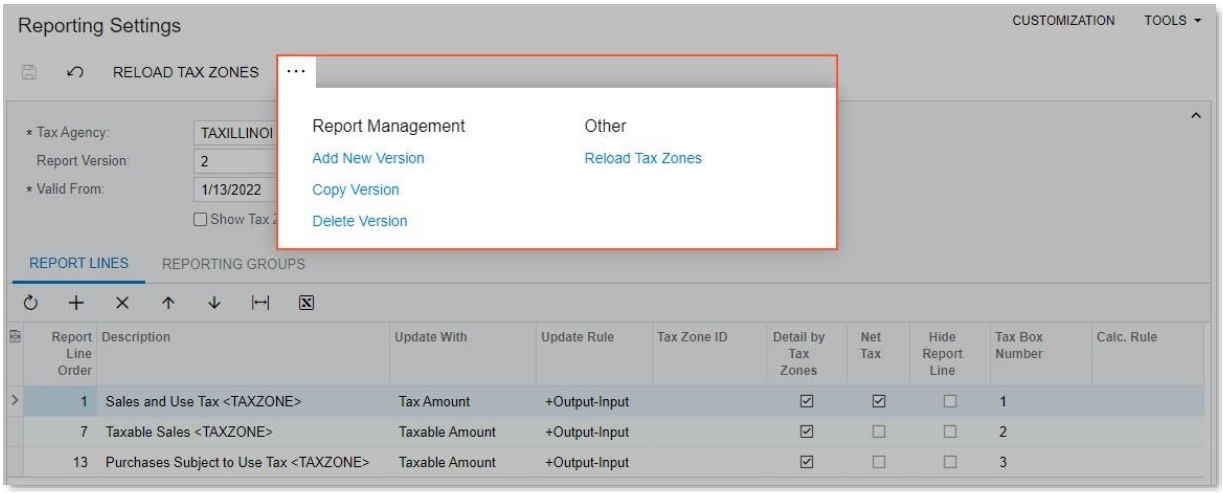
In February 2022, accountants can prepare a tax report for January 2022 to meet the 2022 tax regulations. At the same time, if needed, accountants can prepare an amendment for the tax report for December 2021 and use the old settings of the tax report for this amendment. Accountants can run MYOB Advanced tax reports for 2021 and 2022 based on the reporting settings that are valid for the respective year.

Changes to the Reporting Settings Form

On the *Reporting Settings* (TX205100) form, the following UI changes (shown in the following screenshots) have been introduced:

- The More button (...) (Item 1 in the following screenshot) has been added on the form toolbar. A user clicks this button to open the new More menu.
- In the Summary area, the **Report Version** and **Valid From** fields have been added (Item 2).



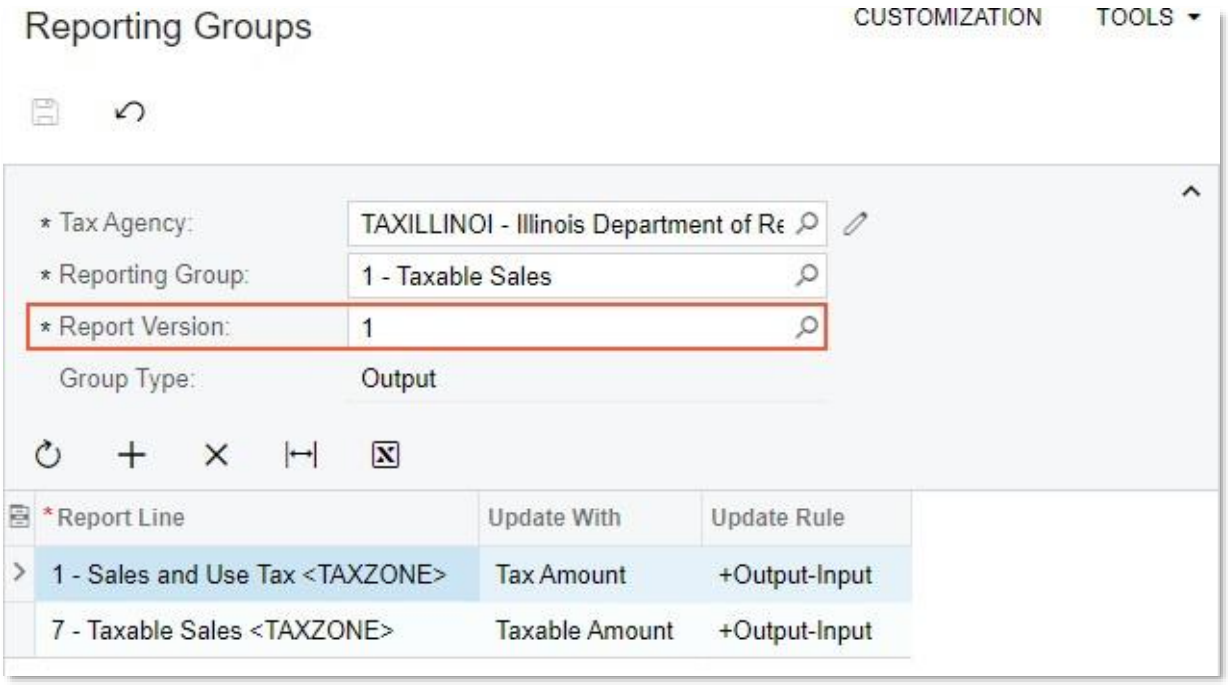


The **Report Management** category of the More menu displays the following commands.

Command	Description
Add New Version	Creates an empty version of the tax report for the selected tax agency. The new version will not have report lines specified. This version will include the current set of reporting groups. The number of the created report version will be displayed in the **Report Version** field in the Summary area.
Copy Version	Copies the selected report version and pastes it as a new version for the select- ed tax agency. The records on the **Report Lines** and **Reporting Groups** tabs are copied too. The number of the created report version will be displayed in the **Report Version** field, and the **Valid From** setting will be updated with the new date.
Delete Version	Deletes the selected report version. Only a newly added version can be deleted. This command becomes available if the selected report version does not have tax transactions posted for it.

Changes to the Reporting Groups Form

On the *Reporting Groups* (TX205200) form, the **Report Version** field has been added, as shown in the following screenshot.



The **Report Version** field displays a version of the tax report. Users can select a version by opening the lookup table for this field.

If a user opens the *Reporting Groups* form from a workspace, the **Report Version** field is empty, even if a tax agency is selected. If a user navigates to the *Reporting Groups* form from the *Reporting Settings* (TX205100) form by clicking **Group Details** on the **Reporting Groups** tab, the **Report Version** field shows the **Report Version** setting that is copied from the *Reporting Settings* form.

Changes to Reports, Inquiries, and Processes

The process that users run on the *Prepare Tax Report* (TX501000) form now uses the report version that corresponds to the selected tax period.

The process that users run on the *Release Tax Report* (TX502000) form now uses the report version recorded in the TaxHistory table by the process that was run on the *Prepare Tax Report* form.

For both processes, the system will apply the report version whose **Valid From** date is earlier than or the same as the end date of the selected tax period and whose version number is the highest of the available versions. If a tax report has multiple versions with a **Valid From** date that falls within the reporting period, the system will select the version with a **Valid From** date that is closest to the end date of the tax period.

The *Tax Summary* (TX621000), *Tax Details* (TX620500), and *Tax Report Details* (TX502010) forms now use the report version saved to the TaxHistory table for the selected period.

Upgrade Notes

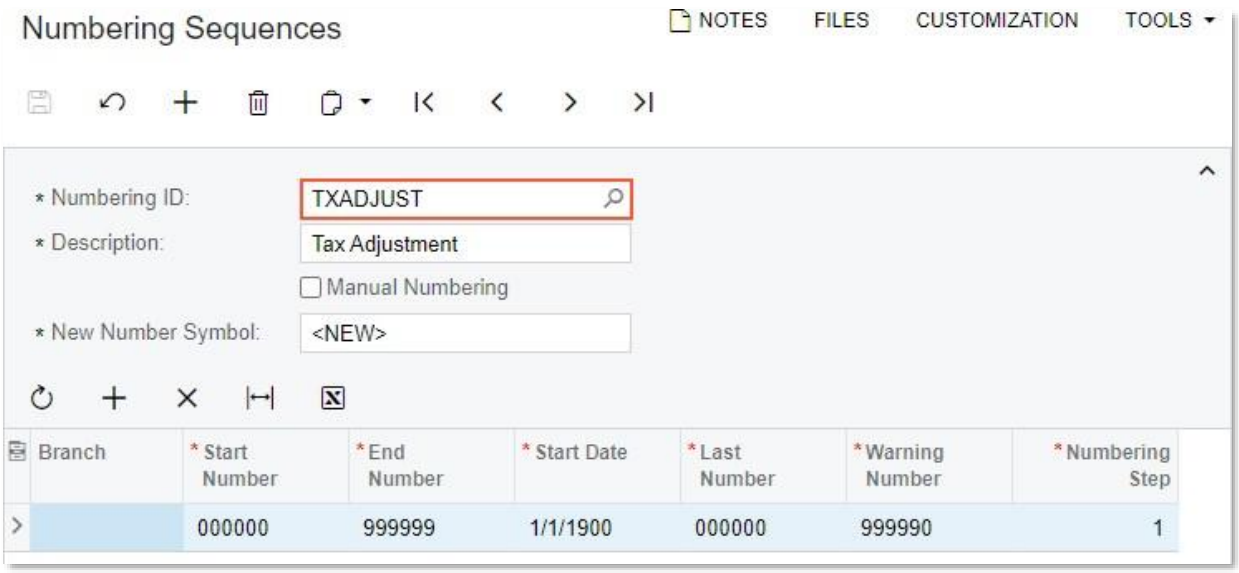
After an upgrade to MYOB Advanced 2022.1, the new fields on the *Reporting Settings* (TX205100) and *Reporting Groups* (TX205200) forms will be populated with the following values for all tax agencies:

- **Report Version**: *1*
- **Valid From**: *1/1/1900*

Numbering Sequence for Tax Adjustments

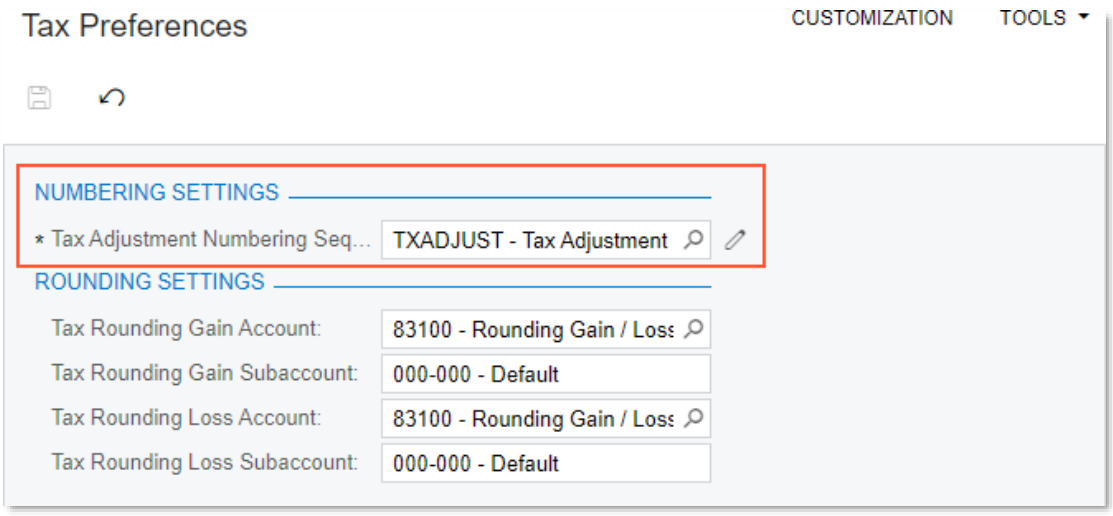
In previous versions of MYOB Advanced, when users created tax adjustments on the *Tax Adjustments* (TX301000) form, the system used the numbering sequence for AP bills. Each time a number was used for a tax adjustment, it created a break in the reference numbers of accounts payable documents.

In MYOB Advanced 2022.1, a predefined numbering sequence (*TXADJUST*) has been created and can be used for tax adjustments. The following screenshot shows the new numbering sequence on the *Numbering Sequences* (CS201010) form.



Changes to the Tax Preferences Form

On the *Tax Preferences* (TX103000) form, the **Numbering Settings** section with the **Tax Adjustment Numbering Sequence** field has been added, as shown in the following screenshot.



Before users start to work with the tax functionality, an administrative user can select the *TXADJUST* numbering sequence in the **Tax Adjustment Numbering Sequence** field on the *Tax Preferences* form. A different numbering sequence can instead be specified in this field as long as it has first been created on the *Numbering Sequences* form. The new numbering sequence will be used by the system for the *Adjust Output* and *Adjust Input* types of documents created by users on the *Tax Adjustments* (TX301000) form.

Upgrade Notes

After an upgrade to MYOB Advanced 2022.1, the **Tax Adjustment Numbering Sequence** field on the *Tax Preferences* (TX103000) form will be populated with the numbering sequence for AP bills. Thus, the system will initially work as it has in earlier versions of MYOB Advanced.

Performance Improvements in Deferred Revenue Recognition

In previous versions of MYOB Advanced, the process that users ran on the *Run Recognition* (DR501000) form had performance issues and was likely to time out. Namely, the following processing tasks could take a significant amount of time:

- Loading of deferral schedule records to the table on the form.
- Recognition of the loaded records when a user clicked **Process** or **Process All** on the form toolbar.

To address these issues, the following solutions have been implemented in MYOB Advanced 2022.1 for the *Run Recognition* form:

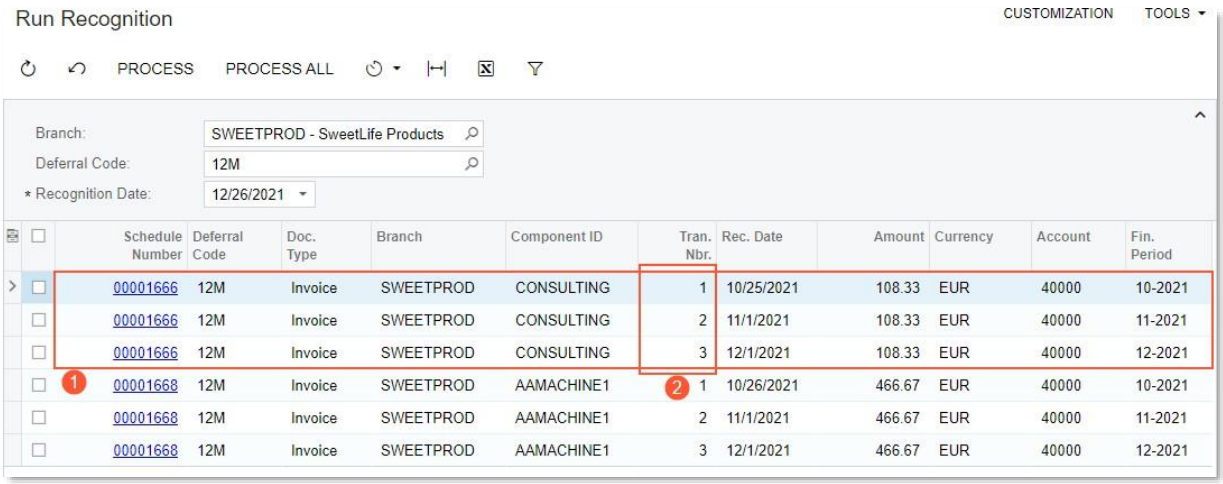
1. *Parallel processing*, which increases the speed of the process. An administrator must make changes in the system to enable this processing, as described in the next section.
2. *Paging*, which increases the speed of data loading. The system implements this mechanism without the administrator taking any action.

The paging mechanism works only if the system does not contain a deferral code with the *On Payment* option specified in the **Recognition Method** field on the *Deferral Codes* (DR202000) form.

Changes to the Run Recognition Form

In previous versions of MYOB Advanced, on the *Run Recognition* (DR501000) form, the system showed only the first open transaction of a deferral schedule component even if there were multiple open transactions of this component and these transactions met the selection criteria on the form (the **Branch**, **Deferral Code**, and **Recognition Date** settings).

In MYOB Advanced 2022.1, the *Run Recognition* form shows all open transactions of deferral schedules that meet the selection criteria. A user can process any or all of the listed transactions. In the following screenshot, Item 1 shows the components of the same deferral schedule and Item 2 shows the transactions of this component, which the user can process.



Reconciliation of Unreleased Retainage in AR and AP with GL

In previous versions of MYOB Advanced, users had no convenient way of reconciling the balances of the Retainage Payable and Retainage Receivable accounts with the general ledger.

To resolve this issue, in MYOB Advanced 2022.1, two new reports have been implemented—*AP Retained Balance* (AP635000) and *AR Retained Balance* (AR635000). Both reports appear in the system if the *Retainage Support* feature is enabled on the *Enable/Disable Features* (CS100000) form.

The report amounts are calculated based on the documents that match the following criteria:

- The **Apply Retainage** checkbox is selected for the document on the on the *Bills and Adjustments* (AP301000) or *Invoices and Memos* (AR301000) form.
- The document has unreleased retainage at the end of the selected financial period.
- The closed period of the document is later than the selected financial period, and the post period is earlier than or the same as the selected financial period

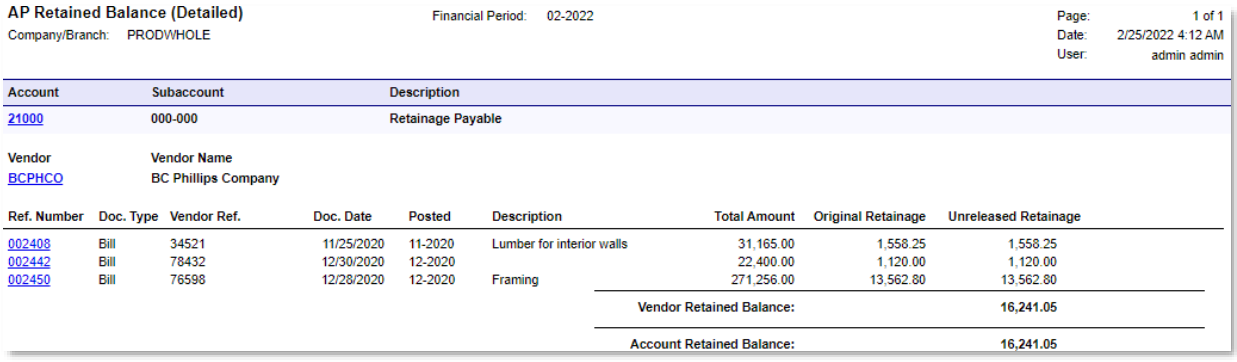
All amounts in the reports are shown in the base currency of the selected company. The amounts of credit memos in the *AR Retained Balance* report and of debit adjustments in the *AP Retained Balance* report are shown as negative numbers.

The new reports use the updated logic of calculating closed dates and closed periods. This logic is described in *Finance: Updated Logic of Closed Date and Closed Period for Documents with Retainage*.

The AP Retained Balance Report

The *AP Retained Balance* (AP635000) report displays the balance of open retainage in the AP subledger for a selected financial period.

On the report form, a user can select the needed report format, *Detailed* or *Summary*, before running the report. The following screenshot shows the *AP Retained Balance* report generated in the *Detailed* format for a particular supplier.



AP Retained Balance (Detailed) Financial Period: 02-2022 Page: 1 of 1
Company/Branch: PRODWHOLE Date: 2/25/2022 4:12 AM
User: admin admin

Account	Subaccount	Description
21000	000-000	Retainage Payable

Vendor	Vendor Name
BCPHCO	BC Phillips Company

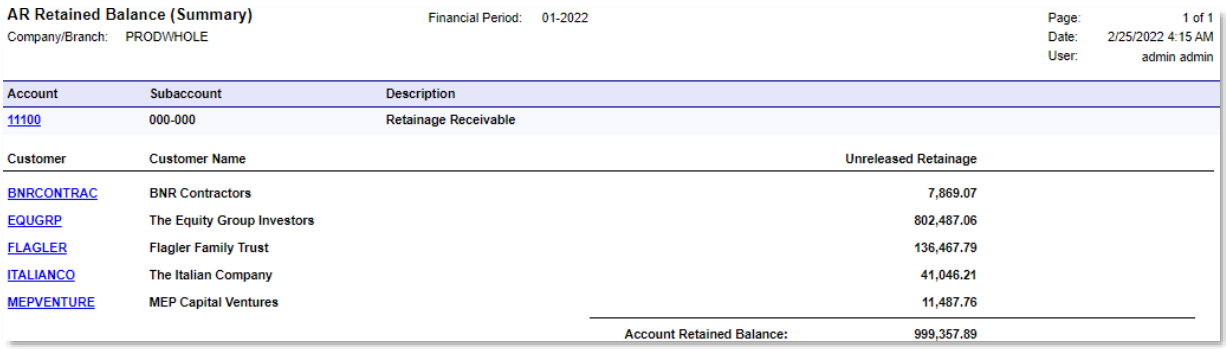
Ref. Number	Doc. Type	Vendor Ref.	Doc. Date	Posted	Description	Total Amount	Original Retainage	Unreleased Retainage
002408	Bill	34521	11/25/2020	11-2020	Lumber for interior walls	31,165.00	1,558.25	1,558.25
002442	Bill	78432	12/30/2020	12-2020		22,400.00	1,120.00	1,120.00
002450	Bill	76598	12/28/2020	12-2020	Framing	271,256.00	13,562.80	13,562.80
					Vendor Retained Balance:			16,241.05
					Account Retained Balance:			16,241.05

The report is available for users to which the *Administrator*, *AP Viewer*, *AP Clerk*, *AP Admin*, or *MYOB Support* role is assigned on the *User Roles* (SM201005) form.

The AR Retained Balance Report

The *AR Retained Balance* (AR635000) report displays the balance of open retainage in the AR subledger for a selected financial period.

On the report form, a user can select the needed report format, *Detailed* or *Summary*, before running the report. The following screenshot shows the *AR Retained Balance* report generated in the *Summary* format for all customers.



AR Retained Balance (Summary)
Company/Branch: PRODWHOLE
Financial Period: 01-2022
Page: 1 of 1
Date: 2/25/2022 4:15 AM
User: admin admin

Account	Subaccount	Description
11100	000-000	Retainage Receivable

Customer	Customer Name	Unreleased Retainage
BNRCONTRAC	BNR Contractors	7,869.07
EQUGRP	The Equity Group Investors	802,487.06
FLAGLER	Flagler Family Trust	136,467.79
ITALIANCO	The Italian Company	41,046.21
MEPVENTURE	MEP Capital Ventures	11,487.76
	Account Retained Balance:	999,357.89

The report is available for users to which the *Administrator*, *AR Viewer*, *AR Clerk*, *AR Admin*, or *MYOB Support* role is assigned on the *User Roles* (SM201005) form.

Support of Multiple Base Currencies for Deferred Revenue

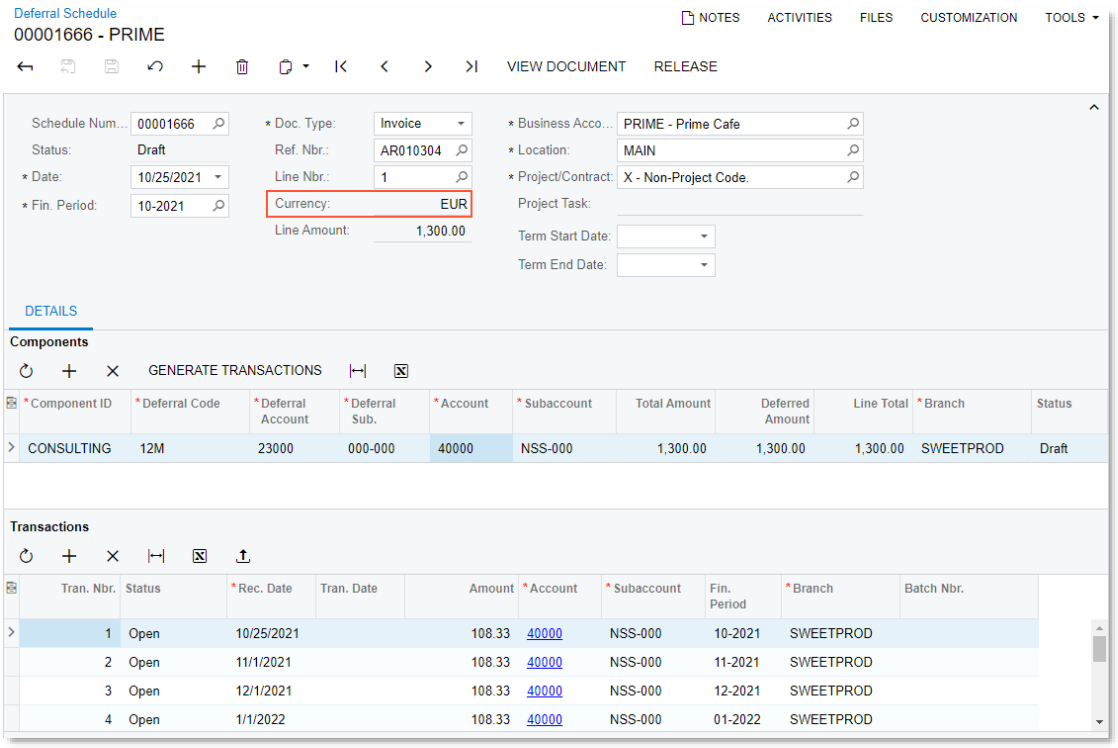
The *Multiple Base Currencies* feature was implemented in MYOB Advanced in 2021 R1, although it was not compatible with multiple other features, including *Deferred Revenue Management*. Starting in MYOB Advanced 2022.1, the deferred revenue subledger can be used with the *Multiple Base Currencies* feature enabled. The deferred revenue functional area does not support deferral schedules in a foreign currency; schedules are processed only in the base currency. With the *Multiple Base Currencies* feature enabled on the *Enable/Disable Features* (CS100000) form, on all deferred revenue forms that produce GL transactions, the system verifies that entities with the same base currency are specified in one deferral schedule. Users can now review the currency of deferral schedules on all data entry forms and reports.

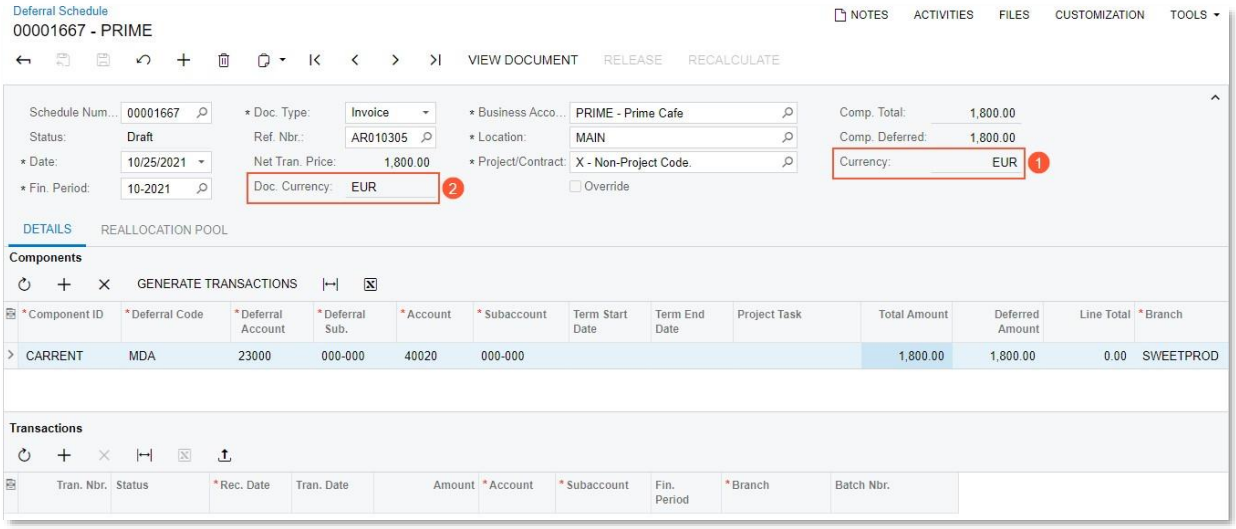
Changes to the Enable/Disable Features Form

On the *Enable/Disable Features* (CS100000) form, the *Multiple Base Currencies* feature can be enabled if the *Deferred Revenue Management* feature is enabled.

Changes to the Deferral Schedule Form

If the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* (CS100000) form, depending on whether the *Revenue Recognition by IFRS 15/ASC 606* feature is enabled, the **Currency** field has been added to the Summary area of the *Deferral Schedule* (DR201500) form, as shown in the following screenshots.





For a deferral schedule created automatically by the system based on a document, the **Currency** setting (Item 1) is copied from the document's base currency. In this case, the **Doc. Currency** field (Item 2) is read-only (as you can see in the second screenshot above).

For manually created deferral schedules, the following rules determine the value in the **Currency** field:

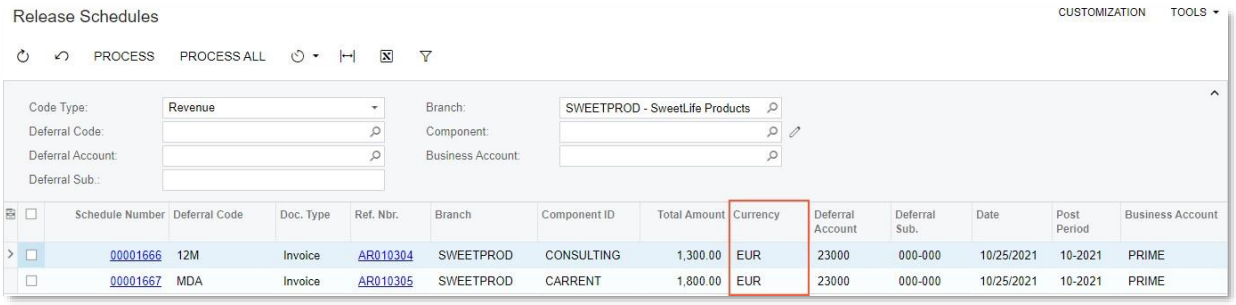
- If no document is selected in the **Ref. Nbr.** field and no business account is selected in the **Business Account** field, the **Currency** field is filled in by default with the base currency of the branch to which the user is signed in. The **Currency** field is read-only.
- If no document is selected in the **Ref. Nbr.** field and the **Business Account** field contains a business account for which a base currency is specified, the **Currency** field is filled in with the base currency of the entity (branch, company, or company group) associated with the business account. The **Currency** field is read-only.
- If the **Business Account** field contains a business account which is not associated with any entity, the **Currency** field is filled in with the base currency of the branch to which the user is signed in. The **Currency** field is available for editing. The lookup table in the **Currency** field displays the base currencies of the branches to which the user has access.
- If a document is selected in the **Ref. Nbr.** field, the **Currency** field is filled in by default with the document's base currency, regardless of whether the base currency is specified for the selected business account.

The system verifies that all branches selected in the **Components** table on the **Details** tab have the same base currency as the schedule currency specified in the **Currency** field of the Summary area. On release of the deferral schedule, the system verifies that the base currency of the entity associated with the business account (if one is specified) and of the branches selected in the **Components** table is the same as the schedule currency.

Changes to the Release Schedules Form

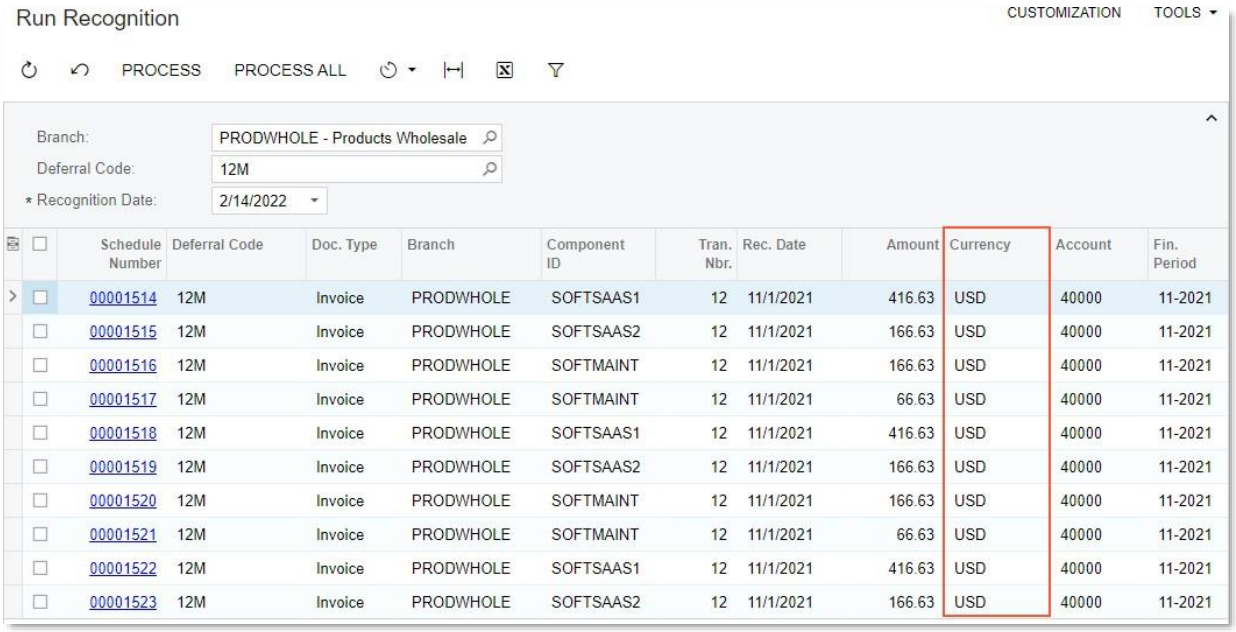
On the *Release Schedules* (DR503000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** column is displayed in the table, as shown in the following screenshot.

The **Currency** column is filled in with the schedule's currency, which is specified on the *Deferral Schedule* (DR201500) form.



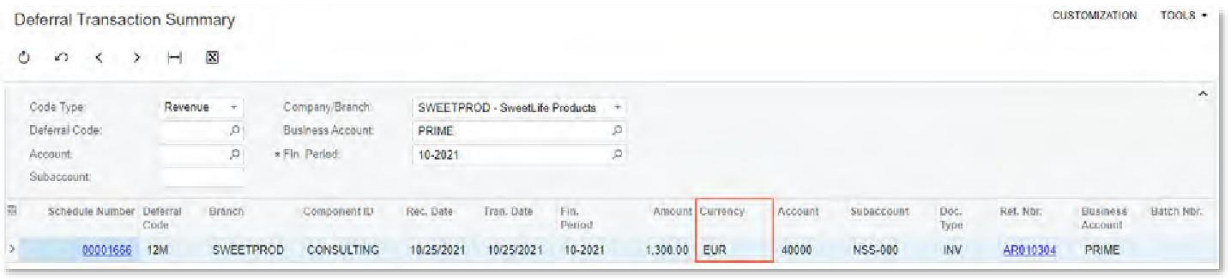
Changes to the Run Recognition Form

On the *Run Recognition* (DR501000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** column is displayed in the table, as shown in the following screenshot. The **Currency** column is filled in with the schedule's currency, which is specified on the *Deferral Schedule* (DR201500) form.



Changes to the Deferral Transaction Summary Form

On the *Deferral Transaction Summary* (DR402000) form, if the *Multiple Base Currencies* feature is enabled, the Currency column is displayed in the table, as shown in the following screenshot. The **Currency** column is filled in with the schedule's currency, which is specified on the *Deferral Schedule* (DR201500) form.



Changes to Reports and Inquiries

On the *Draft Schedules* (DR630030) form, the **Company/Branch** field has been added to the **Report Parameters** tab. This parameter is required if the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* (CS100000) form.

On multiple other report forms that are related to deferred revenue and already have the **Company/Branch** report parameter, this parameter is now required if the *Multiple Base Currencies* feature is enabled.

Upgrade Notes

During an upgrade to MYOB Advanced 2022.1, the upgrade script will insert values in the new BaseCuryID database field for existing deferral schedules. Each value will be copied from the Company.BaseCuryID field.

Support of Multiple Base Currencies for Fixed Assets

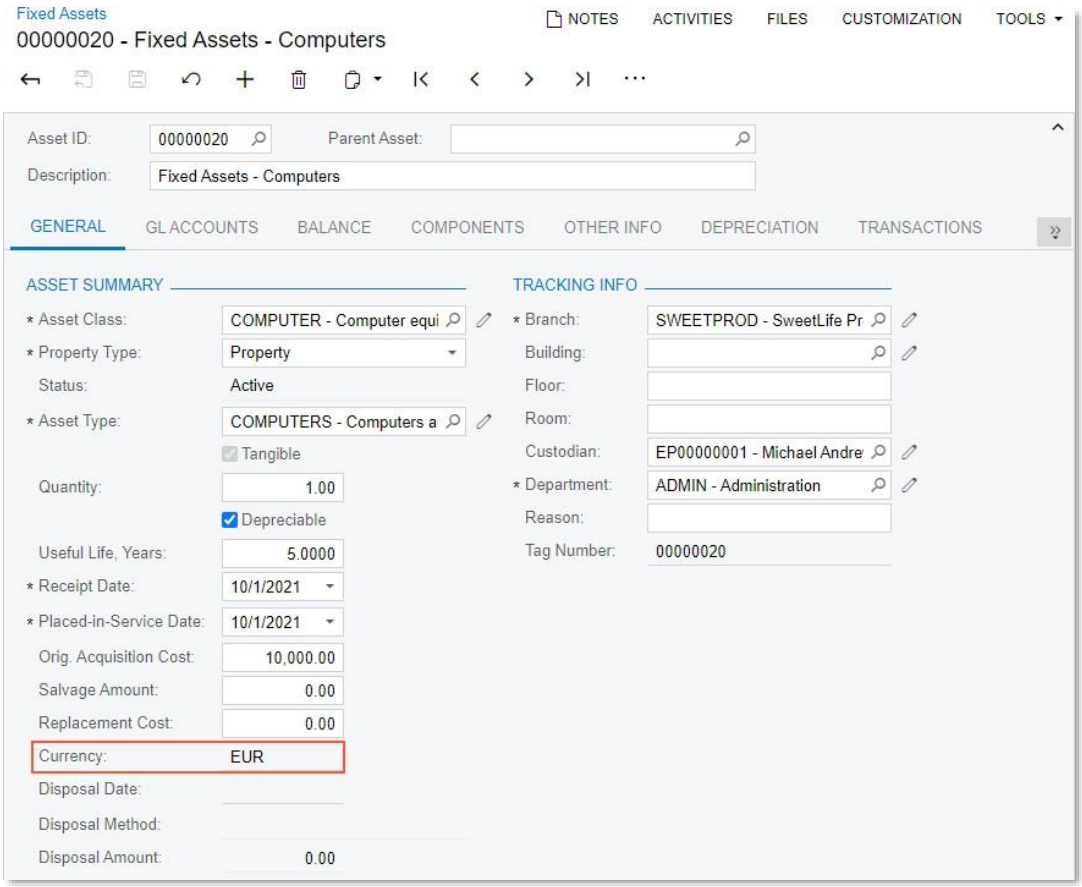
The *Multiple Base Currencies* feature was implemented in MYOB Advanced in 2021 R1, although it was not compatible with multiple other features, including *Fixed Asset Management*. Starting in MYOB Advanced 2022.1, the *Fixed Asset Management* feature can be used with the *Multiple Base Currencies* feature enabled. The fixed assets functional area does not support documents in a foreign currency; documents are processed only in the base currency. With the *Multiple Base Currencies* feature enabled on the *Enable/Disable Features* (CS100000) form, on all fixed asset-related forms that produce GL transactions, the system verifies that the branches specified in a transaction have the same base currency. Users can now review the currency of amounts and total amounts in all fixed asset transactions on multiple data entry forms and reports.

Changes to the Enable/Disable Features Form

On the *Enable/Disable Features* (CS100000) form, the *Multiple Base Currencies* feature can be enabled if the *Fixed Asset Management* feature is enabled.

Changes to the Fixed Assets Form

On the *Fixed Assets* (FA303000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** field is displayed on the **General** tab, as shown in the following screenshot.



The **Currency** field shows the currency in which the fixed asset amounts are stored. The asset's currency specified in this field is the base currency of the branch to which the asset is assigned. The **Currency** field is read-only.

If on the *Fixed Assets* form, a user changes the branch of the asset in the **Branch** field on the **General** tab and no *Purchasing+* transaction has been released for the asset, the system will insert the base currency of the selected branch in the **Currency** field.

Users cannot change the asset's branch to a branch in a different currency in the following cases:

- If the asset has produced at least one GL transaction with the *Purchasing+* transaction type.
- If the asset was created by clicking **Split** on the More menu of the *Fixed Assets* form, even if no GL transaction was generated.
- If the asset was created on the *Convert Purchases to Assets* (FA504500) form, even if no GL transaction has been generated yet.
- If a reconciliation transaction has been created for the asset.
- If the asset was migrated.

If the *Multiple Base Currencies* feature is enabled, on the **Reconciliation** tab of the *Fixed Assets* form, the system loads only the transactions in the base currency of the branch selected in the **Branch** field.

Changes to the Convert Purchases to Assets Form

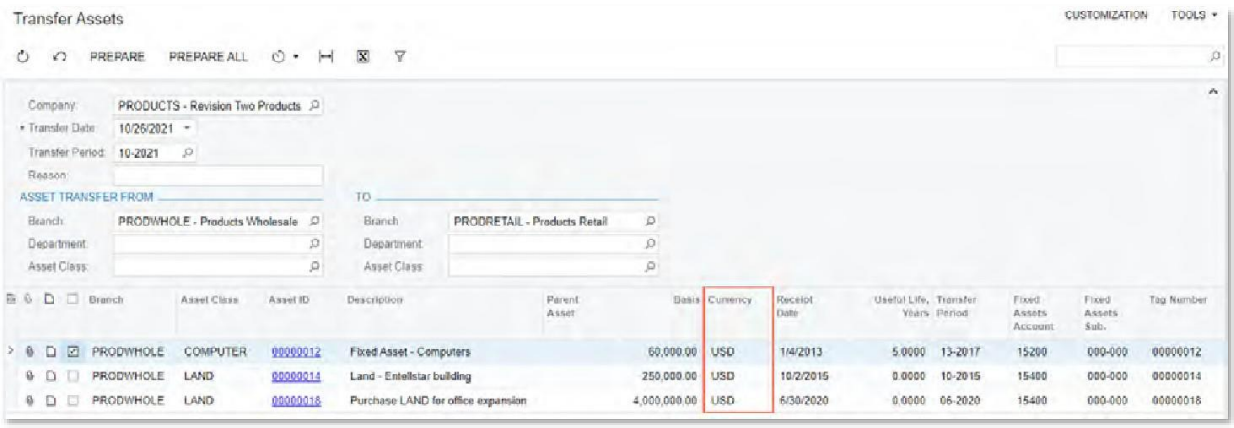
On the *Convert Purchases to Assets* (FA504500) form, if the *Multiple Base Currencies* feature is enabled, it will not be possible to create an asset in a branch based on a purchasing transaction posted for another branch that has a different base currency.

If a user is adding a new asset, the upper table shows only the GL transactions in the same base currency as the base currency of the selected branch.

If a user is making an addition to a fixed asset, the lookup table in the **Asset ID** column in the lower table shows only the assets whose currency is the same as the base currency of the selected branch.

Changes to the Transfer Assets Form

On the *Transfer Assets* (FA507000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** column is displayed in the table, as shown in the following screenshot.



The **Currency** column shows the asset's currency, which is specified on the *Fixed Assets* (FA303000) form. Users will be able to easily transfer assets from multiple branches with the same base currency to one branch.

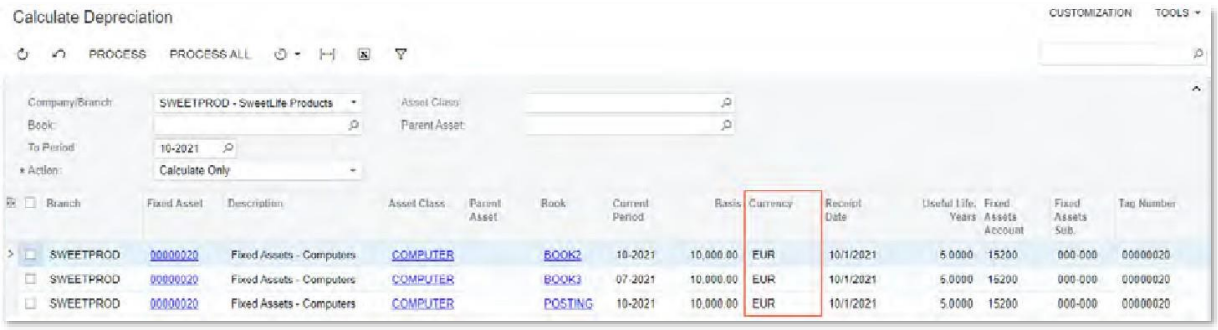
Note: Assets can be transferred only between the branches with the same base currencies. If the currencies are different, an asset has to be disposed of in the source branch on the *Dispose Assets* (FA505000) form and acquired in the destination branch on the *Fixed Assets* form.

