MYOB Advanced

Release Notes

2022.2

Contents

Introduction

MYOB Advanced 2022.2 is a major release that adds a wide range of new features across the entire MYOB Advanced system.

Installation and Upgrade Notes

We strongly recommend that before administrators upgrade MYOB Advanced to a newer product version, they back up all configuration files and databases used by the application instances. For a detailed description of the general procedure of updating MYOB Advanced, see Updating MYOB Advanced by Using the Configuration Wizard in the Installation Guide.

Multiple changes have been made in MYOB Advanced 2022.2, in comparison to Version 2022 R1, that may affect customisations and integrations. For details, see Release Notes for Developers.

If the MYOB Advanced instance was integrated with software provided by an independent software supplier (ISV) partner, we recommend that the administrator consult with this partner about the compatibility of its products with MYOB Advanced 2022.2.

Deprecated Support for Internet Explorer

MYOB Advanced 2022.2 does not support Internet Explorer. MYOB Advanced continues to support Microsoft Edge, Firefox, Google Chrome, and Apple Safari.

Deprecated Support for Azure Cloud Services

On August 24, 2021, Microsoft announced plans to retire the Cloud Services (classic) deployment model on August 31, 2024. As of April 5, 2021, the new Azure Cloud Services deployment model is generally available. Starting in 2022.2, MYOB is switching to the new deployment model and is no longer providing the following:

- Azure service package files (with the .cspkg extension) for each major version and minor updates
- The functionality to generate .cscfg files by using the MYOB Advanced Configuration Wizard

Therefore, in MYOB Advanced 2022.2, an administrator cannot install MYOB Advanced by using the Azure Cloud Services (classic) deployment model.

To deploy the MYOB Advanced Service for 2022.2 and later on the Windows Azure platform by using Azure Cloud Services (extended support), the administrator should create a Windows virtual machine in the Azure portal and install MYOB Advanced, as described in the Installing MYOB Advanced Locally topic.

Upgrade Policy

On the Apply Updates (SM203510) form, only minor updates are available for the currently installed version of MYOB Advanced. The administrator should upgrade the MYOB Advanced instance from

previous major versions of the system to Version 2022.2 manually on the server. (An upgrade through the web interface is not supported because the customisation of the MYOB Advanced instance may be incompatible with Version 2022.2 due to changes in Version 2022.2.)

Prerequisite Steps

Before administrators install MYOB Advanced 2022.2 or upgrade to it locally, they need to do the following:

1. Switch the Internet Information Services application pool where the MYOB Advanced 2022.2 instance will be installed to Integrated mode. (Classic mode is not supported.)
2. Install Microsoft .NET Frameworks 4.8 on the server where the MYOB Advanced 2022.2 instance will be installed.
3. Install Microsoft .NET Core 3.1 on the server where the MYOB Advanced 2022.2 instance will be installed.

Upgrade Path

The upgrade to MYOB Advanced 2022.2 must be performed as described in the following table. The upgrade process depends on the version before the upgrade.

From Version	Upgrade Path
2022.2 Beta	A direct upgrade to later builds of MYOB Advanced 2022.2 is supported.
2022.2 Preview 2	An upgrade to later builds of MYOB Advanced 2022.2 is not supported. The administrator must completely remove all components of the system and install the later build from scratch.
2022.2 Preview 1	An upgrade to later builds of MYOB Advanced 2022.2 is not supported. The administrator must completely remove all components of the system and install the later build from scratch.
2022 R1	A direct upgrade to MYOB Advanced 2022.2 is supported.
2021 R2	A direct upgrade to MYOB Advanced 2022.2 is supported.
2021 R1	A direct upgrade to MYOB Advanced 2022.2 is supported.
2020 R2	An incremental upgrade is required. The following steps must be performed in the listed order: 1. Upgrade to the latest Version 2022 R1 X build available. 2. Upgrade to Version 2022.2.

From Version	Upgrade Path
2020 R1	An incremental upgrade is required. The following steps must be performed in the listed order: 1. Upgrade to the latest Version 2021 R2 X build available. 2. Upgrade to Version 2022.2.

MYOB Advanced 2022.2 can be upgraded from the following particular versions:

- 2022 R1 Update 10 (22.110.0018) and earlier
- 2021 R2 Update 15 (21.215.0016) and earlier
- 2021 R1 Update 24 (21.124.0017) and earlier

For the list of upgradable versions for later 2022.2 updates, see the Release Notes for the particular 2022.2 update.

Before upgrading

Before performing the upgrade to MYOB Advanced 2022.2, the administrator should do the following:

- If the organisation uses MYOB Advanced Manufacturing Edition and visibility restrictions by branch or company have been configured for customer or supplier accounts, make sure that users who work with production-related forms have appropriate access permissions to companies or branches. These permissions allow users to view and specify the customer or supplier accounts that are assigned to these companies or branches. Also, make sure that all production-related documents and transactions that include customer or supplier accounts have been processed through completion.
- All legacy credit card transactions—that is, credit card transaction generated on the Sales Orders (SO301000) and Invoices (SO303000) form in MYOB Advanced 2020 R2 and earlier versions—must be captured, voided, or converted to payments before the application can be upgraded to MYOB Advanced 2022.2. The Generate Payments for Card Transactions (SO511000) form has been removed from the system.

> **Important:** The upgrade to MYOB Advanced 2022.2 will not be possible if legacy credit card transactions exist in the system.

New Features

Commerce

Connection of a Store with a Custom Shopify App

Previously, it was possible to connect a Shopify store to MYOB Advanced in the following ways:

- By using the MYOB Advanced public app, which is available in the Shopify App Store
- By using a private app developed and installed in a Shopify store specifically for connecting it to MYOB Advanced

In January 2022, Shopify deprecated support for the private apps and introduced custom apps, which can now be used to connect a Shopify store to MYOB Advanced.

To Connect a Store by Using a Custom Shopify App

In MYOB Advanced 2022.2, to establish a connection between a Shopify store and MYOB Advanced, a user should complete the following general steps:

1. In Shopify, create a custom Shopify app and install it in the Shopify store. For details, see the Shopify documentation.
2. In the Shopify store, obtain the custom app's access token and shared secret. For information, see the Shopify documentation.
3. On the Shopify Stores (BC201010) form, create a store, and specify the access token and shared secret in the **API Access Token** and **API Secret Key** fields of the **Connection Settings** tab (shown in the following screenshot).

For step-by-step instructions for connecting a Shopify store to MYOB Advanced, see "Initial Configuration: To Establish the Store Connection" in the in-product help.

The API key and API password had to be specified for the connection through the private app. Because this connection is no longer supported, the **API Password** field has been removed from the **Connection Settings** tab of the Shopify Stores form. The **API Key** field is now filled in by the system automatically when the user specifies the access token and shared secret of the custom app.

Export of Sales Orders to Shopify

In previous versions of MYOB Advanced, it was impossible to export sales orders created or updated in MYOB Advanced to a Shopify store. Starting in MYOB Advanced 2022.2, an administrative user can set up the order export so that if a sales order has been created in MYOB Advanced, it can be exported to a Shopify store, and if a user changes a sales order that has already been exported, these changes can be synchronised with Shopify.

Setting Up the Order Export

Before sales orders can be exported to a Shopify store, an administrative user needs to specify the order type of the orders that can be exported to the Shopify store. To do this, the administrative user selects the type in the new **Order Types for Export** field (see the following screenshot) on the **Order Settings** tab of the Shopify Stores (BC201010) form.

Order types are available for selection in this field only if they are based on the *SO* (Sales Order) or *SA* (Sales Order with Allocation) order template. The order template of an order type is specified on the Order Types (SO201000) form.