Changes to the Dispose Assets Form

On the *Dispose Assets* (FA505000) form, if the *Multiple Base Currencies* feature is enabled, the **Company/Branch** setting is now required. By default, this setting displays the branch to which the user is signed in. The user can select another branch, company, or company group to which the user has access.

Changes to the Calculate Depreciation Form

On the *Calculate Depreciation* (FA502000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** column is displayed in the table, as shown in the following screenshot. The **Currency** column shows the asset's currency, which is specified on the *Fixed Assets* (FA303000) form.



Changes to Reports and Inquiries

If the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* (CS100000) form, on multiple report and inquiry forms related to fixed assets, the **Company/Branch** setting is now required. By default, this element is filled in with the company or branch to which the user is signed in.

Upgrade Notes

During an upgrade to MYOB Advanced 2022.1, the upgrade script will insert the values in the new BaseCuryID database field for existing fixed assets. This value will be copied from the Company.BaseCuryID field.

Updated Logic of Closed Date and Closed Period for Documents with Retainage

In previous versions of MYOB Advanced, the closed date, closed financial period, and closed transaction period for all documents were set to the date of the most recent application of the payment document. This setting was not correct for documents with retainage—those that had the **Apply Retainage** check field selected in the Summary area of the *Bills and Adjustments* (AP301000) or *Invoices and Memos* (AR301000) form. This is because these documents became closed when all of the following conditions were met:

- The balance of the original document became zero.
- The amount of unreleased retainage for the original document became zero.
- The balance of child retainage documents for the original document, if they existed, became zero.

In MYOB Advanced 2022.1, a new logic of determining the closed date (the ClosedDate field maintained by the system), closed period (ClosedFinPeriod), and (ClosedTranPeriod) has been introduced for documents with retainage. Each of these dates is defined as the most recent date and the most recent period of either of the following events:

- The payment application of the original document
- The release of the retainage document (when the retained balance is transferred from the retainage account to the AR or AP account)

The closed date and closed period will be filled in for the original document when the status of the original document changes from *Open* to *Closed*.

Due to the changed logic, retainage reconciliation reports will be based on the ClosedFinPeriod parameter of the document. (This parameter is not displayed on the UI and is stored in the database.) The affected reports are *AP Retained Balance* (AP635000) and *AR Retained Balance* (AR635000). When one of these reports is run, the system will select only the documents whose closed period is later than the **Financial Period** specified in the report parameters of the applicable report.

The changed logic described in this topic was necessary in order to provide a convenient way for users to reconcile the balances of the Retainage Payable and Retainage Receivable accounts with the general ledger. For more information, see *Finance: Reconciliation of Unreleased Retainage in AR and AP with GL*.

Other Improvements

In MYOB Advanced 2022.1, multiple improvements to financial management processes have been introduced, as described below.

Performance Improvements in Fixed Asset Processes

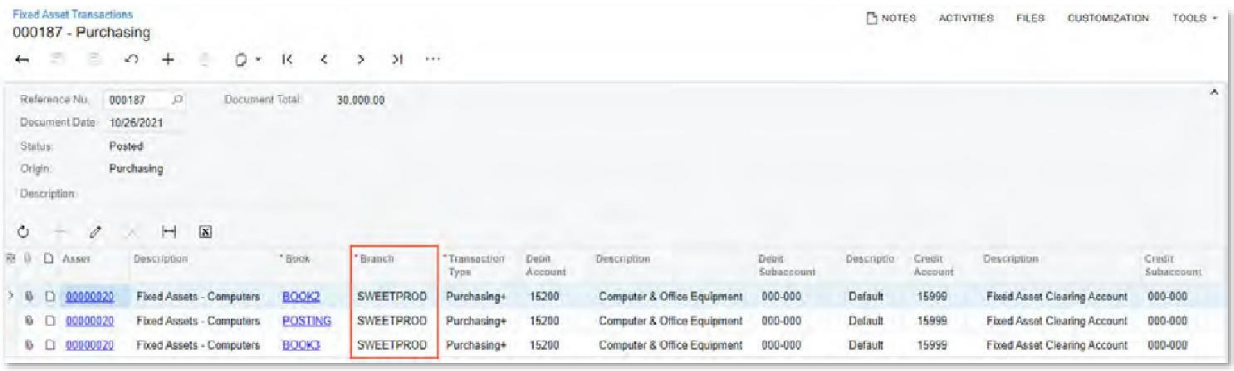
In many cases, the most recent period of fixed asset book history in the FABookHistory table is needed for transactions. In previous MYOB Advanced versions, to retrieve this period, the system used an aggregate query that was slow, especially on large amounts of data. The slow aggregated query affected multiple fixed asset processes, especially depreciation calculation and disposal.

To improve the performance of these processes, in MYOB Advanced 2022.1, this most recent period is now stored in the FABookBalance table in the newly added FaBookBalance.MaxHistoryPeriodID field. A new most recent period is calculated and saved to the database whenever a fixed asset's history is changed (inserted or deleted). The slow aggregated query has been removed, and the FaBookBalance.MaxHistoryPeriodID field is used instead of the removed query.

The Addition of the Branch Column on Fixed Assets Forms

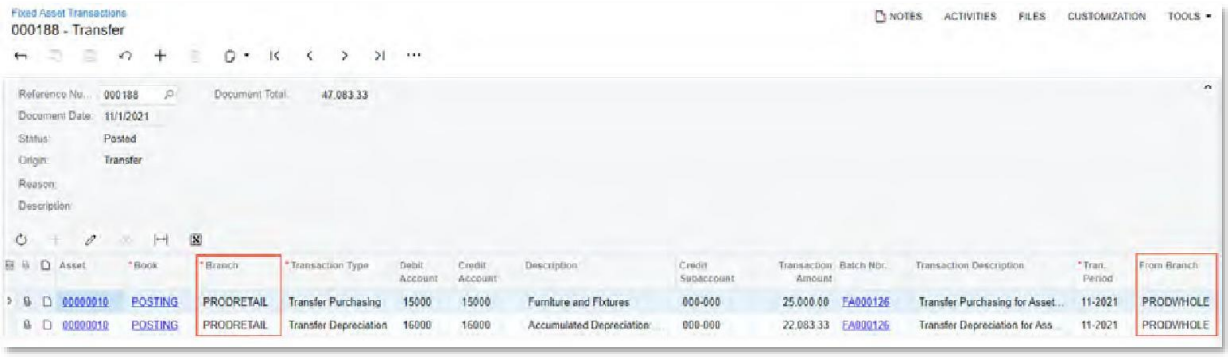
In previous versions of MYOB Advanced, information about branches was not available on the *Fixed Asset Transactions* (FA301000) form and on the **Transaction History** tab of the *Fixed Assets* (FA303000) form. As a result, users could not review the source and destination branches of transactions created on these forms.

On the *Fixed Asset Transactions* (FA301000) form, the **Branch** column has been added to the table, as shown in the following screenshot.

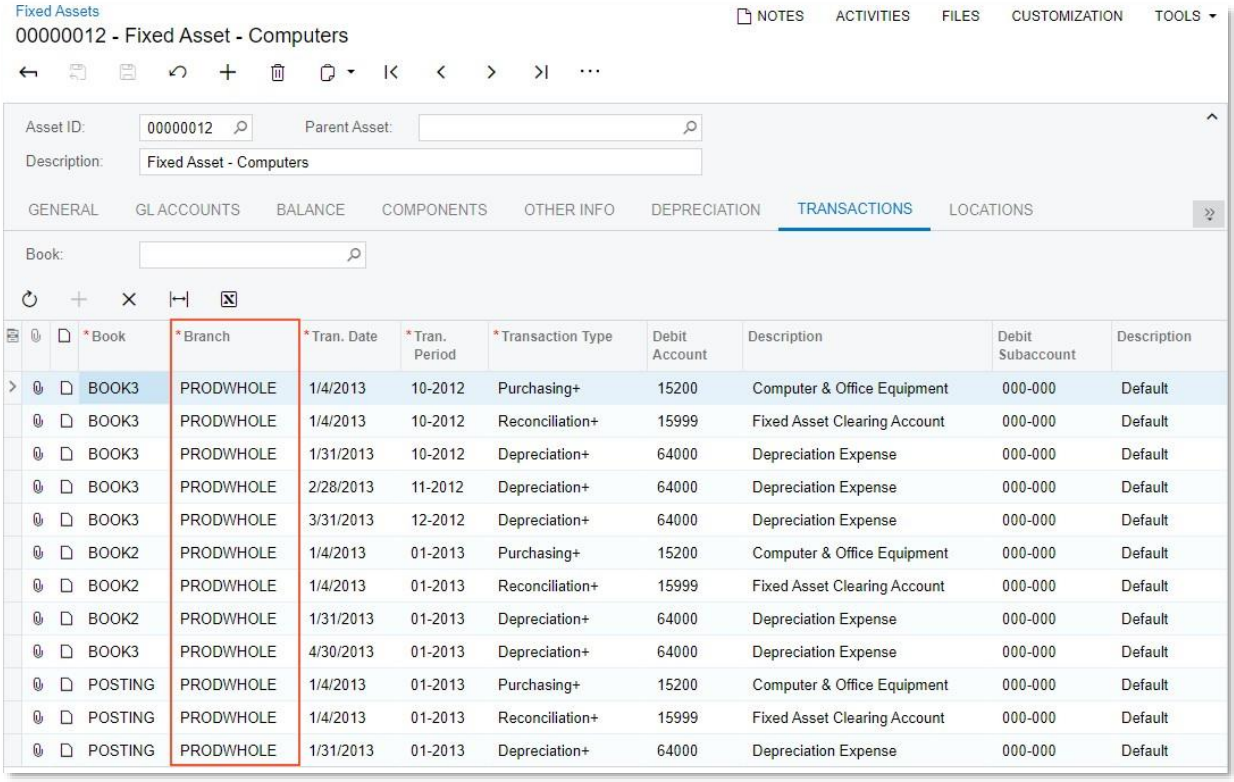


For transactions that have *Transfer* specified in the **Origin** field on the *Fixed Asset Transactions* form, the **From Branch** column has been added to the table. The column appears on the form if the *Multi-Branch Support* feature is enabled on the *Enable/Disable Features* form.

The following screenshot illustrates a transfer transaction with the new **Branch** and **From Branch** columns.



In MYOB Advanced 2022.1, the **Branch** column has been added to the table on the **Transactions** tab of the *Fixed Assets* form, as shown in the following screenshot.



The **Branch** column appears on the form if the *Multibranch Support* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Simplified Workflows for Financial Forms

In previous versions of MYOB Advanced, the customisation of workflows was prohibited for some forms. Starting in MYOB Advanced 2022.1, the description of these workflows has been simplified, and customisers can modify the workflows in Customisation Project Editor. Customised and custom workflows can be created for the following screens:

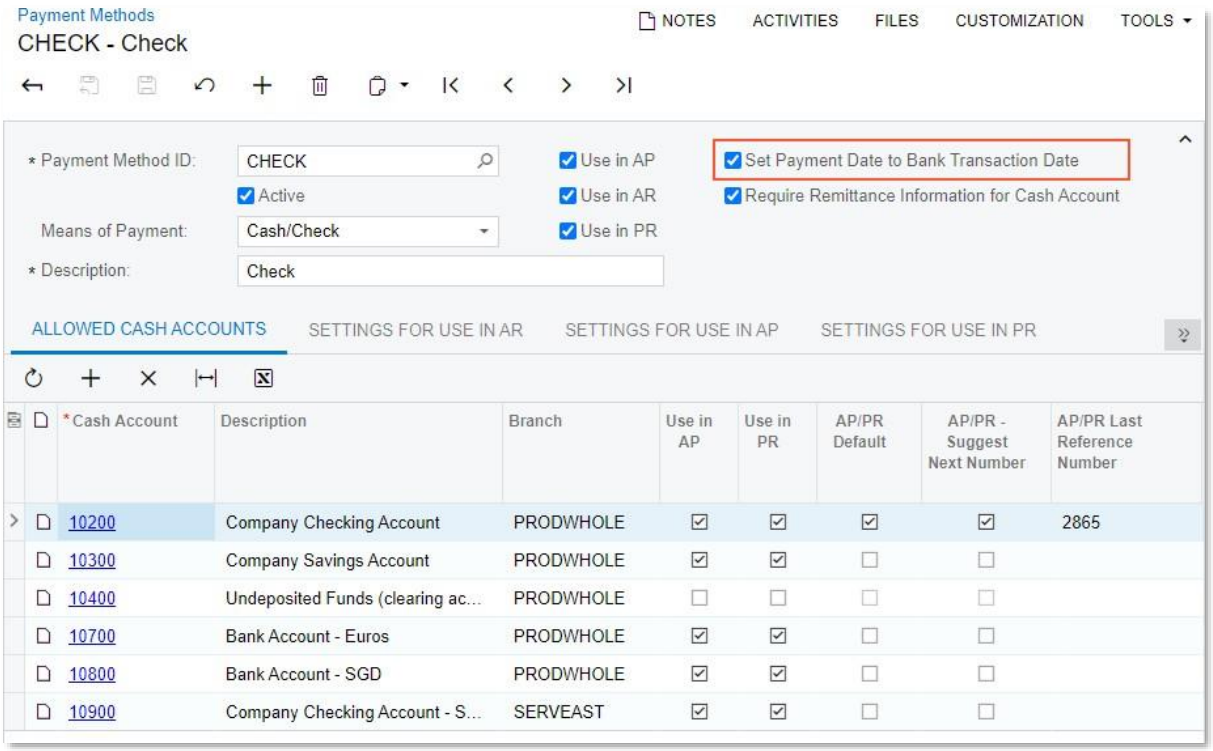
- *Invoices and Memos* (AR301000)
- *Payments and Applications* (AR302000)

- *Cash Sales* (AR304000)
- *Invoices* (SO303000)
- *Bills and Adjustments* (AP301000)
- *Checks and Payments* (AP302000)
- *Quick Checks* (AP304000)

Assignment of a Payment Date Based on the Bank Transaction

In previous versions of MYOB Advanced, when a user matched a bank transaction to an unreleased AR or AP payment document on the *Process Bank Transactions* (CA306000) form and then processed the matched transactions, the system did not update the payment date to match the bank transaction date automatically. The user had to manually adjust the date of the payment document and then process the bank transaction.

In MYOB Advanced 2022.1, a new checkbox, **Set Payment Date to Bank Transaction Date**, has been added to the Summary area of the *Payment Methods* (CA204000) form (shown in the following screenshot).



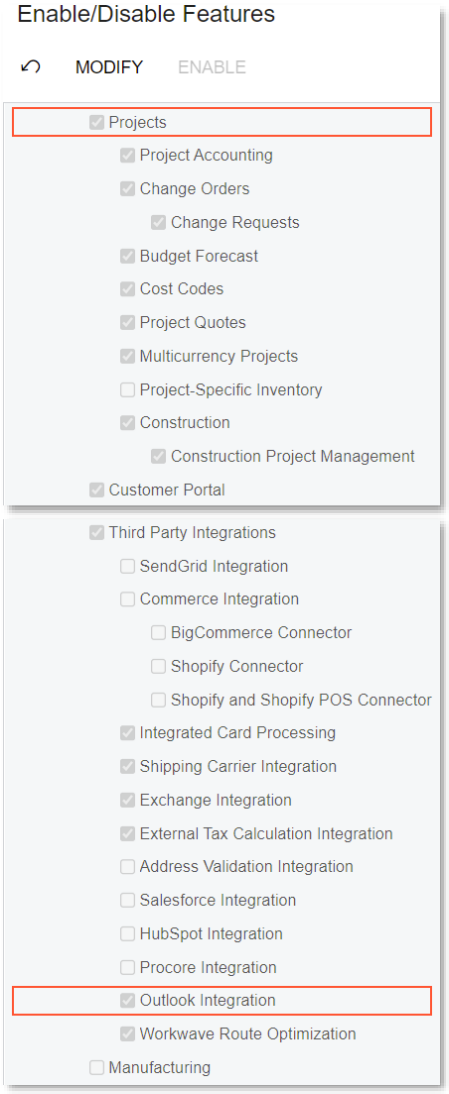
Now if this checkbox is selected for a payment method on the *Payment Methods* form, when a user matches a bank transaction to an unreleased payment document that is based on the payment method and then processes the bank transaction on the *Process Bank Transactions* form, the system updates the date of the payment document to match the date of the bank transaction.

Integrations

Improvements to the MYOB Add-In for Outlook

The MYOB add-in for Outlook allows an email to be associated with the corresponding contact and this email to be stored as an email activity in MYOB Advanced. This add-in works only if the *Outlook Integration* feature (under *Third Party Integrations*) is enabled on the *Enable/Disable Features* (CS100000) form.

In previous versions of MYOB Advanced, enabling the *Construction Project Management* feature, which is located in the *Projects* group of features, gave users the capability to attach email activities to related projects through the MYOB add-in for Outlook. Starting in MYOB Advanced 2022.1, this capability is available if the *Projects* feature is enabled (see the following screenshot), but it no longer requires the *Construction Project Management* feature to be enabled.



Manufacturing

Control Point Operations in Production Routing

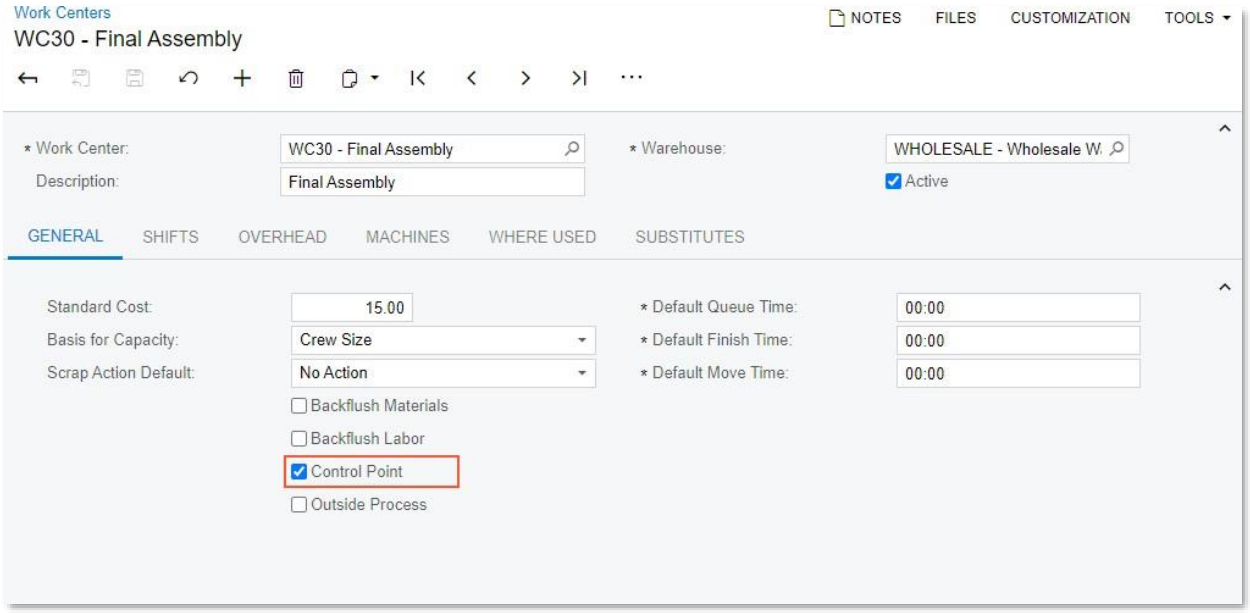
MYOB Advanced Manufacturing Edition 2022.1 provides enhanced recording of quantities of completed items for production operations. Organisations may define labor and materials to be backflushed for most routing operations if they want to reduce the cost of manual recording of quantities of completed items during the production process. However, there may be specific milestone operations at which workers must record the quantity of completed items.

Now production managers can mark particular routing operations as control points, which means that workers must record the quantity of completed items for each of these operations. The use of control points provides the following enhancements in the production management process:

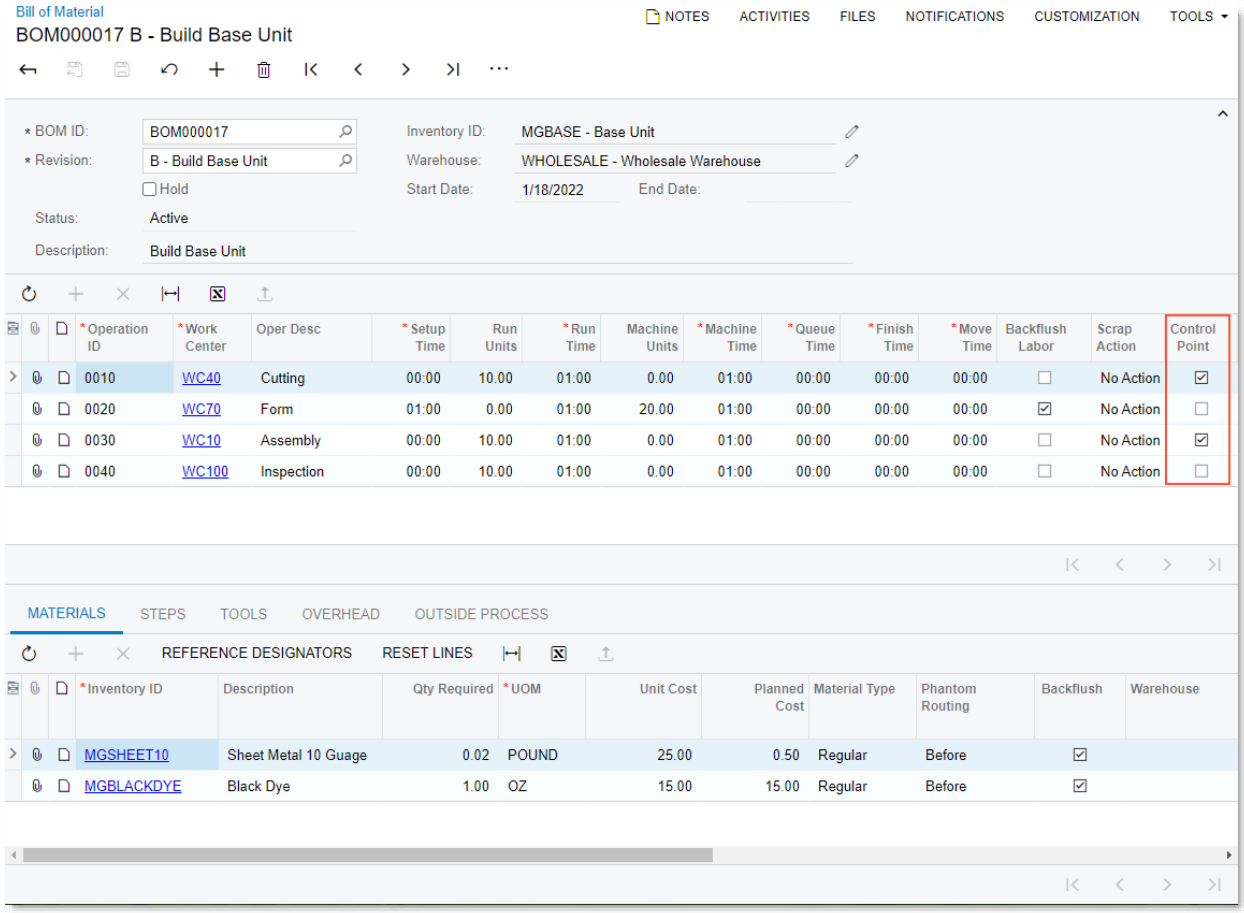
- Better visibility of the production progress: Workers must enter the quantity of completed items not only for the last operation in routing (as it was in the previous versions) but also for each control point operation, so production managers can track the progress.
- Improved accuracy of data recording for production orders: The system now helps manufacturers to prevent quantity entry on operations after the control point operation if the quantity exceeds the quantity reported as complete on the previous operation marked as a control point. This can greatly reduce recording errors and prevent the receipt of items for which any operations have not been recorded as completed.

Control Point Operations

A production manager can set up control points at the work center or production operation level. If workers must record the completed quantity for operations performed in a particular work center, the production manager selects the new **Control Point** checkbox on the **General** tab of the *Work Centers* (AM207000) form, shown in the following screenshot. The system copies the state of the checkbox to each new bill of material, estimate, engineering change control, and engineering change request that includes an operation with the work center specified.

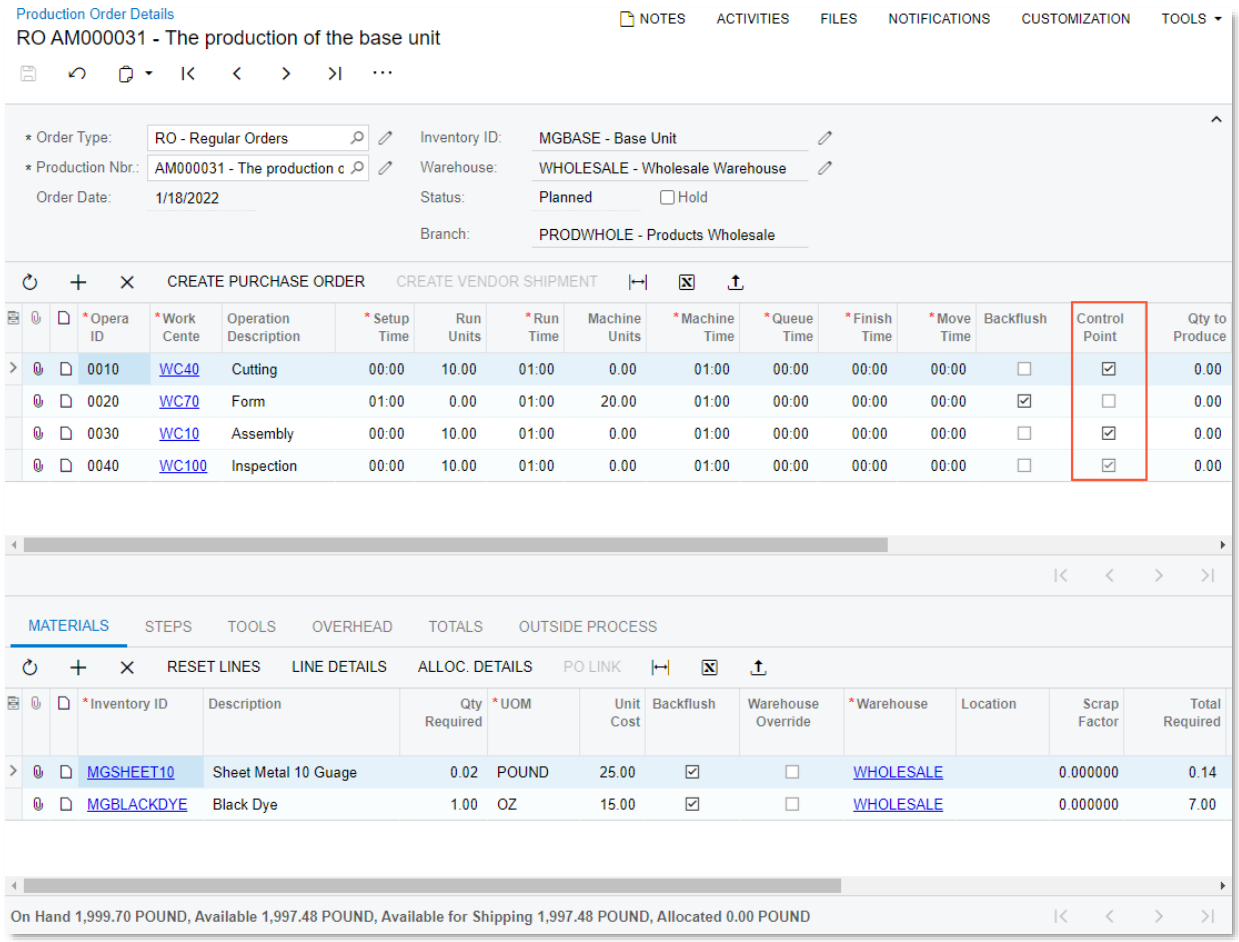


If only some operations performed in a work center must be control points, then the production manager makes sure that the **Control Point** checkbox is cleared for the work center on the *Work Centers* form. The production manager then marks particular operations as control points in a bill of material by selecting the new **Control Point** checkbox for each needed operation in the Operations table of the *Bill of Material* (AM208000) form, displayed in the following screenshot. The system copies the state of the checkbox for these operations to each new production order based on the bill of material.



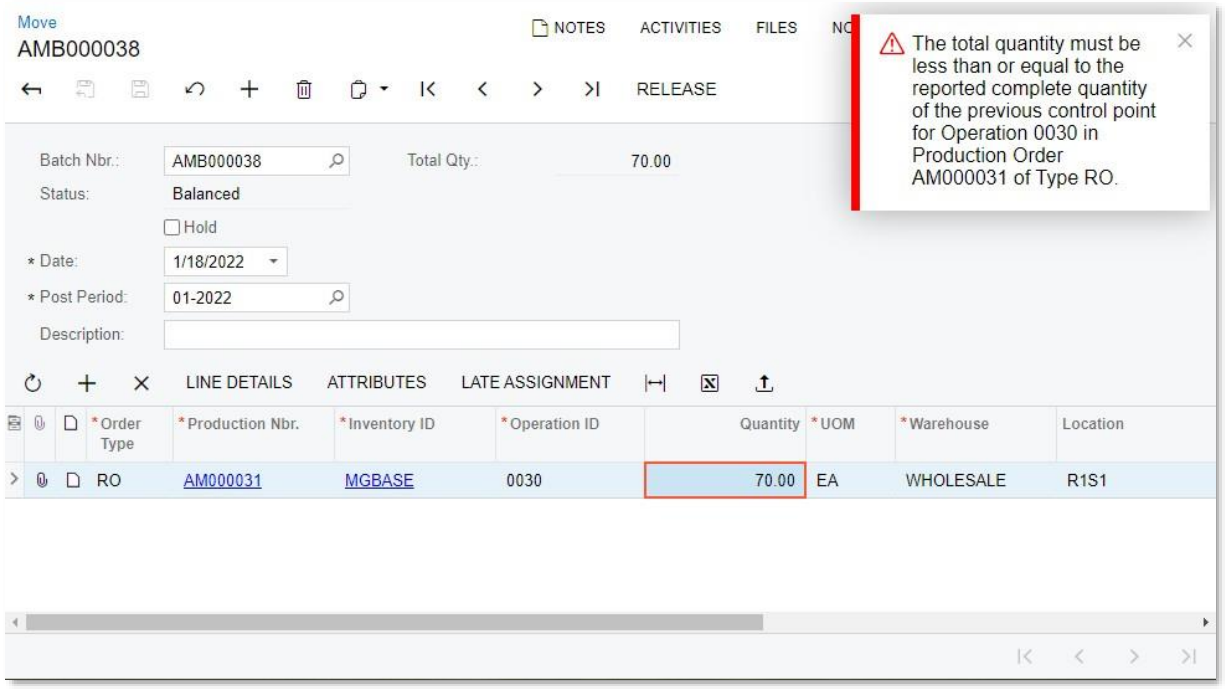
The production manager can change the default state of the **Control Point** checkbox for each operation of a production order (except the last one) in the Operations table on the *Production Order Details* (AM209000) form, shown in the following screenshot.

Note: The last routing operation is always a control point because before the production order can be completed, workers must record the completed quantity. Thus, for the last operation in the Operations table, the **Control Point** checkbox is selected and unavailable for editing.



If multiple routing operations are marked as control points, when a worker enters the quantity of completed items on the *Labor* (AM301000) or *Move* (AM302000) form for the control point operations, the system verifies that the quantity entered for the current operation is less than or equal to the quantity recorded for the preceding control point operation. If this condition is not met, the system displays an error message (shown in the screenshot below) and does not release the labor or move transaction until the worker enters the correct item quantity.

For example, suppose that a production order for producing a base unit contains four operations: *0010 Cutting*, *0020 Form*, *0030 Assembly*, and *0040 Inspection*; the *0010* and *0030* operations are control points. Further suppose that on the *Move* form, a worker creates a move transaction for Operation *0010* and specifies 7 as the completed quantity. Then another worker, when specifying the completed quantity of the item for Operation *0030* on the same form, mistakenly specifies 70 instead of 7 as the quantity. The system does not release the move transaction until the worker specifies a quantity of 7 or less.



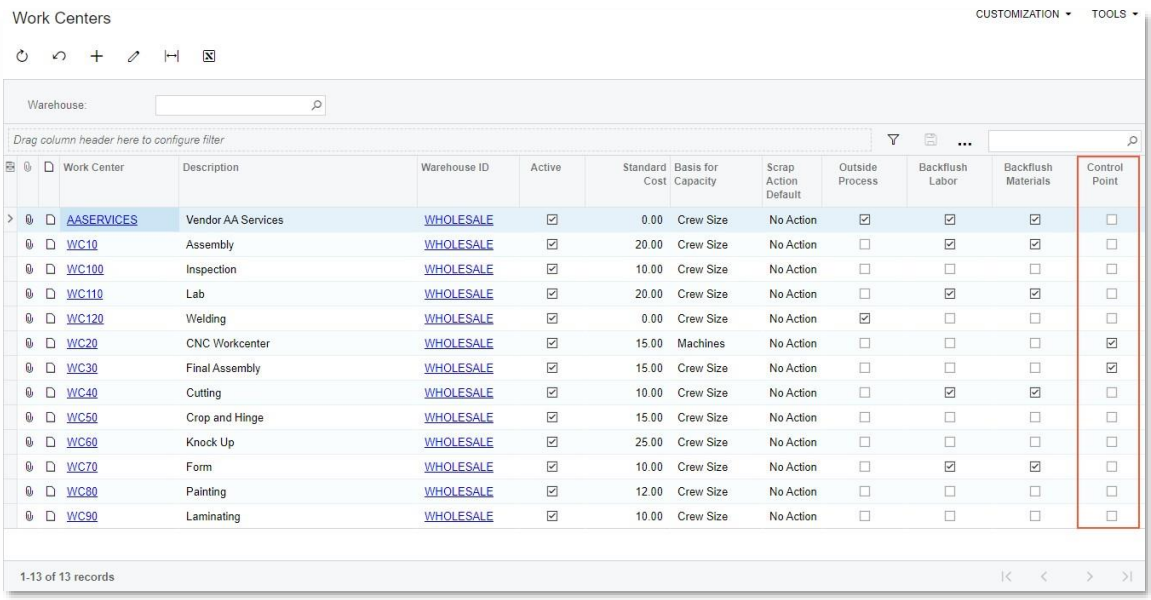
When a worker would like to revert the quantity of completed items for some operation and enters a negative quantity value on the *Move* form for this operation, the system verifies that the completed quantity after the reversal is more than or equal to the completed quantity recorded for the next operation marked as a control point. If the validation fails, the system displays an error message and does not release the transaction until the worker enters the correct quantity to be reversed.

In the previously considered example of a production order for producing a base unit, suppose that on the *Move* form, a worker creates a move transaction for Operation *0010* and specifies the completed quantity as 7. Further suppose that another worker creates a move transaction for Operation *0030* on the same form and specifies the quantity of 5. Then the first worker found out that the quantity specified for Operation *0010* is incorrect and creates a move transaction with a quantity of –3. The system calculates the new completed quantity for Operation *0010* as 7 – 3 = 4. The new quantity is less than the quantity recorded for Operation *0030*. So the system will not release the move transaction until the worker specifies –2 or –1 as the quantity to be reversed.

UI Enhancements

To support the new functionality, the following UI changes have been introduced:

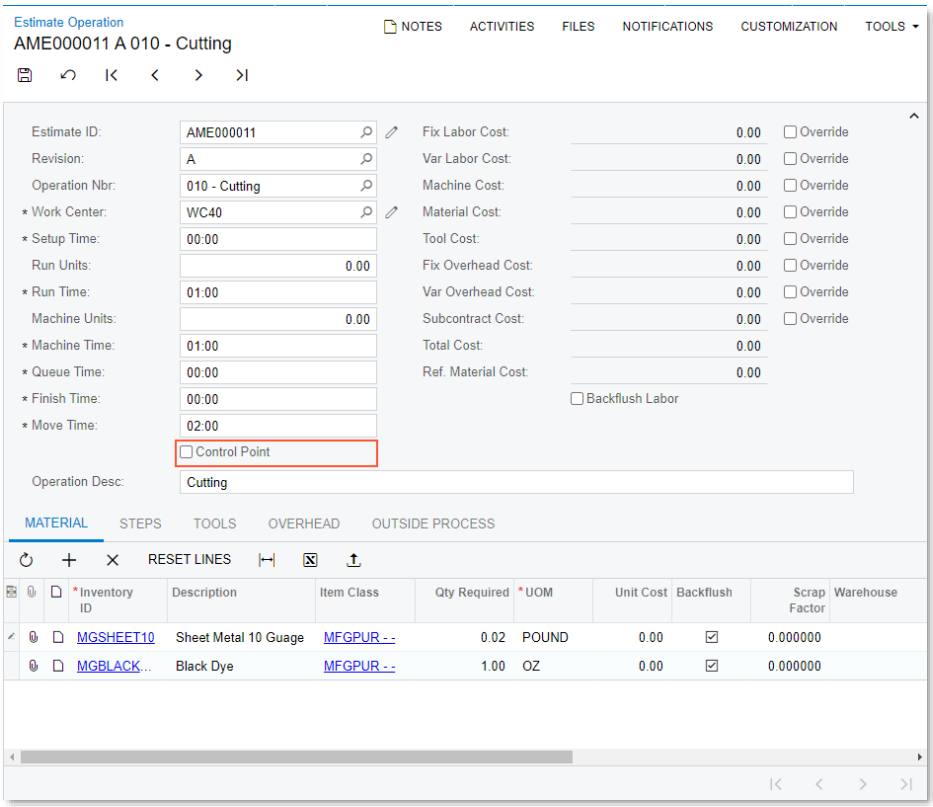
1. The **Control Point** checkbox has been added to the Work Centers (AM2070PL) list of records and *Work Center Dispatch* (AM000007) form so that a production manager can quickly find the work centers marked as control points (see the following screenshot of the Work Centers list of records).



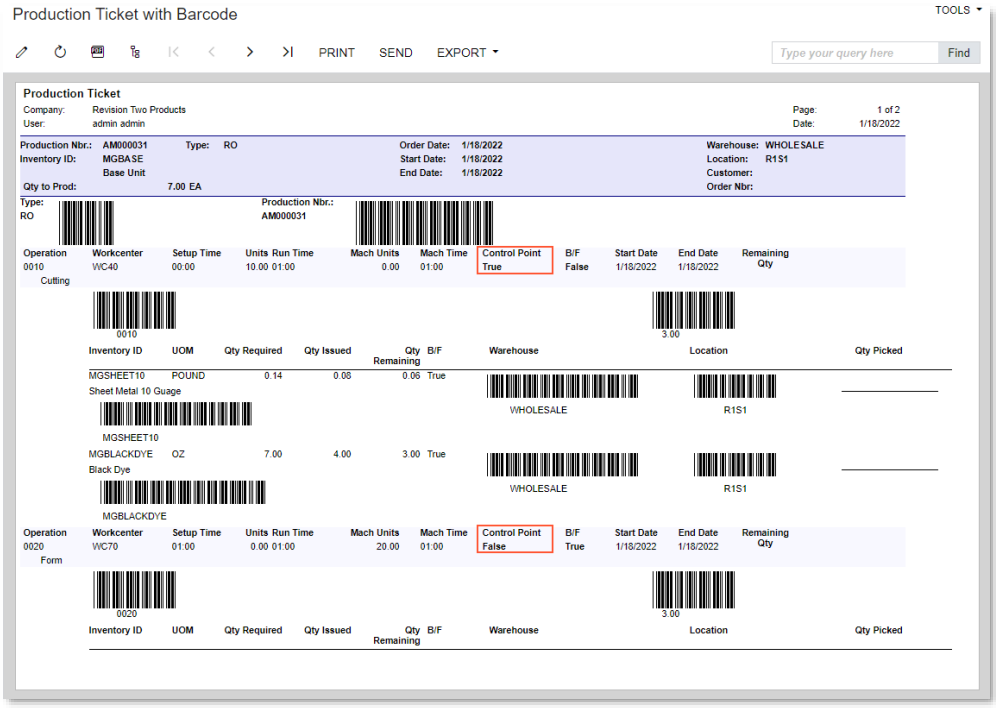
2. The **Control Point** checkbox has been added to the following locations:

   - *Estimate* (AM303000), **Operations** tab
   - *Bill of Material* (AM208000), Operations table
   - *Engineering Change Request* (AM210000), **Operations** tab
   - *Engineering Change Order* (AM215000), **Operations** tab

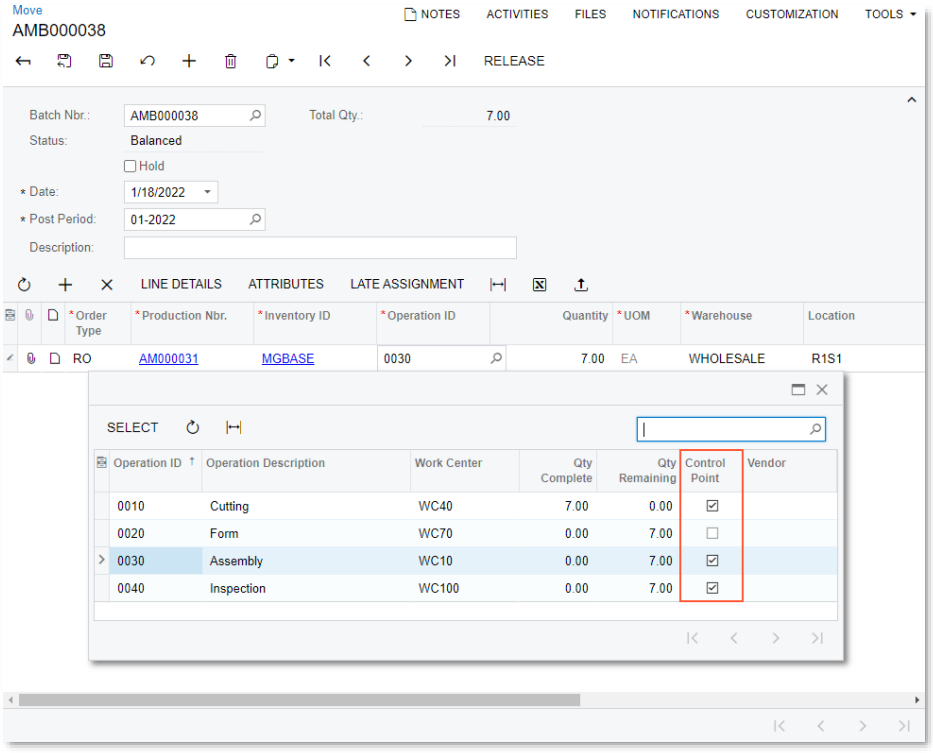
3. The **Control Point** checkbox has been added to the Summary area of the *Estimate Operation* (AM304000) form, as shown in the following screenshot.



4. The state of the **Control Point** field for operations is now displayed on the *Production Ticket* (AM625000) and *Production Ticket with Barcode* (AM625010) reports. The following screenshot shows the *Production Ticket with Barcode* report.



5. The **Control Point** checkbox has been added to the lookup table of the **Operation ID** field or column on the forms of MYOB Advanced Manufacturing Edition where it is displayed. The following screenshot shows the lookup table for the **Operation ID** column on the *Move* (AM302000) form.



Direct Creation of Engineering Change Orders

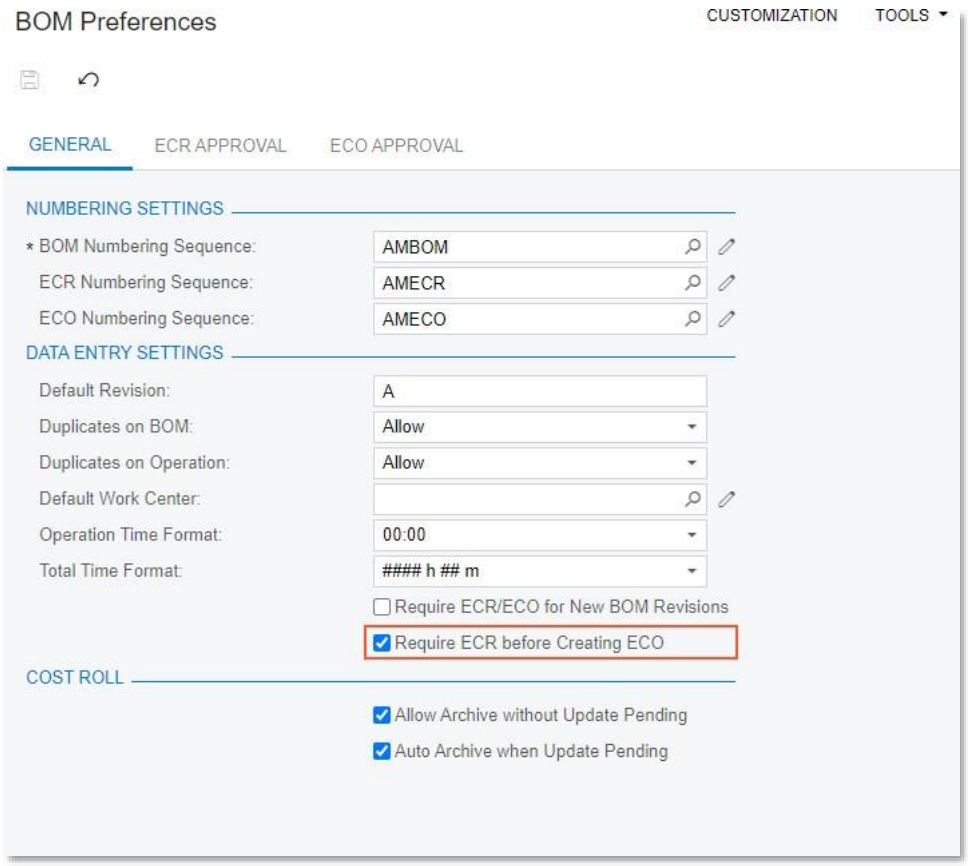
In MYOB Advanced Manufacturing Edition 2022.1, a manufacturing engineer can now directly create an engineering change order (ECO) without first creating an engineering change request (ECR).