The export of sales orders follows the same process as the order import does. That is, the *Sales Order* entity is first prepared on the Prepare Data (BC501500) form and then processed on the Process Data (BC501500) form. During the synchronisation, the **Sync Direction** of the *Sales Order* entity should be set to *Export* or *Bidirectional*.

A sales order is exported if it has the order type selected in the store settings on the Shopify Stores form and if it has one of the following statuses:

- Open
- Pending Processing
- Shipping
- Back Order
- Completed

When a sales order created in MYOB Advanced is exported, it is assigned the *Paid* status in Shopify, regardless of its open balance in MYOB Advanced. If the sales order has not yet been fully paid, a user can later collect the payment and create the corresponding payment document in MYOB Advanced.

Exporting Customers, Items, and Taxes

A customer specified in a sales order in MYOB Advanced is exported along with the order. If the customer has not been previously exported to the Shopify store, the retail-commerce connector creates it in the Shopify store and adds it to the exported sales order during the order export.

Stock and non-stock items added to a sales order in MYOB Advanced must be synchronised with the Shopify store; otherwise, an error will occur during the export of the sales order.

The synchronisation of the taxes applied to a sales order depends on the state of the **Tax Synchronisation** checkbox on the **Order Settings** tab (**Taxes** section) of the Shopify Stores (BC201010) form for the store. If the Tax Synchronisation checkbox is selected, taxes corresponding to the tax IDs from the order settings are created and applied to the exported sales order in the Shopify store. These tax IDs as listed on the Taxes tab of the Sales Orders (SO301000) form.

Updating Synchronised Orders

After a sales order has been exported from MYOB Advanced to a Shopify store, a user can still make changes to the sales order in MYOB Advanced if these changes do not affect the order total. (For example, the user can update the shipping address or change the customer's email address or phone number.) The sales order can then be resynchronised so that the sales order in the Shopify store reflects the most recent changes.

> **Important:** A sales order that has been created in MYOB Advanced and exported to Shopify cannot be edited in the Shopify admin area. If a user needs to make any changes to this order (that is, the changes that the user would normally make after clicking the **Edit** button at the top of the Shopify order page), the user should cancel the order and recreate it with the correct settings and details.

An administrative user can allow adding items to sales orders that have been exported to Shopify. To do so, on the **Order Settings** tab of the Shopify Stores (BC201010) form, the administrative user selects the **Allow Adding Items to Processed Orders** checkbox (shown in the following screenshot).

When the **Allow Adding Items to Processed Orders** checkbox is selected for a store, a new column, **Excluded from Export**, is displayed for sales orders synchronised with the store on the **Details** tab of the Sales Orders (SO301000) form. If a user adds an item to such an order, the **Excluded from Export** checkbox automatically becomes selected, which indicates that this item will not be reflected in the order in the Shopify store after the sales order is resynchronised.

In the following screenshot, the *APJAM96* item has been added to the sales order after the order has been synchronised with the Shopify store.
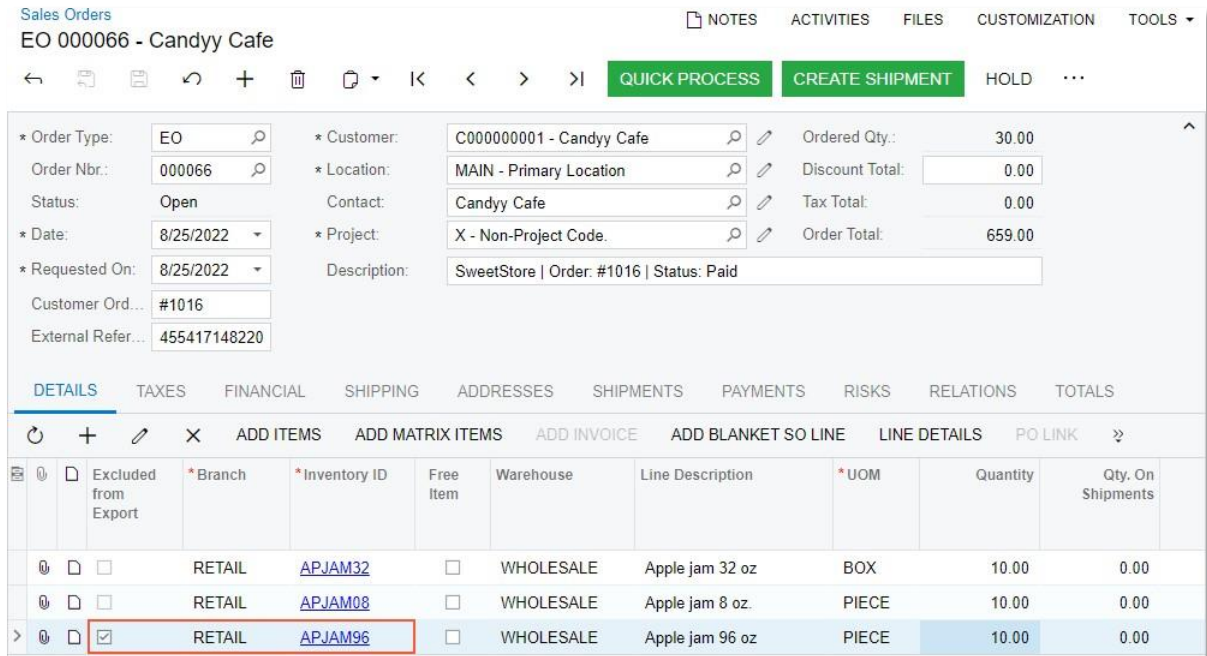
To prevent a user from changing the order settings that cannot be exported to a synchronised order in Shopify, the UI elements of the Sales Orders (SO301000) form that are listed in the following table are made unavailable for editing as soon as the sales order is synchronised with the Shopify store.

Location on the Sales Order form	UI Element
Details tab	• **Quantity** • **Unit Price** • **Manual Price** • **Discount Percent** • **Discount Amount** • **Tax Category**
Taxes tab	• **Tax Rate** • **Tax Amount** • **Taxable Amount**
Discounts tab, which is shown if the *Customer Discounts* feature is enabled on the Enable/Disable Features (CS100000) form	• **Manual Discount** • **Discount Amt.** • **Discount Percent**
	• **Free Item**

Location on the Sales Order form	UI Element
	• **Free Item Qty.**
Totals tab	• **Override Freight Price** • **Freight Price** • **Premium Freight Price**

Also, after sales order synchronisation, the **Recalculate Prices** command becomes unavailable on the More menu of the form.

Enhanced Export of Product Availability Settings

In MYOB Advanced 2022.2, a number of improvements have been introduced for the export of product availability settings to BigCommerce and Shopify stores. The sections of this topic provide a high-level overview of the changes.

Synchronisation of Availability Settings of Matrix Items

In MYOB Advanced, a user can specify the availability settings for a template item on the **eCommerce** tab of the Template Items (IN203000) form. Starting in MYOB Advanced 2022.2, the user can also specify the availability settings for each of the template item's matrix items on the **eCommerce** tab of the Stock Items (IN203000) form. These improvements provide more granular control over the availability settings assigned to the product (template item) and its variants (matrix items) in the external system during the synchronisation of the *Template Item* entity.

Now the availability settings of a product variant in the external system are determined by the settings specified both for the template item and for the matrix item, and the purchasability status assigned to each of the product variants is consistent with the purchasability of the status of the product itself.