Direct Creation of Engineering Change Orders

An organisation with a small engineering team may find it undesirable to create an engineering change request as a prerequisite to creating an engineering change order. The team may want to eliminate the extra step of reviewing and generating the ECO and avoid storing unnecessary data in the system. In previous versions of MYOB Advanced Manufacturing Edition, a manufacturing engineer always had to create an ECR before creating an ECO. This extra step is no longer needed.

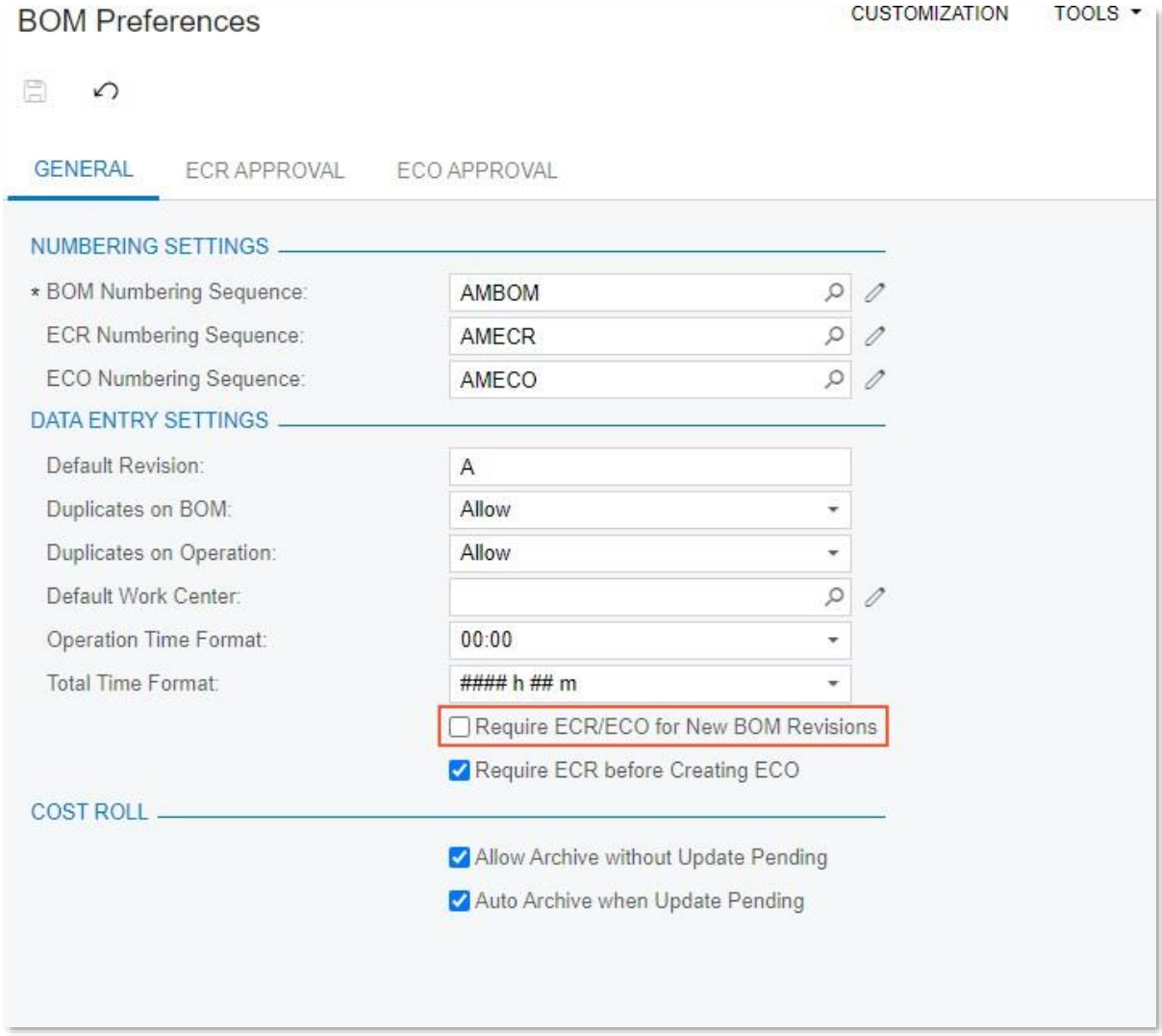
To allow the direct creation of ECOs, a manufacturing engineer clears the new **Require ECR before Creating ECO** checkbox on the *BOM Preferences* (AM101000) form, shown in the following screenshot. With this checkbox cleared, the engineer can create an ECO directly on the *Engineering Change Order* (AM215000) form by clicking **Add New Record** on the form toolbar. This checkbox is displayed only when the *Engineering Change Control* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Note: Once the checkbox has been cleared, we do not recommend selecting it again because this may cause the engineering change control functionality to work improperly.



UI Enhancements

On the *BOM Preferences* (AM101000) form, for clarity, the **Prevent New Revision Without ECR** has been renamed to **Require ECR/ECO for New BOM Revisions** (see the following screenshot).



Document Visibility Restriction by Branch

In MYOB Advanced Manufacturing Edition 2022.1, on forms that display production-related documents and transactions, support of multiple branches has been implemented. If an organisation uses multiple branches in MYOB Advanced, an implementation manager now can restrict the visibility of documents and transactions by branch for each user role.

This functionality is available only when either the *Multibranch Support* feature or the *Multicompany Support* feature is enabled (or both features are enabled) on the *Enable/Disable Features* (CS100000) form.

Visibility Restriction by Branch

In many cases, users who work in a particular branch must be able to view production documents and transactions related to only their branch. To meet this requirement, an implementation manager can restrict the visibility of branch-specific data for a user role assigned to the users of each branch by doing the following:

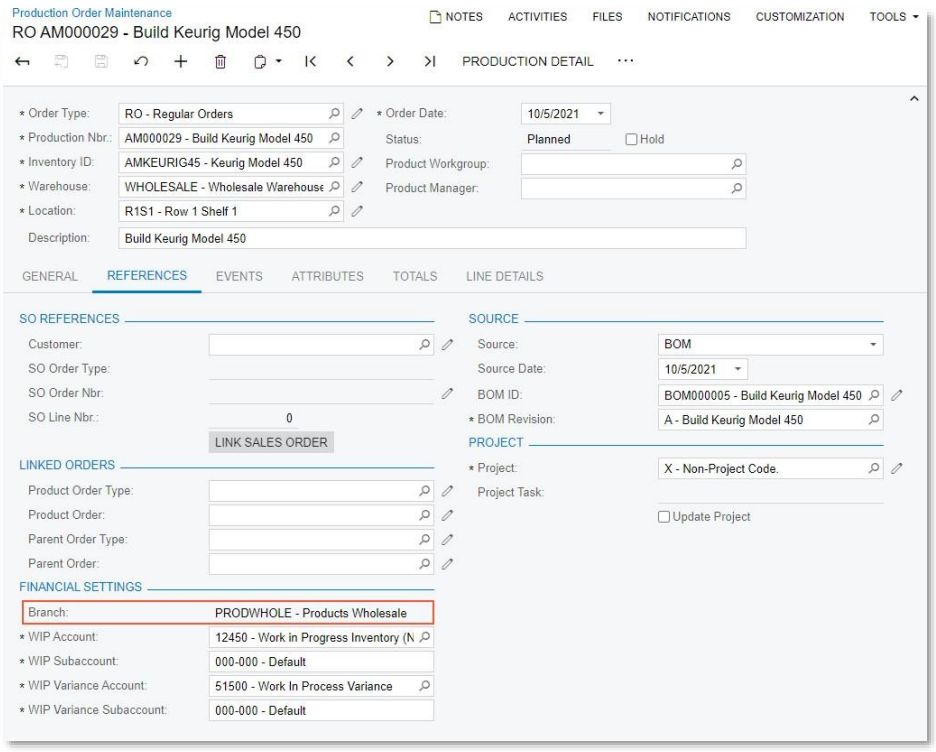
1. On the *User Roles* (SM201005) form, creating a user role dedicated to restricting the visibility of data to particular branches and assigning the role to the needed users.
2. On the *Branches* (CS102000) form, for the branch, specifying the dedicated user role in the **Access Role** field of the **Configuration Settings** on the **Branch Details** tab.

Forms with Multibranch Support

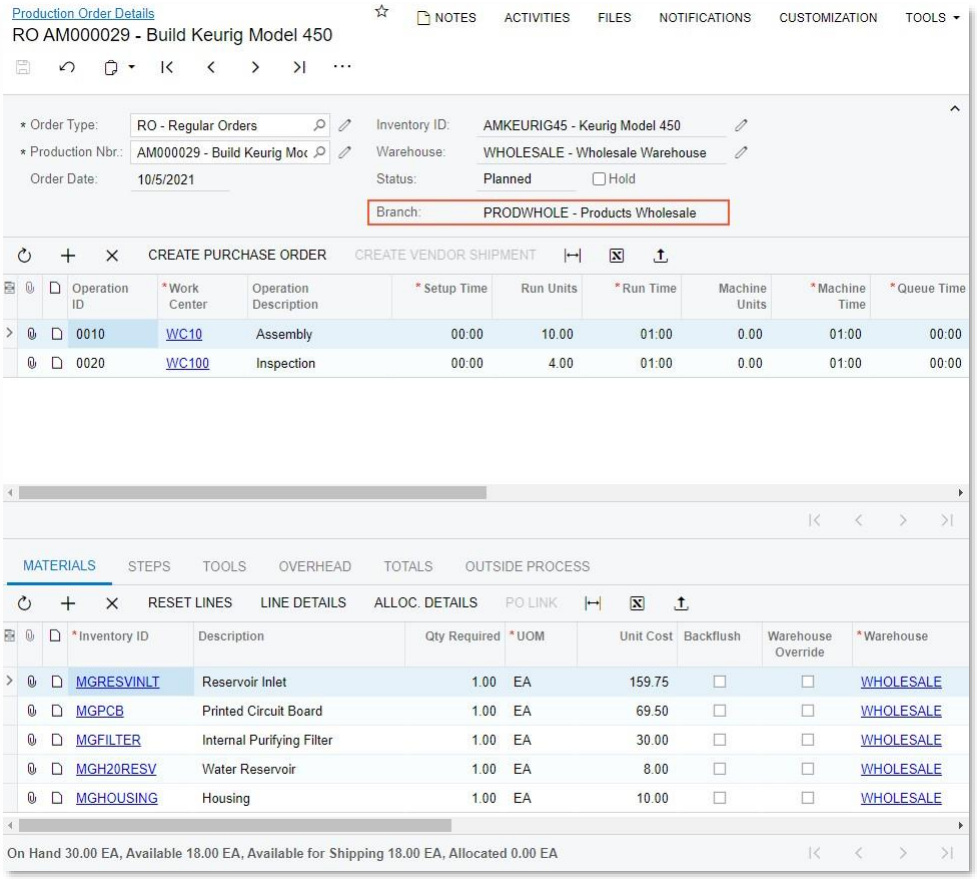
In a multibranch company, each warehouse is assigned to a specific branch. For production documents and transactions that are warehouse-specific, the system now copies the branch from the warehouse settings specified on the *Warehouses* (IN204000) form and uses this branch to restrict the visibility of data for users on applicable forms of MYOB Advanced Manufacturing Edition.

On the following forms, the **Branch** field has been added in the noted locations:

- *Production Order Maintenance* (AM201500): In the **Financial Settings** section on the **References** tab (see the following screenshot)



- *Production Order Details* (AM209000): In the Summary area (see the following screenshot)



On the following forms, multiple branches have been supported in the noted ways:

- *Create Production Orders* (AM510000): When a user initiates the creation of production orders, the system copies the branch of the demand warehouse to the production order.
- *Process Capable to Promise* (AM515000): When creating a planning production order during CTP calculation, the system copies to the production order the branch of the warehouse specified in the sales order line on the *Sales Orders* (SO301000) form. Then the system copies the branch to the regular production order when a user accepts the CTP date.

The **Branch** column has been added to the tables of the following forms:

- *Cost Transactions* (AM309000)
- *Close Production Orders* (AM506000)
- *Estimates (AM3030PL)*
- *Forecast* (AM202000)
- *Forecast Listing* (AM000005)
- *Generate Forecast* (AM502000)
- *Master Production Schedule* (AM201000)
- *MRP Display* (AM400000)
- *MRP Exceptions* (AM403000)
- *MPS Listing* (AM000004)
- *Print Production Orders* (AM511000)
- *Production Order Maintenance (AM2015PL)*
- *Production Summary* (AM000006)
- *Release AM Documents* (AM503000)
- *Release Production Orders* (AM500000)
- *Rough Cut Planning* (AM501000)
- *Unreleased Material Allocations* (AM305500)
- *Supplier Shipments (AM3100PL)*
- *Work Center Dispatch* (AM000007)

The column is hidden by default on most of these forms. If an implementation manager wants users to view this column, the manager should add it to the table by using the **Column Configuration** dialog window and sharing the configuration with all users in the system. For details, see *To Share a Column Configuration*.

Note: Displaying the branch on a form may be useful only if a user can view data in multiple branches.

Planned Delay Times in Production Scheduling

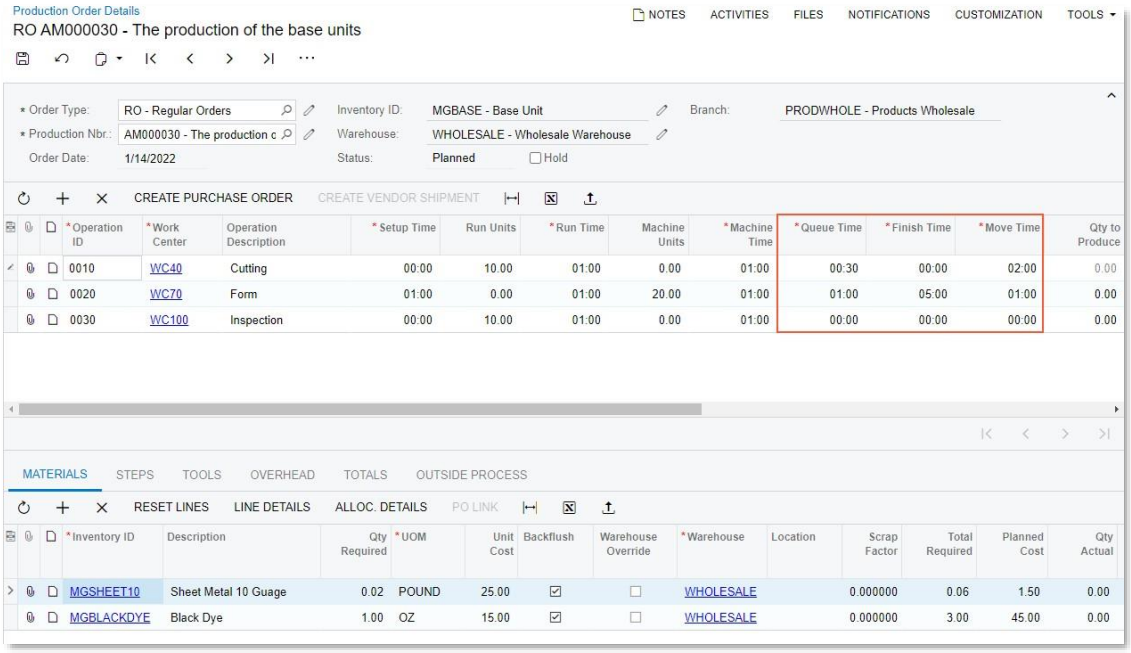
In MYOB Advanced Manufacturing Edition 2022.1, additional settings have been implemented to reflect planned delays that may occur in the production process. The system now uses these settings to calculate the duration of production operations by accounting for the move time, finish time, and queue time in material requirements planning and advanced planning and scheduling.

Settings for Delay Times Between Operations

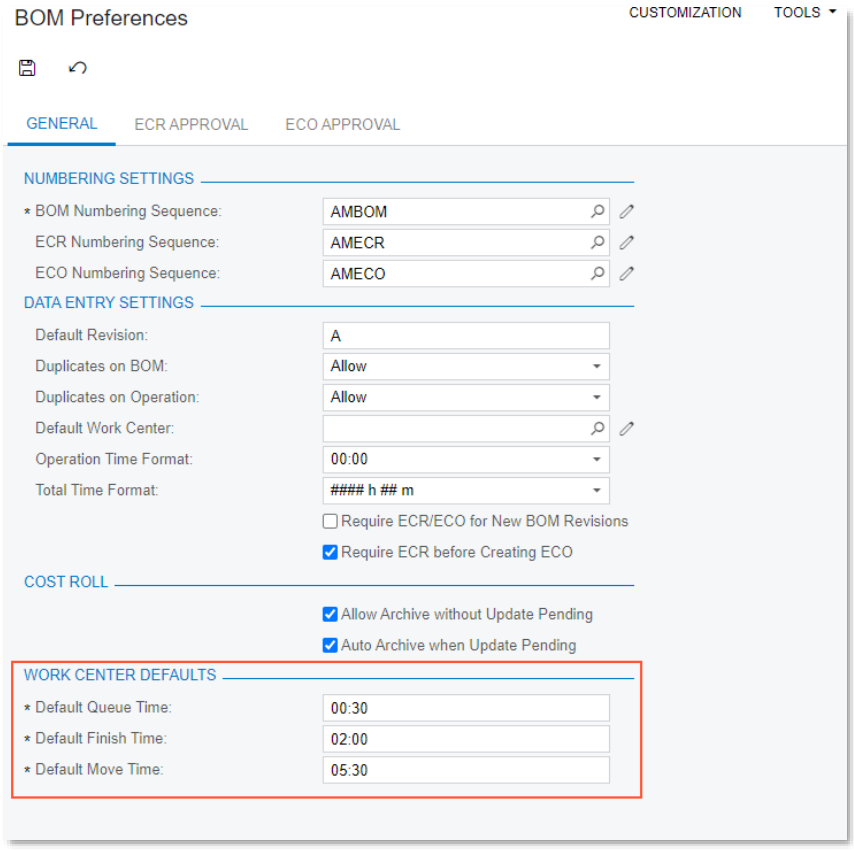
If an organisation has various delays between production operations, it can specify any of the following fixed times in the production settings:

- Queue time: The time a semi-finished item has to wait in a work center before workers can start processing the item. For example, the previous operation may take less lime than the current operation, so items need to be stacked before the current operation is started.
- Finish time: The time required for the semi-finished item to be prepared for the next operation when the current operation has been finished. For example, the item being produced may need time to dry, cure, or age.
- Move time: The time for a semi-finished item to be moved from the work center where the current operation is performed to the work center where the next operation will be performed. For example, the work centers may be located in different buildings, and it may take significant time to move the items from one building to the other.

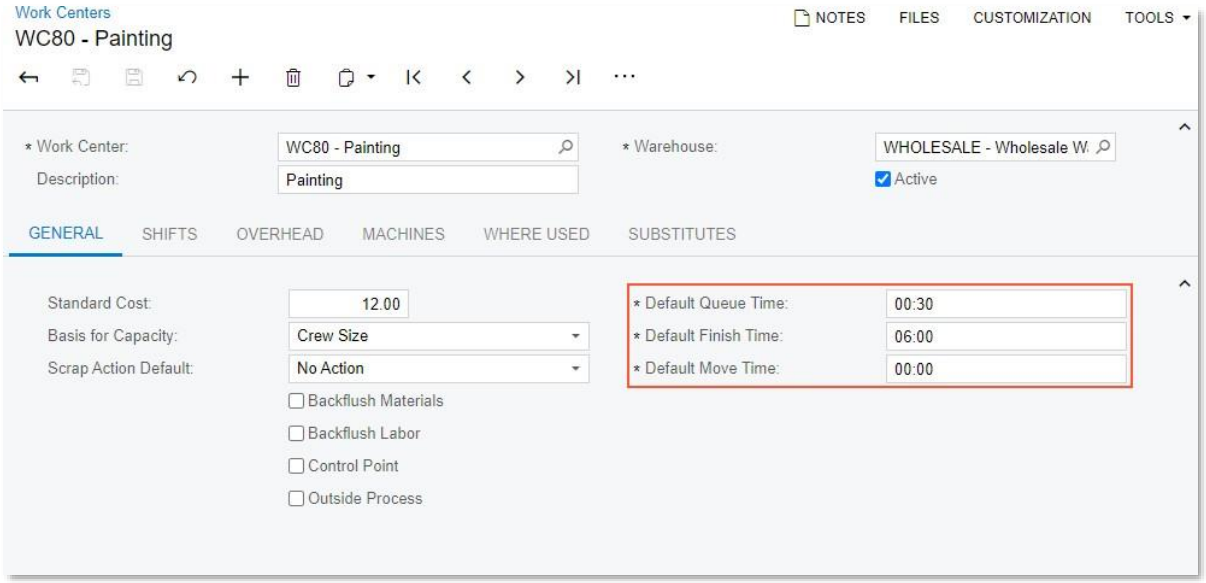
In the previous versions of MYOB Advanced Manufacturing Edition, a production manager could enter the queue time, finish time, and move time for operations of a production order on the *Production Order Details* (AM209000) form (see the following screenshot). However, these times were not taken into consideration when the system scheduled the resources required for the production. In MYOB Advanced Manufacturing Edition 2022.1, these settings affect the scheduling calculations.



A production manager can now specify the default values of the queue time, finish time, and move time for all new work centers in the **Default Queue Time**, **Default Finish Time**, and **Default Move Time** fields of the new **Work Center Defaults** section on the *BOM Preferences* (AM101000) form, as shown in the following screenshot.



The manager can change the default time values for each work center in the new **Default Queue Time**, **Default Finish Time**, and **Default Move Time** fields on the **General** tab of the *Work Centers* (AM207000) form, shown in the following screenshot. The system copies these values when users add the operations performed in the work center to a bill of material, estimate, engineering change request, engineering change order, or production order on the corresponding forms. (For a full list of forms where the new time settings have been added, see the *UI Enhancements* section below.)



Queue Time

A production manager can specify the queue time of an operation to account for potential delays in the start of the operation, which can be useful if these delays are planned or regular. During scheduling, the system extends the operation's lead time and the production order's lead time by the queue time. During advanced planning and scheduling, the system also does the following when a nonzero queue time is specified for a particular operation:

- Delays the start time of the operation.
- If the queue time is specified for the first operation in the routing, does one of the following with the production order, depending on the value in the **Scheduling Method** field on the *Production Order Maintenance* (AM201500) form:
    - *Start On*: Delays the start time of the first operation and therefore delays the finish time (and possibly date) of the production order. For example, suppose that the initial start date of a production order is January 5, the finish date is January 6, and a queue time of one day is specified for the first operation. When the system schedules the production order, it keeps January 5 as the start date of the production order and changes the finish date to January 7 to account for the queue time.
    - *Finish On*: Moves the start date of the entire production order to the earlier date. For example, suppose that the initial start date of a production order is January 5, the finish date is January 6, and a queue time of one day is specified for the first operation. When the system schedules the production order, it

keeps January 6 as the finish date and changes the start date to January 4 to account for the queue time.

The system does not increase the occupation time of the crew, machine, tool, or work center resources by the value of the queue time.

Finish Time

A production manager can specify the finish time for an operation to account for the time needed to finalise the operation before workers can move the items to the next operation. During scheduling, the system extends the operation's lead time and the production order lead time by the finish time. During advanced planning and

scheduling, the system also does the following when a nonzero finish time is specified for a particular operation:

- Increases the occupation time of the work center resource where the operation takes place
- Starts counting the finish time when a user records an operation as completed

The system does not increase the occupation time of the crew, machine, or tool resources by the value of the finish time.

Move Time

A production manager can specify the move time for an operation so that the system considers the time needed to move items in production between the work center where the current operation was performed and the work center where the next operation will be performed. During scheduling, the system delays the start of the next operation and extends the production order lead time by the move time.

During advanced planning and scheduling, when a nonzero move time is specified for the last operation in the routing, the system also does the following with the production order, depending on the value in the **Scheduling Method** field on the *Production Order Maintenance* (AM201500) form:

- *Start On*: Delays the finish time (and possibly date) of the entire production order. For example, suppose that the initial start date of a production order is January 5, the finish date is January 6, and a move time of one day is specified for the last operation. When the system schedules the production order, it keeps January 5 as the start date of the production order and changes the finish date to January 7 to account for the move time.
- *Finish On*: Moves the scheduled start date of the production order to the earlier date. For example, suppose that the initial start date of a production order is January 5, the finish date is January 6, and a move time of one day is specified for the last operation. When the system schedules the production order, it keeps January 6 as the finish date and changes the start date to January 4 to account for the move time.

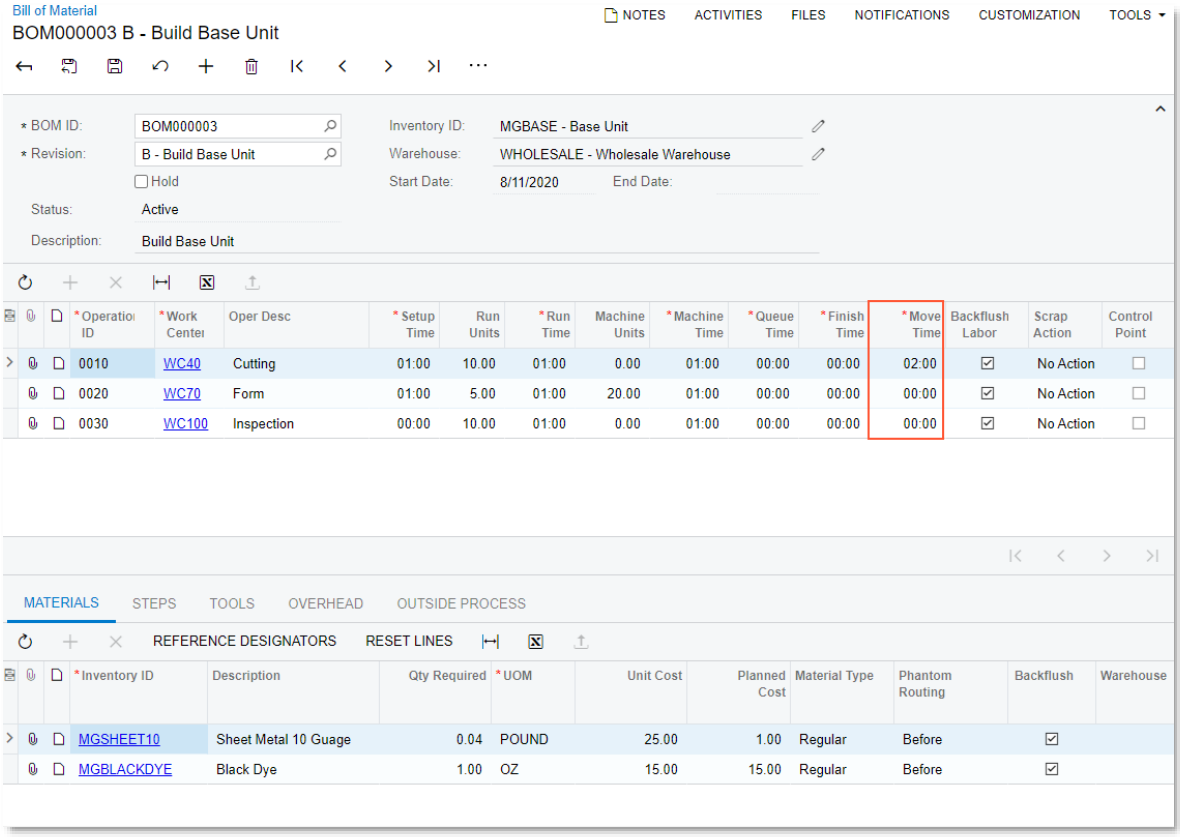
The system does not increase the occupation time of the crew, machine, tool, or work center resources by the value of the move time.

UI Enhancements

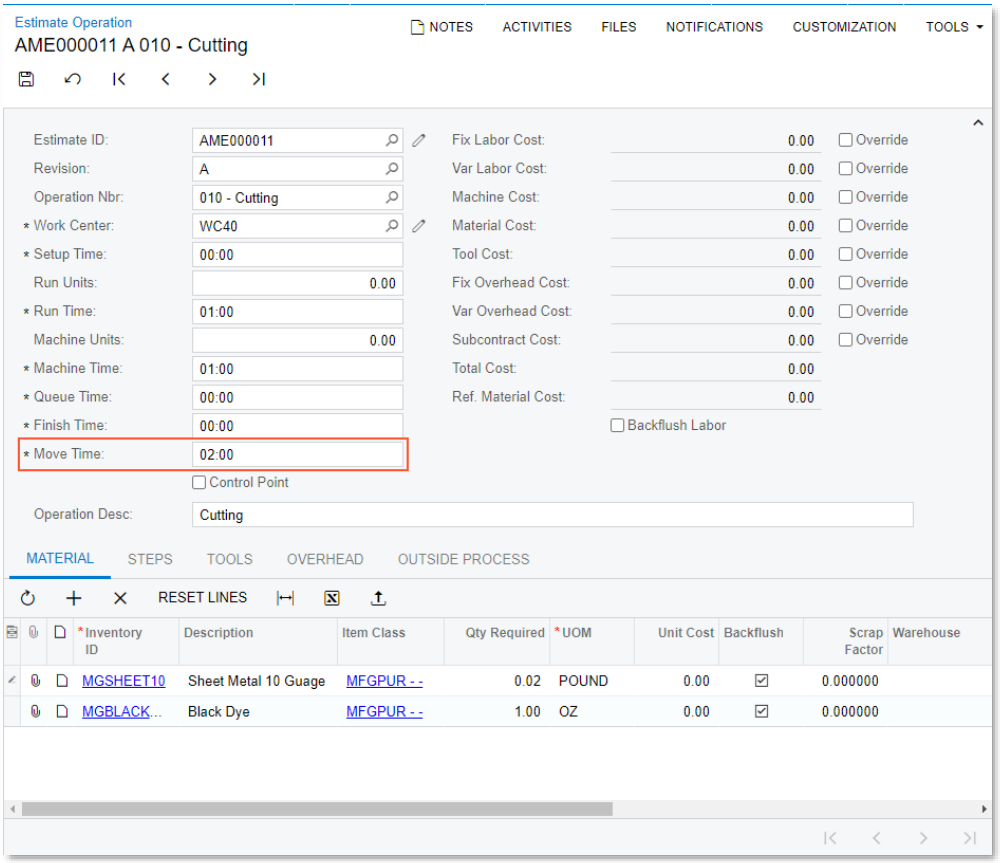
To support the new functionality, the following UI changes have been introduced:

- The **Default Move Time** field has been moved from the **Scheduling** section of the *Production Preferences* (AM10200) form to the new **Work Center Defaults** section of the *BOM Preferences* (AM101000) form.
- The **Move Time** column has been added to the following locations:
    - *Estimate* (AM303000), **Operations** tab
    - *Bill of Material* (AM208000), Operations table
    - *Engineering Change Request* (AM210000), **Operations** tab
    - *Engineering Change Order* (AM215000), **Operations** tab

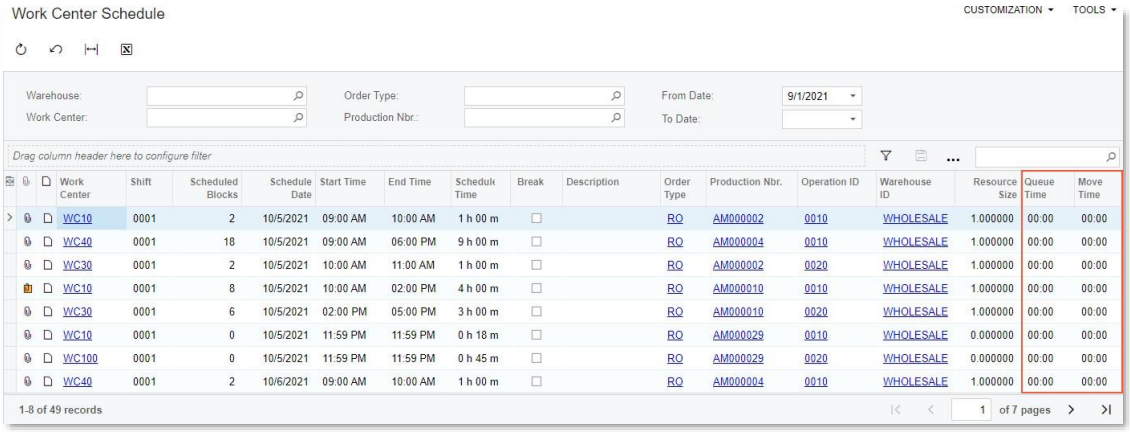
The following screenshot displays the Operations table on the *Bill of Material* form.



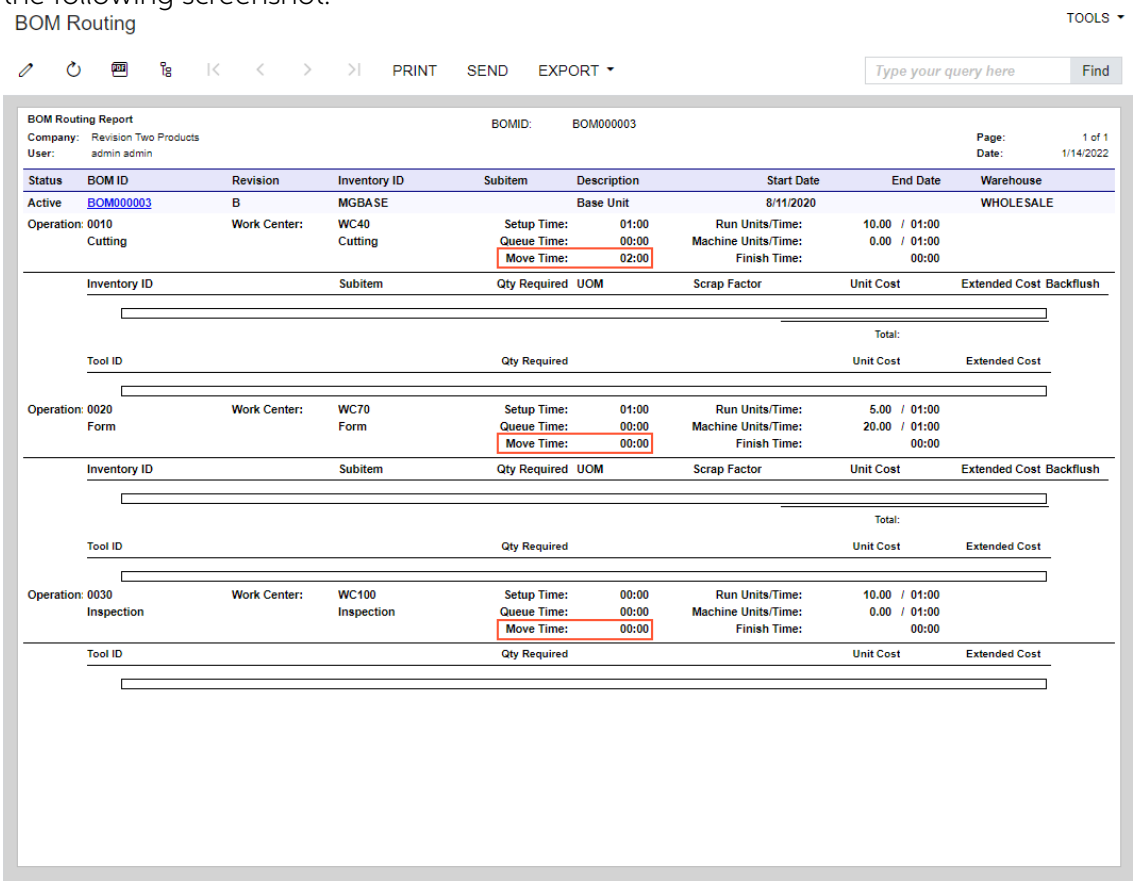
- The **Move Time** field has been added to the Summary area of the *Estimate Operation* (AM304000) form, as shown in the following screenshot.



- The **Queue Time** and **Finish Time** columns have been added to the *Work Center Schedule* (AM000001) form, as you can see in the following screenshot.



- The move time has been added to the *BOM Routing* (AM612000) report, displayed in the following screenshot.



Predefined Dashboards

Starting in 2022.1, the following dashboards are available in MYOB Advanced Manufacturing Edition out of the box:

- *Production Manager (AM0034DB)*: A dashboard where production managers can review the manufacturing- related information that is important for everyday work, such as the number of production orders in process, the number of late production orders, the production variances, and relevant information about projects.
- *Production Meeting (AM0041DB)*: A dashboard for plant managers, area leads, and employees who support production. They can use the dashboard to quickly review manufacturing-related information during a daily production meeting.
- *Engineering (AM0035DB)*: A dashboard for engineers who are responsible for managing and maintaining bills of material, engineering change requests, and engineering change orders. On the dashboard, they can review information related to engineering change control.

These dashboards, which are described in more detail in the following sections, 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, where they are listed under the **Dashboard: Manufacturing** category.

Production Manager Dashboard

The *Production Manager (AM0034DB)* dashboard is shown in the following screenshot.

The following table lists the widgets included in the *Production Manager* dashboard and briefly describes each of them.

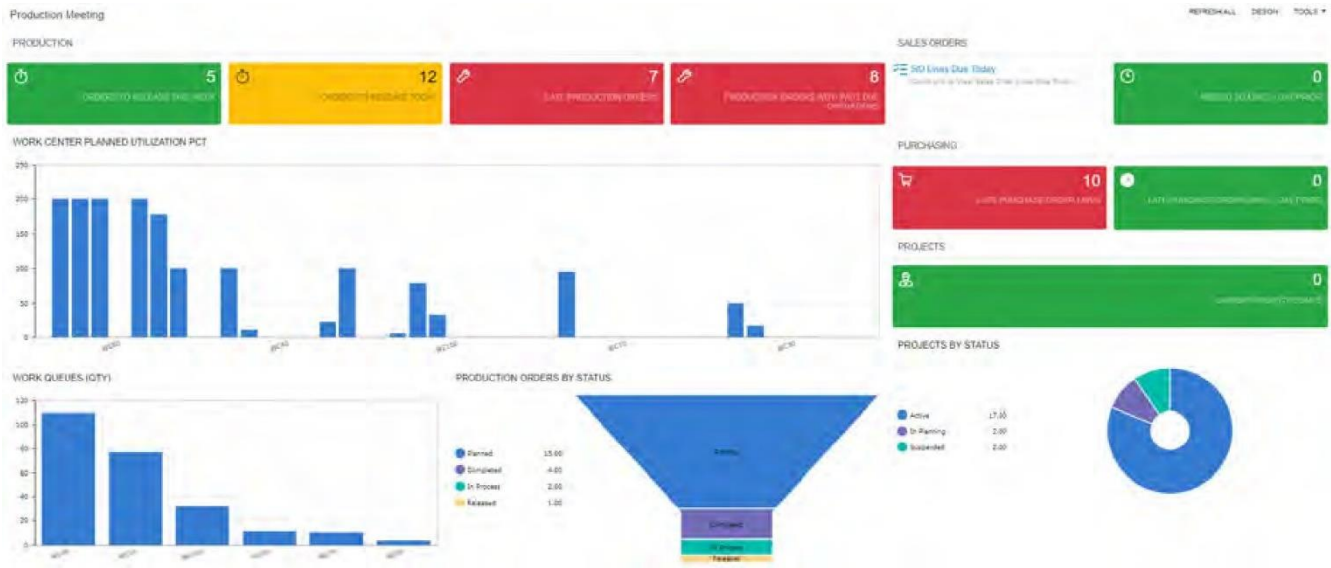
Widget	Widget Type	Description
Orders to Release Today	*KPI*	The number of production orders with the *Planned* status that have a start date that is the same as or earlier than the current date.
Orders to Release This Week	*KPI*	The number of production orders with the *Planned* status that have a start date within the current week.
Late Production Orders	*KPI*	The number of production orders that have an end date earlier than the current date and a status other than *Closed*, *Completed*, or *Canceled*.
Production Orders with Past-Due Operations	*KPI*	The number of production orders that have an operation with an end date earlier than the current date. The widget excludes production orders that have a status of *Completed*, *Closed*, or *Canceled*.
Production Orders by Status	*Chart*	The number of production orders that have a status other than *Closed* or *Canceled*, grouped by status.
Work Queues (Qty.)	*Chart*	The sum of the quantities to produce grouped by work center. The widget displays up to 10 work centers with the largest queues.
Orders to Review	*Data Table*	The list of production orders that have the *Completed* status.
Orders Not Started	*Data Table*	The list of production orders (excluding planning production orders) that have the *Planned* status.
Late Production Orders with Sales Orders	*Data Table*	The list of production orders that have an end date earlier than the current date and that have a linked sales order. The widget excludes production orders that have a status of *Completed* or *Closed*.

Widget	Widget Type	Description
Projects by Status	*Chart*	The number of projects, grouped by status. The widget excludes the projects with the *Canceled* or *Completed* status. The data in this widget is available only when the *Projects* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Urgent Project Issues	*KPI*	The number of project issues with a priority of *Urgent*. The data in this widget is available only when the *Projects* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Labor Variances by Month	*Chart*	The sum of labor variances for the last six months for production orders with a start date in these months. The widget excludes the orders with a status of *Planning*.
Top 5 Variances this Quarter	*Chart*	The five production orders that have the largest variance and a start date within the current quarter. The system calculates variance as the sum of the material variance, labor variance, fixed overhead variance, variable overhead variance, machine variance, tool variance, and subcontract variance. The widget excludes production orders that have a status of *Planned*.
Top 5 Variances this Period	*Chart*	The five production orders that have the largest variance and a start date within the current financial period. The system calculates variance as the sum of the material variance, labor variance, fixed overhead variance, variable overhead variance, machine variance, tool variance, and subcontract variance. The widget excludes production orders that have a status of *Planned*.
Material Variances by Month	*Chart*	The sum of material variances for the last six months for pro- duction orders with a start date in these months.
Top 5 WIP Value Orders	*Chart*	The five production orders with the largest WIP total.

Widget	Widget Type	Description
Scrap Analysis	*Data Table*	The list of operations with the quantity scrapped larger than zero for all production orders. The widget excludes production orders that have a status of *Closed* or *Canceled*.

Production Meeting Dashboard

The *Production Meeting (AM0041DB)* dashboard is shown in the following screenshot.



The following table lists the widgets included in the *Production Meeting* dashboard and briefly describes each of them.

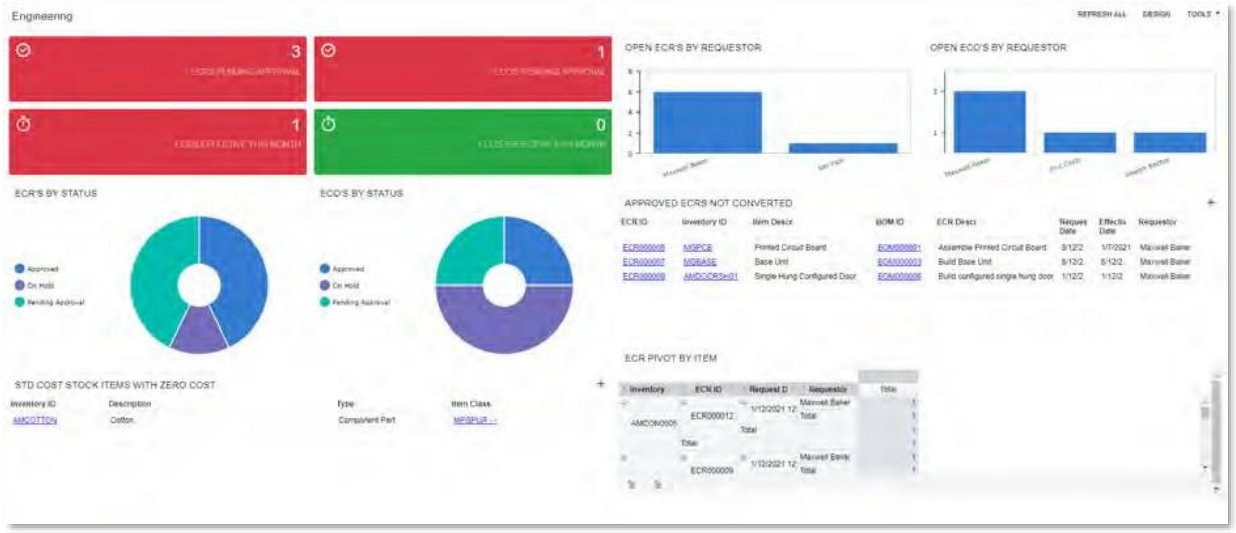
Widget	Widget Type	Description
Orders to Release To-day	*KPI*	The number of production orders with the *Planned* status that have a start date that is the same as or earlier than the current date.
Orders to Release This Week	*KPI*	The number of production orders with the *Planned* status that have a start date within the current week.
Widget	**Widget Type**	**Description**
Late Production Orders	*KPI*	The number of production orders that have an end date earlier than the current date and a status other than *Closed*, *Completed*, or *Canceled*.

Widget	Widget Type	Description
Production Orders with Past-Due Operations	*KPI*	The number of production orders that have an operation with an end date earlier than the current date. The widget excludes production orders that have a status of *Completed*, *Closed*, or *Canceled*.
Work Center Planned Utilisation Pct.	*Chart*	The five work centers with the largest amount of planned work for the next seven days. The system calculates the amount of planned work as the ratio of planned blocks to total blocks for each day and for each work center.
Production Orders by Status	*Chart*	The number of production orders that have a status other than *Closed* or *Canceled*, grouped by status.
Work Queues (Qty.)	*Chart*	The sum of the quantities to produce grouped by work center. This widget displays up to 10 work centers with the largest queues.
SO Lines Due Today	*Link*	A link to the generic inquiry that displays all open sales order lines with a ship date that is the same as the current date.
Missed SO Lines - Day Prior	*KPI*	The number of open sales order lines with a ship date of the previous date. The widget excludes the lines of orders with a status of *Canceled*, *Completed*, or *Invoiced*.
Late Purchase Order Lines	*KPI*	The number of all purchase order lines that have an overdue promised date and an open quantity that is greater than 0. The widget excludes the lines of purchase orders with the *RS* order type or a status of *Canceled*, *Closed*, or *Rejected*.
Late Purchase Order Lines - Day Prior	*KPI*	The number of all purchase order lines that have a promised date that is the same as the previous date and an open quantity that is greater than 0. The widget excludes the lines of purchase orders with the *RS* order type or a status of *Canceled*, *Closed*, or *Rejected*.

Widget	Widget Type	Description
Projects by Status	*Chart*	The number of projects, grouped by status. The widget excludes the projects with the *Canceled* or *Completed* status. The data in this widget is available only when the *Projects* feature is enabled on the *Enable/Disable Features* (CS100000) form.
Urgent Project Issues	*KPI*	The number of project issues with a priority of *Urgent*. The data in this widget is available only when the *Projects* feature is enabled on the *Enable/Disable Features* (CS100000) form.

Engineering Dashboard

The *Engineering (AM0035DB)* dashboard is shown in the following screenshot. The majority of the dashboard data is available only when the *Engineering Change Control* feature is enabled on the *Enable/Disable Features* (CS100000) form.



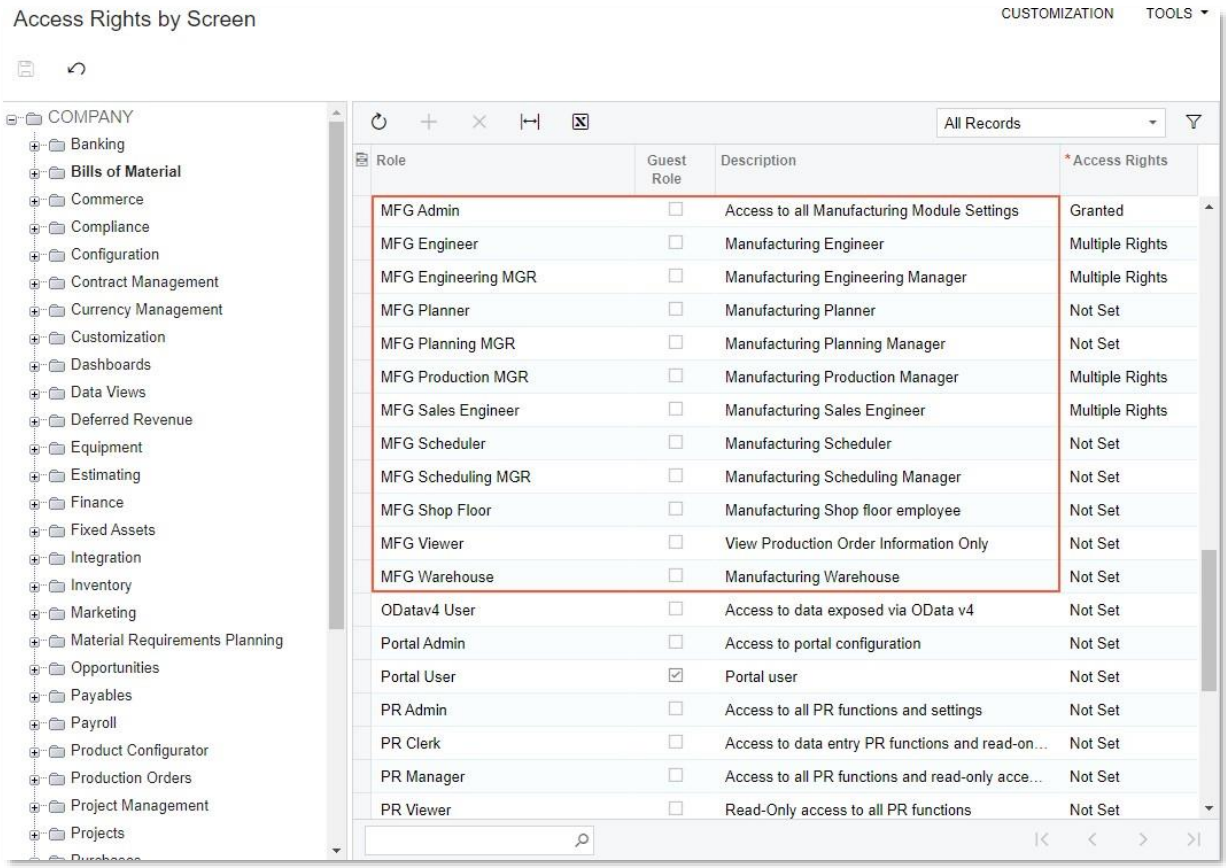
The following table lists the widgets included in the *Engineering* dashboard and briefly describes each of them.

Widget	Widget Type	Description
ECRs Pending Approval	*Scorecard KPI*	The number of engineering change requests (ECRs) that have the *Pending Approval* status. The data in this widget is available only when approval maps have been configured for ECRs.
ECOs Pending Approval	*Scorecard KPI*	The number of engineering change orders (ECOs) that have the *Pending Approval* status. The data in this widget is available only when approval maps have been configured for ECOs.
ECRs Effective this Month	*Scorecard KPI*	The number of ECRs whose effective date is between the first date and the last date of the current month.
ECOs Effective this Month	*Scorecard KPI*	The number of ECOs whose effective date is between the first date and the last date of the current month.
Open ECRs by Requestor	*Chart*	The number of open ECRs, grouped by the requestor. The widget excludes ECRs with a status of *Rejected* or *Completed*.
Open ECOs by Requestor	*Chart*	The number of open ECOs, grouped by the requestor. The widget excludes ECOs with a status of *Rejected* or *Completed*.
ECRs by Status	*Chart*	The number of ECRs by status, excluding *Rejected* or *Completed*.
Widget	**Widget Type**	**Description**
ECOs by Status	*Chart*	The number of ECOs by status, excluding *Rejected* or *Completed*.
Approved ECRs Not Converted	*Data Table*	The list of ECRs with a status of *Approved* and a blank ECO ID.

Widget	Widget Type	Description
Std. Cost Stock Items with Zero Cost	*Data Table*	The list of stock items that have the *Standard* valuation method with a current cost of 0.
ECR Pivot by Item	*Pivot Table*	The list of ECRs with such details as inventory ID, ECR ID, re- quest date, and requestor. The widget aggregates the number of ECRs by BOM ID.

Predefined User Roles

In MYOB Advanced Manufacturing Edition 2022.1, predefined user roles have been added that provide access to the forms needed in the everyday work of particular employees (see the following screenshot). Implementation managers can now use these predefined roles for users involved in production instead of creating and setting up the roles from the ground up. The managers can also modify the role permissions to meet the organisation's access policies. In smaller organisations, the managers can apply multiple roles to the same user who takes over multiple duties.



In the following table, you can view the details of the predefined user roles.

Role Name	Description	Responsibilities
MFG Engineer	A manufacturing engineer who supports the shop floor	Creates and maintains bills of materials Initiates engineering change requests and executes engineering change orders Suggests cost-effective alternate processes and materials when possible
MFG Engineering MGR	A manager of manufacturing engineers who sets up engineering change control and monitors changes in bills of material	Sets preferences related to engineering Creates and maintains bills of material (except creating labor codes, overhead, and shifts) Handles mass changes and cost rolling
MFG Shop Floor	A shop floor worker whose time is typically value-added	Performs the manufacturing of items Clocks in and out of jobs Views work center schedules and pro- duction dashboards
MFG Production MGR	A manufacturing production manager who resolves problems for the shop floor and ensures that production is moving along	Works with planning, scheduling, engineering, and warehouse personnel to resolve problems Creates and changes production orders Approves clock entries of production workers Specifies production settings (except labor codes)

Role Name	Description	Responsibilities
MFG Scheduler	A manufacturing scheduler who sets up and reviews the production schedule; this person also adjusts constraints and communicates completion dates	Identifies and resolves scheduling conflicts in advance Has the primary KPI to keep the on-time delivery percent high Uses material requirement planning tools Regenerates material requirements planning Runs rough-cut planning
MFG Scheduling MGR	A manufacturing scheduling manager who defines the scheduling methodology and monitors the scheduling and planning process	Sets the preferences for scheduling Maintains advanced planning and scheduling Works closely with the planner and the production manager to make sure the planning, production, and scheduling areas align Regenerates material requirements planning Runs rough-cut planning
MFG Planner	A manufacturing planner who regularly evaluates the requirements needed to successfully execute both customer- and replenishment-driven production orders	Uses statistical analysis to suggest stocking levels for raw materials, semi-finished goods, and finished goods Makes recommendations on staffing levels based on trends and data Generates and manages forecasts
MFG Planning MGR	A manufacturing planning manager who develops production plans in adherence to the organisation's budget and deadlines	Uses statistical analysis to suggest stocking levels for raw materials, semi-finished goods, and finished goods Makes recommendations on staffing levels based on trends and data Generates and manages forecasts Uses master production schedules for planning

Role Name	Description	Responsibilities
MFG Sales Engineer	A manufacturing sales engineer who works closely with sales or independently	Takes customer requirements and ap- plies information to an estimate Has a primary key performance indica- tor (KPI) of an estimate or request for quotation (RFQ) turnaround time Has secondary KPIs of winning percent and profitability percent Uses estimating functionality (except for preferences) Creates inventory items from non-inventory items Converts estimates to bills of material
MFG Warehouse	A manufacturing warehouse worker who supports production	Primarily performs cycle counts, picking of material, and moving of items in pro- duction from one location to another Helps place material on shelves Issues materials to production orders Supports the traceability of items by lot or serial number
MFG Viewer	An employee outside of the production department who needs to view manufacturing processes, monitoring milestones and the statuses of specific production orders	Tracks the progress of production orders to inform customers Tracks the progress of production for projects
MFG Admin	A manufacturing administrator; this person may be a production manager or an employee of an IT department	Maintains and oversees all manufacturing settings

The following forms and reports show details about access to forms:

- *Access Rights by Role* (SM201025)
- *Access Rights by Screen* (SM201020)
- *Access Rights by Role* (SM651500)

Other Improvements

In MYOB Advanced Manufacturing Edition 2022.1, multiple improvements to the UI and manufacturing management processes have been introduced, as described below.

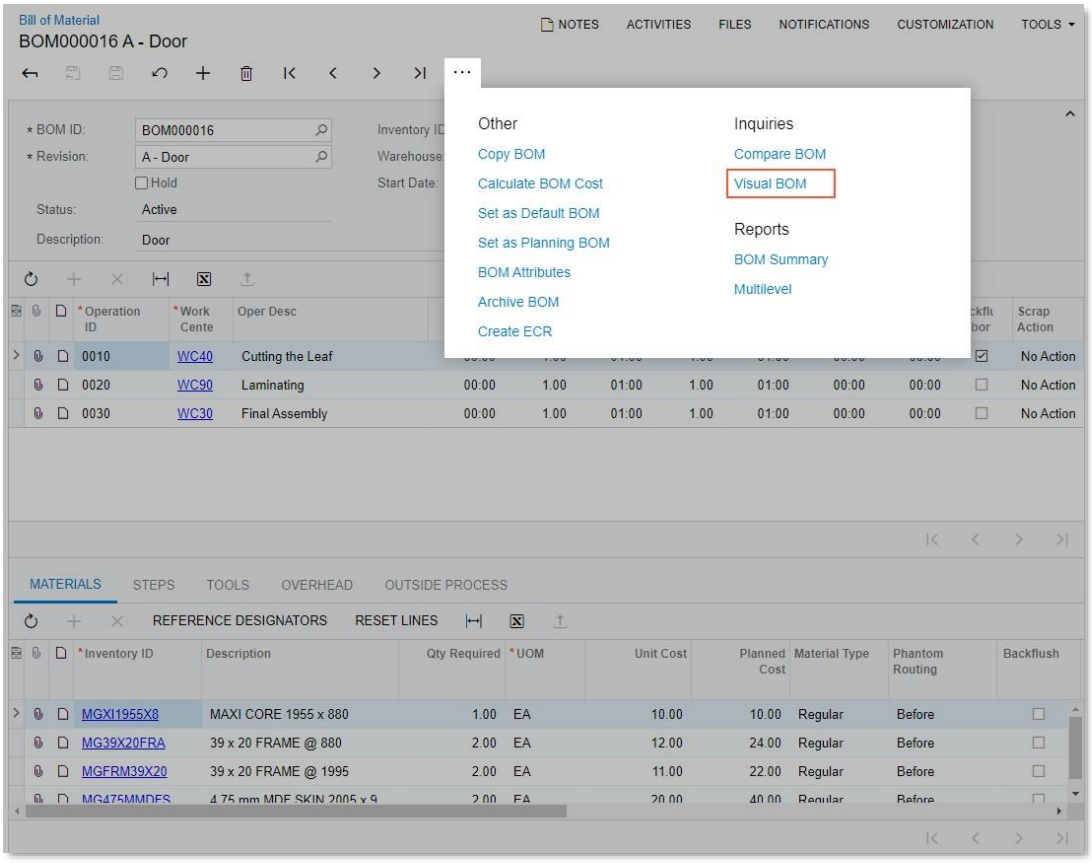
Changes in the Sort Order of Identifier Columns

On the following forms, the default sort order of identifier column values has been changed to descending:

- Bill of Material (AM2080PL): The **BOM ID** column
- Estimates (AM3030PL): The **Estimate ID** column
- Production Order Maintenance (AM2015PL): The **Production Nbr.** column
- *Production Order Details* (AM209000): The **Production Nbr.** column in the lookup table of the **Production Nbr.** field
- *Transactions By Production Order* (AM000011): The **Production Nbr.** column
- Supplier Shipments (AM3100PL): The **Shipment ID** column

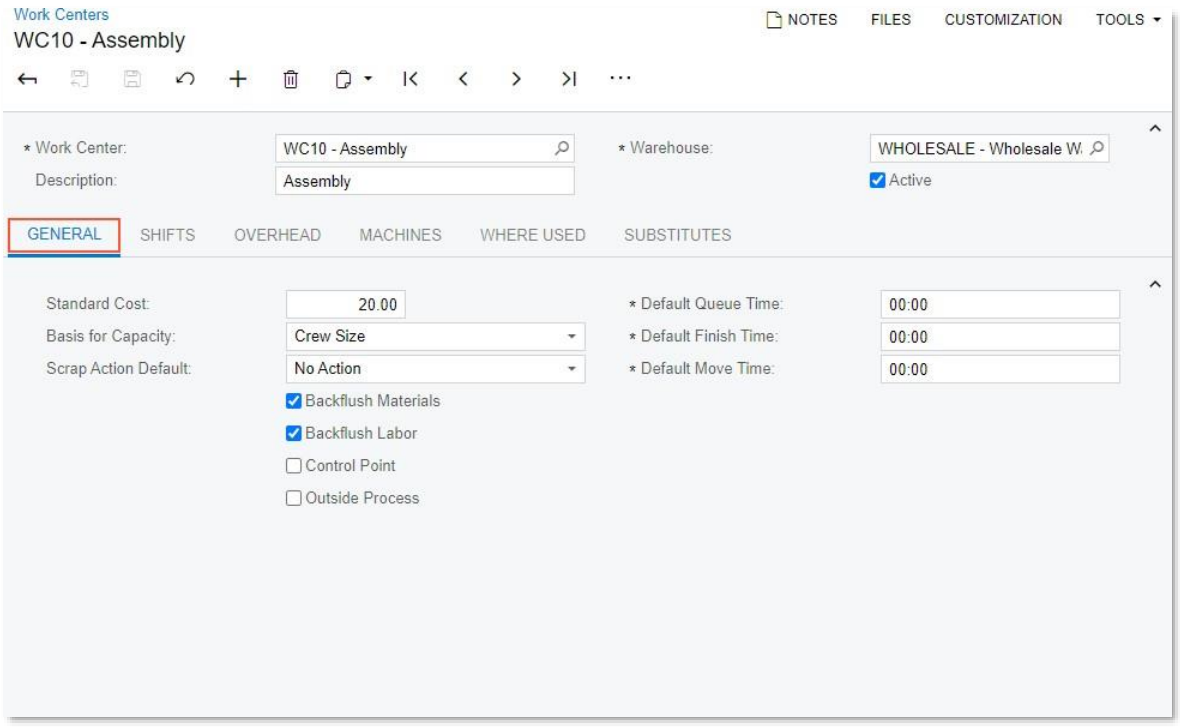
The Visual BOM Command on the Bill of Material Form

The **Visual BOM** command has been added to the More menu of the *Bill of Material* (AM208000) form (see the following screenshot). A production manager clicks this command to open the *Visual BOM* (AM216000) form, where the manager can view details about a particular bill of material, such as materials and operations, in a tree view.



Redesign of the Work Centers Form

On the *Work Centers* (AM207000) form, the **General** tab has been added for better usability (shown in the following screenshot). Some elements have been moved to this tab from the Summary area (such as **Standard Cost** and **Basis for Capacity**). Also, new settings for operation delay times have been added (for details, see *Manufacturing: Planned Delay Times in Production Scheduling*).



Support of the New Automated Warehouse Operations Engine

In MYOB Advanced Manufacturing Edition 2022.1, the *Scan Materials* (AM300030), *Scan Move* (AM302010), and *Scan Labor* (AM302020) forms have been redesigned to support the new automated warehouse operations engine. (By using these forms, workers enter manufacturing transactions with a barcode scanner or a mobile device with barcode scanning support.)

Mobile

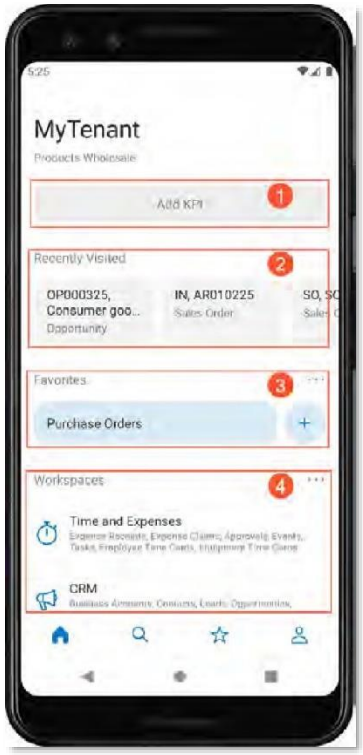
Support of Workspaces

In the MYOB mobile app connected to an instance of MYOB Advanced 2022.1, workspaces are now supported.

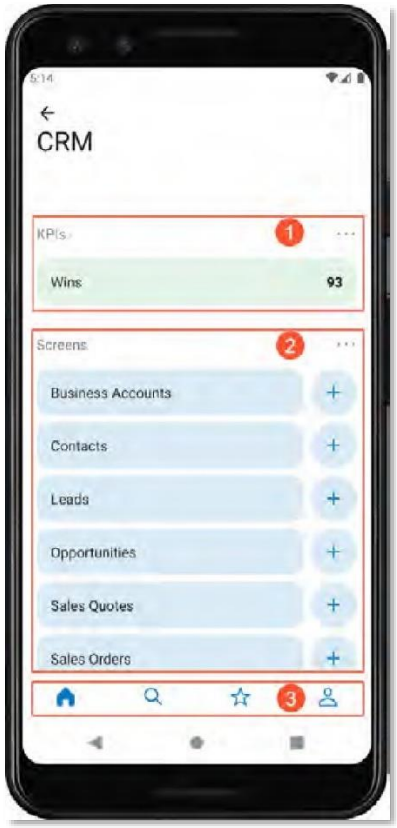
With the workspace support, a user can do the following in the mobile app:

- Find the required screens by browsing the workspaces
- View only those workspaces that are relevant to the user's role
- Perform typical operations (for example, create new records) for a screen directly from the list of screens in a workspace without needing to open the corresponding screen first
- Reorder workspaces
- Add KPI widgets from the dashboards to the main menu and to workspaces
- Navigate to detailed data by tapping a widget
- View the list of recent records that the user has opened both in the mobile app and in the MYOB Advanced instance
- Navigate to any of the recent records by tapping the corresponding tiles
- Define records and screens as favourites or remove them from favourites
- View the list of records marked as favourites both in the mobile app and in the MYOB Advanced instance
- Navigate to favourite records
- Reorder the list of favourite records and screens

The following screenshot shows the main menu of the mobile app. The menu contains a placeholder for adding KPI widgets (see Item 1 in the screenshot), the list of recently visited screens and records (Item 2), the list of screens and records marked as favourites (Item 3), and the tiles with the workspaces (Item 4).



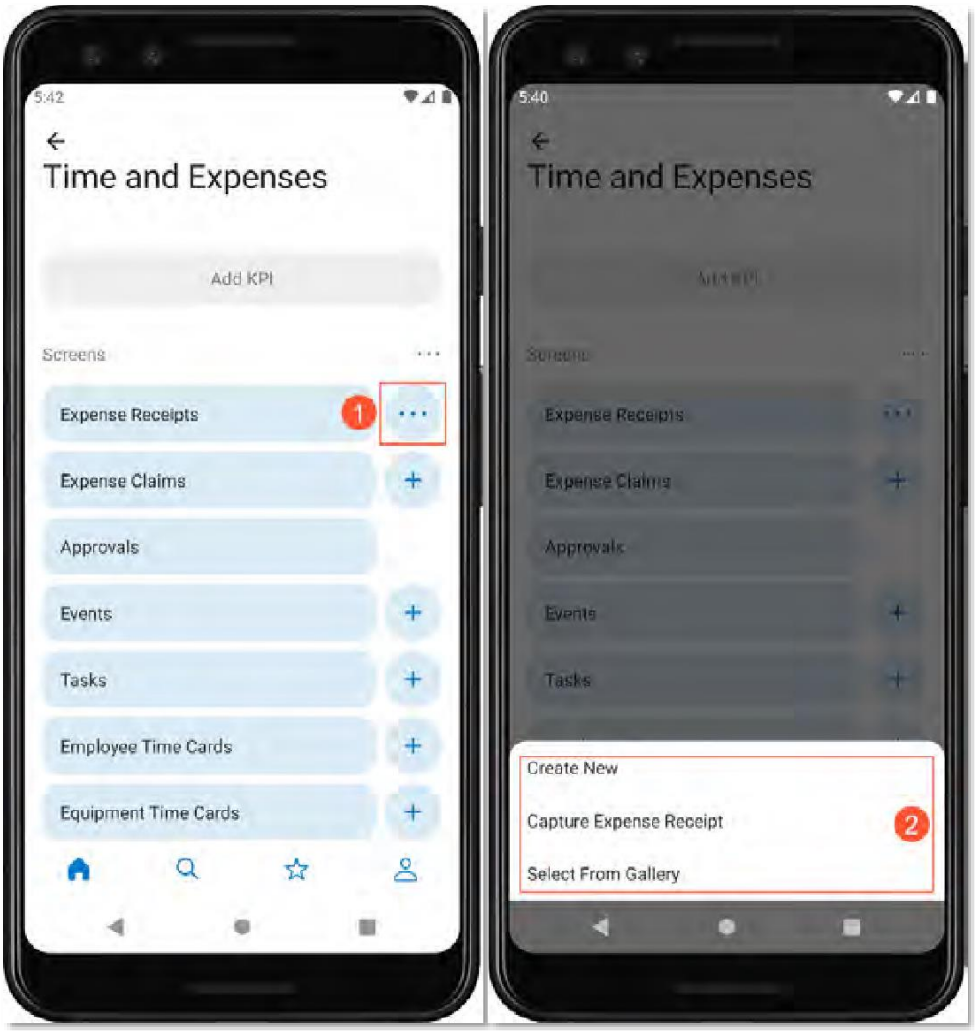
Each workspace contains a placeholder for adding KPI widgets (see Item 1 in the following screenshot) and the list of screens added to this workspace (Item 2).



Also, the following buttons have been added to the bottom of the main screen (see Item 3 in the screenshot above):

- Home: Navigates to the main menu
- Search: Enables a search among records, screens. and workspaces
- Favourites: Opens the list of screens and records marked as favourites
- Settings: Opens the mobile app settings

A user can add new records by tapping the plus button to the right of the name of any screen. If other actions are available for a screen, the More (...) button is displayed instead of the plus button (see Item 1 in the following screenshot). The user can then select the required action on this menu (Item 2).



Individual User Settings Applied at the Mobile App Level

The settings described in this section are configured by a user of the mobile app and are applied to only this user's copy of the MYOB mobile app.

To change the order in which the workspaces are displayed on the main menu of the mobile app, the user taps **Reorder Workspaces** on the More menu of the **Workspaces** section and

drags the tiles with workspaces to the needed locations. Alternatively, the user can tap a tile with a workspace and drag it to the needed location.

Note: Workspaces in the MYOB mobile app do not coincide with workspaces in the corresponding instance of MYOB Advanced. Users configure mobile workspaces separately (see *Support of New Forms* below).

To change the order in which the screens are displayed in a workspace, the user taps **Reorder Workspaces** on the More menu of the **Screens** section and drags the tiles with screens. Alternatively, the user can tap a tile with a screen and drag it to the needed location.

Users can now add to the main menu of the mobile app and to each of the workspaces KPI widgets of the following types:

- Scorecard
- Meter
- Trend card

By default, no widgets are displayed. To add a widget, the user taps **Add KPI** and selects the required widget. Only widgets that are part of dashboards without parameters are available for selection.

Note: A user can see a widget only if the corresponding dashboard is visible and the user has the needed privileges to view this dashboard.

System-Wide Configuration and Customisation

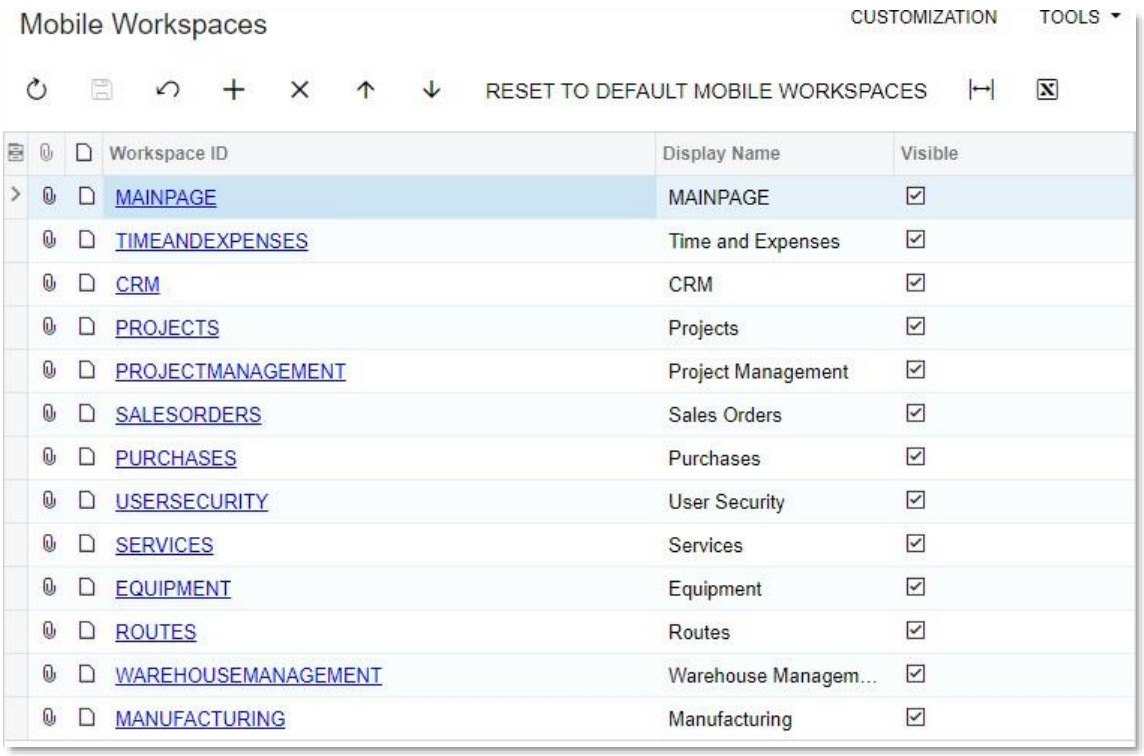
The configuration described in this section is performed by a user who has the *Administrator* or *Customiser* predefined role. The system applies this configuration to the mobile app connected to the current tenant in an MYOB Advanced instance for all users.

Support of New Forms

In the MYOB Advanced instance, the following forms have been added:

- *Mobile Workspaces* (AU220012): The customiser configures the list of workspaces on this form.
- *Mobile Workspace* (AU220013): The customiser configures the screens and widgets that should be added to the selected workspace on this form.

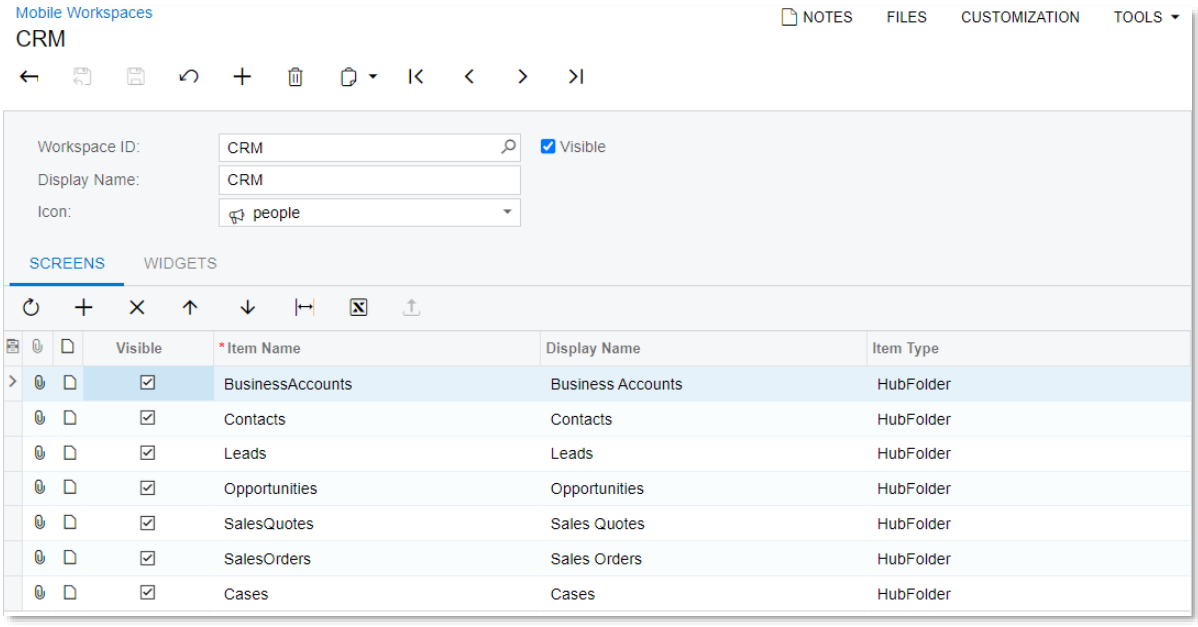
The following screenshot shows the *Mobile Workspaces* form with the default workspaces.



Workspace ID	Display Name	Visible
MAINPAGE	MAINPAGE	☑
TIMEANDEXPENSES	Time and Expenses	☑
CRM	CRM	☑
PROJECTS	Projects	☑
PROJECTMANAGEMENT	Project Management	☑
SALESORDERS	Sales Orders	☑
PURCHASES	Purchases	☑
USERSECURITY	User Security	☑
SERVICES	Services	☑
EQUIPMENT	Equipment	☑
ROUTES	Routes	☑
WAREHOUSEMANAGEMENT	Warehouse Managem...	☑
MANUFACTURING	Manufacturing	☑

Notice that the form also contains the **MAINPAGE** workspace. This read-only workspace contains the settings of the main menu of the mobile app.

The following screenshot shows the *Mobile Workspace* form for the **CRM** workspace.



Visible	*Item Name	Display Name	Item Type
☑	BusinessAccounts	Business Accounts	HubFolder
☑	Contacts	Contacts	HubFolder
☑	Leads	Leads	HubFolder
☑	Opportunities	Opportunities	HubFolder
☑	SalesQuotes	Sales Quotes	HubFolder
☑	SalesOrders	Sales Orders	HubFolder
☑	Cases	Cases	HubFolder

A workspace added on the *Mobile Workspaces* form is displayed on the main menu of the mobile app only if this workspace contains at least one screen or one KPI widget that is available to the mobile app user.

Note: The mobile app users can view a KPI widget or a screen only if they have the needed privileges to view the corresponding dashboard or access the underlying form.

Managing Workspaces in a Customisation Project

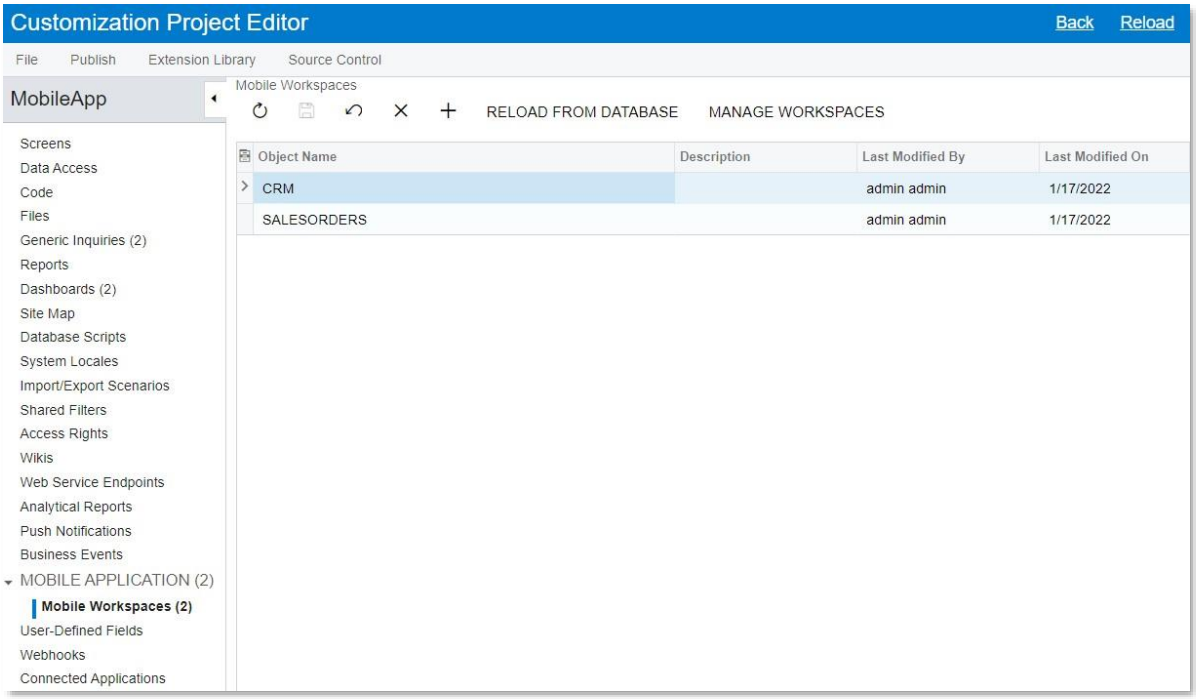
The customiser can add to a customisation project the following types of items:

- *MobileSitemapWorkspace*: This item contains general data, such as the name of a workspace, its sequential number, and its icon.
- *MobileSitemapWorkspaceItems*: This item contains the screens included in the workspace.
- *MobileSitemapWorkspaceWidgets*: This item contains the KPI widgets included in the workspace and its screens.

The customiser uses the Mobile Workspaces page of the Customisation Project Editor to manage these items in the customisation project.

To add a workspace to the customisation project, the customiser clicks **Add New Record** on the page toolbar and selects the required workspaces in the **Add Workspace** dialog window, which is opened. Notice that this dialog window contains workspaces that the customiser has modified—that is, added a screen on the *Mobile Workspace* form, or added a new workspace or changed the order of workspaces on the *Mobile Workspaces* form.

To configure workspaces in the customisation project, the customiser clicks **Manage Workspaces** on the page toolbar. This opens the *Mobile Workspaces* form, where the customiser can add or remove workspaces. The following screenshot shows the Mobile Workspaces page with the added **CRM** and **SalesOrders** workspaces.



Also, the **Manage Workspaces** button has been also added to the More menu of the Mobile Application page. Clicking this button redirects the customiser to the Mobile Workspaces page.

To update a workspace in the customisation project, the customiser clicks the required workspace in the table and clicks **Reload from Database** on the page toolbar.

To remove a workspace from the customisation project, the customiser clicks the required workspace in the table and clicks **Delete Row** on the page toolbar.

If the customiser adds a new screen to the mobile app by using the **Add New Screen** command on the Mobile Application page of the Customisation Project Editor, the new screen is added to the **Other** workspace by default. To avoid this, the customiser needs to add this screen to one of the workspaces on the *Mobile Workspace* form.

Order Management

Sales with Blanket Sales Orders

MYOB Advanced 2022.1 introduces the ability to create blanket sales orders for regular sales based on a long-term agreement between the selling company and the customer.

The blanket sales order functionality is available when the *Inventory and Order Management* feature is enabled on the *Enable/Disable Features* (CS100000) form.

General Information

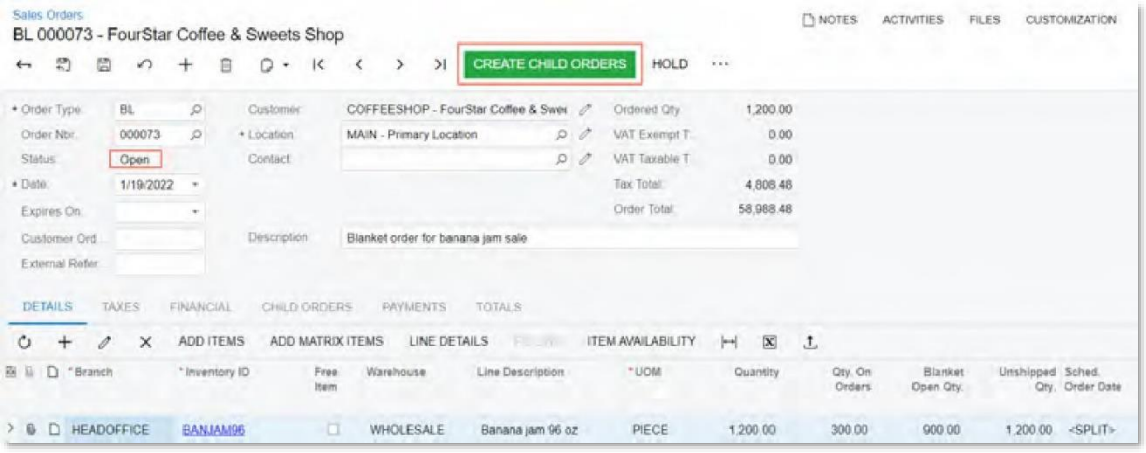
The most representative business scenario for using blanket sales orders is the sale of large quantities of an item or multiple items that can be delivered in multiple shipments to different customer locations over a specified period. The blanket sales orders can be used for planning, forecasting, and monitoring purposes because the quantities that the user enters on a blanket sales order do not affect the item availability in the warehouse, unlike the quantities in regular sales orders.

A blanket sales order in MYOB Advanced has an order type for which the *Blanket Order* automation behaviour is specified on the **Template** tab of the *Order Types* (SO201000) form. The predefined *BL* order type has been added to the system for the processing of blanket sales orders.

Lines of the blanket sales order are converted to child orders on the date you specify for shipping. A child order is a regular sales order with a link to the blanket sales order; the child order has an order type with the *Sales Order* automation behaviour. The blanket sales order is completed when all child orders have been shipped.

The user can create a child order for a blanket sales order in one of the following ways:

- By clicking **Create Child Orders** on the form toolbar or the More menu of the *Sales Orders* (SO301000) form for a blanket sales order with the *Open* status (shown in the following screenshot).
- By selecting the *Create Child Orders* action in the **Actions** field in the Summary area of the *Process Orders* (SO501000) form, selecting the unlabeled checkbox for the blanket sales order in the table, and clicking **Process** on the form toolbar.



When the user invokes the creation of child orders, the system generates sales orders of the type that is specified in the new **Default Child Order Type** field on the *Order Types* form (**Child Order Settings** section) for the type specified for the blanket sales order.

Note: In the current version of the application, only order types with the *Sales Order* automation behaviour can be specified as the default order type for child orders.

Preparation of a Blanket Sales Order

Suppose that a customer has ordered 120 boxes of apple jam, and the customer wants the jam to be delivered in 10 boxes to two locations at the beginning of each month over the following six months. On the *Sales Orders*

(SO301000) form, the user enters the following data to prepare a new blanket sales order for the creation of child orders:

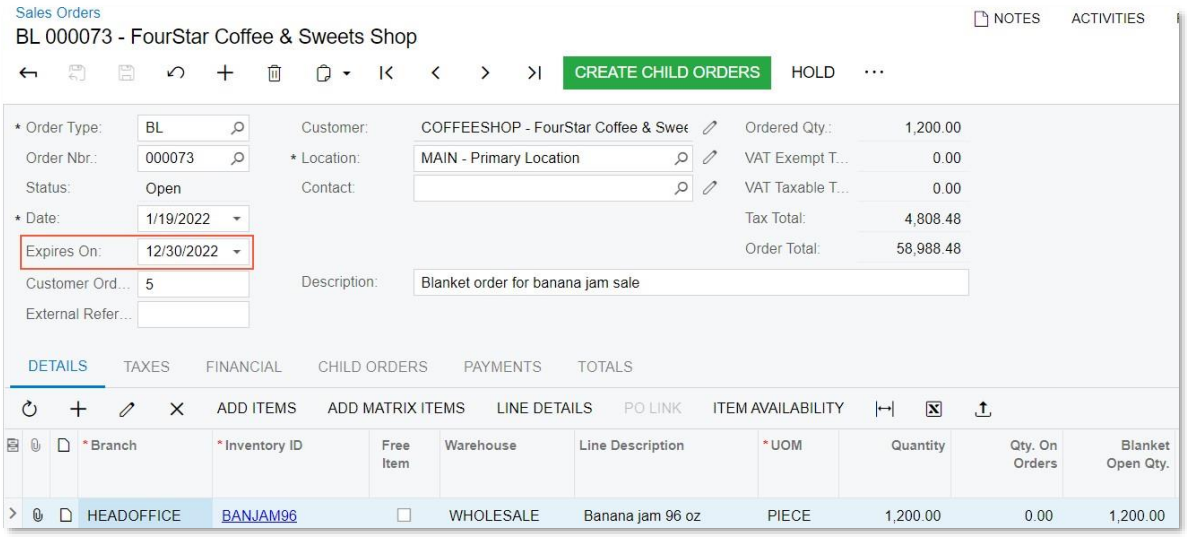
- The customer: The user specifies the customer in the Summary area.
- A description of the blanket sales order (optional): The user specifies the description in the Summary area.
- The expiration date (optional): The user specifies the expiration date of the blanket sales orders in the new **Expires On** field in the Summary area.
- The lines with the item: On the **Details** tab, the user adds two lines with the *APJAM* item (one line for each location) and specifies the item quantity as 60 for each line.
- Shipping location: The user specifies the locations of the customer in the **Ship-To Location** column for each line of the blanket sales order on the **Details** tab.
- Line splits: For both lines on the **Details** tab, the user creates multiple line splits for each scheduled order date, customer order number (optional), purchase order creation date (optional), and allocation (optional) for child orders. These line splits are created in the **Line Details** dialog window.

The sections below provide more detailed explanations of the expiration date, the line splits, and the shipping locations for blanket sales orders.

Expiration of a Blanket Sales Order

A user can specify an expiration date for any sales order whose order type has the *Blanket Order* automation behaviour. The user can specify this date in the new **Expires On** field in the Summary area of the *Sales Orders* (SO301000) form (shown in the following screenshot).

The **Expires On** field is empty by default. The user can leave the field empty if no expiration date is known.