Determination of the Item's Purchasability

Previously, when a user synchronised the *Stock Item* and *Template Item* entities with an external system, only some of the availability settings of the stock and template items were updated in the external system. For existing items, the product's purchasability was determined based on the availability settings alone, regardless of the available quantity of the item and the **When Qty Unavailable** setting specified for the item on the **eCommerce** tab of the Stock Items (IN203000) or Template Items (IN203000) form. To make the availability settings of items and the available quantity of items in the external system reflect the settings specified for them in MYOB Advanced, the user had to synchronise the *Product Availability* entity.

Starting in MYOB Advanced 2022.2, for products that have already been synchronised with the external system, when the *Stock Item* and *Template Item* entities are synchronised, the system checks the available quantity of the item in the external system before determining its purchasability status.

Export of Available Quantities in Sales UOMs

Starting in MYOB Advanced 2022.2, the available quantity of an item whose quantity is configured to be tracked is exported to external systems in the item's sales unit of measure, which is defined on the **General** tab of the Stock Items (IN202500) form. If an item's base UOM is different from its sales UOM, during the synchronisation of the *Product Availability* entity, the item's available quantity is converted from the base UOM to the sales UOM before the quantity is exported to an external system.

> **Important:** To avoid discrepancies in sales orders imported into MYOB Advanced, we recommend that before changing an item's sales UOM, a user makes sure that there are no unsynchronised sales orders that contain the item. Also, the user should synchronise the item's available quantity immediately after changing its sales UOM so that new orders for the item are created in the external system with the updated UOM.

Multiple Guest Customer Accounts

In previous versions of MYOB Advanced, orders that were placed in an external system by guest customers (for example, customers that make purchases at a point of sale or create orders on a BigCommerce website without signing in) and then imported into MYOB Advanced were created in MYOB Advanced for a single customer account assigned to all such orders. If an excessive number (that is, hundreds of thousands) of orders has been assigned to the guest customer, this could lead to performance issues. In MYOB Advanced 2022.2, this issue has been addressed, as described in the following section.

Use of Multiple Guest Customer Accounts

Starting in MYOB Advanced 2022.2, an administrator can set up the system to use multiple guest customer accounts to record guest sales orders imported from BigCommerce or Shopify. To do so, the administrator selects the new **Use Multiple Guest Accounts** checkbox (see item 1 in the following screenshot) on the **Customer Settings** tab of the *BigCommerce Stores* (BC201000) or *Shopify Stores* (BC201010) form. (See the following screenshot).
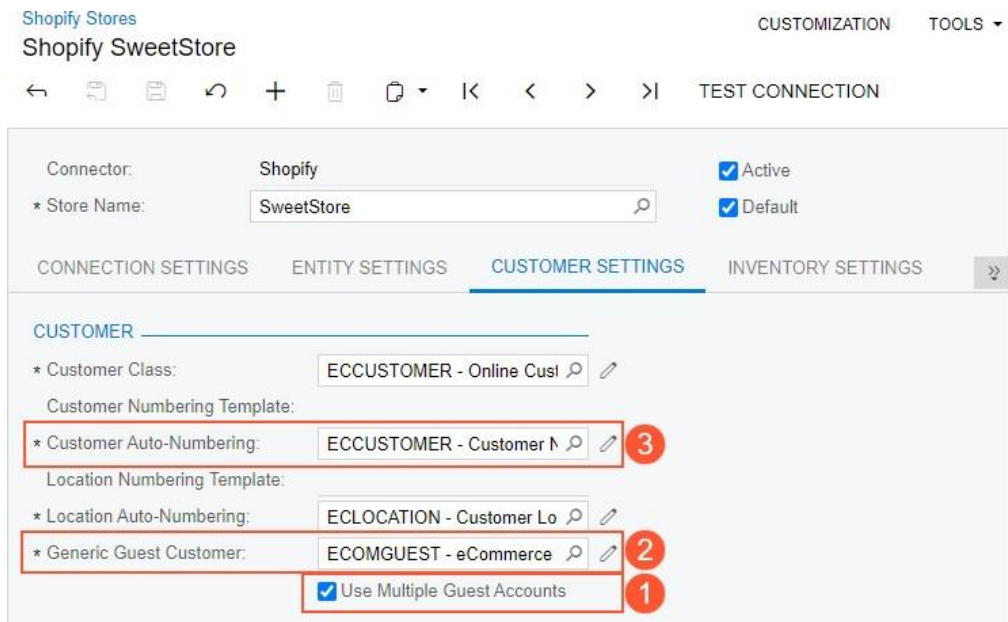
When this checkbox is selected, this system limits the number of sales orders that can be created in MYOB Advanced for the customer account selected in the **Generic Guest Customer** field of the same tab (see Item 2 in the previous screenshot). The customer account selected in this field that appears on imported sales orders placed by anonymous customers. By default, the allowed number of sales orders per guest customer account is limited to 10,000.

When the maximum allowed number of sales orders is exceeded, the system creates a new customer account and inserts its identifier in the **Generic Guest Customer** field. The settings of the new customer account are copied from the previous generic guest customer account, and its identifier is generated based on the numbering sequence specified in the **Customer Auto-Numbering** field of the tab (Item 3).

External Description in Synchronisation Records

In previous versions of MYOB Advanced, when an entity was synchronised with an external e-commerce system, the synchronisation records of the entity displayed on the Process Data (BC501500) and Sync History (BC301000) forms included information about only the identifier of the entity in the external system.

Starting in MYOB Advanced 2022.2, on the Process Data and Sync History forms, a new column, External Description (shown in the following screenshot), has been added to simplify the identification of particular synchronisation records.
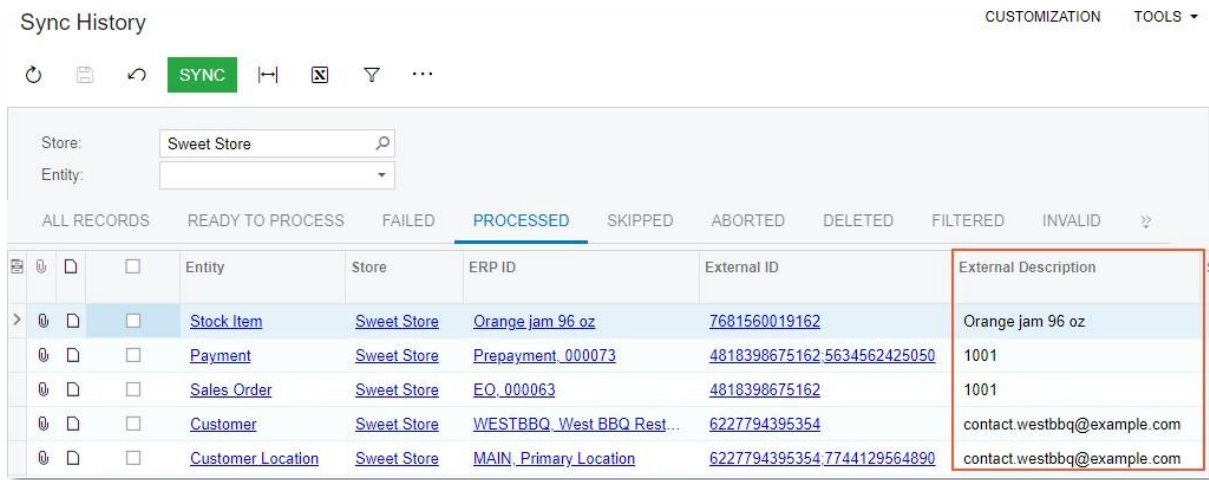
The following table summarises the information this column displays for each entity for a BigCommerce store and a Shopify store.