When the current business date is later than the expiration date of the blanket sales order, the system displays a warning message in the Summary area. The order maintains the *Open* status. If the user tries to make changes in the order, the user will not be able to save those changes in the expired blanket sales order until the expiration date is changed to a later date.

Instead of extending the expiration date of the blanket sales order, the user can assign the *Expired* status to it in one of the following ways:

- Select the **Process Expired Order** command on the More menu of the *Sales Orders* form for the blanket sales order
- Select the *Process Expired Order* action in the Summary area of the *Process Orders* (SO501000) form, select the unlabeled checkbox for the order, and click **Process** on the form toolbar

The user can also create a schedule for the system to regularly perform the *Process Expired Order* action on the *Process Orders* form for all listed blanket sales orders.

Note: If the blanket sales order has any allocations of items, links to purchase orders, or payment applications, they are not removed when the order is assigned the Expired status. Instead, the system displays warning messages about the lines with allocations, links to purchase orders, and payment applications. The user should review and manually remove these allocations, links to purchase orders, and payment applications, or the user can extend the expiration date if the agreement with the customer will continue. If the user cancels a blanket sales order with the *Expired* status by clicking the **Cancel Order** command on the More menu, the allocations and the links to purchase orders are removed automatically.

Line Splits in the Line Details Dialog Window

On the **Details** tab of the *Sales Orders* (SO301000) form, a user can open the **Line Details** dialog window for any detail line by clicking the line and then clicking **Line Details** on the table toolbar. This dialog window can be used to split the item quantity of the line into *line splits*: smaller quantities with some different settings shown in separate lines of the dialog window.

Initially, when the user opens this dialog window for a line of a blanket sales order, the system displays only one line in the dialog window. The user can split the line in the dialog window into multiple lines and enter different data in any of the following columns for each line split: **Sched. Order Date**, **Sched. Shipment Date**, **Customer Order Nbr.**, **Allocated**, and **PO Creation Date**. The **Alloc. Warehouse** column is unavailable for editing because transfers between warehouses are not supported for the processing of blanket sales orders.

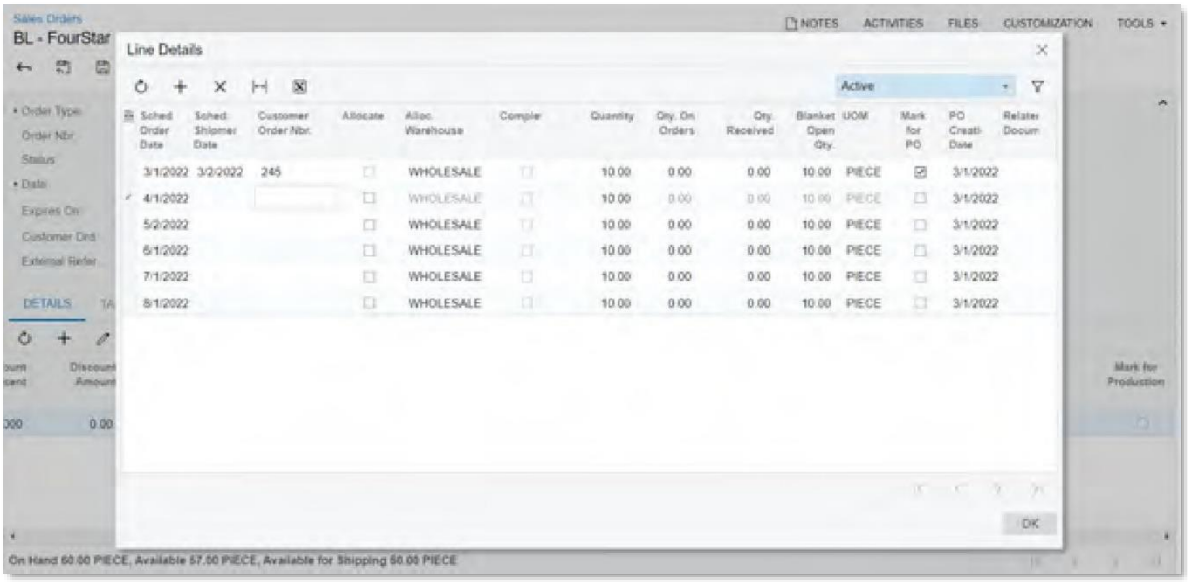
To create a new line in the **Line Details** field, the user reduces the value in the **Quantity** column of an existing line and presses Enter. The system automatically creates a new line with the remaining quantity of the item. The user can repeat the process with any line of the dialog window until it contains the needed number of line splits, each with the appropriate quantity and other settings. (See the screenshot below.)

By default, the current business date is automatically inserted in the **Sched. Order Date** column on the **Details** tab of the *Sales Orders* form for each line of a blanket sales order. If the user creates line splits with different scheduled order dates for the line, the system changes the value in the **Sched. Order Date** column on the **Details** tab to *<SPLIT>* for this line.

When the user has finished entering the line splits in the **Line Details** dialog window as well as other settings of the sales order, the user creates the child orders that correspond to the line splits. When the user clicks **Create Child Orders** on the form toolbar or the More menu (under **Processing**), the system generates a separate child order for each line split with a different scheduled order date as long as the scheduled order date is earlier than or the same as the current business date. If the **Sched. Order Date** column is empty in a blanket sales order line split in the **Line Details** dialog window, the system does not generate a child order for this line split.

The **Customer Order Nbr.** column in the **Line Details** dialog window is empty by default. If the user specifies a customer order number (see the first two lines in the following

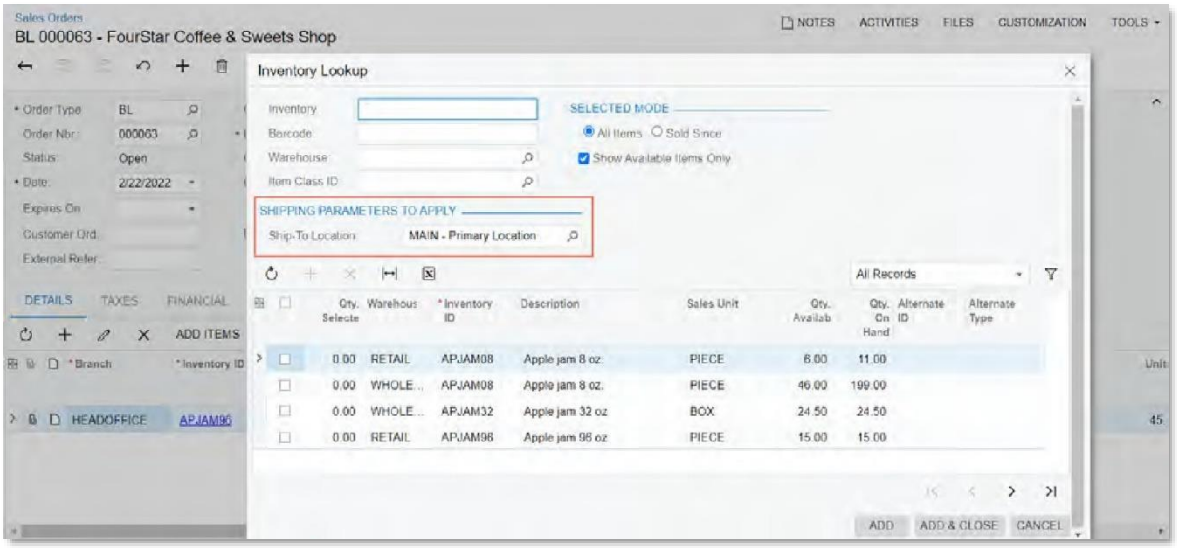
screenshot), the system inserts this customer order number into the **Customer Order Nbr.** field in the Summary area of the *Sales Orders* form for the generated child order.



Shipping Locations in Blanket Sales Orders

A value must be specified in the **Ship-To Location** column on the **Details** tab of the *Sales Orders* (SO301000) for each line of a blanket sales order. By default, the system copies this value from the customer location specified in the **Location** field in the Summary area of the *Sales Orders* form. The user can manually change the value in any line. In child orders, the value of the **Location** field in the Summary area is copied from the **Ship-To Location** column of the corresponding line of the blanket sales order. When the user creates child orders, the system generates a separate child order for each location and groups lines with the same location within one child order.

A new **Shipping Parameters to Apply** section has been added to the **Inventory Lookup** dialog window, which a user can open by clicking the **Add Items** button on the table toolbar of the **Details** tab. (See the following screenshot.) This section appears only if the selected order is a blanket sales order. The **Ship-To Location** field of this section contains the location to be copied to the **Ship-To Location** column for all lines that contain items that are added by using this dialog window. By default, the system inserts the value of the **Location** field in the Summary area of the *Sales Orders* for the sales order, but the user can select another customer location.



Actions During the Creation of Child Orders

When a user initiates the creation of child orders on the *Sales Orders* (SO301000) or *Process Orders* (SO501000) form, the system does the following:

- Groups the line splits defined in the **Line Details** dialog window of the *Sales Orders* form for all lines of the blanket sales order according to grouping rules (described below).
- Creates child orders for each group of blanket sales order line splits that has a nonzero quantity and a scheduled order date earlier than or the same as to the current business date.

The system uses the following grouping rules for the line splits of the blanket sales order on the *Sales Orders* form:

- Line splits are placed in one group if they have the same values in all of the following columns of the **Line Details** dialog window:
    - Sched. Order Date
    - Customer Order Nbr.
    - Ship-To Location
    - Tax Zone
    - Shipping Terms
    - Ship Via
    - FOB
    - Shipping Zone
- If the **Customer Order Nbr.**, **Ship-To Location**, or **Tax Zone** column is empty for the line split of the blanket sales order, this line split can be grouped with only line splits for which the same column is also empty.

When a user initiates the creation of child orders after the creation of line splits in the **Line Details** dialog window of the *Sales Orders* (SO301000) form, a child order line is created for each line split of the blanket sales order. The quantity in the child order line is equal to the value in the **Blanket Open Qty** column in the dialog window for a corresponding line split.

Note: The state of the **Allocated** checkbox in the **Line Details** dialog window for a line split of a blanket sales order is transferred to the corresponding line of the child order. If the child order line is deleted or the quantity in the line is reduced, the allocated quantity of the item is returned to the blanket sales order line and remains allocated. If the allocation has been done in the child order line, the allocation will not be transferred to the blanket sales order line if the child order line is deleted, or the quantity of the line is reduced. In this case, only the quantity of the item in the blanket sales order line will be changed.

Once a child order is created for a blanket sales order line, the blanket sales order on the *Sales Orders* (SO301000) form is changed as follows:

- The **Customer** and **Currency** fields in the Summary area become unavailable for editing. If the new **Use Currency Rate from Blanket Order** checkbox is selected on the *Order Types* (SO201000) form for the selected type of the blanket sales order, the currency rate of the blanket sales order is copied to the child orders. If the user changes the date of a child order, the system changes the currency rate of this child order to the effective currency rate for the selected date.
- The **Warehouse**, **UOM**, **Unit Price**, and **Ext. Price** columns for the blanket sales order line for which the child order has been created become unavailable for editing.
- The system updates the values in the following columns of the blanket sales order line: **Qty. On Orders**, **Blanket Open Qty**, and **Unshipped Qty**. Note that the values in the **Blanket Open Qty** and **Unshipped Qty.** columns are always *0* for lines with service items because the system does not track these quantities for service items.
- A link to the child order appears on the **Child Orders** tab of the *Sales Orders* form. On the **Child Orders** tab, the order amount is derived from the child order according to the child order currency rate. Therefore, this amount may not match with the amount of the blanket sales order line due to different currency rates.

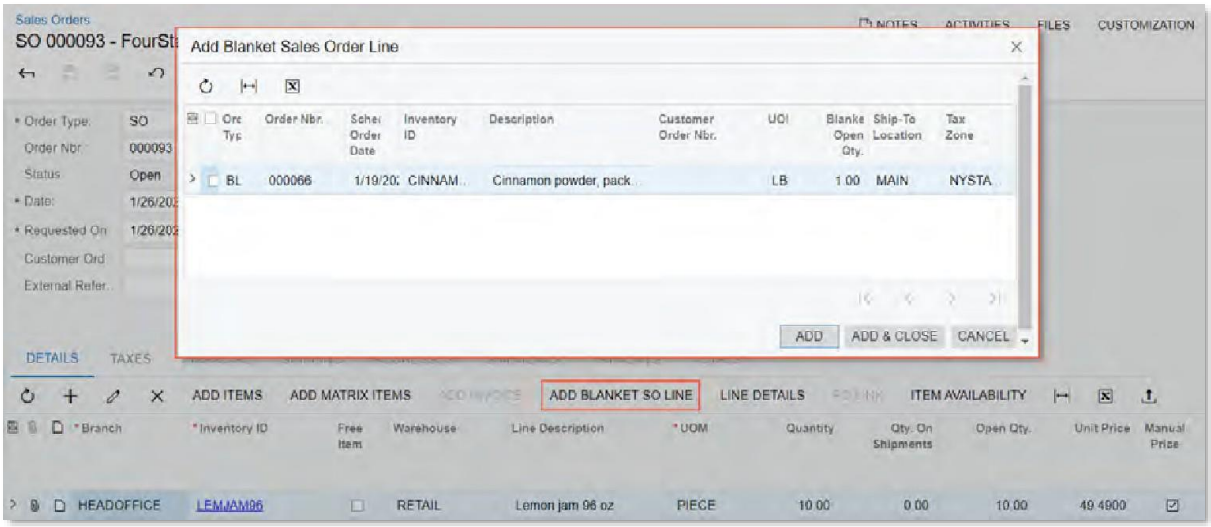
The following limitations apply to blanket sales orders that have a linked child order:

- If at least one child order has been generated for a blanket sales order, the user cannot delete the blanket sales order or any line for which a child order has been generated.
- The user cannot make the quantity in the blanket sales order line less than the quantity that has been already transferred to child orders
- The following rules apply to each generated child order on the *Sales Orders* form:
- The **Customer** and **Currency** fields in the Summary area are unavailable for editing.
- The **Warehouse** and **UOM** columns on the **Details** tab are unavailable for editing for the lines of the child order.
- If the child order is canceled or deleted, the quantities of items in each line of the child order are returned to the quantities of the corresponding blanket sales order line.

- If a user decreases the quantity in a line of the child order, the difference between the reduced quantity and the original quantity is returned to the blanket sales order line split in the **Line Details** dialog window of the *Sales Orders* form. In the blanket sales order line, the system updates the values of the **Qty. On Orders** and **Open Qty** columns on the **Details** tab of the *Sales Orders* form.
- For lines of the child order that contain stock or non-stock items, the quantity of the item cannot be greater than the remaining value in the **Open Blanket Qty** column on the **Details** tab of the *Sales Orders* form for the related line split of the blanket order. For child order lines that contain service items, the quantity of the item can be greater than the quantity in the related blanket order line.

Add Blanket Sales Order Line Dialog window

The **Add Blanket SO Line** button has been added to the table toolbar of the **Details** tab of the *Sales Orders* (SO301000) form, as shown in the following screenshot. This button appears for only sales orders whose order type has the *Sales Order* automation behaviour. When a user clicks this button, the **Add Blanket Sales Orders Line** dialog window (also shown in the following screenshot) opens.



In the dialog window, the system displays line splits of blanket sales orders that meet the following criteria:

- The blanket sales order and the child order have the same customer.
- The blanket sales order and the child order have the same currency.
- The child order and the line split of the blanket sales order have the same shipping location.
- The child order and the line split of the blanket sales order have the same tax calculation mode.
- The child order and the line split of the blanket sales order have the same tax zone.

- The child order and the line split of the blanket sales order have the same customer order number if the customer order number is specified for the line split and child order.
-
- The value in the **Sched. Order Date** column for a blanket sales order line split is earlier than or the same as the date of the child order.
- The value in the **Blanket Open Qty** column for a blanket sales order line is greater than zero on the **Details** tab of the *Sales Orders* form.

When the user adds a line of the blanket sales order from the **Add Blanket Sales Orders Line** dialog window to a child order, the system copies the discount of the blanket sales order line. The payment applications of the blanket sales order are not copied to the child order.

Other Commands to Be Used for Blanket Sales Orders

For a blanket sales order, a user can click the following commands on the More menu and the equivalent buttons on the form toolbar of the *Sales Orders* (SO301000) form:

- **Reopen Order**: (available if the blanket sales order has the *Completed* or *Canceled* status): Causes the system to check the expiration date of the blanket sales order. Depending on the results of the check, the system assigns the order the *Open* status if the expiration date is later than the business date or the *Expired* status if the expiration date is earlier than the current business date.
- **Cancel Order**: (available if the blanket sales order has the *Open*, *Completed*, or *Expired* status): Assigns the *Canceled* status to the blanket sales order and removes any allocations and links to purchase orders. The blanket sales order cannot be canceled if at least one child order is linked to this order, or a payment has been applied to the order.
- **Delete**: Deletes the blanket sales order. The blanket sales order cannot be deleted if at least one child order is linked to this order, or a payment has been applied to the order.
- **Complete Order**: (available if the blanket sales order has the *Open* or *Expired* status and if at least one child order created for a blanket sales order line has a processed shipment): Causes the system to assign the *Completed* status to the order.
- **Prepare Invoice**: Causes the system to prepare invoices for all shipments in child orders that contain at least one line from the blanket sales order. If a child order has a confirmed shipment that does not contain lines of the blanket sales order, the system does not prepare an invoice for the shipment.
- **Print Blanket Sales Order**: Causes the system to prepare and open the new *Blanket Sales Order (SO641040)* report, which is a print-friendly version of the blanket sales order.
- **Email Blanket Sales Order**: Causes the system to email the blanket sales order. Before this command is used, an email notification template should be configured for sending a blanket sales order to a customer.

Purchase to Order in the Blanket Sales Order Line

For any line of the blanket sales order, a user can select the checkbox in **Mark for PO** column (which makes the line available to be added to a purchase order) and specify *Purchase to Order* in the **PO Source** column on the **Details** tab of the *Sales Orders* (SO301000) form. The state of the checkbox in the **Mark for PO** column is copied to the line splits created for the line on the **Details**. The user can clear the checkbox in the **Mark for PO** column for a line split. The system will not create purchase requests on the *Create Purchase Orders* (PO505000) for line splits with cleared checkbox in this column.

The **PO Creation Date** column has been added for the blanket sales order line on the **Details** tab and for line splits in the **Line Details** dialog window of the *Sales Orders* form. When the user adds a line of a blanket sales order, the system inserts the current business date into this column. (No value is required for the column.) If a blanket sales order line is marked for purchasing and the user clicks the **Create Purchase Orders** command on the More menu, the system selects blanket sales order line splits with a purchase order creation date that is earlier than or the same as the current business date and opens them on the *Create Purchase Orders* (PO505000) form. The user can create purchase orders for blanket order line splits.

When a child order is created for a blanket sales order line split with a link to a purchase order, the link to a purchase order is transferred to the child order. The link to the sales order is automatically updated in the related purchase order. If the quantity in the child order is reduced, the purchase order becomes linked to the blanket sales order line for the reduced quantity and to the child order line. If a child order is deleted or canceled, the link to the purchase order returns to the blanket sales order.

When the user releases a purchase receipt associated with the purchase order, the item will be allocated to the child order. If the quantity of the purchase receipt is greater than the quantity linked to the child order, the excess quantity will be allocated in the blanket sales order line splits.

Note: When a purchase receipt is released and the item becomes allocated in a child order, the system considers this allocation to be made directly on the child order. If the child order line is deleted or the item quantity is reduced, the allocation will be transferred to the line split of the blanket sales order.

Discounts in Blanket Sales Orders

In blanket sales orders, only manual and automatic line discounts can be applied. The **Discount Total** field does not appear on the Summary area of the *Sales Orders* (SO301000) form for blanket sales orders.

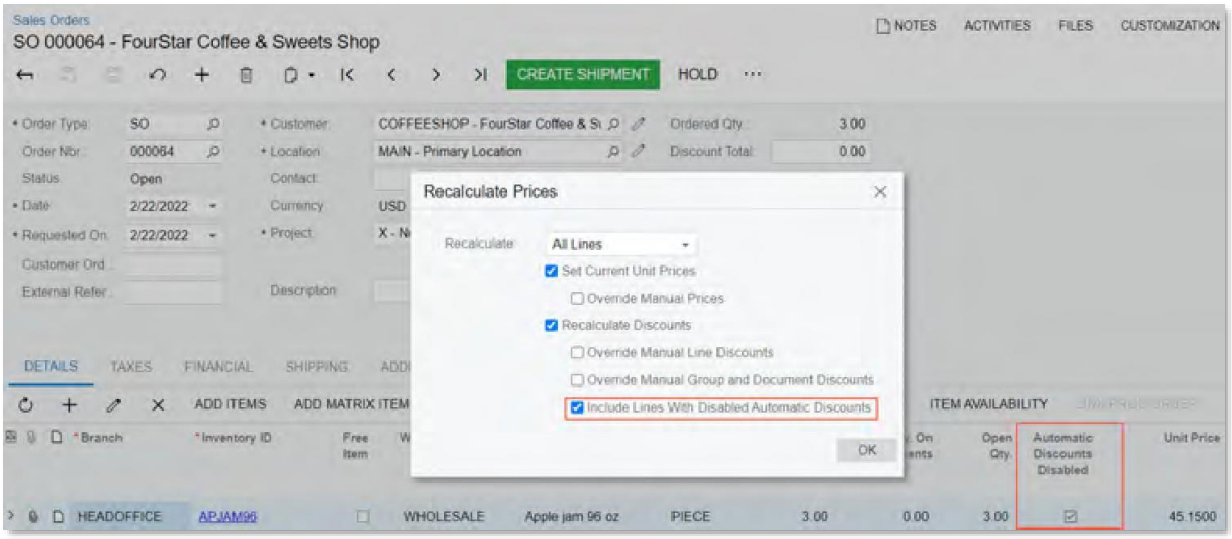
Note: Group and document discounts are not applicable in blanket sales orders.

When a user creates a child order, the values in the **Discount Code** and **Discount Percent** columns specified for a line of a blanket sales order on the **Details** tab of the *Sales Orders* form are automatically transferred to the child order line. The discount amount is recalculated based on the quantity of the item in the child order line. If the user changes the

quantity or unit price of the item in the child order line, the system automatically recalculates the discount amount by using the discount percent.

If a line of a child order is copied from a line split of a blanket sales order or was added to the child order by using the **Add Blanket Sales Order Line** dialog window, new automatic line, group, and document discounts are not applied to this line. If the user wants to calculate the automatic line, group, or document discounts for such lines, then the user can click the **Recalculate Prices** command on the More menu of the *Sales Orders* form. The system opens

the **Recalculate Prices** dialog window (shown in the following screenshot). If the user selects the **Include Lines With Disabled Automatic Discounts** checkbox and clicks **OK**, the system clears the **Automatic Discount Disabled** checkbox in the lines of the child order that have a link to a blanket order and recalculates discounts for all lines in the child order.



Tax Calculation in Blanket Sales Orders

In blanket sales orders, the taxes are calculated according to the tax zones specified in the **Tax Zone** column for lines of the order on the **Details** tab of the *Sales Orders* (SO301000) form. Therefore, a single blanket sales

order can have different tax zones. When the user adds a line to the blanket order, the system copies the tax zone specified on the *Customer Locations* (AR303020) form for the customer location that is specified in the **Ship-To Location** column of the line. The user can manually change the value of the **Tax Zone** column for a line of the blanket sales order. The system calculates summarised taxable amounts for each tax zone and then calculates taxes.

The taxes calculated for a blanket sales order are not transferred to child orders. When the child order is created, the taxes in this order are calculated the way they are calculated in regular sales orders. The user cannot change the tax amount manually and add new taxes in the blanket sales order.

A blanket sales order cannot have lines with both internal tax zones and tax zones that are external providers.

If the user calculates taxes via an external tax provider and the customer specified in the Summary area of the *Sales Orders* form for a blanket sales order has a predefined tax zone on the *Customer Locations* form, the system copies this tax zone to **Customer Tax Zone** field on the **Financial** tab of the *Sales Orders* form. In this case, the external tax zone is used to calculate taxes for all lines of the blanket sales order, and the **Tax Zone** column on the **Details** tab of the *Sales Orders* form cannot be edited in the lines of the blanket sales order.

When the user saves the blanket sales order, the system sends the information about the shipping location of each blanket sales order line and its address to the external tax provider. The external tax provider calculates the taxes based on the addresses specified for each shipping location of the blanket sales order lines.

The user can override the tax zone in a blanket sales order by selecting the **Override Tax Zone** checkbox on the **Financial** tab of the *Sales Orders* form. When the user selects the checkbox, the system opens the **Override Tax Zone** dialog window, in which the user can select a new tax zone. If the user overrides the tax zone, the taxes for all lines of the blanket sales order are calculated according to the newly specified tax zone.

Payments and Prepayments Applied to Blanket Sales Orders

A user can apply a payment or prepayment (credit memo) to a blanket sales order. The application can be made from the payment or prepayment on the *Payments and Applications* (AR302000) form, or the user can create a payment or prepayment directly on the **Payments** tab of the *Sales Orders* (SO301000) form.

If at least one child order is prepared for a blanket sales order, on the **Payments** tab of the *Sales Orders* form, the **Create Payment** and **Create Prepayment** buttons become unavailable.

Payment or prepayment applications on blanket sales orders are transferred to child orders. The transferred amount is shown in the **Transferred to Child Orders** column on the **Payments** tab of the *Sales Orders* form. On the *Payments and Applications* form, the transferred amount can be viewed in the **Transferred to Child Orders** column on the **Sales Orders** tab. The payment or prepayment applications on blanket sales orders cannot be transferred directly to the invoice.

When a user manually decreases the amount in the **Applied To Order** column on the **Payments** tab for a child order, the decreased amount of the application is returned to the blanket sales order.

For the blanket sales order, the **Create Payment** and **Create Prepayment** dialog windows work the same way as they do for regular sales orders whose order type has the *Sales Order* automation behaviour.

New Reports for Blanket Sales Orders

In MYOB Advanced 2022.1, the *Blanket Sales Order Summary (SO610600)* and *Blanket Sales Order Details (SO610700)* reports have been introduced for blanket sales orders. The *Blanket Sales Order Summary* report provides information about blanket sales orders that is similar to the contents of the *Sales Order Summary* (SO610500) report. The *Blanket Sales Order Details* report contains extended information about blanket sales order lines and child orders.

Sales orders with order types that have the *Blanket Order* automation behaviour are not included in the following reports:

- *Sales Order Summary* (SO610500)
- *Sales Order Details by Customer* (SO611000)
- *Sales Order Details by Inventory Item* (SO611500)
- *Sales Profitability by Item and Order* (AR671000)
-
- *Sales Profitability by Item Class and Item* (AR674000)
- *Sales Profitability by Customer Class and Customer* (AR675000)
- *Sales Profitability by Customer and Order* (AR672000)
- *Daily Sales Profitability* (AR676000)
- *Sales Profitability by Salesperson and Customer* (AR673000)
- *Sales Profitability Analysis* (AR409000)

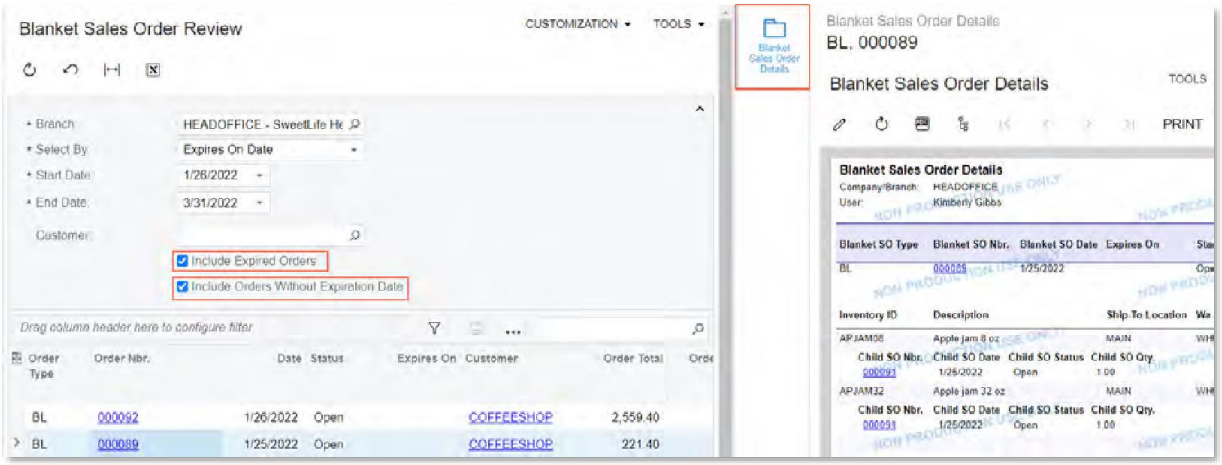
Sales orders whose order types have the *Blanket Order* automation behaviour are included in the *Order Register* (SO612000) report.

Blanket Sales Order Review Form

The new *Blanket Sales Order Review (SO403000)* inquiry form has been implemented to give users the ability to review blanket sales orders and their expiration dates if these dates have been specified. (This form is shown in the following screenshot.)

Blanket sales orders with the *Expired* status and blanket sales orders with the empty **Expires On** field in the Summary area of the *Sales Orders* form are shown in the inquiry results by default. The user can clear the **Include Expired Orders** and **Include Orders Without Expiration Date** checkboxes in the Selection area of the form to exclude these orders from the inquiry results.

The inquiry provides some statistical information on each listed blanket sales order: the open quantity in the blanket sales order, the quantity in its child orders, the percent of the unshipped quantity, and the number of days before the expiration of the order. The user can click any blanket sales order in the inquiry results and then click the **Blanket Sales Order Details** button on the side panel in the right part of the form to view the selected blanket sales order in the format of the *Blanket Sales Order Details (SO610700)* report.



Other Information About Blanket Sales Orders

Stock items in the lines of blanket sales orders do not have any item plans and do not affect replenishment. Blanket sales orders do not affect the customer's balance.

Freight amounts are not calculated in blanket sales orders.

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Platform

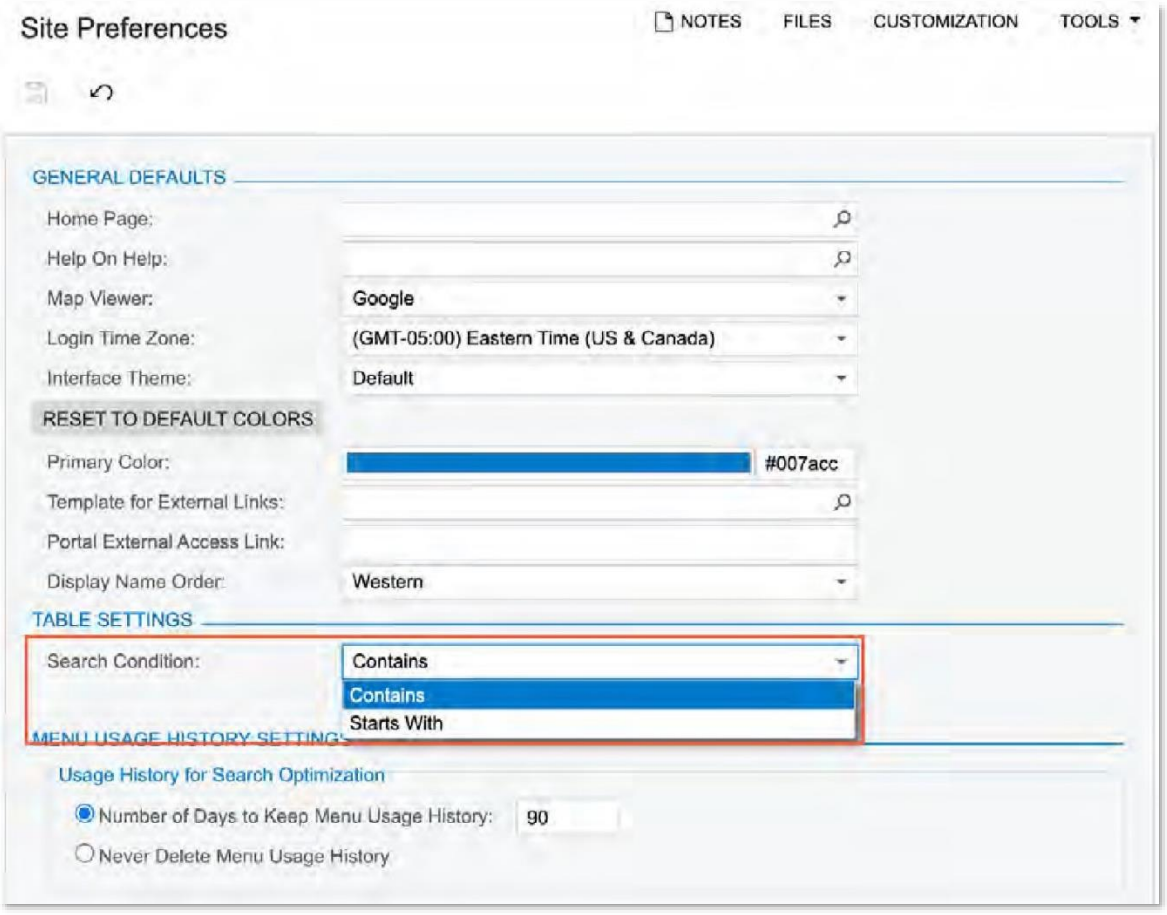
Ability to Manage Search Performance

MYOB Advanced 2022.1 introduces the ability to select a condition to be used by default in the search field in some tables.

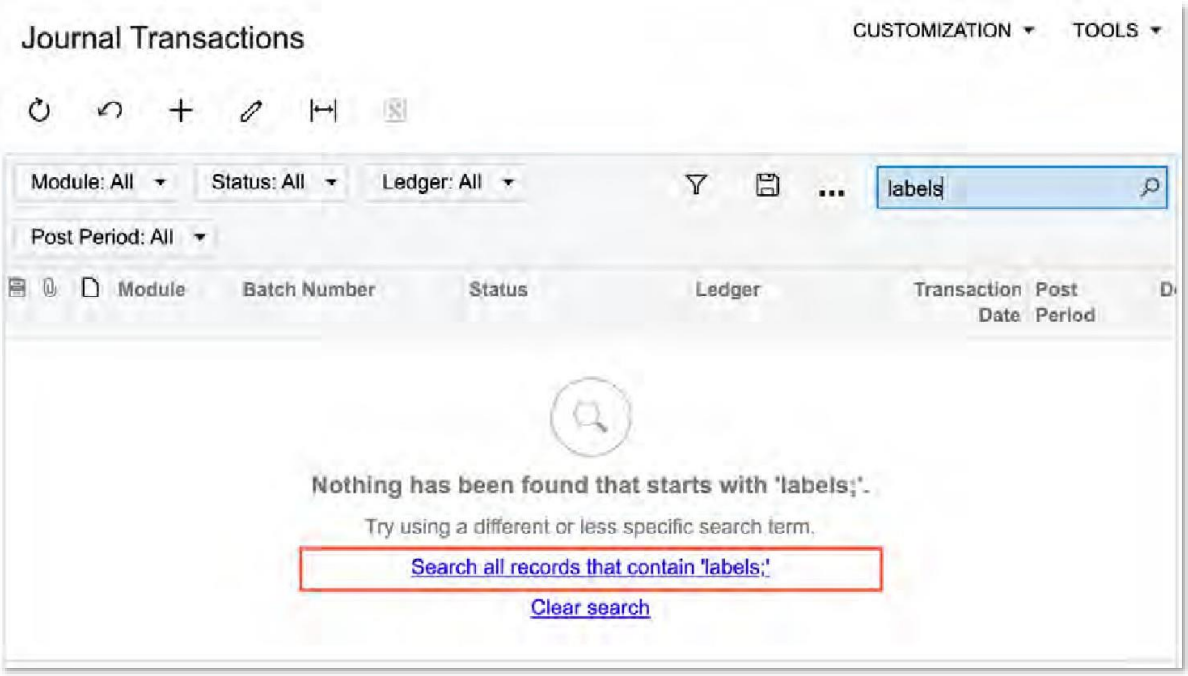
Configuration of a Search Condition

On the *Site Preferences* (SM200505) form, the **Table Settings** section has been added. The section includes the new **Search Condition** field. A system administrator can control which condition the system uses by default for the searches performed with the search field in tables, by selecting one of the available options (see the following screenshot):

- *Contains* (default): The system converts the *Contains* condition to the LIKE '%X%' inquiry in MS SQL; the search may take some time and cause performance issues. This option is offered to preserve backward compatibility.
- *Starts With*: The *Starts With* condition (LIKE 'X%' in MS SQL) works quicker when a user is searching for a record in a table.



If the administrator selected the *Starts With* option, the system uses this condition by default for these searches. If a search returns no results, the system notifies the user and provides a link the user can click to perform the search with the *Contains* condition instead; see the following screenshot.



DAC Schema Browser Improvements

In MYOB Advanced 2022.1, multiple improvements in the DAC Schema Browser have been implemented. These improvements include both user interface and functional changes that make the use of the DAC Schema Browser more streamlined. The changes are described in the following sections.

Availability Updates

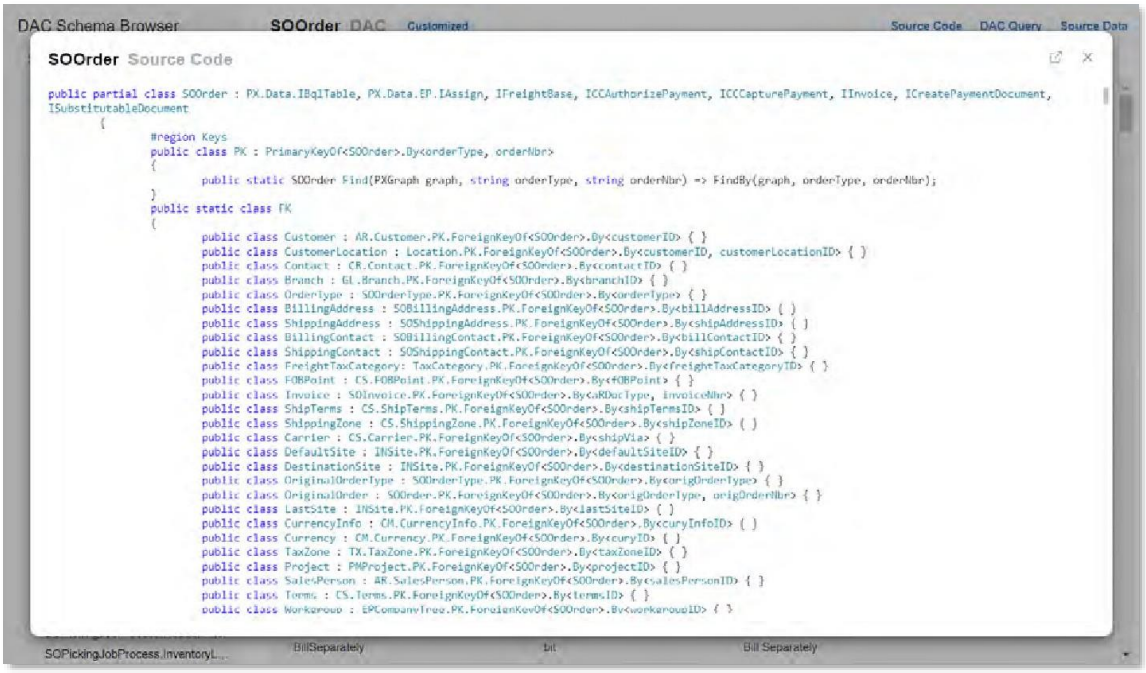
In an MYOB Advanced instance, customisers and users designing generic inquiries and reports can now access the DAC Schema Browser by doing one of the following:

- Typing *<instance_name>/dacBrowser* in the address bar of the browser
- Clicking the DAC Schema Browser tile on the main Help Portal page

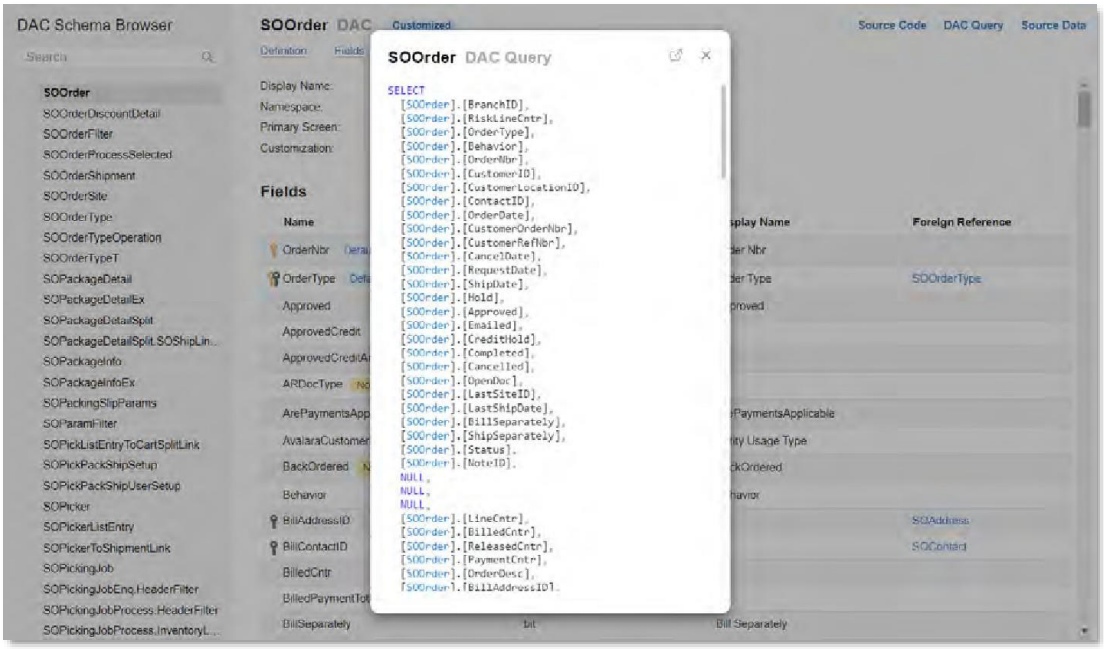
Functional Updates

The page title bar of the DAC Schema Browser now contains the *Source Code* and *DAC Query* links. The *Preview Source Data* link has been renamed to *Source Data*. (This link is shown on the form only if the user account is assigned any of the following roles: *Administrator*, *Customiser*, or *Report Designer*.)

A user clicks the *Source Code* link to open the source code browser for the selected DAC (see the following screenshot).



A user clicks the *DAC Query* link to open a SQL query that the selected DAC executes (see the following screenshot).



The search field now supports searching by the DAC's display name, as well as by its name.

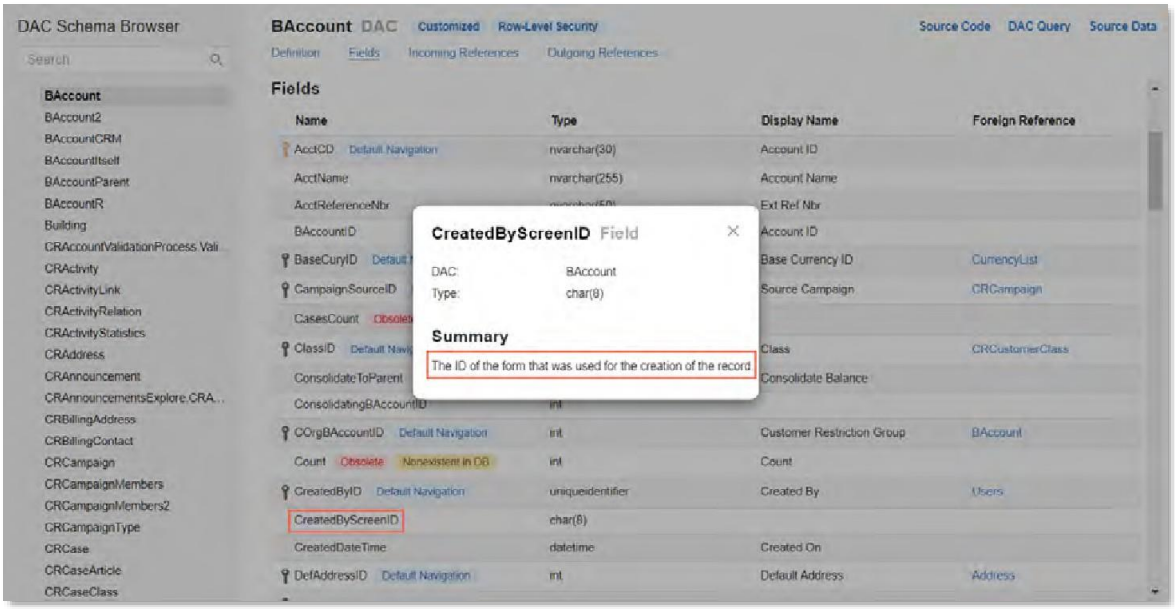
User Interface Updates

In the **Fields**, **Incoming References**, and **Outgoing References** tables, every DAC label now has a tooltip with the full DAC name.

For DACs that are intended only for internal use (that is, the DACs with the PXInternalUseOnly attribute), the *Internal* tag has been added. Customisers should not use these DACs in their reports, generic inquiries, or customisations.

The headers in the tables freeze when users scroll the page.