Entity	External Description for Shopify	External Description for BigCommerce
Customer Price Class	N/A	Email address
Customer	Email address	Email address
Customer Location	Email address	Email address
Sales Category	N/A	Sales category name
Stock Item	Product name	Product name
Non-Stock Item	Product name	Product name
Template Item	Product name	Product name

Entity	External Description for Shopify	External Description for BigCommerce
Base Sales Price	N/A	Product name If the base price is defined for a matrix item, the product name of the matrix item
Price List	N/A	Price list name
Product Image	Product name	Product name
Product Availability	Product name	Product name
Sales Order	Shopify order number	BigCommerce order number
Payment	Shopify order number	BigCommerce order number
Shipment	Shopify order number	BigCommerce order number; tracking number (if it exists)
Refund	Shopify order number	BigCommerce order number

CRM

Enhanced Marketing Lists and Campaigns

In MYOB Advanced 2022.2, users can add multiple members to marketing lists and campaigns, and manage the members and subscriptions quickly and easily.

New Layout of the Marketing Lists Form

In previous versions of MYOB Advanced, adding or updating multiple members of a marketing list could be time-consuming, and a user could manage subscriptions of only one list member at a time. Starting in MYOB Advanced 2022.2, the layout of the Marketing Lists (CR204000) form has been significantly changed (see the screenshot below).

The form now has a More menu with the following commands:

- **Convert to Static List** (for details, see the Enhancements to Static and Dynamic Marketing Lists section)
- **Convert to Dynamic List**: If a user confirms the intention to convert the list, the **Generic Inquiry** and **Shared Filter** fields appear in the Summary area (see Items 1 and 2 in the following screenshot). The user can open the generic inquiry in a new browser tab by clicking the icon to the right of the **Generic Inquiry** field.

In the new **Status** field, the user can select *Active* or *Inactive* for the marketing list (Item 3).

The **Used in Campaigns** tab has been added (Item 4). On this tab, users can see all the marketing campaigns that the current marketing list has been added to.

Also, the **Configuration Options** and **Selection Criteria** tabs have been removed from the form. The **Activities** tab has been hidden and can be shown through a customisation.

The table toolbar of the **List Members** tab of this form has the following new buttons (see Item 5 in the previous screenshot):

- **Add Members**: Opens a menu that lists the **Add from Generic Inquiry**, **Add from Marketing Lists**, and **Add from Campaigns** commands. These commands are available only if the marketing list is static. For details, see the *Addition of New Members to a Static Marketing List* section below.
- **Manage Subscription**: Opens a menu that lists the **Subscribe All** and **Unsubscribe All** commands. For details, see the *Enhanced Subscription Management* section below.
- **Copy All**: Opens the Copy Members wizard. For details, see the *Copying of Members Between Marketing Lists* section below.
- **Clear All**: Deletes all the members currently shown on all pages of the table from the marketing list.

> **Note:** Clicking the **Clear All** button deletes only members that are shown in the table when the user clicks the button (not all members of the list).

The user can do any of the following:

- Delete all the records from the table. In this case, the user would click the menu command without first filtering records.
- Search for the records that meet the needed criteria (for example, employees) and then delete all the records that meet these criteria.
- Select a filter among any available filters, and then click the button to delete all the filtered records.

Enhancements to Static and Dynamic Marketing Lists

On the Marketing Lists (CR204000) form, the default **List Type** option for a newly created marketing list is *Static* (see Item 1 in the following screenshot). A user can convert the static marketing list to a dynamic one by clicking **Convert to Dynamic List** on the form toolbar (Item 2) or the More menu.

Similarly, a dynamic marketing list can be converted to static through the **Convert to Static List** button, which is shown on the form toolbar and available on the More menu for a dynamic marketing list.

In previous versions of MYOB Advanced, if a user converted a dynamic list to a static list, the system deleted all the members from the **List Members** tab. In MYOB Advanced 2022.2, if a user clicks **Convert to Static List** on the Marketing Lists form, and at least one member is in the table on the **List Members** tab, the system displays the

following warning message: *Do you want to keep the members in this list after conversion to a static list?* The user can choose what to do with the members after conversion: keep the members or delete them from the list.

Addition of New Members to a Static Marketing List

On the **List Members** tab of the Marketing Lists (CR204000) form, a user can add new members to a static marketing list by clicking **Add Members** on the table toolbar and selecting the needed menu command.

If the user clicks **Add Members > Add from Generic Inquiry**, the **Add Members** dialog box opens, in which the user can select a generic inquiry, select any shared filter for the generic inquiry (including *All Records*), and add the members from the generic inquiry to the marketing list (see the following screenshot).

If the user clicks **Add Members > Add from Marketing Lists**, the **Add Members from Marketing Lists** dialog box opens. In the dialog box, the user can select any number of marketing lists (see Item 1 in the following screenshot) and add the members from these lists to the marketing list (Item 2).

If the user clicks **Add Members > Add from Campaigns**, the **Add Members from Campaigns** dialog box opens. In the dialog box, the user can select any number of marketing campaigns (see Item 1 in the following screenshot) and add the members from the campaigns to the marketing list (Item 2).

Enhanced Subscription Management

On the table toolbar of the **List Members** tab of the Marketing Lists (CR204000) form, a user can click **Manage Subscription > Subscribe All** or **Manage Subscription > Unsubscribe All**.

> **Note:** Clicking the **Subscribe All** or **Unsubscribe All** button subscribes or unsubscribes only members that are displayed in the table when the user clicks the button (not all members of the list).

Depending on when the user clicks the menu command, the user can do any of the following:

- Subscribe or unsubscribe all the members listed on the tab to the marketing list. In this case, the user would click the menu command without first filtering records.
- Search for the records that meet the needed criteria (for example, email address and business account) and then click the menu command to subscribe or unsubscribe all the members that meet these criteria.
- Select a filter among any available filters, and then click the menu command to subscribe or unsubscribe all the members that are included in the filter.

Copying of Members Between Marketing Lists

A user can copy members from a dynamic or static marketing list to a new static list or to any number of selected static lists. On the **List Members** tab of the Marketing Lists (CR204000) form, when the user clicks the **Copy All** button on the table toolbar, the first page of the Copy Members wizard opens (see the following screenshot).

On this page of the wizard, if the user selects **Add All Members to a New Static List** (see Item 1 in the left screenshot below) and clicks **Next** (Item 2), the **Add Members to a New Marketing List** page opens, and the user can do any of the following:

- Populate the required UI elements with values and create a new list by clicking **Create** (Items 3 and 4 in the right screenshot)

- Populate the required UI elements with values, create the new list, and open the new marketing list on the same form by clicking **Create and Review**
- Cancel the creation of the list by clicking **Cancel**

On the first page of the wizard, if a user selects **Add All Members to Existing Static Lists** (see Item 1 in the left screenshot below) and clicks **Next** (Item 2), the **Add Members to Marketing Lists** page opens, and the user can do either of the following:

- Copy all members from the current marketing list to the selected marketing lists by selecting the target lists and clicking **Copy** (Items 3 and 4 in the right screenshot)
- Cancel the copying of the members from the current list to the selected marketing lists by clicking **Cancel**

Improved Layout of the Marketing Campaigns Form

In previous versions of MYOB Advanced, on the Marketing Campaigns (CR202000) form, a user could add multiple members to a campaign by using the **Add Members** dialog box. This process involved many unnecessary clicks, and the user needed to apply multiple filters in order to manage members being added to the campaign.

Starting in MYOB Advanced 2022.2, on the Marketing Campaigns form, the new **Marketing Lists** tab has been added (see the following screenshot). The tab shows all the static and dynamic marketing lists available in the system.

The user can add members from a list or multiple lists by selecting the needed checkboxes left of the marketing list IDs and saving the changes to the form. If the user changes the set of selected

marketing lists and clicks **Save**, the system shows the following warning message: *You have updated the set of marketing lists for the campaign. You can update the campaign members or keep the current members*. The user can keep the current campaign members or update the members from the newly selected set of marketing lists.

On the **Members** tab of the Marketing Campaigns form, the following changes have been made (see the screenshot below):

- The **Update List** button has been added (see Item 1 in the following screenshot). If a user clicks the button, the system updates the members that have been added from marketing lists to the campaign. Thus, any changes that have been made to the members of the marketing lists will be applied to the members of the marketing campaign. Manually added members remain in the campaign.
- A Search field has been added.
- The **Clear All** button has been added (Item 2). A user can filter records in the table or search for records that meet the needed criteria and delete the selected members. Alternatively, the user can delete all the members currently listed in the table.
- The **Add New Members** button has been removed.
- The **Marketing List ID** column has been added (Item 3). In this column, a user can see the source of the listed members.

Subscription Management for a Particular Lead, Contact, or Business Account

In previous versions of MYOB Advanced, in order to subscribe a member (a lead, contact, or business account) to a marketing list, a user had to manually add a static marketing list to the **Marketing Lists** tab of the Leads (CR301000), Contacts (CR302000), or Business Accounts (CR303000) form, respectively.

Starting in MYOB Advanced 2022.2, static and dynamic marketing lists are added to the **Marketing Lists** tab of the Leads, Contacts, and Business Accounts form automatically. A user can subscribe the member (that is, the lead, contact, or business account selected on the form) to the needed static marketing lists by selecting the **Subscribed** checkbox (which is initially cleared for a newly created list) for the list and saving these changes.

Also, on the **Marketing Lists** tab of the Leads, Contacts, and Business Accounts forms, the **Manage Subscription** menu has been added (see the following screenshot). By using its **Subscribe All** and **Unsubscribe All** commands, a user can subscribe the member to all the marketing lists shown on the tab or unsubscribe the member from all these lists.

A user can also unsubscribe a member from a marketing list by doing either of the following on the **List Members** tab of the Marketing Lists (CR204000) form:

- For a dynamic or static marketing list, clearing the **Subscribed** checkbox for the member
- For a static marketing list, deleting the member and saving the changes

In either of these cases, for the member, the system will clear the **Subscribed** checkbox for the marketing list on the **Marketing Lists** tab of the Leads, Contacts, or Business Accounts form.

Minor Enhancements to the Leads, Contacts, and Business Accounts Forms

On the **Campaigns** tab of the Leads (CR301000), Contacts (CR302000), and Business Accounts (CR303000) forms, a Search field has been added and the set of columns has been changed (see the following screenshot).

Additional Information

For details about the management of marketing lists and campaigns, see Managing Marketing Lists and Managing Marketing Campaigns in the in-product help.

Side Panels with Marketing Data for CRM Entities

In MYOB Advanced 2022.2, a side panel has been added to the lists of marketing campaigns and marketing lists, and a tab has been added to the side panels of the lists of business accounts and contacts. These side panels give a user the ability to view the list of records while simultaneously viewing (and modifying, if necessary) various information related to any record selected in the list.

On the side panel of the Marketing Lists (CR2040PL) list of records, the settings of the selected marketing list on the Marketing Lists (CR204000) form can be viewed. On the side panel of the *Marketing Campaigns (CR2020PL)* list of records, the **Campaign Summary** tab has been added, which allows the user to view a dashboard showing summary statistics of the selected campaign, along with the progress and results of the selected marketing campaign.

On the side panels for the *Business Accounts (CR3030PL)* and *Contacts (CR3020PL)* lists of records, the **Marketing** tab has been added to give users easy access to key statistics related to the marketing campaigns that are associated with the selected contact or business account.

Side Panels for the Lists of Marketing Campaigns and Marketing Lists

In previous versions of MYOB Advanced, to see details about a particular marketing campaign or marketing list while viewing the list of records, a user had to open the record, view the information, and then close the entry form to return to the list of records; this process could be time-consuming. Starting in MYOB Advanced 2022.2, side panels are shown on the Marketing Campaigns (CR2020PL) and Marketing Lists (CR2040PL) lists of records. With these side panels, a user can have a comprehensive view of the settings of a record without opening it on the form. Thus, the user can quickly find, view, and modify information related to the selected record.

When a user selects a record on the *Marketing Lists* list of records, the settings of the selected marketing list on the

Marketing Lists (CR204000) form are shown on the side panel. (See the following screenshot.)

On the *Marketing Campaigns* list of records, in addition to the ability to view the details of the selected record, a user can view summary analytics and statistics about the progress and effectiveness of the marketing campaign selected in the list of records.

The following screenshot shows the **Campaign Summary** tab (Item 1) on the side panel of the *Marketing Campaigns* list of records.
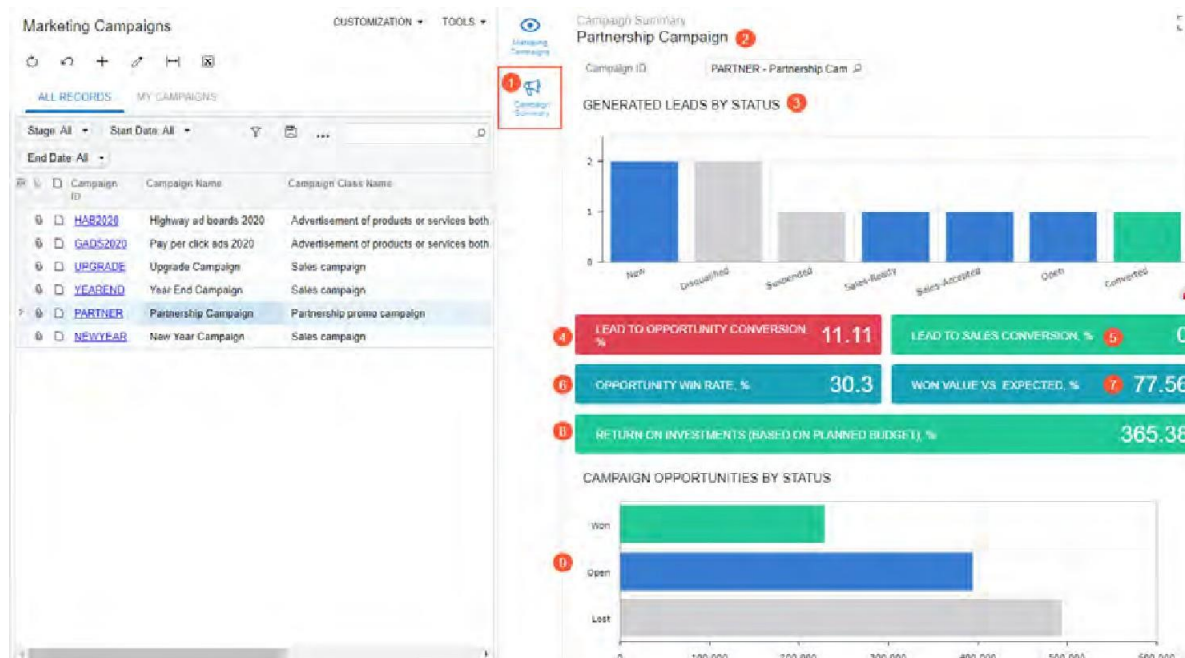
For the selected campaign (Item 2), the dashboard on the tab displays the following widgets (Items 3–9 in the previous screenshot):

- *Generated Leads by Status*: This widget (Item 3) shows the number of leads generated by the selected marketing campaign by lead status. The user can use this information to estimate how the sales have been progressing since the campaign was started. To show leads with different statuses, the following colour-coding of columns is used: blue for leads in work, grey for disqualified leads, and green for converted leads. The colour-coding can be changed by a system administrator.