Annotations have been added for the common fields that do not have XML comments specified for them. The following screenshot shows the annotation for the CreatedByScreenID field.



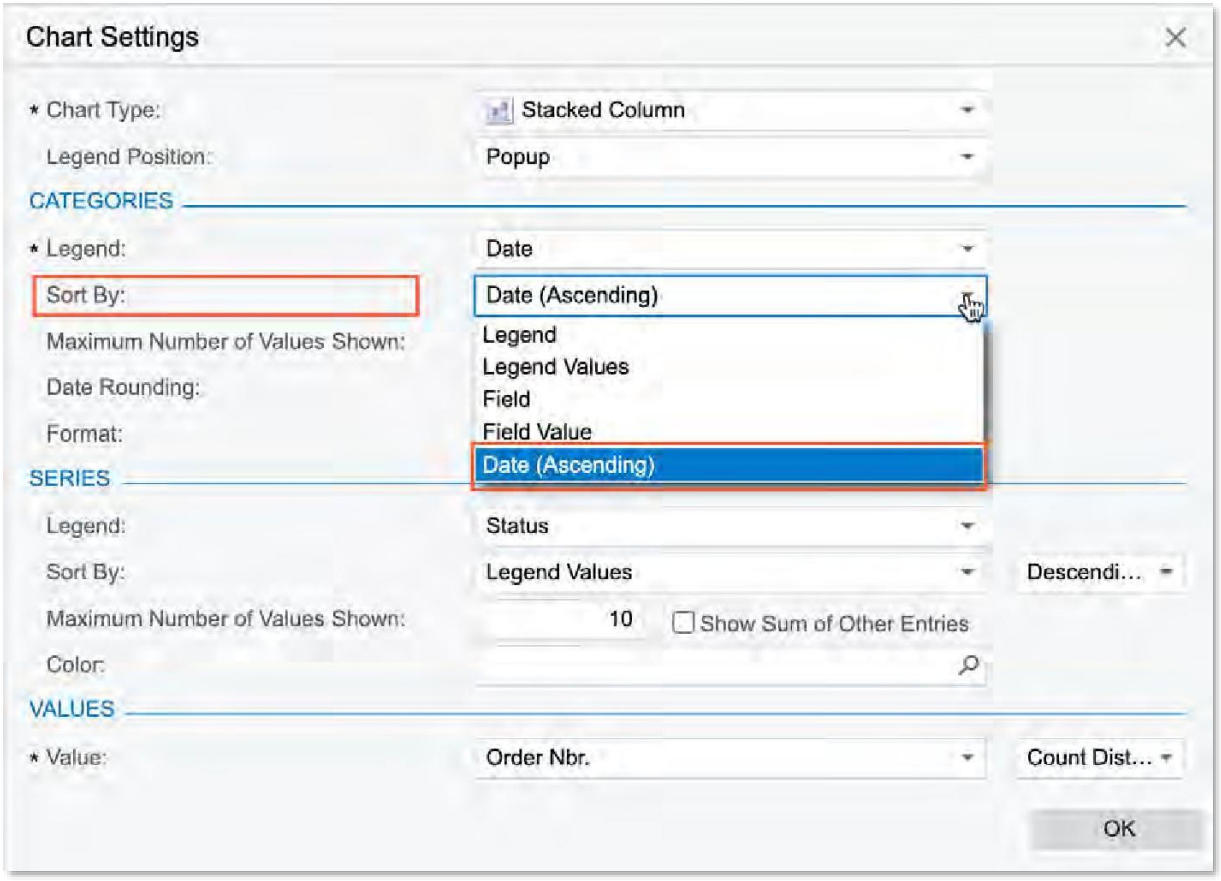
Enhancement to Chart Widget

MYOB Advanced 2022.1 introduces the ability to display dates in ascending order on the X axis.

This ability can be useful to demonstrate changes in data within a period of time that ends with the last date in the data returned by the inquiry. For example, a user can design a widget that demonstrates the number of sales orders completed in the 10 days prior to the date of the last completed order.

Configuration of a Chart Widget

In the **Categories** section of the **Chart Settings** dialog window, the new *Date (Ascending)* option has been added to the **Sort By** drop-down list (as shown in the following screenshot). The option is available if a data field that represents a date is selected in the **Legend** field.



With this option selected, the system will display the dates in ascending order on the X axis of the chart (as shown in the following screenshot).

Improvements to the Tracking Fields Used for Business Events

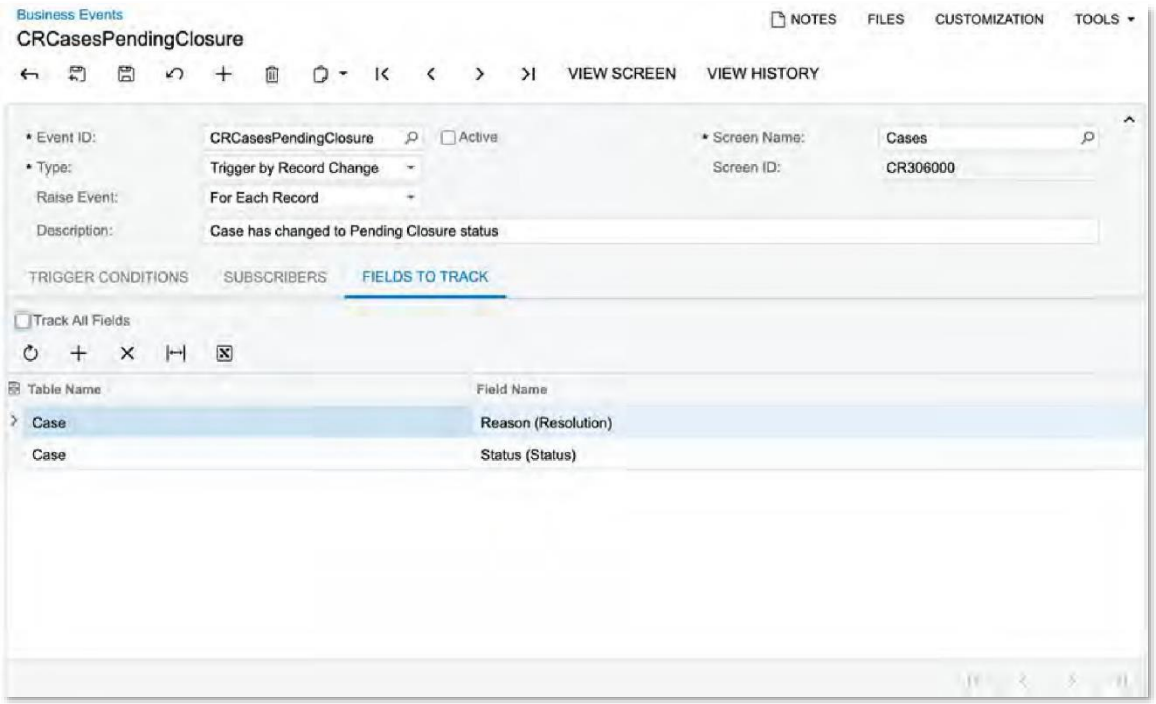
With MYOB Advanced 2022.1, the tracking of the data fields used for business events has been improved.

In earlier versions, for a business event with the *Trigger by Record Change* type, the system monitored the data changes made to the data included in the generic inquiry form or provided by a data entry form. If a value for a data field had been changed, the system stored the new and previous value of a data field.

If this business event had push notifications configured as a subscriber, the system sent a push notification each time a value of any field had changed, even if the field is not mentioned in trigger conditions. This resulted into multiple useless push notifications and could cause overflow of the processing queues.

Data Field Tracking

On the *Business Events* (SM302050) form, the **Fields to Track** tab has been added for the business events with the *Trigger by Record Change* type (see the following screenshot).



By default, the system tracks all the fields used for configuring conditions on the **Trigger Conditions** tab of the form. That is, these fields are listed in the table of the tab. These rows cannot be modified or deleted. A user can add other data fields to the table to make the system track these fields.

If a generic inquiry is specified in the **Screen Name** field of the form, a user can manually add only data fields that were added to the **Results Grid** tab of the *Generic Inquiry* (SM208000) form.

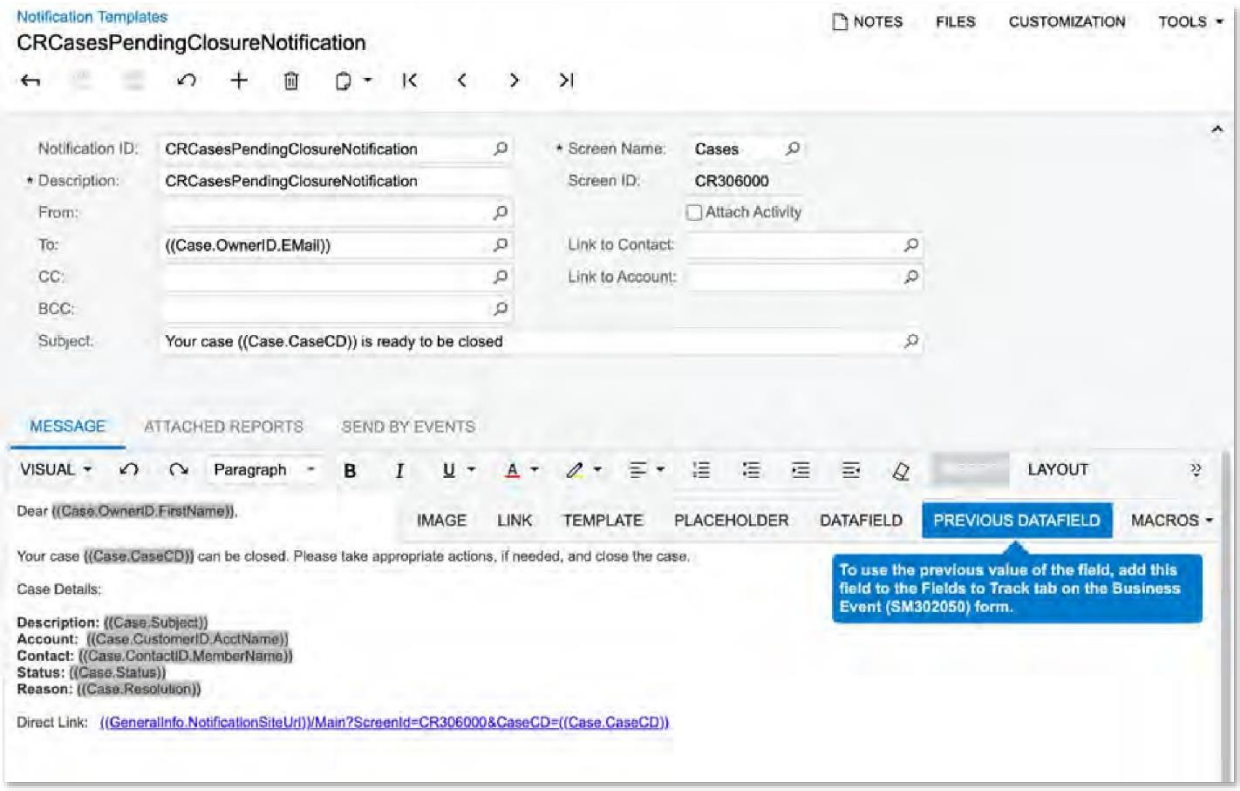
To make the system track all the data fields, a user can select the **Track All Fields** checkbox above the table of the tab. In this case, the system displays a warning that this action may cause queue overflow and impair performance.

Note: For the business events configured in previous versions of MYOB Advanced, the **Track All Fields** checkbox is selected by default.

Usage of the Field Values in Subscribers

If the user plans to use a previous value of a data field for configuring a subscriber of a business event, this field should be added to the table on the **Fields to Track** tab of the *Business Events* (SM302050) form. Otherwise, the system will not store or return a previous value for the field.

While a user is configuring a subscriber and intends to insert a placeholder for a previous value of a field, the system warns the user about the necessity of adding the data field to the list of the tracked fields (see the following screenshot).



Projects and Construction

Support of Multiple Base Currencies in Projects

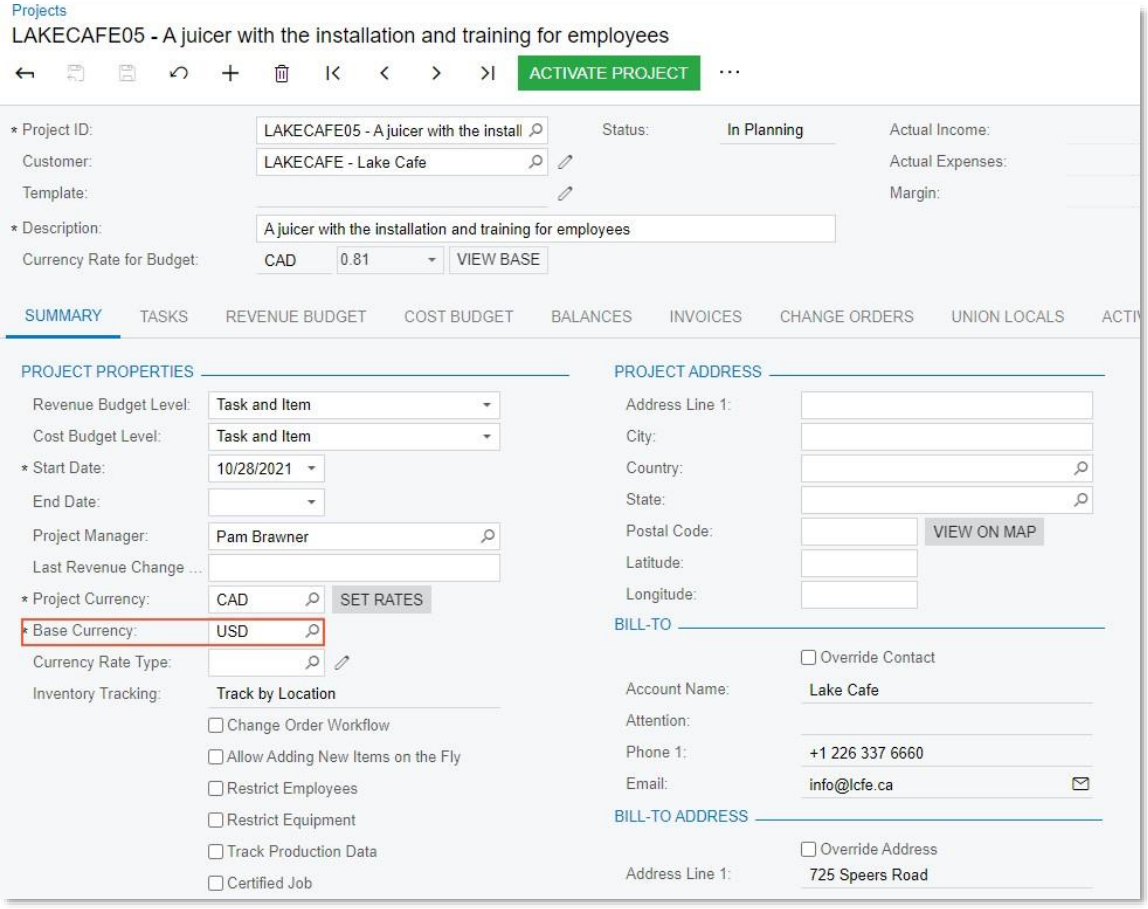
The *Multiple Base Currencies* feature was implemented in MYOB Advanced in 2021 R1, although it was not compatible with multiple other features, including *Projects*. Starting in MYOB Advanced 2022.1, the project functionality can be used with the *Multiple Base Currencies* feature enabled. With the *Multiple Base Currencies* feature enabled on the *Enable/Disable Features* (CS100000) form, companies with different base currencies can be configured within one tenant; the system now verifies that the base currency specified in the project-related documents corresponds to the base currency of the branch.

Changes to the Enable/Disable Features Form

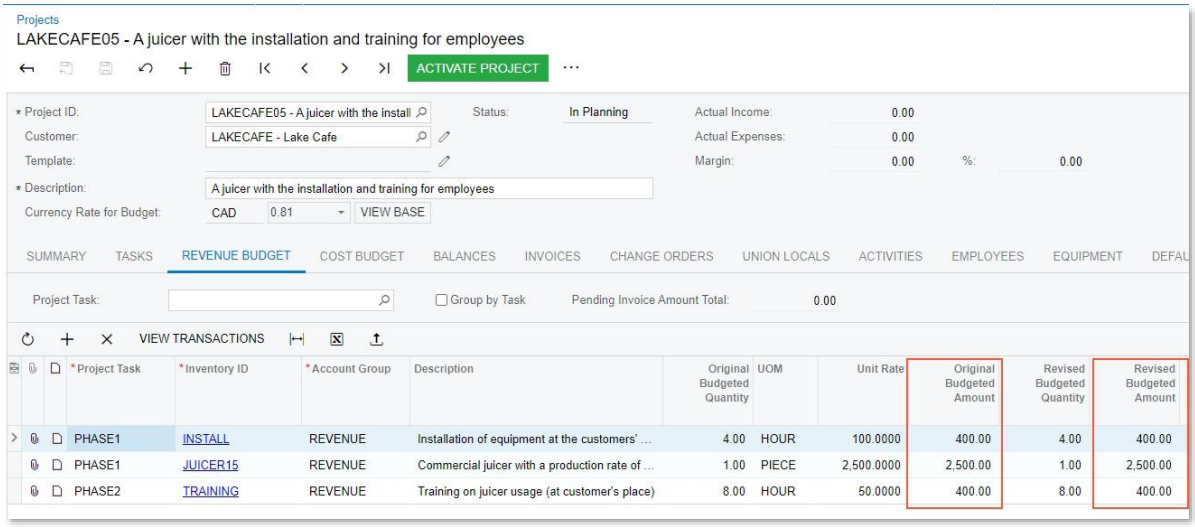
On the *Enable/Disable Features* (CS100000) form, the *Multiple Base Currencies* feature can be enabled if the *Projects* and *Multicurrency Projects* features are enabled.

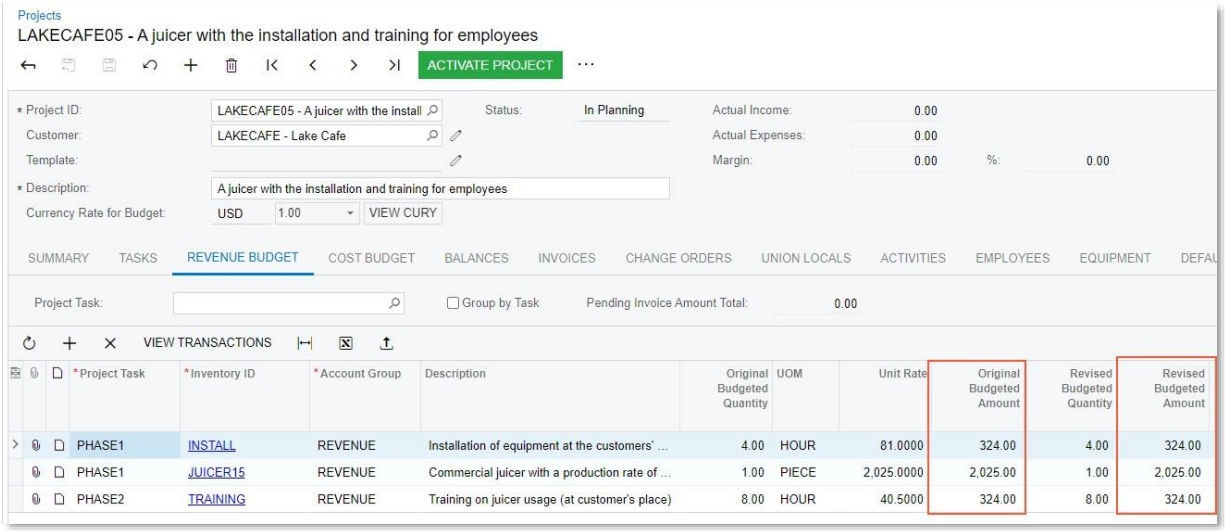
Changes to the Projects Form

If the *Multiple Base Currencies* and *Multicurrency Projects* features are enabled on the *Enable/Disable Features* (CS100000) form, on the **Summary** tab of the *Projects* (PM301000) form, the **Base Currency** field appears in the **Project Properties** section (as shown in the following screenshot). In this field, the user specifies the base currency of the project. The system verifies that the selected base currency matches the base currency of the branch, which is selected in the **Branch** field on the **Summary** tab (in the **Billing and Allocation Settings** section). The user can change the base currency only if no project transactions have been posted to the project yet.



In the Summary area of the form, a user clicks the **View Base** button to review the project amounts on the **Revenue Budget**, **Cost Budget**, and **Balances** tabs in the base currency; to switch back to reviewing the amounts in the project currency, the user clicks the **View Cury** (see the following screenshots, which show the amounts on the **Revenue Budget** tab).

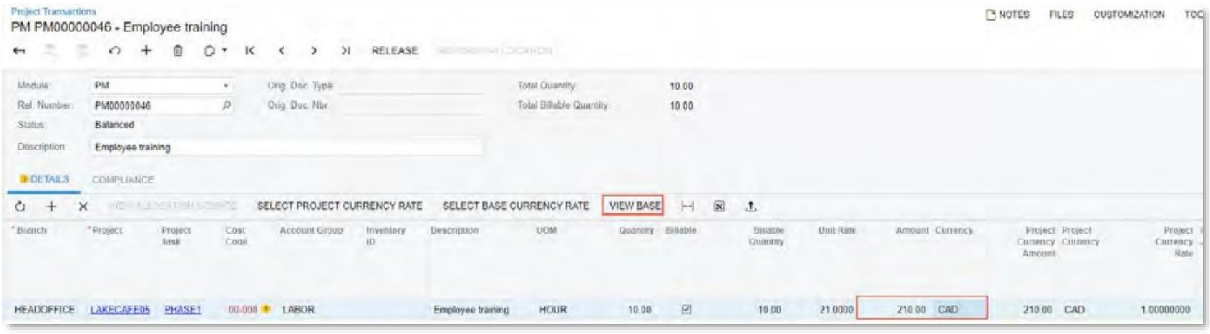




Changes to Project Transactions

If the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* (CS100000) form, when a user manually enters a project transaction on the *Project Transactions* (PM304000) form, the system uses the base currency of a selected project as the base currency of each project transaction line.

A user can review the transaction line amounts in the base currency by clicking the **View Base** button on the table toolbar; to view the transaction line amounts in the project currency, the user clicks the **View Cury** button on the table toolbar.



Also, the following changes have been made to the logic of calculating the transaction amounts:

- If a project transaction produces a general ledger transaction, in the created GL transaction on the *Journal Transactions* (GL301000) form, the system uses the base currency of the branch from the project transaction line as the base currency in the created GL batch. The system copies the project transaction line amount in the transaction currency (that is, in the currency selected by the user in the project transaction line) and recalculates this amount in the base currency of the GL batch by using the default exchange rate type specified in the **GL Rate Type** field on the *Currency Management Preferences* (CM101000) form.
- If the system creates a project transaction on release of the general ledger transaction, the system uses the base currency of the project selected in the general ledger transaction line as the base currency of the created project transaction line. The system calculates the amount of the project transaction line in the base and project currency by using the default exchange rate type specified in the selected project in the **Currency Rate Type** field on the **Summary** tab of the *Projects* (PM301000) form. The same rules are used for the project transactions created during the running of an allocation process, and for the project transactions created on release of employee time cards.

The described calculation logic is now applied to project transactions regardless of whether the *Multiple Base Currencies* feature is enabled on the *Enable/Disable Features* form.

Changes to Project Billing

Now during project billing, in the created pro forma invoice on the *Pro Forma Invoices* (PM307000) form or in the accounts receivable invoice on the *Invoices and Memos* (AR301000) form, the system uses the default exchange rate type of the customer and customer location selected in the document to determine exchange rate for calculating the billing amounts in the base currency.

Known Limitations

The system currently does not support multiple base currencies in projects if the *Multicurrency Projects* feature is disabled on the *Enable/Disable Features* (CS100000) form.

Enhancements in Tracking Changes to Commitments

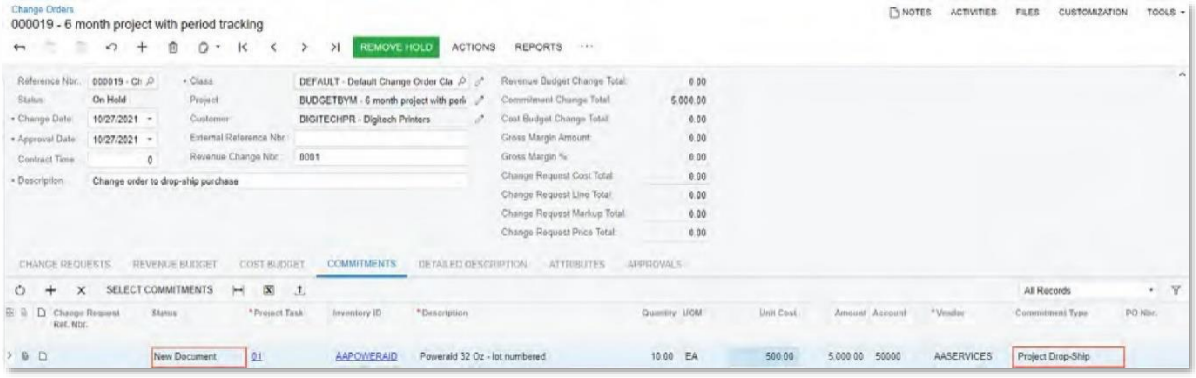
Starting in MYOB Advanced 2022.1, a user can track changes to project commitments that have been created based on project drop-ship orders.

Change Orders for Project Drop-Ship Orders

Now a user can make changes to a project's commitments that have been created based on purchase orders of the *Project Drop-Ship* type. To make changes to a project drop-ship order, a user creates a change order on the *Change Orders* (PM308000) form. Then on the **Commitments** tab (which appears for change orders of a change order class that allows making changes to commitments), the user can do any of the following:

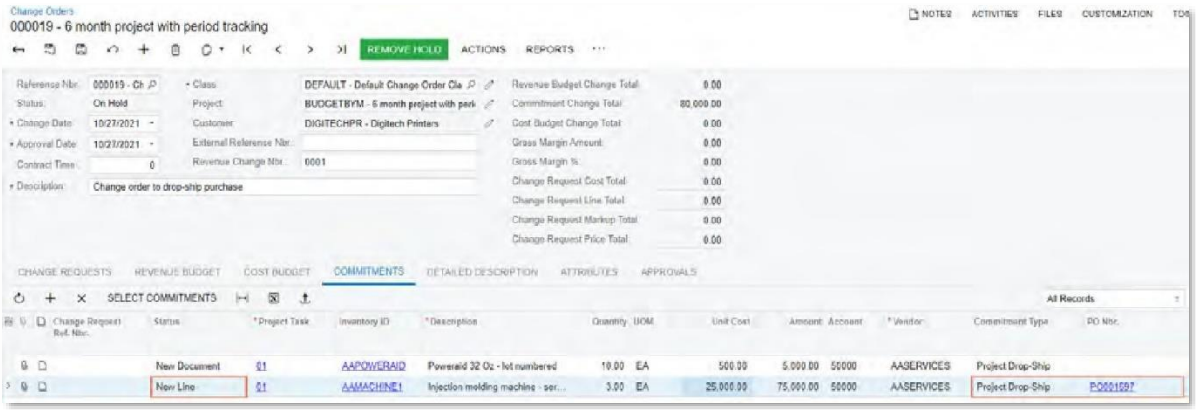
- Create a new project drop-ship order.

To create a new document, the user adds a new row and selects *Project Drop-Ship* in the **Commitment Type** column. The system inserts the *New Document* status (see the following screenshot) in the line.



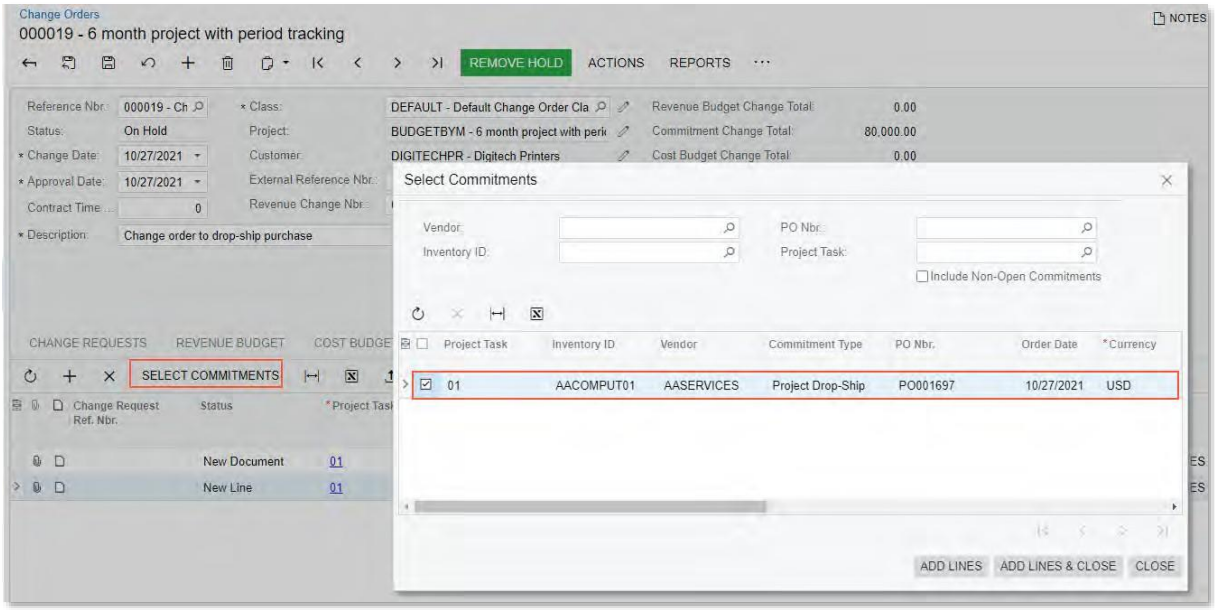
- Add a new line to an existing project drop ship order.

To add a line to existing document, the user adds a new row in the table, selects *Project Drop-Ship* in the **Commitment Type** column, and then selects the reference number of the project drop-ship order in the **PO Nbr.** column (or in the **Commitment Nbr.** column if the *Construction* feature is enabled). The system inserts the *New Line* status (see the following screenshot) in the line.

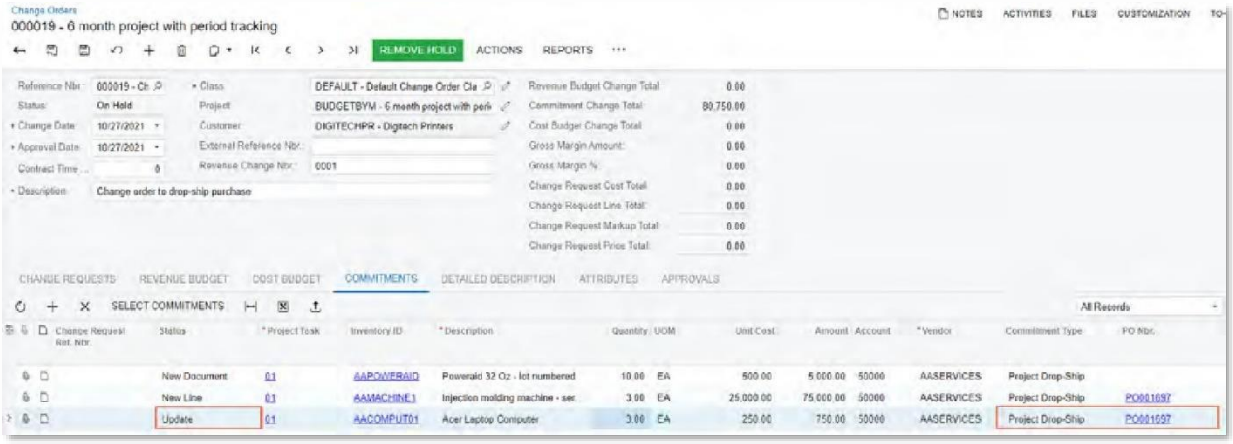


- Adjust a line of an existing project drop-ship order.

To adjust a line in an existing document, the user clicks **Select Commitments** on the table toolbar, and in the **Select Commitments** dialog window, which opens, selects the unlabeled checkbox for the line (or lines) to be added to the change order (as shown in the following screenshot); then the user clicks **Add Lines & Close** in the dialog window.



The system adds a line with the *Update* status, as shown in the following screenshot. In the added line, the user can adjust the line quantity and amount.



When a user releases the change order, the system updates the related project drop-ship order or creates a new one, depending on the type of the commitment line. In the corresponding cost budget line of the project on the *Projects* (PM301000) form, the system updates the **Committed CO Quantity** and **Committed CO Amount** values based on updated commitment values.

UI Changes

On the **Commitments** tab of the *Change Orders* (PM308000) form, the following changes have been made:

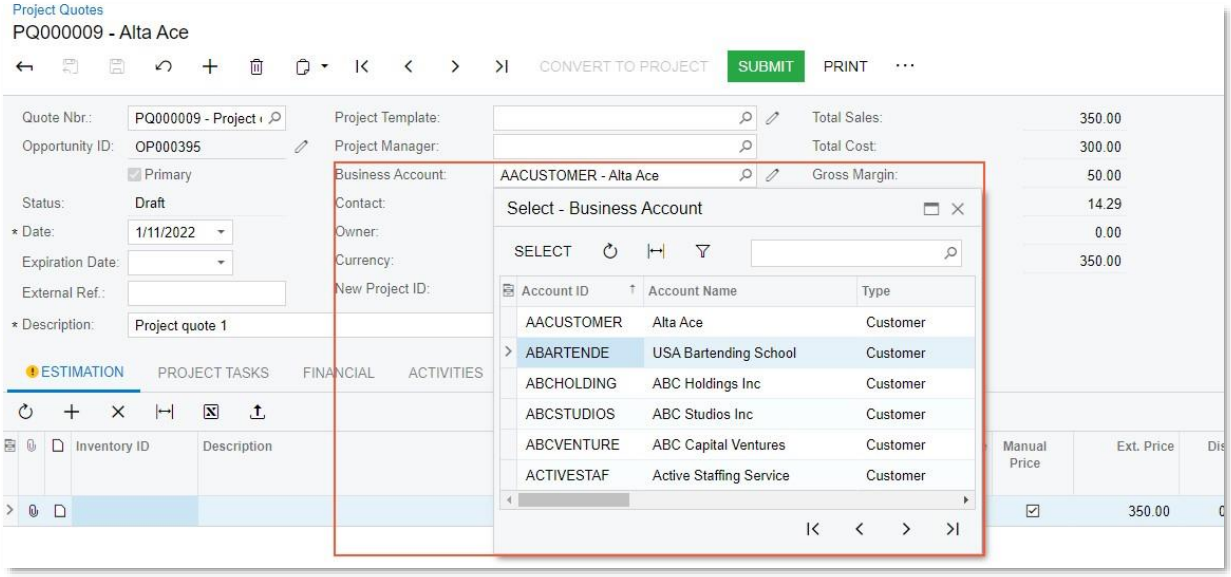
- In the **Commitment Type** column, the *Project Drop-Ship* type has been added, and the *Purchase Order* type has been renamed to *Normal Purchase Order*.
- In the **PO Nbr.** (or **Commitment Nbr.** if the *Construction* feature is enabled) column, the purchase orders of the *Project Drop-Ship* type are now available for selection.

Project Quote Improvements

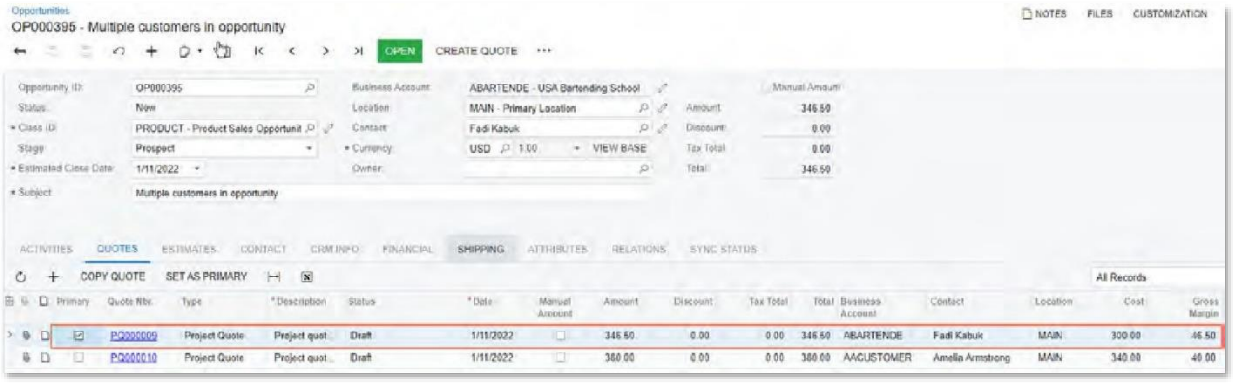
In MYOB Advanced 2022.1, the project quote functionality has been enhanced and improved. Now with a minimum of steps, users can create project quotes for multiple customers that are related to the same opportunity. Also, the layout of the *Project Quotes* (PM304500) form has been revised for a better user experience.

Multiple Customers Related to an Opportunity

On the *Project Quotes* (PM304500) form, a user now can change the business account, location, and contact in any project quote (primary or non-primary) that is assigned the *Draft* status, as shown in the following screenshot.



With this functionality, the user can create project quotes for multiple customers and link these project quotes to the same opportunity (see the following screenshot).

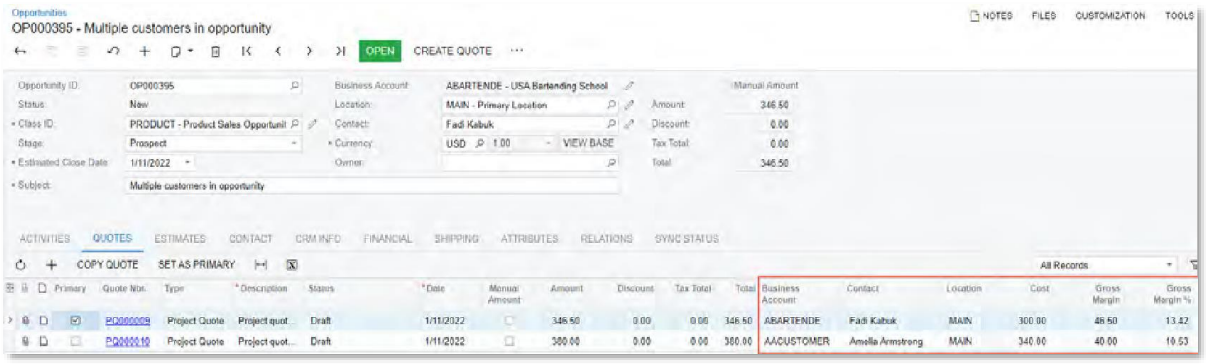


UI Changes

On the *Opportunities* (CR304000) form, the following changes have been made:

- In the Summary area, the **Multiple Customers** checkbox has been removed.

-
- The **Multiple Customers** tab (which was shown if the **Multiple Customers** checkbox was selected) has been removed.
- On the **Quotes** tab, the **Business Account**, **Contact**, **Location**, **Cost**, **Gross Margin**, and **Gross Margin %** columns have been added.



On the *Project Quotes* form, the following UI changes have been made:

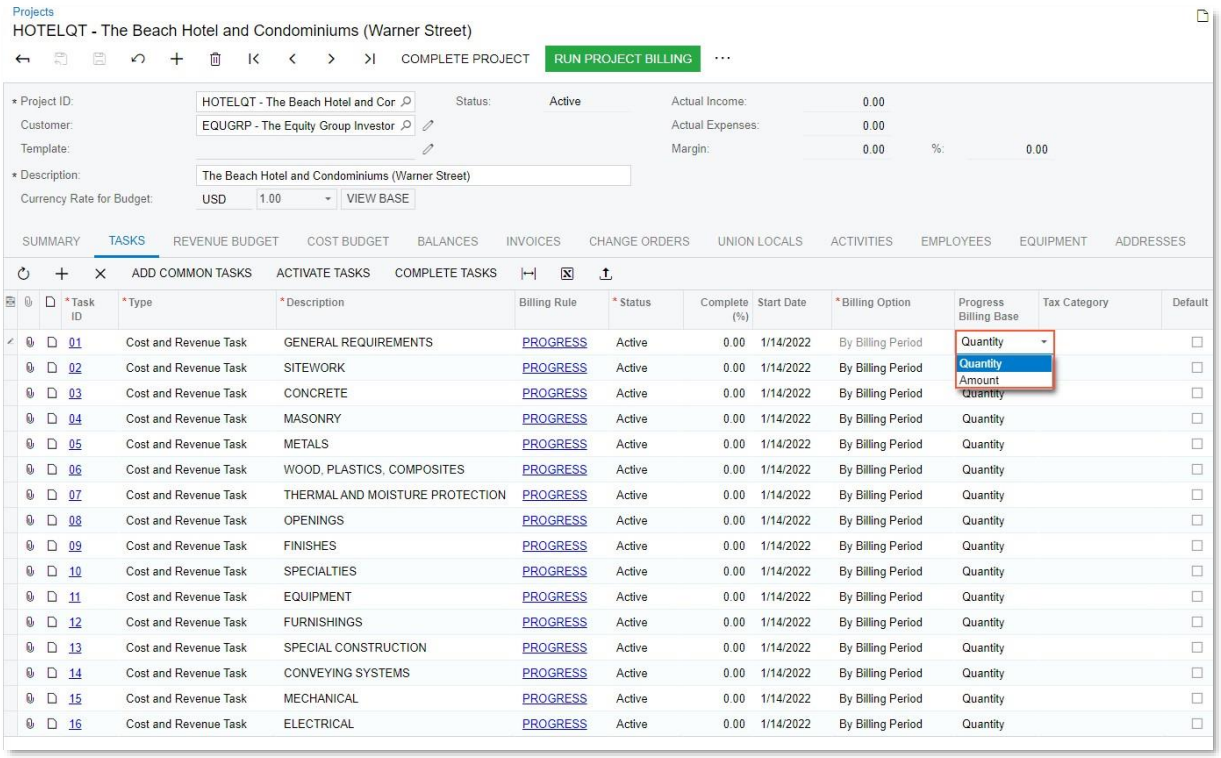
- The name of the **Billing** tab has been changed to **Financial**.
- The new **Addresses** tab has been added.
- The **Ship-To Address** section has been renamed to **Project Address** and moved from the **Shipping** tab to the **Addresses** tab.
- The **Ship-To Contact** section has been deleted. As a result, if a project quote is defined as the primary quote of an opportunity, the data for the **Ship-To Info** section of the **Shipping** tab on the *Opportunities* (CR304000) form is populated with the settings of the business account.
- The **Address** section has been renamed to **Bill-To Address** and moved from the **Billing** tab to the **Addresses** tab.
- The **Contact Information** section has been moved from the **Billing** tab to the **Addresses** tab and renamed to **Bill-To Contact**.

Progress Billing Based on Quantity

In previous versions of MYOB Advanced, the projects billed by progress could be billed only based on the amount in the revenue budget lines. In MYOB Advanced 2022.1, the functionality of progress billing has been extended. Now a project manager can configure a project so that the pro forma invoices or accounts receivable invoices will be prepared based on the pending quantities specified in revenue budget lines. To support progress billing based on quantity, the changes described below have been made.

Changes on the Projects Form

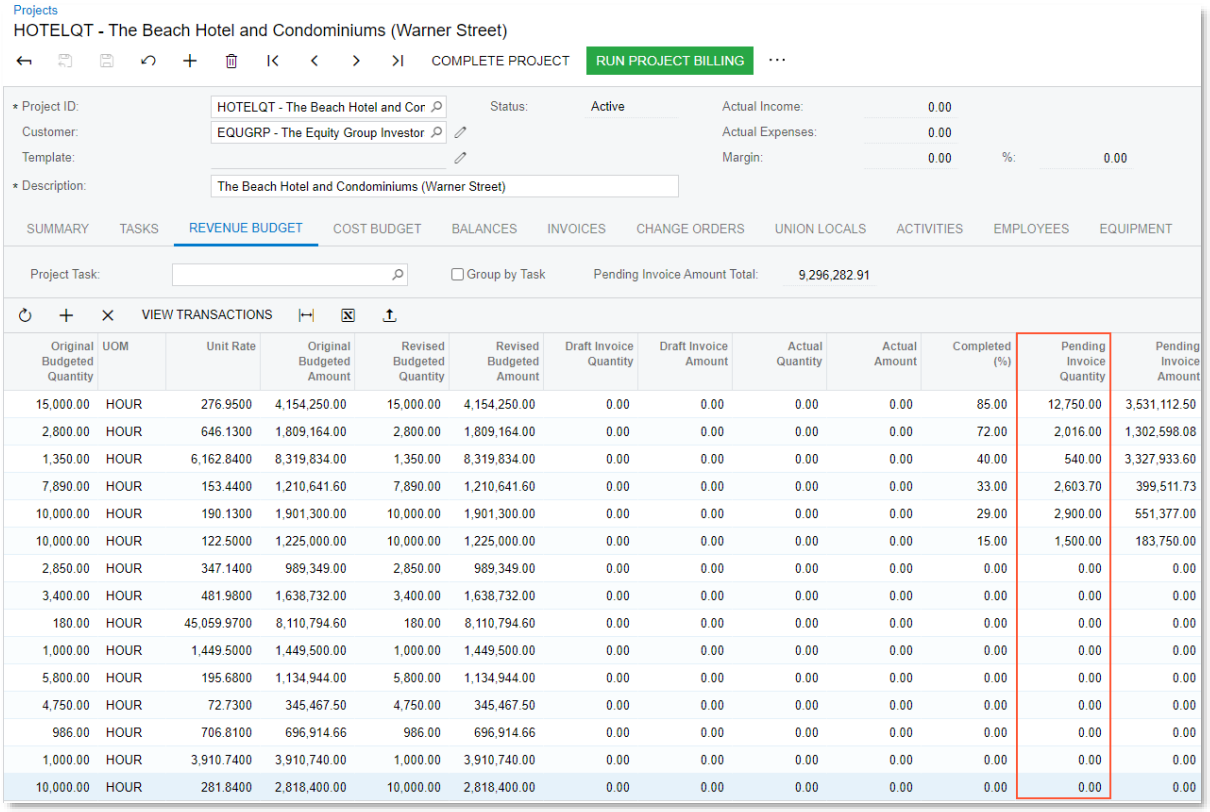
On the **Tasks** and **Revenue Budget** tabs of the *Projects* (PM301000) form, the **Progress Billing Base** column has been added, as shown in the following screenshot.



In the **Progress Billing Base** column, a user specifies the basis of progress billing of this task or revenue budget line. The following options are available:

- *Amount*: The system bills the line based on its amount. This option corresponds to the progress billing process that has been used in previous MYOB Advanced versions. To bill the line based on the amount, the user specifies the pending invoice amount in the **Pending Invoice Amount** column on the **Revenue Budget** tab of the *Projects* form. The **Pending Invoice Quantity** column contains 0.00, and this value cannot be changed.
- *Quantity*: The system bills the line based on its quantity. The user must specify the number of units to be billed in the **Pending Invoice Quantity** column on the **Revenue Budget** tab of the *Projects* form, as shown in the following screenshot. The system calculates the value in the **Pending Invoice Amount** column automatically as the pending invoice quantity multiplied by the unit rate specified in the line. Also, the

system automatically calculates the **Completed (%)** and **Performance (%)** values based on the budgeted and billed quantities in the revenue budget line. The calculated quantities and amounts will be copied to the corresponding lines of the pro forma invoice or accounts receivable invoice created by the billing process.



Original Budgeted Quantity	UOM	Unit Rate	Original Budgeted Amount	Revised Budgeted Quantity	Revised Budgeted Amount	Draft Invoice Quantity	Draft Invoice Amount	Actual Quantity	Actual Amount	Completed (%)	Pending Invoice Quantity	Pending Invoice Amount
15,000.00	HOUR	276.9500	4,154,250.00	15,000.00	4,154,250.00	0.00	0.00	0.00	0.00	85.00	12,750.00	3,531,112.50
2,800.00	HOUR	646.1300	1,809,164.00	2,800.00	1,809,164.00	0.00	0.00	0.00	0.00	72.00	2,016.00	1,302,598.08
1,350.00	HOUR	6,162.8400	8,319,834.00	1,350.00	8,319,834.00	0.00	0.00	0.00	0.00	40.00	540.00	3,327,933.60
7,890.00	HOUR	153.4400	1,210,641.60	7,890.00	1,210,641.60	0.00	0.00	0.00	0.00	33.00	2,603.70	399,511.73
10,000.00	HOUR	190.1300	1,901,300.00	10,000.00	1,901,300.00	0.00	0.00	0.00	0.00	29.00	2,900.00	551,377.00
10,000.00	HOUR	122.5000	1,225,000.00	10,000.00	1,225,000.00	0.00	0.00	0.00	0.00	15.00	1,500.00	183,750.00
2,850.00	HOUR	347.1400	989,349.00	2,850.00	989,349.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3,400.00	HOUR	481.9800	1,638,732.00	3,400.00	1,638,732.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
180.00	HOUR	45,059.9700	8,110,794.60	180.00	8,110,794.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1,000.00	HOUR	1,449.5000	1,449,500.00	1,000.00	1,449,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5,800.00	HOUR	195.6800	1,134,944.00	5,800.00	1,134,944.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4,750.00	HOUR	72.7300	345,467.50	4,750.00	345,467.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00
986.00	HOUR	706.8100	696,914.66	986.00	696,914.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1,000.00	HOUR	3,910.7400	3,910,740.00	1,000.00	3,910,740.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
10,000.00	HOUR	281.8400	2,818,400.00	10,000.00	2,818,400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

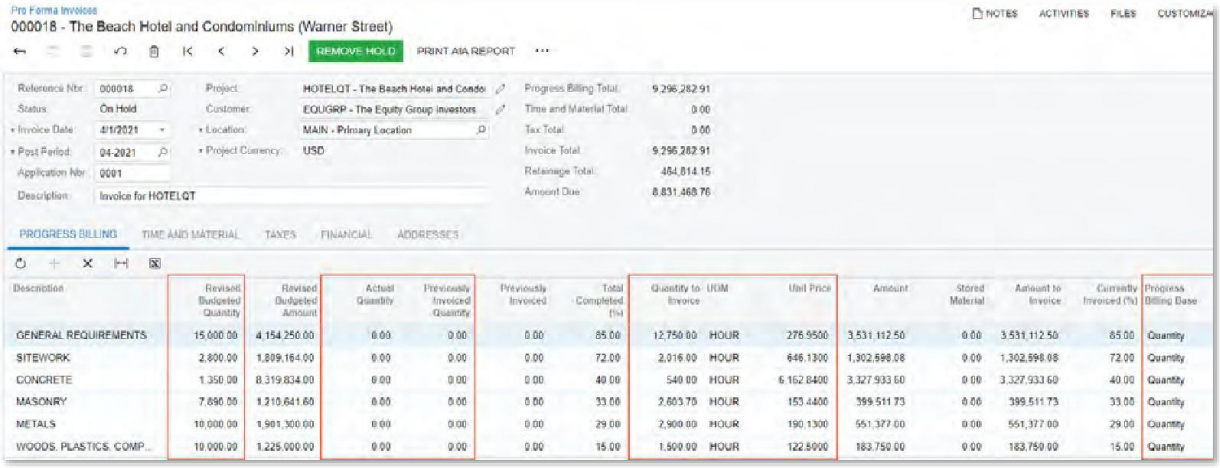
Changes on the Pro Forma Invoices Form

On the **Progress Billing** tab of the *Pro Forma Invoices* (PM307000) form, the following columns (shown in the screenshot below) have been added:

- **Revised Budgeted Quantity**: The revised budgeted quantity of the line, which is copied from the related revenue budget line of the project on the **Revenue Budget** tab of the *Projects* form.
- **Actual Quantity**: The actual quantity of the line, which is copied from the related revenue budget line of the project.
- **Previously Invoiced Quantity**: The running total of the **Quantity to Invoice** column on this tab for all the lines of pro forma invoices that have been created for this revenue budget line.
- **Quantity to Invoice**: The billing quantity of the line. On creation of the pro forma invoice line, the system copies the **Pending Invoice Quantity** value of the related revenue budget line of the project to this column if the revenue budget line is billed based on quantity. On release of the pro forma invoice, this quantity is copied to the prepared accounts receivable invoice.

Note: If the related revenue budget line is billed based on amount, **Quantity to Invoice** is zero and cannot be changed.

- **UOM**: The unit of measure, which is copied from the related revenue budget line of the project.
- **Unit Price**: The unit price, which is copied from the **Unit Rate** column of the related revenue budget line.
- **Progress Billing Base**: The basis of project billing that has been used for this line.



Changes on Other Forms

The **Progress Billing Base** column has been added on the **Tasks** tab of the *Project Templates* (PM208000) form. Also, the **Progress Billing Base** field has been added on the **Summary** tab of the following forms:

- *Project Template Tasks* (PM208010)
- *Project Tasks* (PM302000)
- *Common Tasks* (PM208030)

Project Specific Taxes

The tax jurisdiction used for the calculation of sales taxes and use taxes may depend on the location of the supplier or customer from which a document originates, and on the location of the site where the purchased or sold products or services were delivered. For example, a purchasing manager may purchase materials or services for a project from a supplier in a tax zone that differs from the tax zone of the project. In this case, the use tax must be calculated for the purchased materials based on the tax zone of the project.

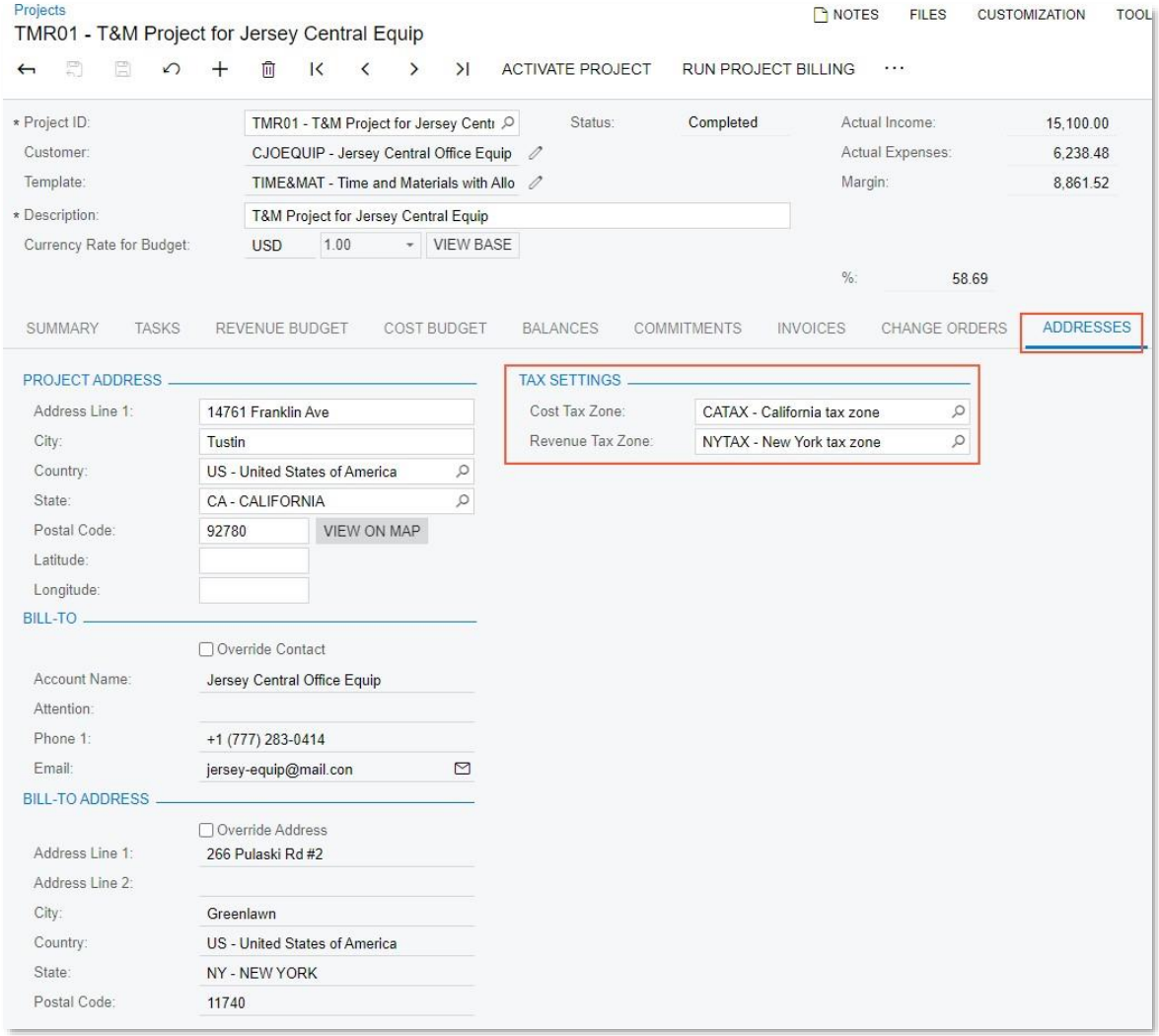
Starting in MYOB Advanced 2022.1, the system can be configured to use project-specific tax zones for calculating taxes and defining the ship-to addresses in project-related documents.

Changes to the Project Accounting Forms

On the *Projects Preferences* (PM101000) form, the **Calculate Project-Specific Taxes** checkbox has been added. If this checkbox is selected, in the project-related documents, the system uses the cost tax zone, revenue tax zone, and project address information that are specified in a project.

On the *Projects* (PM301000) form, the following UI changes have been made, as shown in the screenshot below:

- The new **Addresses** tab has been added.
- The **Project Address**, **Bill-To**, and **Bill-To Address** sections have been moved from the **Summary** tab to the **Addresses** tab.
- The **Tax Settings** section has been added. The **Cost Tax Zone** field specifies the tax zone to be used in the cost documents (such as bills, purchase orders, and subcontracts) related to the project. The **Revenue Tax Zone** field specifies the tax zone to be used in the revenue documents (such as invoices and sales orders) related to the project. A user can specify project-specific tax zones if the **Calculate Project-Specific Taxes** checkbox is selected on the *Projects Preferences* form.



Documents with Project-Specific Taxes

If the **Calculate Project-Specific Taxes** checkbox is selected on the *Projects Preferences* (PM101000) form, the system uses the project-specific tax zones in project-related documents that are created on the following forms:

- *Pro Forma Invoices* (PM307000)
- *Opportunities* (CR304000)
- *Project Quotes* (PM304500)
- *Sales Orders* (SO301000)
- *Invoices* (SO303000)
- *Invoices and Memos* (AR301000)
- *Purchase Orders* (PO301000) if the **Require Single Project per Document** checkbox is selected on the *Accounts Payable Preferences* (AP101000) form
- *Subcontracts* (SC301000) if the **Require Single Project per Document** checkbox is selected on the *Accounts Payable Preferences* (AP101000) form

- *Bills and Adjustments* (AP301000) if the **Require Single Project per Document** checkbox is selected on the *Accounts Payable Preferences* (AP101000) form
- *Expense Receipt* (EP301020) if the **Allow Mixed Tax Settings in Claims** checkbox is selected on the *Time and Expenses Preferences* (EP101000) form
- *Expense Claim* (EP301020) if the **Allow Mixed Tax Settings in Claims** checkbox is selected on the *Time and Expenses Preferences* (EP101000) form
- *Service Orders* (FS300100)
- *Appointments* (FS300200)
- *Cash Sales* (AR304000)

Changes to the Rules of Shipping Address Selection

If the **Calculate Project-Specific Taxes** checkbox is selected on the *Projects Preferences* (PM101000) form, the address in the **Ship-To Address** section of the project-related documents is determined by using the following rules:

- If a project-related document is generated from a parent document, the address settings in the **Ship-To Address** section are copied from the **Ship-To Address** section of the parent document.
- If a project-related document is entered manually, the system copies the address settings (including the empty values) from the **Project Address** section of the *Projects* (PM301000) form.
- If a document that is not related to any project is entered manually, the system copies the address settings from the customer location or supplier location.

If the **Calculate Project-Specific Taxes** checkbox is cleared, the system copies the address settings from the customer location or supplier location.

The system updates the shipping address in an existing document as follows:

- If the **Calculate Project-Specific Taxes** checkbox is selected, the system updates the **Ship-To Address** section only if the project has been changed.
- If the **Calculate Project-Specific Taxes** checkbox is cleared, the system updates the **Ship-To Address** section only if the location has been changed.

Upgrade Notes

If the organisation has previously used the *Tax Zone* customisation package, the package must be unpublished before the upgrade. Then during the upgrade, the system will make the following changes:

- For each project, the Project.TaxZoneID value from the customisation package will be copied to the **Revenue Tax Zone** (Contract.RevenueTaxZoneID) and **Cost Tax Zone** (**Contract.CostTaxZoneID**) fields on the *Projects* (PM301000) form.
- The **Calculate Project-Specific Taxes** checkbox (PMSetup.CalculateProjectSpecificTaxes) on the *Projects Preferences* (PM101000) form will be selected.

If the organisation has not used the *Tax Zone* customisation package, the **Calculate Project-Specific Taxes** checkbox on the *Projects Preferences* form will be cleared by default.

After an upgrade, the system administrator must select or clear the **Calculate Project-Specific Taxes** checkbox on the *Projects Preferences* form, depending on the organisation's business requirements.

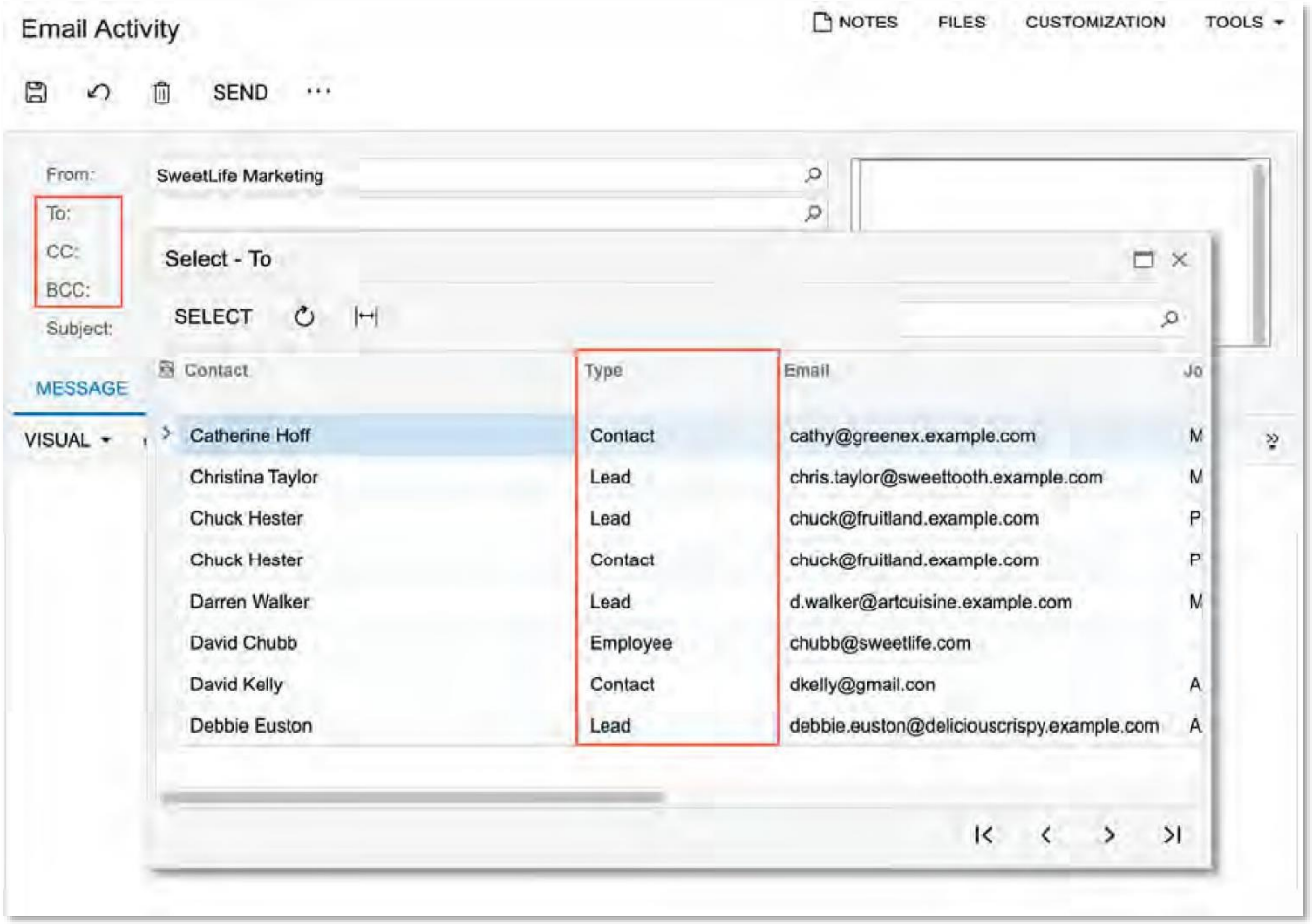
System Administration

Enhancements to Email Processing

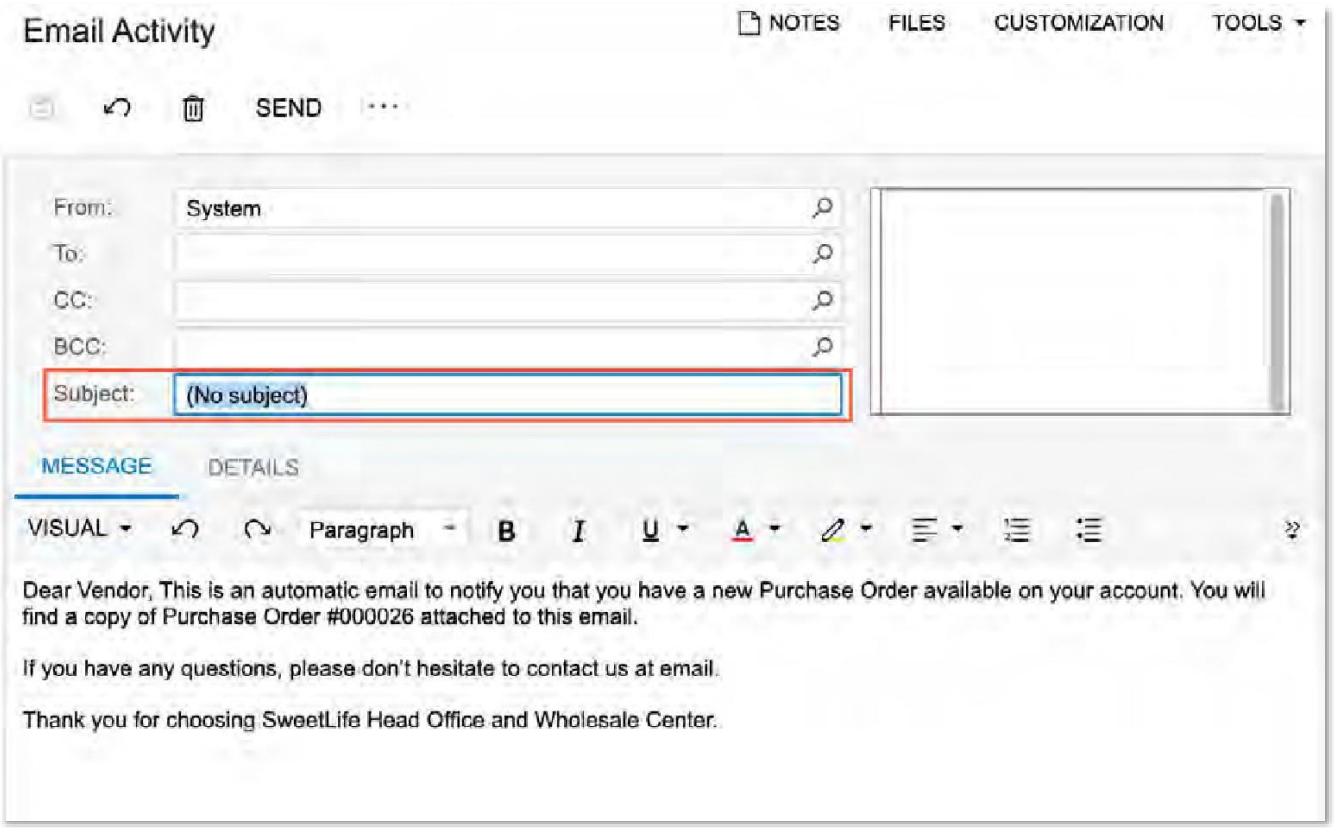
MYOB Advanced 2022.1 introduces multiple enhancements to the functionality related to email processing.

Enhancements to the Creation of an Email Activity

On the *Email Activity* (CR306015) form, a user can specify the recipients of the email in the any of the following fields: **To**, **CC**, and **BCC**. When the user opens the lookup table to select a contact in the corresponding field, the user can now view the type of the entity (*Contact*, *Employee*, or *Lead*) whose email address is available for selection (as shown in the following screenshot).

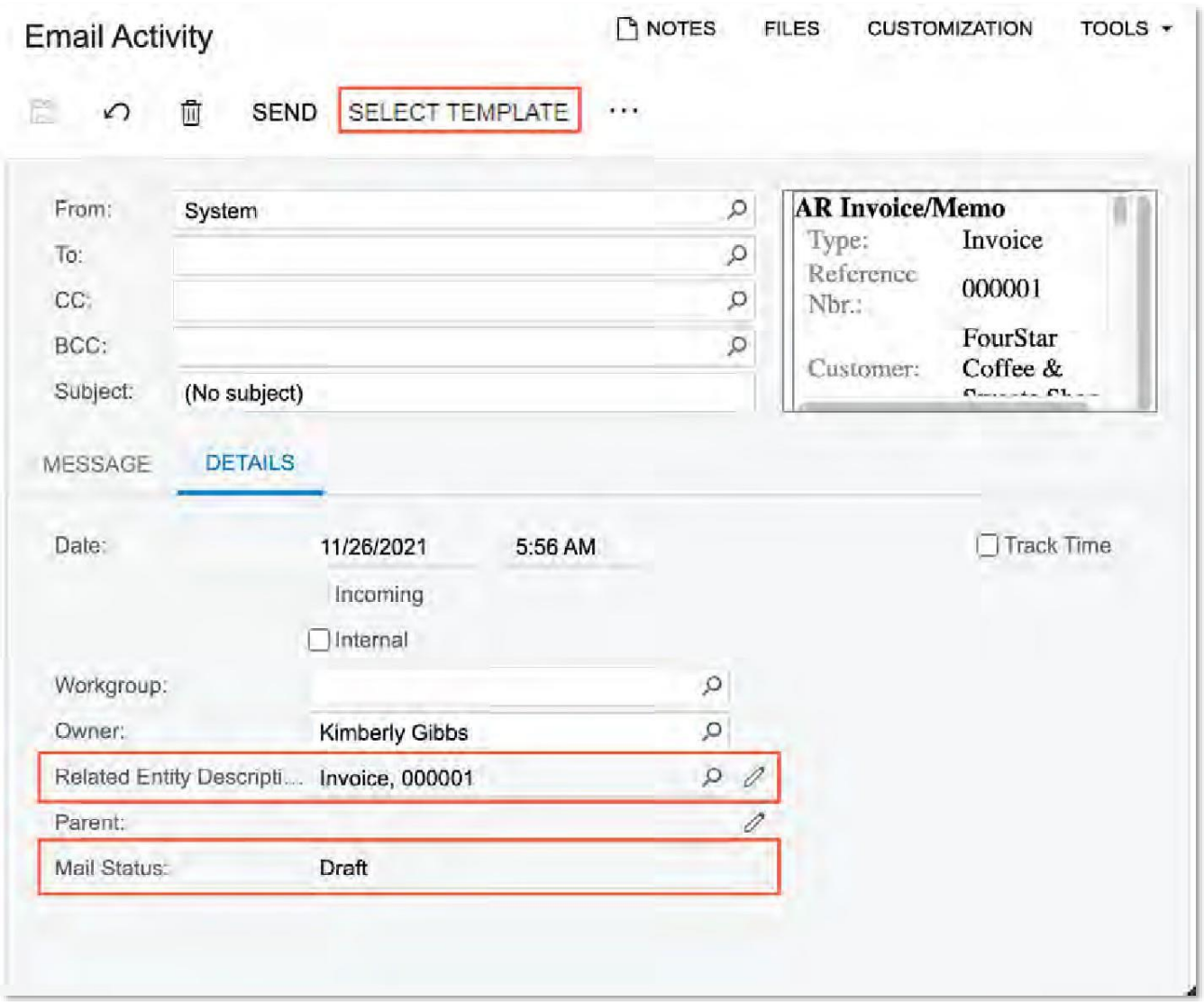


When the user saves the email for the first time, the system no longer requires values to be specified in the **To**, **CC**, **BCC**, and **Subject** fields. If the user does not fill in the **Subject** field and saves the email, the system inserts *(No subject)* in the field (as shown in the following screenshot).



Also, the system will automatically save the email each time the user adds an image or attaches a file to the email. The **Send** button on the form toolbar is available even if any of the following fields are empty: **To**, **CC**, **BCC**, and **Subject**. If a user does not specify at least one recipient and clicks the **Send** button, the system displays a warning to notify the user that at least one recipient has to be specified. If the user clicks the **Send** button with the **Subject** field empty, the system inserts *(No subject)* in the field and sends the email at once or adds it to the processing queue.

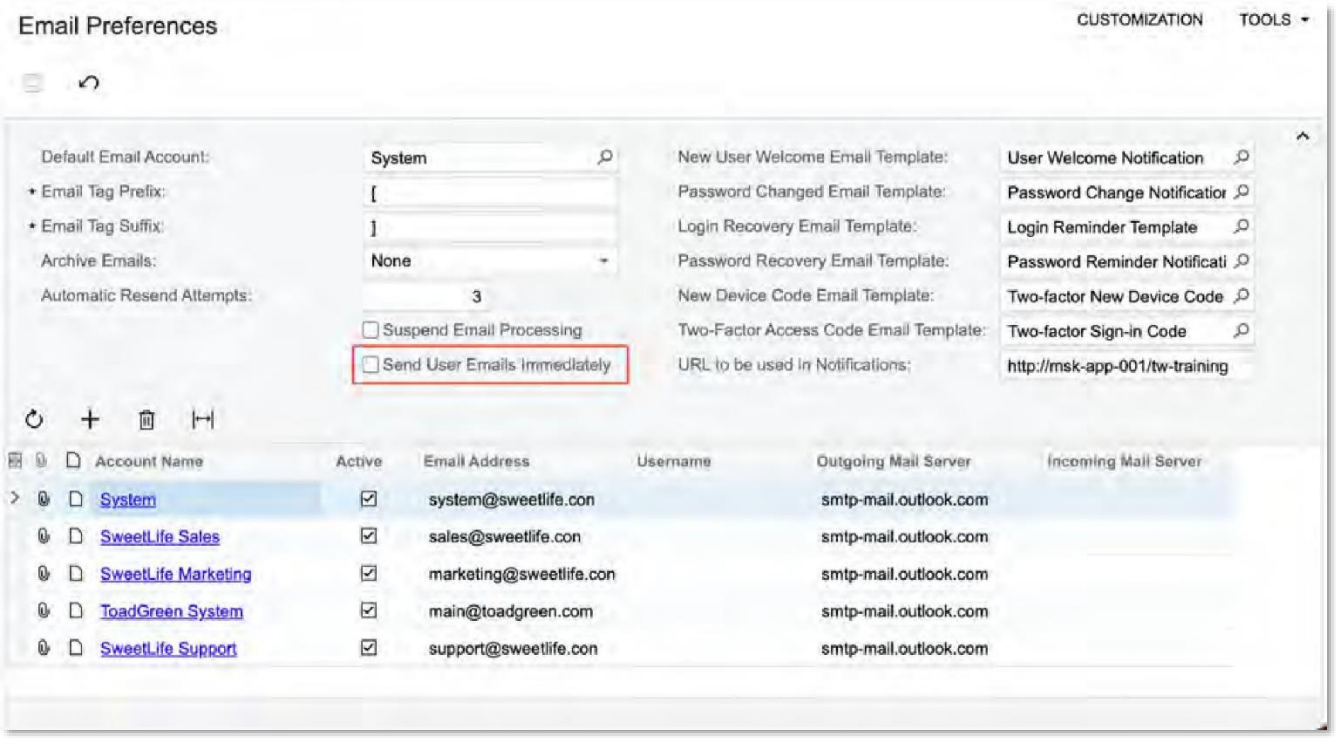
The **Select Source** button has been replaced with the **Select Template** button. The **Select Template** button is available if the selected email activity has the *Draft* status and is associated with a related entity. That is, on the **Details** tab of the *Email Activity* form, the **Mail Status** field has the *Draft* value, and an entity is specified in the **Related Entity Description** field (as shown in the following screenshot).



When a user clicks the **Select Template** button, the system opens the **Select Template** dialog window, where the user can select the notification template whose content will replace or be appended to the text entered on the **Message** tab of the *Email Activity* form.

Enhancements to the Sending Process

MYOB Advanced 2022.1 also provides enhancements to the process of sending user emails. On the *Email Preferences* (SM204001) form, the **Send User Emails Immediately** checkbox has been added. It is cleared by default (as shown in the following screenshot).

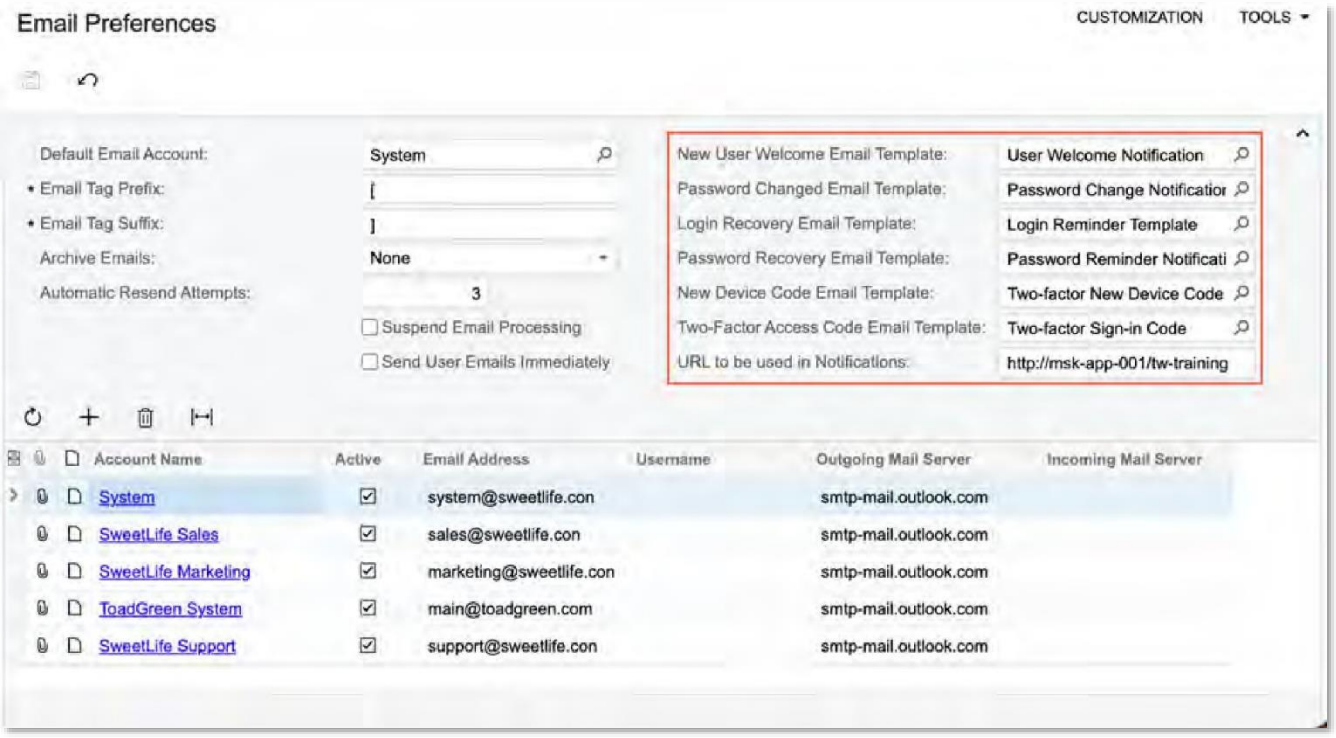


The **Send User Emails Immediately** checkbox is available for selection if the **Suspend Email Processing** checkbox is cleared on the same form. If a user selects the **Suspend Email Processing** checkbox, the system clears the **Send User Emails Immediately** checkbox (if it was selected) and makes it unavailable for selection.

If the **Send User Emails Immediately** checkbox is selected, when a user clicks **Send** on the *Email Activity* (CR306015) form for an email, the system sends the email at once and assigns it the *Processed* status.

If the checkbox is cleared, the system adds the email to the sending queue and assigns the email the *Pending Processing* status.

Regardless of the state of the **Send User Emails Immediately** checkbox, the system immediately sends the service emails for which corresponding notification templates were specified on the *Email Preferences* (SM204001) form (as shown in the following screenshot).

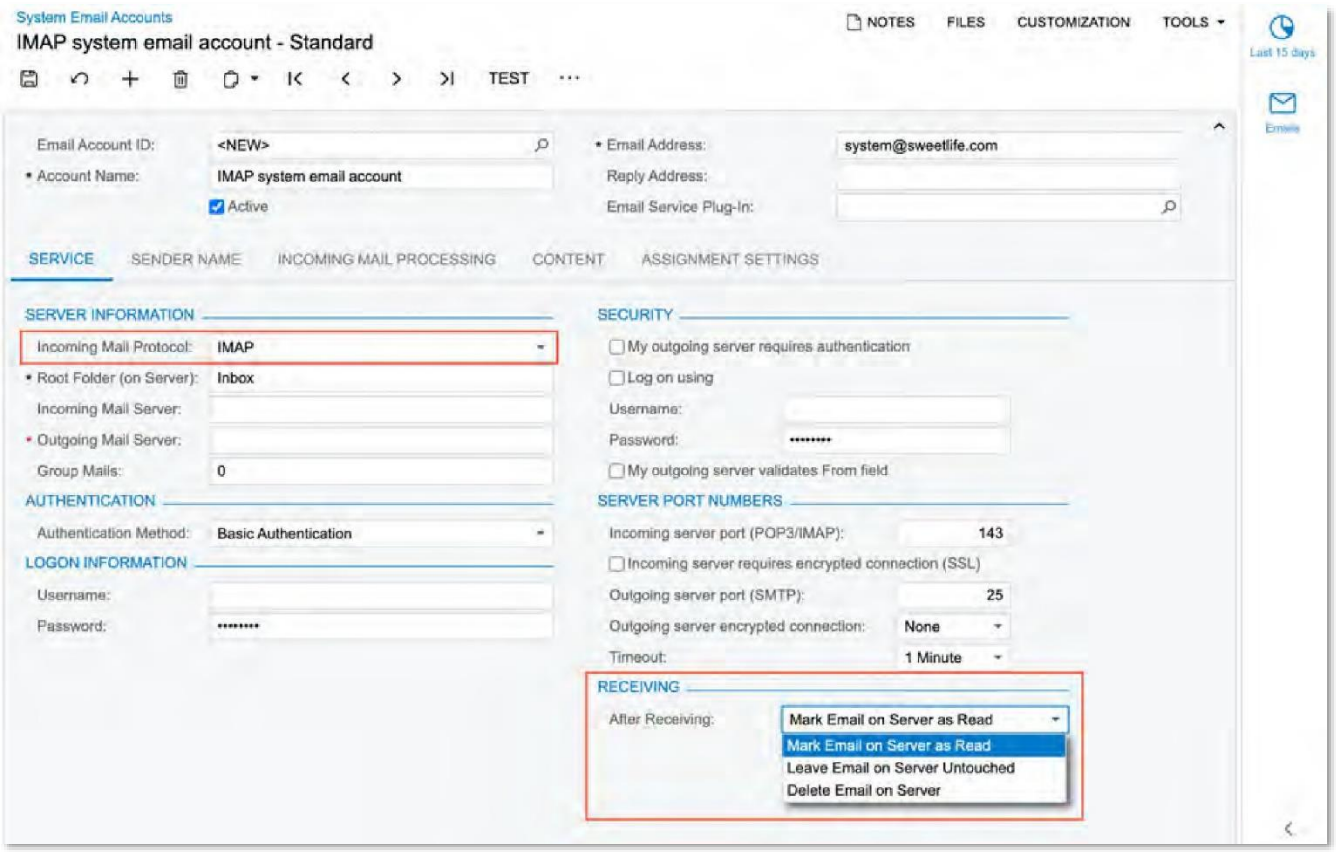


Enhancements to the Processing After Email Receipt

If users of the system access an email by using external mail clients, they can change the read status of an email on the mail server used by the company. With MYOB Advanced 2022.1, for each system email account that is using IMAP protocol, a system administrator can configure how the system should process the collected emails on the email server after collecting them.

On the *System Email Accounts* (SM204002) form, the **After Receiving** field has been added on the **Service** tab (as shown in the following screenshot). The following processing options are available in the drop-down list:

- *Mark Email on Server as Read* (default): The system marks the email as read on the email server, regardless of its read status.
- *Leave Email on Server Untouched*: The system does not change the read status of the email on the email server.
- *Delete Email on Server*: The system deletes the email on the email server, regardless of its read status.



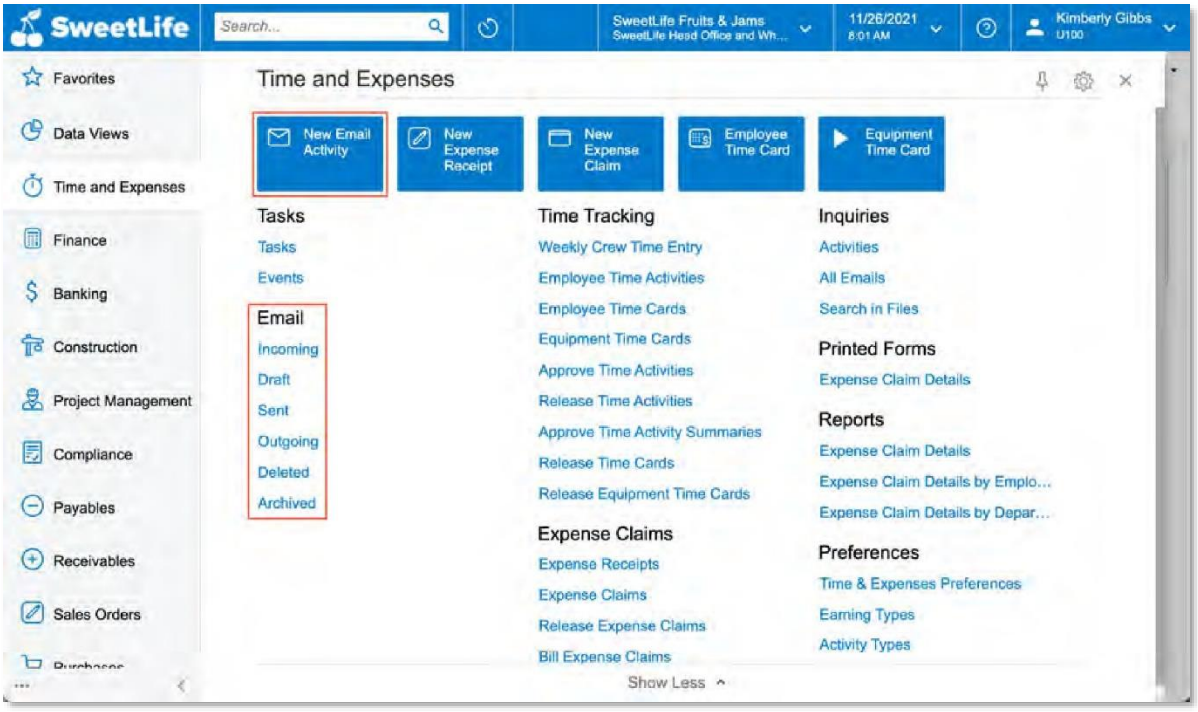
Redesigned Inquiry Forms That List Emails

The following inquiry forms have been replaced with generic inquiry forms with the same names but different form identifiers:

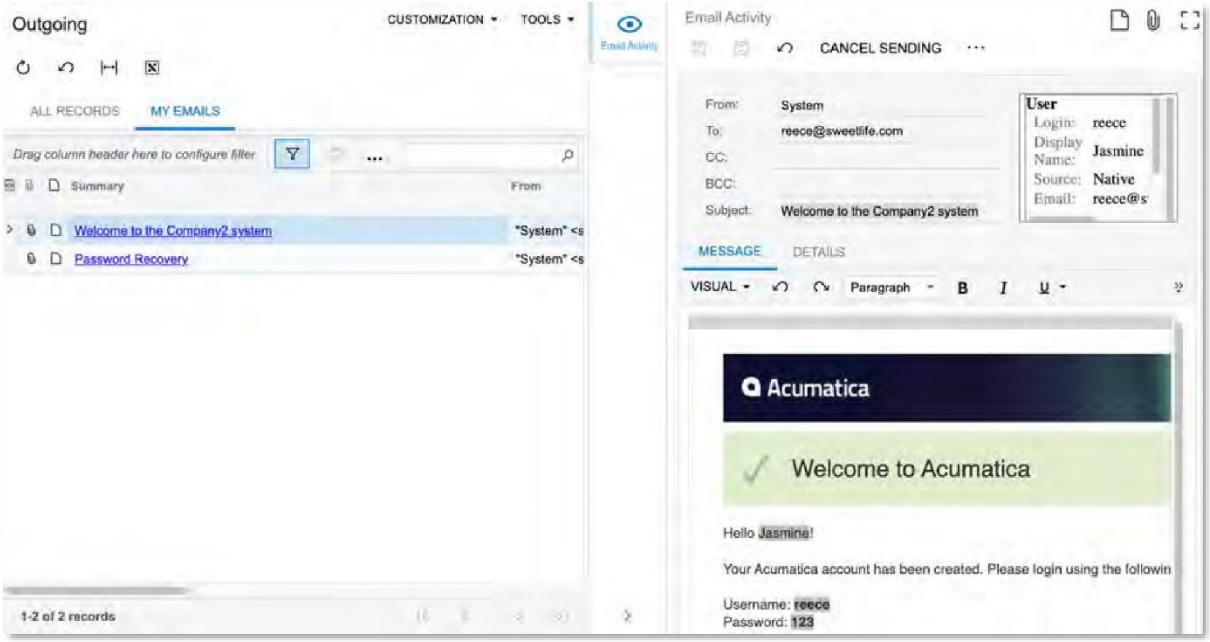
- Incoming (CO409000)
- Draft (CO409010)
- Sent (CO409080)
- Outgoing (CO409020)
- Deleted (CO409090)
- Archived (CO409030)

Note: The form reference topics for these forms will be deprecated.