- *Lead to Opportunity Conversion, %*: This widget (Item 4) shows how many leads generated as a result of the selected marketing campaign were converted to opportunities. The value is calculated by the following formula and expressed as a percentage: (**Leads Converted / Leads Generated**) * 100. These calculations are based on the settings specified on the **Campaign Details** tab of the Marketing Campaigns (CR202000) form. To show the level of lead conversion, the following colour-coding of the widget is used: red for less than 13%, and green for 13% or more. The value of the threshold can be changed by a system administrator.

- *Lead to Sales Conversion, %*: This widget (Item 5) shows the proportion of the number of qualified leads generated by the selected marketing campaigns that have resulted in sales to the total number of leads generated by the campaign. The value is calculated by the following formula and expressed as a percentage: (**Won Opportunities / Leads Generated**) * 100. These calculations are based on the settings specified on the **Campaign Details** tab of the Marketing Campaigns form.

- *Opportunity Win Rate, %*: This widget (Item 6) shows the proportion of the number of opportunities with the *Won* status to the total number of opportunities created from the selected marketing campaign. The value is calculated by the following formula and displayed as a percentage: (**Won Opportunities / Opportunities**) * 100. These

calculations are based on the settings specified on the **Campaign Details** tab of the Marketing Campaigns form.

- *Won Value vs. Expected, %*: This widget (Item 7) shows the comparison of the actual value of the opportunities with the *Won* status to the expected value of opportunities for the campaign. The value is calculated by the following formula and expressed as a percentage: (**Won Opportunities Value** / **Expected Return**) * 100. These calculations are based on the settings specified on the **Campaign Details** tab of the Marketing Campaigns form.

- *Return on Investments (Based on Planned Budget), %*: This widget (Item 8) shows the profitability of the campaign. The value is calculated by the following formula and expressed as a percentage: (**Won Opportunities Value** – **Planned Budget**) / **Planned Budget** * 100. These calculations are based on the settings specified on the **Campaign Details** tab of the Marketing Campaigns form.

- *Campaign Opportunities by Status*: This widget (Item 9) shows the number of opportunities generated by the selected marketing campaign by status. This data can help the user to estimate how many opportunities could be successful. To show opportunities with different statuses, the following colour-coding of bars is used: blue for open opportunities, grey for lost opportunities, and green for won opportunities. The colour-coding can be changed by a system administrator.

Lists of records are also generic inquiry forms that generic inquiry designers sometimes modify on the Generic Inquiry (SM208000) form. If the *CR-Campaigns* or *CR-Marketing Lists* generic inquiry (which corresponds to the *Marketing Campaigns* or *Marketing Lists* list of records, respectively) has been modified before the upgrade to the MYOB Advanced 2022.2, a generic inquiry designer should reset the settings of this form to the default settings before or after the upgrade has been done. This step ensures that the new side panels of these lists of records can be used. To reset the settings of the generic inquiry, the designer selects the generic inquiry on the Generic Inquiry form and clicks **Clipboard** > **Reset to Default** on the form toolbar.

Marketing Tab on the Side Panels for Business Accounts and Contacts

In previous versions of MYOB Advanced, a user had to seek and collect information about marketing campaigns associated with a selected contact or business account and their leads. This involved manually opening different forms and finding needed records, which could be labour-intensive. Starting in MYOB Advanced 2022.2 the user can get all this information by clicking the **Marketing** icon on the side panel of the *Business Accounts (CR3030PL)* or *Contacts (CR3020PL)* list of records.

The following screenshot shows the *Business Accounts (CR3030PL)* form with the **Marketing** tab selected on the side panel (Item 1).

The **Marketing** tab contains a dashboard with four widgets for the selected business account (Item 2 in the previous screenshot), to quickly provide information about marketing campaigns to the user. The first two widgets (Items 3 and 4) give the user summary information about marketing campaigns associated with the selected business account. The remaining widgets (Items 5 and 6) provide information about the leads generated by campaigns.

Lists of records are also generic inquiry forms that generic inquiry designers sometimes modify on the Generic Inquiry (SM208000) form. If the *CR-BusinessAccounts2018R1* or *CR-Contacts2018R1* generic inquiry (which corresponds to the *Business Accounts* or *Contacts* list of records, respectively) has been modified before the upgrading to MYOB Advanced 2022.2, a generic inquiry designer should reset the settings of this form to the default settings before or after the upgrade has been done. This step ensures that the new side panels of these lists of records can be used. To reset the settings of the generic inquiry, the designer selects the generic inquiry on the Generic Inquiry form and clicks **Clipboard** > **Reset to Default** on the form toolbar.

The Currency of Business Accounts and Related Entities

In MYOB Advanced 2022.2, users can select a currency for a business account class and a particular business account. If a business account is extended to be a customer, the currency is synchronised between the business account and the associated customer. Also, the default currency of an opportunity or sales quote is affected by the business account specified for it.

The following sections describe these dependencies and the changes on the CRM forms.

Changes to the Customer Management Preferences Form

In previous versions of MYOB Advanced, on the Customer Management Preferences (CR101000) form, an administrator specified the default currency for customer relationship management (CRM) and indicated whether it could be overridden.

Starting in MYOB Advanced 2022.2, the **Default Currency** field and **Enable Currency Override** checkbox have been removed from the **General** tab (**Miscellaneous Settings** section) of the Customer Management Preferences form.

Users can specify these currency settings for each business account class and business account specified in an opportunity or a sales quote. For details, see the following sections.

Currency Selection for Business Account Classes and Business Accounts

In previous versions of MYOB Advanced, users could not select the default currency for a particular business account. For example, if the company using MYOB Advanced was located in the United States and a prospect was located in Canada, it was not possible to specify Canadian dollars as the prospect's currency and calculate prices in the opportunity in this currency.

Starting in MYOB Advanced 2022.2, a user can select a currency in a business account class and a business account of the *Prospect* customer status.

On the **Details** tab of the Business Account Classes (CR208000) form, the **Financial Settings** section, which contains the **Currency ID** field and the **Enable Currency Override** checkbox, has been added (see the following screenshot).

The system inserts the default currency settings for each new business account class depending on the settings on the **General** tab (**Data Entry Settings** section) on the Customer Management Preferences (CR101000) form as follows:

- If an account class is specified in the **Default Business Account Class** field, copies the currency specified in the **Currency ID** field and the state of the **Enable Currency Override** checkbox on the Business Account Classes form from the default account class to each new account class
- If no account class is specified in the **Default Business Account Class** field of the Customer Management Preferences form, leaves the **Currency ID** field empty and selects the **Enable Currency Override** checkbox for a new account class

When a user creates a business account and selects the business account class, the currency and the state of the checkbox for the class are copied to the business account. The **Financial Settings** section has been added on the **CRM Info** tab of the Business Accounts (CR303000) form. This section contains the **Currency ID** field and the **Enable Currency Override** checkbox (see the following screenshot). The user can change the currency and the status of the checkbox in a particular business account (even if the **Enable Currency Override** checkbox is cleared for the business account class).

> **Note:** If a business account class is changed or removed for a business account that has been extended to be a customer, the account's currency settings are not changed.

The Currency of a Business Account Extended To Be a Customer

If a business account is extended to be a customer, the system copies the currency and the state of the **Enable Currency Override** checkbox from the customer class on the Customer Classes (AR201000) form to both the business account on the Business Accounts (CR303000) form and the customer on the Customers (AR303000) form.