A user can access the new generic inquires from the **Time and Expenses** workspace. The workspace now features a new tile that gives users the ability to create a new email activity. The following screenshot shows the **Time and Expenses** workspace with the list of the new generic inquiry forms and the added **New Email Activity** tile.



In the inquiry results of the new generic inquiry forms, the system highlights the unread emails with bold formatting. For each new inquiry, a side panel with the **Email Activity** tab has been added. A user can click an email in the list and view (and edit, if needed) the settings of the email activity while remaining on the generic inquiry form. The following screenshot shows the side panel for the new *Outgoing (CO4092PL)* generic inquiry form.



Note: When a user clicks an unread email and then reviews it on the side panel, the system marks the email as read.

Changes to Licensing of Test Tenants

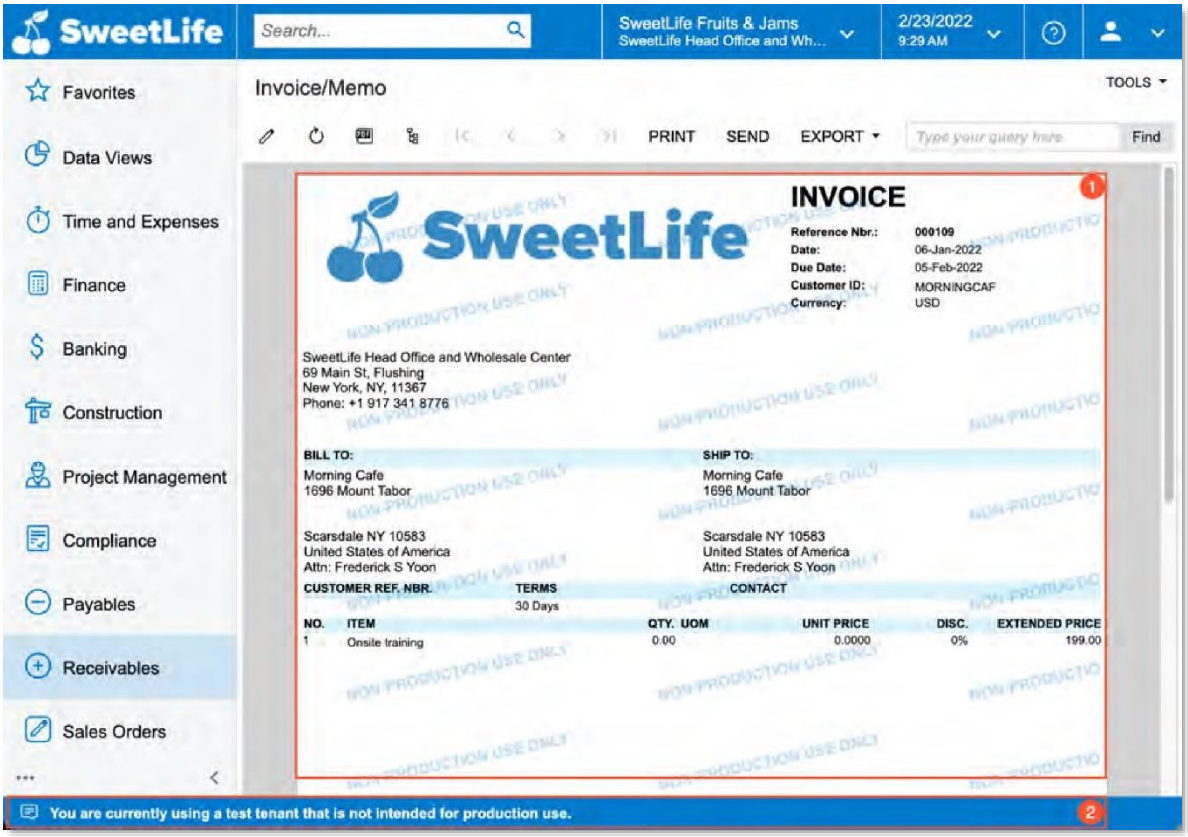
In MYOB Advanced 2022.1, several changes have been introduced to the licensing of test tenants.

In MYOB Advanced, a user can create a virtually unlimited number of test tenants. Test tenants are used to set up test environments that can be used for training purposes or for testing the system before performing potentially hazardous operations.

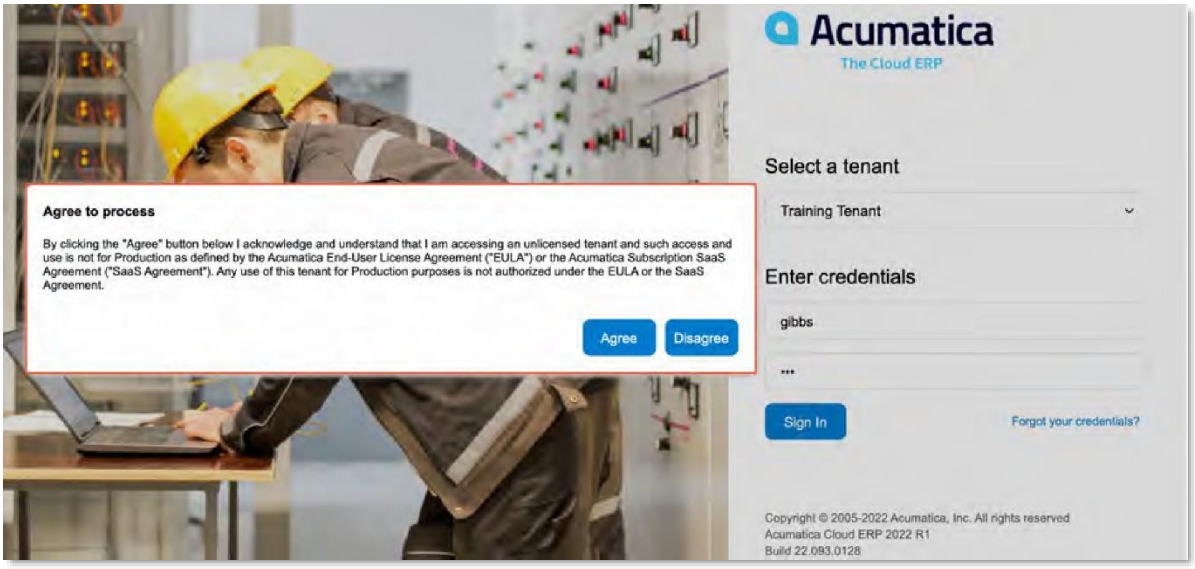
Changes to Licensed Instances

Starting in 2022.1, the following changes have been introduced that affect test tenants:

- The number of concurrent users is limited by the license. Earlier, it was limited to two concurrent users regardless of the license.
- A watermark has been added to all printed forms and reports (see Item 1 in the following screenshot).
- An informational strip is displayed at the bottom of the screen (Item 2).



Also, a user will need to confirm their understanding of the limitations of a test tenant when the user signs in to the tenant for the first time, as shown in the following screenshot.



Known Issues with the Limitations

In some cases ,user sign-in to a multitenant instance may be configured to use an external identity provider, and access to the tenants may be restricted through the selection of the **Secure Tenant on Login Screen** checkbox on the Tenant Setup page of the MYOB Advanced Configuration Wizard. In this case, for a production tenant, the system may display the dialog window for the user to confirm their understanding that they are signing in to a test tenant, and the system may not display this dialog window for a test tenant.

If silent logon is configured, the confirmation dialog window is not displayed.

Customisation

Deprecation of the Legacy Automated Warehouse Operations Engine

Starting in MYOB Advanced 2021 R1, the new Automated Warehouse Operations Engine have been introduced. In MYOB Advanced 2022.1, it completely replaces the legacy Automated Warehouse Operations Engine which has been deprecated. For more information, refer to the *Legacy WMS Engine to be Deprecated in 2022.1 Community* announcement.

The advantages of the new Automated Warehouse Operations Engine:

- Improved customisation capabilities
- More structured, modular code that is easier to read and write
- Multiple architectural improvements

The new Automated Warehouse Operations Engine is required for the *Paperless Picking* feature introduced in MYOB Advanced 2021 R2. For more information, refer to the *Order Management: Paperless Picking* article in the MYOB Advanced 2021 R2 Initial Release Notes.

After an upgrade to MYOB Advanced 2022.1:

- All the customers who enabled the Warehouse Management feature on the *Enable/Disable Features* (CS100000) form before the upgrade to MYOB Advanced 2022.1 will be automatically moved to the new Automated Warehouse Operations Engine.
- The upgrade to the new engine will not affect the standard (core) functionality.

The customisation packages used to customise any of the following screens may NOT work after the upgrade to MYOB Advanced 2022.1 if they are not reworked for the new Automated Warehouse Operations Engine:

- *Pick, Pack, and Ship* (SO302020)
- *Receive and Put Away* (PO302020)
- *Scan and Issue* (IN302020)
- *Scan and Receive* (IN301020)
- *Scan and Transfer* (IN304020)
- *Scan and Count* (IN305020)
- *Item Lookup* (IN202520)
- *Storage Lookup* (IN409020)
- *Scan Labor* (AM302020)
- *Scan Materials* (AM300030)
- *Scan Move* (AM302010)

Developer Documentation

Improvements in Developer Guides

In MYOB Advanced 2022.1, the documentation for developers has been extended and improved as described below.

Project Accounting DAC Reference

The DAC Reference now includes the descriptions of the project accounting data access classes. These descriptions are available in *PX.Objects.PM Namespace* and *PX.Objects.PJ DAC Reference*. A user can also find an overview of the project accounting DACs in *Overview of the Project Accounting DACs*.

New and Updated Examples in the Integration Development Guide

In the Integration Development guide, for the following entities, REST API examples have been added or updated:

- AccountDetailsForPeriodInquiry
    - *Get General Ledger Transactions for Some Period*
- Bill
    - *Create a Bill for Particular Lines of a Purchase Receipt*
- BusinessAccount
    - *Retrieve the List of Business Accounts*
- Contact
    - *Retrieve the List of Contacts*
    - *Link Multiple Contacts to a Customer*
- Employee
    - *Create an Employee*
    - *Retrieve Information about an Employee*
- InventorySummaryInquiry
    - *Get a Summary of an Inventory Item*
- Invoice
    - *Retrieve the List of Invoices*
    - *Release an AR Invoice*
    - *Specify the Tax Zone for an Invoice*
- Opportunity
    - *Create a Sales Order from an Opportunity*

    - *Create a Business Account from an Opportunity*
- Payment
    - *Create an AR Payment*
    - *Retrieve Payments One by One*
- PurchaseReceipt
    - *Release a Purchase Receipt*
- SalesOrder
    - *Create a Shipment from a Sales Order*
- ServiceOrder
    - *Retrieve a Service Order*
- Shipment
    - *Read the Tracking Number from a Shipment*
    - *Write the Tracking Number to a Shipment*
    - *Update the Freight Cost or Price*
    - *Create Separate Shipments for Each Sales Order*
- StockItem
    - *Retrieve Stock Items with Attributes*
    - *Retrieve Unit Conversion Rules from a Stock Item*
    - *Retrieve Stock Items with Prices and Quantities by Warehouse*
- TaxCategory
    - *Update a Tax Category*
- TimeEntry
    - *Read Employee Time Activities*
- Supplier
    - *Retrieve the List of Suppliers*
    - *Create a Supplier*

These examples are also available in the IntegrationDevelopment\Help folder of the *Help-and-Training- Examples* repository in MYOB GitHub.

Integration

Custom Push Notification Destinations for Commerce Connectors

In previous versions of MYOB Advanced, only the predefined *Commerce* push notification destination could be used for sending push notifications to commerce connectors. In MYOB Advanced 2022.1, a developer can use custom push notification destinations for commerce connectors. If the list of generic inquiries in the *Commerce* destination is sufficient for a connector or the developer needs to add to this destination multiple generic inquiries, the developer can use the predefined *Commerce* notification destination. If the developer needs a completely different list of generic inquiries to send push notifications for, the developer can create a custom push notification destination.

Using a Custom Push Notification Destination

To use a custom push notification destination for a commerce connector, the developer does the following:

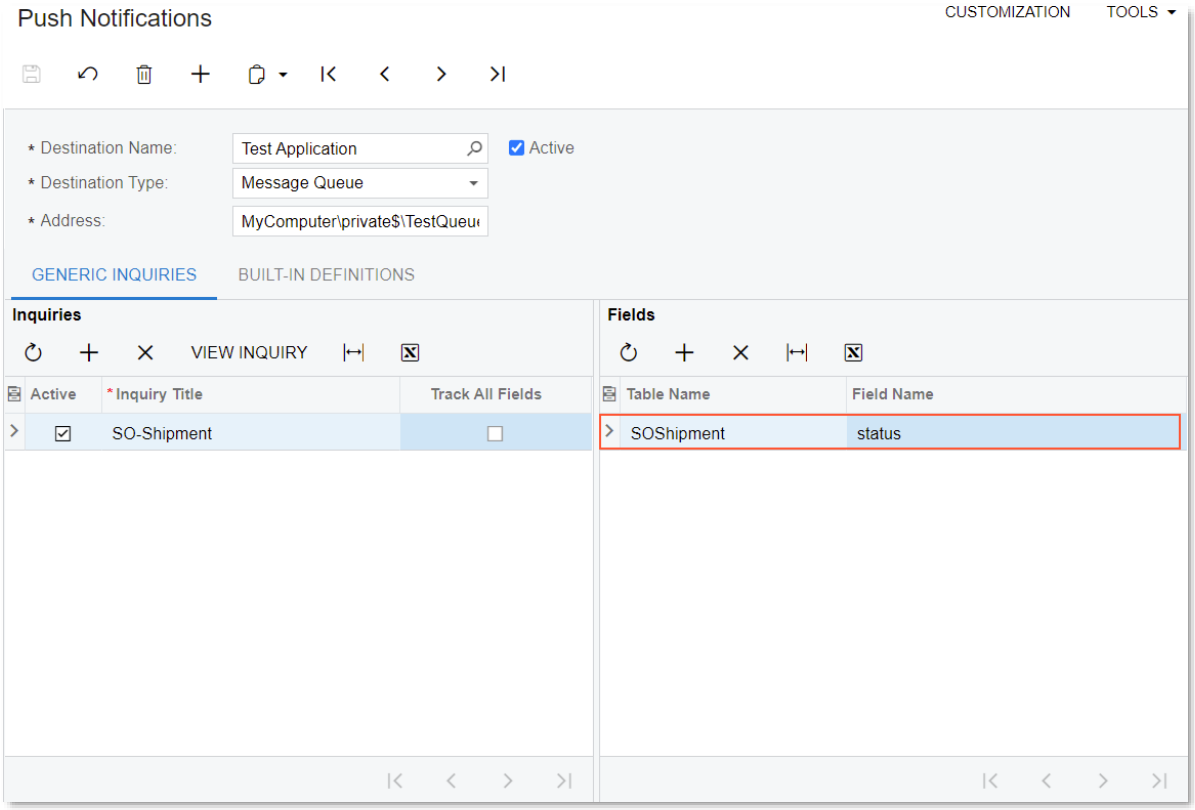
1. On the *Push Notifications* (SM302000) form, creates a custom push notification destination of the Commerce Push Destination type.
2. For each processor class that supports real-time synchronisation through push notifications, in the PushDestination property of the BCProcessorRealtime attribute, specifies the name of the custom push notification destination.
   The following code shows an example of the attribute for the customer processor class.

```
...
[BCProcessorRealtime(PushSupported = true, HookSupported = false,
  PushSources = new String[] { "BC-PUSH-Customers" },
  PushDestination = WCCaptions.PushDestination

)]
public class WooCustomerProcessor : BCProcessorSingleBase<WooCustomerProcessor,
  WooCustomerEntityBucket, MappedCustomer>, IProcessor

{
```

Selection of Fields for Push Notifications

In previous versions of MYOB Advanced, if a generic inquiry was added to a push notification definition, any change of any field of this generic inquiry triggered a push notification. In MYOB Advanced 2022.1, a developer can specify particular fields whose changes will trigger push notifications.

Suppose that for each shipment whose status has been changed, the developer needs to send the shipment number, status, date, warehouse, customer name, quantity, and weight. The developer does not want to receive a push notification when other fields except the status are changed because this could cause performance issues. On the *Push Notifications* (SM302000) form, the developer selects only the **Status** field for tracking in the **Fields** table on the **Generic Inquiries** tab, as shown in the following screenshot.



The developer can also specify particular fields to be tracked for a built-in definition by selecting the fields in the **Fields** table on the **Built-in Definitions** tab of the *Push Notifications* form.

Platform API

Improvements in the PXDBTimeStamp Attribute

In MYOB Advanced 2022.1, the logic behind the PXDBTimeStampAttribute attribute has been improved.

If the RecordComesFirst property of the PXDBTimeStamp attribute is set to *true*, the record's own timestamp is now preferred over the other timestamps (such as a graph timestamp and a timestamp that is stored in the PXTimeStampScope.Persisted collection of the current operation that is performed in a separate thread).

This change has been introduced because using the timestamp field of the record is the safest option when executing the UPDATE statements.

This change affects custom DACs only if a developer turns on the RecordComesFirst option by specifying [PXDBTimestamp(RecordComesFirst = true)] or invoking the PXTimeStampScope.SetRecordComesFirst(typeof(YourDAC), true) method. Otherwise, the code of custom DACs is not affected because the RecordComesFirst property is *false* by default.

For example, the following scenario was not failing even though it worked incorrectly in an operation performed in a separate thread:

1. In Graph 1, reading from the document (for example, a purchase order) was performed.
2. Via Graph 2, the document was updated (for example, a PO receipt updated the quantities of the related purchase order).
3. In Graph 1, the document was processed, even though the instance of the document was out of date because the updates from Step 2 were not applied to the instance.

With the improved logic in MYOB Advanced 2022.1, the *Another Process has updated the document* error now occurs and data consistency issues do not happen.

Thus, we recommend that the developer sets the RecordComesFirst property of the PXDBTimeStap attribute to *true* if the developer is updating a single document from multiple graphs to avoid data consistency issues.

Related Changes in the PX.Objects.PO Namespace

The following changes have been made to the PX.Objects.PO namespace due to this improvement:

- The RecordComesFirst property has been set to *true* for the main PO table.
- The POLineR and POLineUOpen projections have been moved to separate files.
- Validation of the status on release of a PO receipt has been added.

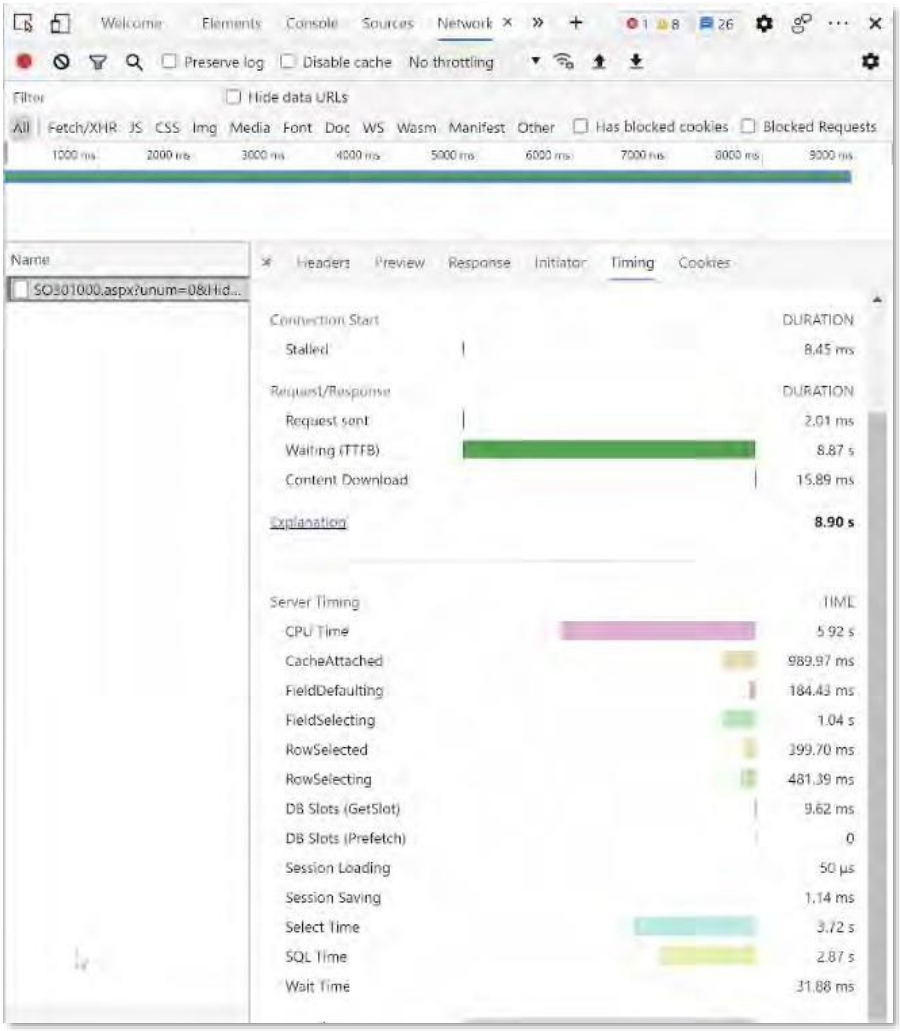
Validation of the status on release of a PO landed cost has been added.

Support of Server Timing API

In MYOB Advanced 2022.1, support for the Server Timing API has been added. This allows the developers to see all performance metrics related to a request-response cycle in a single and familiar place such as browser Developer Tools.

In a development environment (namely, if the site is running on IIS Express or IIS with the <add key="hosting:environment" value="Development" /> setting in the appSettings section in the Web.config file), the performance metrics logging is turned on by default. In a production environment, it is required to turn on the performance metrics logging with the **Start Logging** button in the **Profiler** dialog window, which is displayed after **Tools > Profiler** is clicked. The same action can be done by selecting the **Log Requests** checkbox in the **Request Logging** section of the Request Profiler (SM205070) form.

For example, in Google Chrome, Chrome Developer Tools allows the developer to view the timing of MYOB Advanced processes. On the **Network** tab of Chrome Developer Tools, after an MYOB Advanced page is selected, the **Timing** tab of the panel contains the server timings, as shown in the following screenshot.



Support of Multicurrency in Purchase Order-Related Forms

In MYOB Advanced 2022.1, purchase order-related forms have been moved to the latest version of the multicurrency generic graph extension, which is available in the PX.Objects.CM.Extensions namespace. The namespace includes MultyCurrencyGraph abstract classes and attributes. The main DACs of the graphs that implement the latest version of the multicurrency functionality have their Cury fields marked with PX.Objects.CM.Extensions.PXDBCurrencyAttribute. The call of FindImplementation<IPXCurrencyHelper>() for these graphs returns an object whose type is a successor of MultyCurrencyGraph.

The MultyCurrencyGraph namespace provides MultyCurrencyGraph abstract class. A developer may need to reuse this multicurrency functionality in a custom form.

Technical Improvements in Inventory and Order Management

This section describes improvements that have been implemented in the code of the inventory and order management functional areas.

Database-Related Changes

In MYOB Advanced 2022.1, the following changes have been made to the database:

- The ReceiptType (or POReceiptType) field has been added to following tables: POCartReceipt, POReceiptSplitToCartSplitLink, POReceiptSplitToTransferSplitLink, and POAccrualSplit.
- The OrigReceiptType column has been added to the POReceiptLine table.
- The indexes that used the links to the POreceipt table have been modified.
- The CostType field has been added to the INTranCost table. The field represents a type of inventory cost. The CostType field should be used instead of the IsVirtual field. Possible values of the field are the following:
    - N: Normal
    - D: Drop-Ship
    - P: Drop-Ship PPV
    - T: Transfer

The following changes have been made to the code:

- The primary key of the POReceipt DAC is now extended with the ReceiptType field.
- The POReceiptType field has been added to the BillDetail entity of the Default web service endpoint of 18.200.001 and 20.200.001 versions. The POReceiptType field is now a required field to link the BillDetail entity with the POReceipt entity.
- The **Receipt Type** field was added to the *Unreleased Material Allocations* (AM305500) and *Asset Summary* (FA402000) forms, and to the **Add LC** dialog window of the *Bills and Adjustments* (AP301000) form.
- The code of creating a purchase order from other entities (located in the POCreate.cs file) has been significantly refactored. The customisation of this procedure is now easier and more flexible and does not require the customiser to copy existing code to the extensions.

Improvements in Update Operations

In previous versions of MYOB Advanced, a lot of unnecessary UPDATE operations were performed across the system when PXFormulaAttribute and PXUnboundFormulaAttribute were used with aggregation to the parent record. Usually, formulas with these attributes are supposed to sum some amounts or quantities. In previous versions, the attributes were triggered on every RowUpdated event and updated the parent every time (for example, if some string field is updated). These unnecessary UPDATE operations were removed to improve performance.

For example, when the SOLine.Description field was updated, the updates of the SOOrder object were performed, although the update of the SOLine.Description field did not impact

the SOOrder object in any way. Now the update of the SOLine.Description field does not cause the update of the SOOrder object. But when the SOLine.OrderQty field is updated, the SOOrder.OrderQty is also updated because it depends on the line value via the formula.

Note that the code that implicitly depends on setting the PXCache.Current of the parent DAC after updating a child DAC record may be affected by these changes.

Improvements in Events

The events used by shipments and orders have been split: The new GotShipmentCorrected and GotShipmentConfirmed events are now used for the SOOrder entity, and the ShipmentConfirmed and ShipmentCorrected events are used for shipments.

Web Services

Changes in OData 4 Support

In MYOB Advanced 2022.1, it has become possible to use the OData 4 interface to query data from data access classes that do not have a primary key. For example, data from the PX.Objects.AP.APSetup, PX.Objects.AR.ARSetup, and PX.Objects.GL.GLSetup setup data access classes can be returned via OData 4 now.

Workflow

Improvements in Workflow API

In MYOB Advanced 2022.1, Workflow API has been improved as follows:

- A developer can specify the location of an action in a category: An action can be placed first, last, or before or after a specified action by using the Placement parameter of the WithCategory method. Examples are shown below.

In the following code example, the putOnHold action is placed before the releaseFromHold action inside the processingCategory category.

```
actions.Add(g => g.putOnHold, c => c
.WithCategory(processingCategory, Placement.Before, g => g.releaseFromHold));
```

In the following code example, the putOnHold action is placed last inside the processingCategory category.

```
actions.Add(g => g.putOnHold, c => c
.WithCategory(processingCategory, Placement.Last));
```

- A developer can subscribe an event handler to a change in a set of fields by using the OfFieldUpdated and OfFieldsUpdated methods. An example is shown in the following code.

```
handlers.Add(handler => handler
  .WithTargetOf<ARInvoice>()
  .OfFieldsUpdated<OnUpdateStatusFields>()
  .Is(g => g.OnUpdateStatus)
  .UsesTargetAsPrimaryEntity());


...
public class OnUpdateStatusFields : TypeArrayOf<IBqlField>
  .FilledWith<ARInvoice.hold, ARInvoice.creditHold, ARInvoice.printed,
```

In the code above, the OnUpdateStatus event handler is subscribed to the change of any of the fields declared in the OnUpdateStatusFields class.

Composite States in Workflows

In MYOB Advanced 2022.1, composite states are supported in workflows. A composite (or parent) state is a state that contains an ordered sequence of nested states and transitions to and from these states. With composite states, a customiser can specify common settings (actions, fields to be updated, and transitions) for a group of states only once, in the composite state that includes these states.

Use of Composite States

For each of the states inside a composite state, the customiser can do the following:

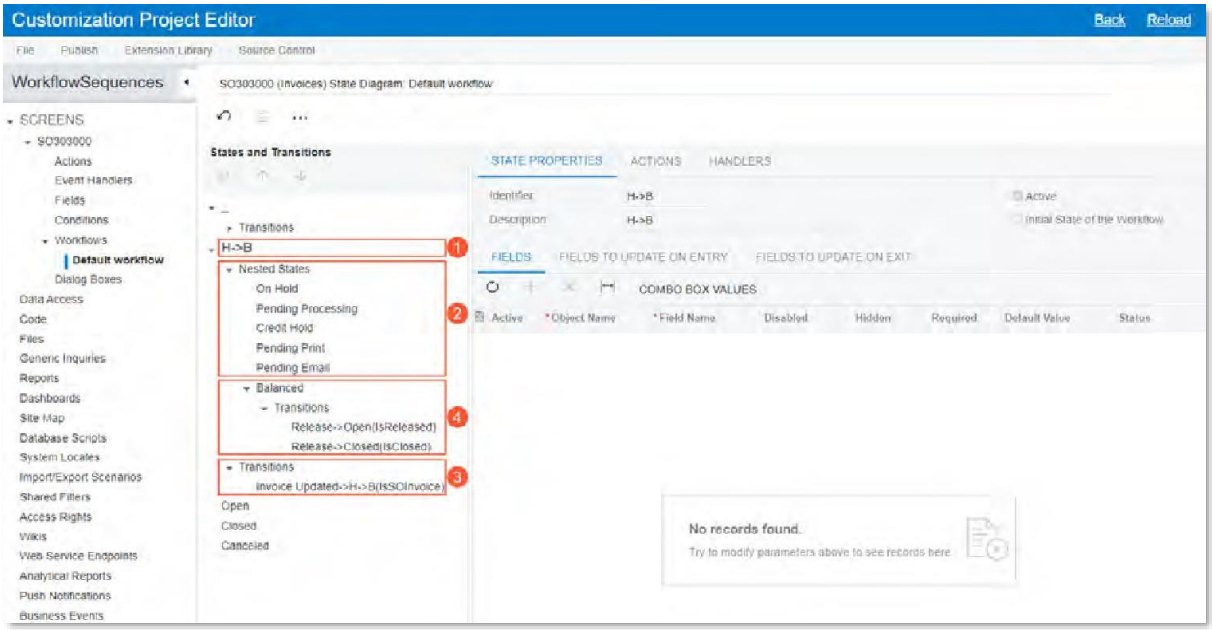
- Specify which of these states should be skipped by using skip conditions
- Specify transitions to the next state inside the composite state instead of transitions to a specific state
- Specify transitions to the state that immediately follows the composite state, if this composite state is itself a nested state in another composite state
- Override the settings inherited from the composite state, if needed

These capabilities make workflow customisation much easier. Customisers do not need to explicitly specify target states for transitions. Thus, if they add or remove states in the workflow or change the order of states, they do not need to modify all the affected transitions.

Composite States (UI)

This topic describes the implementation of composite states in the user interface.

The following screenshot shows the default workflow of the *Invoices* (SO303000) form on the State Diagram: Default Workflow page of the Customisation Project Editor. The composite state (see Item 1 in the screenshot) contains nested states (Item 2) that are part of a typical invoice workflow, as well as transitions (Item 3) to and from the composite state and the nested states. Notice that the *Balanced* nested state also contains transitions (Item 4).



Note: For workflows with nested states, the diagram view of the workflow is not available, and the **Diagram View** command has been removed from the More menu of the Workflow pages. Also, for forms with workflows with nested states, the **Customisation** menu does not contain the **Show State Diagram** command.

Use of Skip Conditions

An entity created on a form cannot be in a composite state; it can only be in one of its nested states. When an entity enters any nested state in a composite state, the system checks the skip condition specified for this state, if one has been defined. If the condition is fulfilled, the system does the following for the current state:

1. If the current state is the initial state of the workflow, assigns the default values for the fields as specified on the **State Properties** tab of the Workflow page for the form
2. Does not check the fields that should be updated when the entity enters the state and leaves it
3. Does not check any of the workflow settings, and moves the entity to the next state inside the composite state

If no skip condition is specified, the system uses the typical workflow for this state. This means that the transitions are triggered only by actions or event handlers, and the system does not check the skip condition again while the entity remains in this state.

Update of Fields of a State

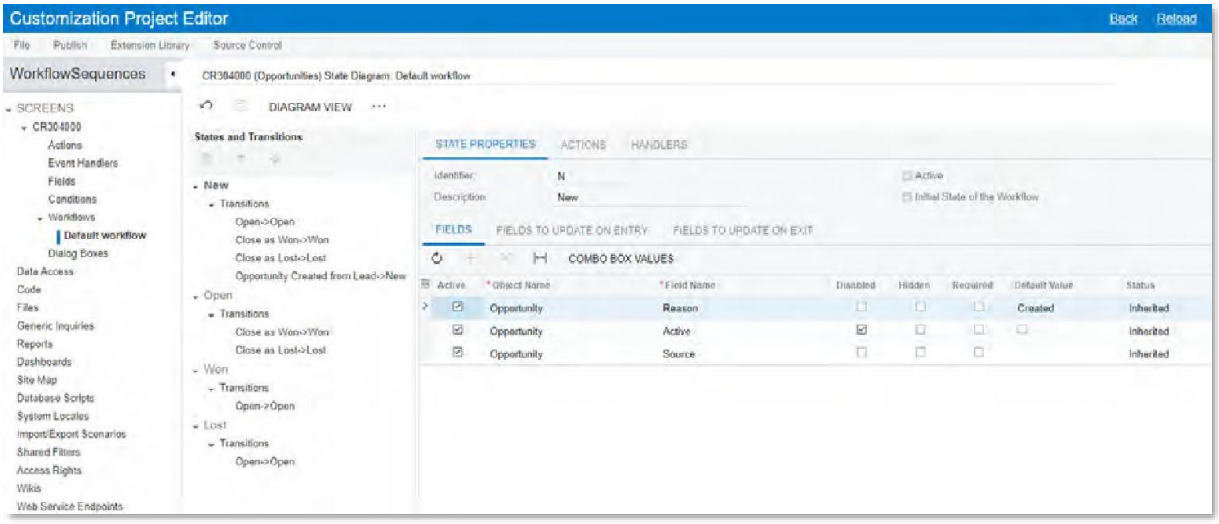
For all types of workflows, on the Workflow pages, the **Fields to Update on Entry** and **Fields to Update on Exit** tabs have been added to the **State Properties** tab. On these tabs, a customiser specifies which fields should be updated when an entity enters a particular state and when the entity leaves this state.

Before a transition is performed, the system checks the following:

- For the target state, the fields that should be updated when the entity enters the state
- For the original state, the fields that should be updated when the entity leaves the state

Changes to the User Interface

In the **State and Transitions** pane of the Customisation Project Editor, for workflows that do not have composite states by default, the transitions are now grouped in the **Transitions** node. The following screenshot shows the tree view of the default workflow for the *Opportunities* (CR304000) form.



On the Workflow page for a customised or custom workflow, the following changes have been implemented:

- On the More menu, the **Change Parent State** command has been added. It opens a dialog window in which the customiser can select the parent state for the current state.
  This command is also available for workflows that do not have composite states yet. If a customiser selects a parent state for any state of such a workflow, this parent state becomes a composite state.
  If you specify a parent state, the state you are creating becomes a nested one for this parent state. If this parent state is not a composite state yet (that is, it does not contain any nested states), it becomes a composite state.
- In the **State Properties** tab, the following elements have been added:
  - **Skip Condition**: A field in the Summary area of the tab that specifies the condition that the system checks when an entity enters any nested state in a

composite state. If the condition is fulfilled, the state is skipped. The field is displayed only for a nested state.
    - **Next State**: A read-only field in the Summary area of the tab that specifies the state to which an entity will move if the skip condition is fulfilled and the entity skips the current state. The field is displayed only for a nested state.
    - **Fields to Update on Entry**: A tab that contains the list of fields that should be updated when an entity enters the state. This tab is also available for workflows without composite states.
    - **Fields to Update on Exit**: The tab that contains the list of fields that should be updated when an entity leaves the state. This tab is also available for workflows without composite states.

- In the **Add State** and **Add Predefined State** dialog windows, the **Parent State** field has been added.
  If the customiser specifies a parent state, the added state becomes a nested one for this parent state. If this parent state is not a composite state yet (that is, it does not contain any nested states), it becomes a composite state. If the customiser leaves this field empty, the state is added to the bottom of the list of states on the **States and Transitions** pane.
- In the **Target State** field of the **Add Transition** dialog window, the *@Next* and *@ParentNext* options have been added. When specifying the target state of the transition, the customiser selects *@Next* to specify the next state in the composite state and *@ParentNext* to specify the next state of the parent state.

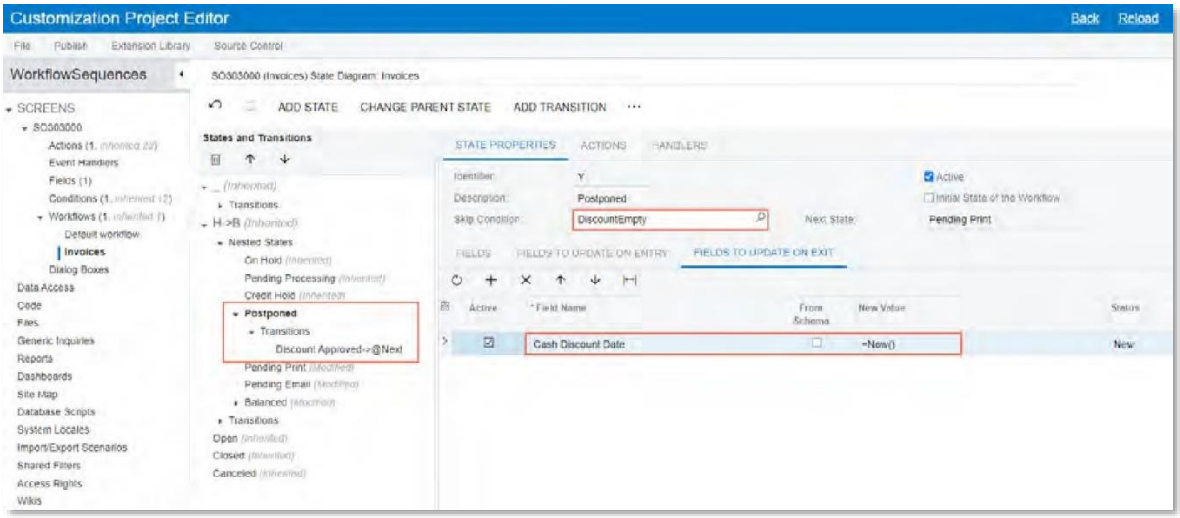
An Example of Using a Composite State

Suppose that the customiser wants to add a new state, *Postponed*, to the workflow for the *Invoices* (SO303000) form after the *Credit Hold* state; the customiser then wants to specify the skip condition for it and add a transition from this state to the next state in the workflow. The customiser performs the following steps:

1. On the Conditions page, creates a condition to make sure that the value in the **Cash Discount** field equals *0*.
2. On the More menu, clicks **Add State**.
3. In the **Add State** dialog window, specifies the following settings:
    - **Identifier**: Y
    - **Description**: *Postponed*
    - **Parent State**: *H->B*
4. Clicks **OK** to close the dialog window.
   The system adds the Postponed state after the last of the nested states (Balanced in this case).
5. Uses the arrows on the toolbar of the **States and Transitions** pane to move the added state after the *Credit Hold* state.
6. Clicks the *Postponed* state, and then selects the created condition in the **Skip Condition** field of the **State Properties** tab.
   If the condition is fulfilled (that is, if the value in the **Cash Discount** field equals *0*) and a document enters the *Postponed* state, it then skips this state and automatically moves to the next state (*Pending Print* in this case).

7. On the More menu, clicks **Add Transition**.
8. In the **Add Transition** dialog window, which is opened, clicks **Create** and specifies the following settings for the action:
    - **Action Name**: DiscountApproved
    - **Display Name**: Discount Approved
    - **Category**: *Processing*
9. Clicks **OK** to close the dialog window.
10. In the **Target State** field of the **Add Transition** dialog window, selects *@Next*.
    This setting indicates that the transition will lead to the next state in the sequence (*Pending Print* in this case).
11. Clicks **OK** to close the dialog window.
    The system adds the transition to the **Transitions** node of the *Postponed* state.
12. On the **Fields to Update on Exit** tab for this state, adds the *Cash Discount Date* field and sets its value to *=Now()*.
    Each time a document leaves this state—that is, when the document moves to another state because a transition has been triggered (in this case, the transition triggered by the *Discount Approved* action)—the value of the *Cash Discount Date* field changes to the current date.
13. Saves these changes.

The workflow with the added state is shown in the following screenshot.



Composite States (API)

This topic describes the implementation of composite states through the use of theworkflow API.

Implementing a Composite State

A developer can add a composite state by using the AddSequence method in the lambda expression of the WithFlowStates method. The developer should specify the name of the composite state as the type parameter of the method. In the lambda expression provided for the AddSequence method, a developer can add the states that are a part of the composite state by using the WithStates method. The states in the composite states are declared the same way as they are declared in the AddFlowStates method.

To specify that a state should be skipped in the composite state, the developer should call the IsSkippedWhen method in the state definition. The condition that determines whether the state should be skipped is specified in the parameter of the IsSkippedWhen method.

An example of a composite state declaration is shown in the following code.

```
.WithFlowStates(fss =>
{
 fss.Add(initialState, flowState => flowState.IsInitial(g => g.initialiseState));
 fss.AddSequence<State.HoldToBalance>(seq =>

  seq.WithStates(sss =>
   {
    sss.Add<State.hold>(flowState =>
    {
     return flowState
      .IsSkippedWhen(conditions.IsNotOnHold)
      .WithActions(actions =>
      {
       ...
      });
```

```
      .IsSkippedWhen(conditions.IsCreditHoldChecked)
      .WithActions(actions =>
      {
       ...
      });
    });
                            sss.Add<State.balanced>(flowState =>
    {
     return flowState
      .WithActions(actions =>
      {
       ...
      });
```

In the code above, the HoldToBalance composite state is declared. The composite state includes the hold, creditHold, and balanced states. The hold state is skipped when the IsNotOnHold condition is true. The creditHold state is skipped when the IsCreditHoldChecked condition is true. The balanced state is never skipped.

Declaring a Transition for a Composite State

A developer can define the following transitions involving a composite state:

- A transition from any state of a workflow to the composite state.
- A transition from a composite state to any state of a workflow.

All of these transitions are inherited by the states of a composite state.

- A transition from a specific state of the composite state to any state of the workflow.
- A transition from a composite state to itself so that the workflow engine can search for a proper state and check the conditions again.

To define such a transition, in the Add method for the transition, specify the target state that is the same as the source state.

- A transition from one state of a composite state to the state defined after it.

To define such a transition, in the Add method for the transition, call the ToNext method.

- A transition from a state in a child composite state to the next state in the parent composite state if the composite state is defined inside another composite state. To define such a state, in the Add method for a transition, call the ToParentNext method.

Note: A composite state cannot be the initial state of the workflow. A developer must specify a transition from an initial state to the composite state.

The following code shows an example of the transitions involving a composite state.

```
.WithTransitions(transitions =>
{
 transitions.AddGroupFrom(initialState, ts =>
 {
  ts.Add(t => t.To<State.HoldToBalance>()
   .IsTriggeredOn(g => g.initialiseState)); // To default sequence
 });
 transitions.AddGroupFrom<State.HoldToBalance>(ts =>
```

```
   .To<State.HoldToBalance>()
   .IsTriggeredOn(g => g.OnUpdateStatus)
   .When(conditions.IsARInvoice));
  ts.Add(t => t
   .To<State.open>()
   .IsTriggeredOn(g => g.OnReleaseDocument)
   .When(conditions.IsOpen));
```

In the code above, the following transitions are declared:

- A transition from the initial state to the HoldToBalance composite state
- A transition from the HoldToBalance composite state to itself
- A transition from the HoldToBalance composite state

Updating an Existing Composite State

To update a composite state, a developer should use the UpdateSequence method in the WithFlowStates method. In the WithStates method of the UpdateSequence method, the developer can add, update, or delete a state by using the Add, Update, or Delete method respectively. To specify the location of the state in the updated composite state, the developer should use the PlaceAfter method.

The following code shows an example of an updated composite state.

```
.WithFlowStates(states =>
{
 states.UpdateSequence<State.HoldToBalance>(seq =>
  seq.WithStates(sss =>
  {
   sss.Add<State.pendingApproval>(flowState =>
   {
    return flowState
     .IsSkippedWhen(conditions.IsApproved)
     .WithActions(actions =>
     {
      ...
     })
     .PlaceAfter<State.hold>();
        }
        )
        ;
        }
        )
        )
        ;
})
.WithTransitions(transitions =>
{
 transitions.AddGroupFrom<State.pendingApproval>(ts =>
 {
  ts.Add(t => t
```

```
 });
});
```

In the code above, the pendingApproval state is added to the HoldToBalance composite state and placed after the hold state. Three transitions are added from the pendingApprovel state.