The currency settings are synchronised between a business account and a customer. If the currency settings are changed for a customer, the same settings are changed for the corresponding business account. Similarly, if the currency settings are changed for a business account, the same settings are changed for the corresponding customer.

The Currency of an Opportunity and a Sales Quote

On the Opportunities (CR304000) and Sales Quotes (CR304500) forms, the system inserts the currency in the **Currency** field of the Summary area based on the **Business Account** setting of the record (when a user creates a new record, changes the setting, or clears the field).

To determine the currency, the system considers the **Currency** setting and the state of the **Enable Currency Override** checkbox of the business account on the Business Accounts (CR303000) form. It also considers the current currency of the opportunity or sales quote and whether there are lines on the **Details** tab of the Opportunities or Sales Quotes form. The system determines the currency to be inserted for the opportunity or sales quote based on the following rules:

- If no business account is specified for the opportunity or sales quote, the system inserts the base currency of the record's branch; this branch is specified in the **Branch** field on the **Financial** tab (**Financial Settings** section) of the Opportunities or Sales Quotes form. This rule is applicable both when a new record is created and when a user clears the **Business Account** field.

  > **Note:** The base currency of the branch is specified for the company on the **Details** tab of the Companies (CS101500) form.

- If the selected business account has a different currency than the opportunity or sales quote currently has, the **Enable Currency Override** checkbox is selected for the business account, and the opportunity or sales quote has no detail lines, the currency of the opportunity or sales quote is changed to the currency of the business account.
- If the selected business account has the same currency as the opportunity or sales quote currently has, the currency of the opportunity or sales quote remains unchanged. This rule applies whether or not the opportunity or sales quote has detail lines.
- If the selected business account has a different currency than the opportunity or sales quote currently has, the **Enable Currency Override** checkbox is selected for the business account, and the opportunity or sales quote has at least one detail line, the currency of the opportunity or sales quote remains unchanged.
- If the selected business account has a different currency than the opportunity or sales quote currently has, the **Enable Currency Override** checkbox is cleared for the business account, and the opportunity or sales quote has at least one detail line, the system displays an error message and the user cannot save the changes to the Opportunities or Sales Quotes form.
- If the selected business account has a different currency than the opportunity or sales quote currently has, the **Enable Currency Override** checkbox is cleared for the business account, and the opportunity or sales quote has no detail lines, the currency of the opportunity or sales quote is changed to the currency of the business account.

Mobile App

In the MYOB mobile app, the **Currency ID** field has been added to the *Business Account* screen of the mobile app, as shown in the following screenshot. The field is unavailable for editing.
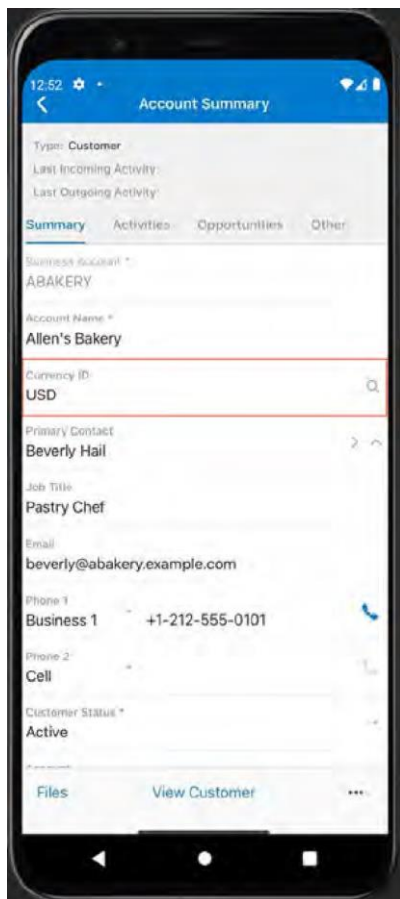
Additional Information

For details about the currency of business accounts and the related entities, see Opportunity Management: Currency in Opportunities and Sales Quotes in the in-product help.

The Ability to Change the Business Account in Opportunities and Sales Quotes

In MYOB Advanced 2022.2, users can change a business account in an opportunity or a sales quote, even if the opportunity or the sales quote has rows added on the **Details** tab of the Opportunities (CR304000) or Sales Quotes (CR304500) form.

Also, users can create sales quotes that are associated with the same opportunity for multiple business accounts (which may be prospects or customers).

Changing of the Business Account in an Opportunity

In previous versions of MYOB Advanced, if at least one row had been added to an opportunity on the **Details** tab of the Opportunities (CR304000) form, a user could not change the business account in an opportunity. For example, if the prospect or customer specified in the **Business Account** field became a different legal entity, the user had

to either create a new opportunity for the new business account or to remove the rows from the **Details** tab before making this change. Also, if a user had to create an opportunity for a business account that was similar to an opportunity for an existing account, the user could not copy the existing opportunity and specify a different account in the new opportunity.

Starting in MYOB Advanced2022.2, a user can change a business account in the **Business Account** field for an opportunity that has rows on the **Details** tab if both of the following conditions are met:

- The opportunity has the *New* or *Open* status.
- If the opportunity has any sales quotes (primary or non-primary), each quote has the *Draft* status.

If the user changes the business account, the system does the following based on the settings of the new business account:

- Recalculates the following settings in the Summary area of the Opportunities form: **Amount**, **Discount**, **Tax Total**, and **Total**
- Recalculates the settings on the **Taxes** and **Discounts** tabs
- Updates the following settings: **Location**, **Contact**, and **Currency**

For details about the changing of the currency in an opportunity after the business account has been changed, see CRM: The Currency of Business Accounts and Related Entities. For details about the changing of the contact in an opportunity after the business account has been changed, see CRM: Other Improvements.

Changing of the Business Account in a Sales Quote

In previous versions of MYOB Advanced, if at least one row had been added to a sales quote on the **Details** tab of the Sales Quotes (CR304500) form, a user could not change the business account in the sales quote.

Starting in MYOB Advanced2022.2, a user can change the business account in the **Business Account** field for a sales quote if both of the following conditions are met:

- The quote (whether it is primary or non-primary) has the *Draft* status.
- The opportunity associated with the sales quote has the *New* or *Open* status.

If the user attempts to change the business account for a sales quote, the system displays a warning dialog box (see the following screenshot) if on the **Contact** tab, the **Override** checkbox has been selected, meaning that the quote's contact settings may have been modified. The user needs to select one of the buttons to indicate how the system should proceed.

Creation and Tracking of Sales Quotes for Multiple Prospects or Customers

Starting in MYOB Advanced2022.2, if an opportunity has multiple sales quotes on the Sales Quotes (CR304500) form, an opportunity can have multiple sales quotes whose business accounts differ from the business account specified for the opportunity on the Opportunities (CR304000) form.

> **Note:** A sales quote can have a different business account than that of the opportunity only if the following conditions are met:

- The quote (whether it is primary or non-primary) has the *Draft* status.
- The opportunity associated with the sales quote has the *New* or *Open* status.

In an opportunity that has sales quotes for different prospects or customers, a user can easily see the business account, location, and contact of each sales quote. On the **Quotes** tab of the Opportunities form, the following columns have been added to the list of available columns: **Business Account**, **Location**, and **Contact**. A user can add these columns to the list of the selected columns by using the **Column Configuration** dialog box (see the following screenshot).

Relations Between Sales Orders and Associated Entities

MYOB Advanced 2022.2 introduces the ability to track and manage bidirectional relations between a sales order, an opportunity, and a sales quote. Also, a user can track one-way relations between a sales order and a variety of records associated with it. These records include CRM entities and other system entities, such as an AR invoice, an expense receipt, a purchase order, or a supplier. While viewing a sales order on the Sales Orders (SO301000) form, a user can now manually associate any of these records with the sales order and view the associated records on the **Relations** tab.

The following sections provide additional details about the new functionality of relations between these entities.

Relations Between Sales Orders, Opportunities, and Sales Quotes

In previous versions of MYOB Advanced, if a sales order was associated with an opportunity or a sales quote, the relation between the sales order and the opportunity and between the sales order and the sales quote was shown only on the Opportunities (CR304000) or Sales Quotes (CR304500) form, respectively. Starting in MYOB Advanced 2022.2, on the Sales Orders (SO301000) form, the **Relations** tab appears on the form, and it shows the relations between the selected sales order and an opportunity and between the sales order and a sales quote (see the following screenshot). The tab also shows any other relations that have been manually added for the sales order.

> **Note:** The **Relations** tab is shown on the Sales Orders form only if the Customer Management feature is enabled on the Enable/Disable Features (CS100000) form.

Relational Roles Supported for Sales Orders

MYOB Advanced supports *one-way* and *bidirectional* relations between a sales order and the associated records. The pairs of bidirectional roles are shown in the following table. With bidirectional roles, roles are associated with each other in both directions: an original role (shown on the **Relations** tab of the record where the relation was originally specified) and a reverse role (shown on the **Relations** tab of the associated record). For example, if a sales order (original record) is created from a sales quote (associated record), then the quote becomes the source of the sales order, and the sales order becomes the derivative document for the quote. The relations between the bidirectional roles are established in the system, a fixed set of relations between the roles is supported, and no pairs can be used beyond those listed in the table.

Original Role	Reverse Role
Source	*Derivative*
Derivative	*Source*
Parent	*Child*
Child	*Parent*

A user can manually add bidirectional roles to the Relations tab if the user created a sales order directly on the Sales Orders (SO301000) form or if a sales order was imported to the system.

The system also supports the one-way *Related Entity* relational role for sales orders. By using this role, the user can manually add relations with such entities as business accounts, cases, or employees, or other sales orders to a sales order. The Related Entity role is shown only on the Sales Orders form for a sales order.

The **Role** column on the **Relations** tab shows one-way and bidirectional roles for a sales order. If a sales order has a relation with an opportunity that is the source of the sales order, then the **Relations** tab shows a relation with the opportunity, and the relation has the *Source* role (Item 1 in the following screenshot). In the **Type** column, the *Opportunity* entity type is shown (Item 2). The user can select various types of entities that can be associated with a sales order (Item 3). The **Add to CC** checkbox—which indicates, if selected, that the contact should receive a copy of notification emails—for the reverse role is always cleared (Item 4), but the user can manually select the checkbox.

For this opportunity, the **Relations** tab of the Opportunities (CR304000) form shows a relation with the sales order, and the relation has the *Derivative* role (see the following screenshot).

Usage Notes

A user can manually delete relations from the **Relations** tab of the Sales Orders (SO301000) form unless the sales order has the *Completed* or *Cancelled* status. If it has one of these statuses, the set of roles in the table is unavailable for editing.

If a user copies a sales order by using the **Copy** command on the **Clipboard** menu or the **Copy Order** command on the More menu, the roles on the **Relations** tab are not copied to a new sales order.

Relations for Sales Orders in the Mobile App

In the MYOB mobile app, the **Relations** tab has been added to the *Sales Order* screen (see the following screenshot).
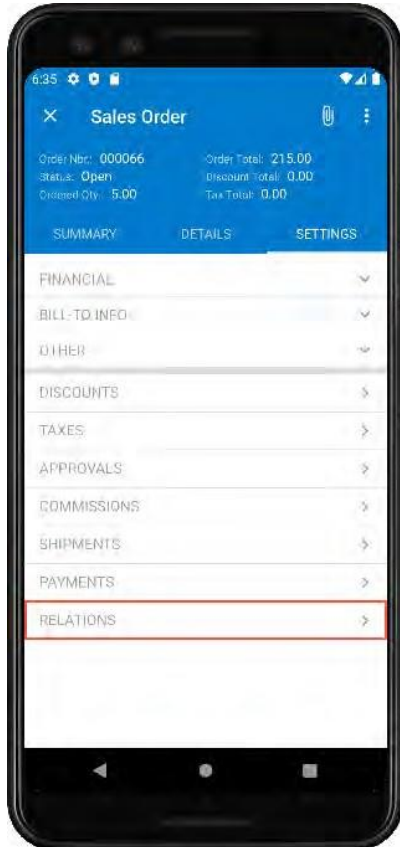
If the user taps **Relations**, the user can see the list of the sales order's relational roles (see the following screenshot).
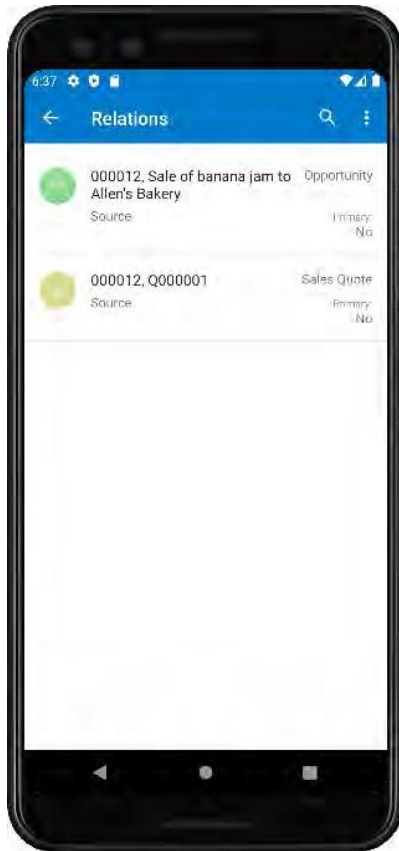
If the user taps a row of the tab, the user can view the relational role of the associated entity and information about the entity. The following screenshot shows information about the sales quote that is associated with the sales order.
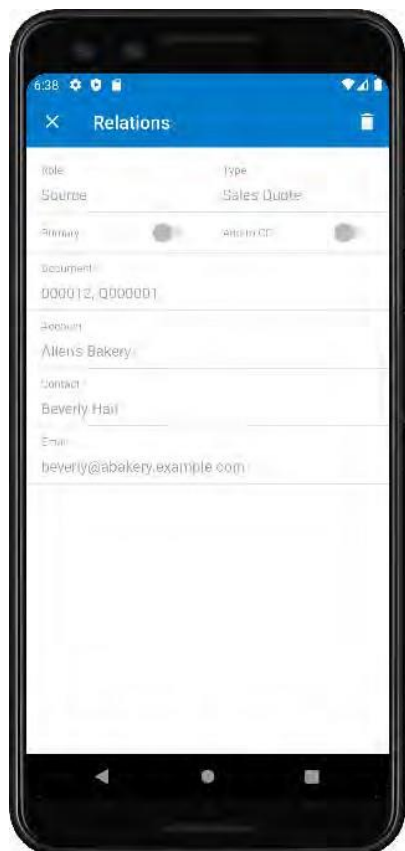
Additional Information

For details about the relations between sales orders, opportunities, and other associated entities, see Relations: Sales Orders, Opportunities, and Other Entities in the in-product help.

Other Improvements

MYOB Advanced 2022.2 introduces multiple improvements to the customer relationship management (CRM) functionality, as described below.

Changes to the Length of Identifiers for CRM Entities

In previous versions of MYOB Advanced, although a numbering sequence on the Numbering Sequences (CS201010) form had a limit of 15 characters, the length of identifiers for CRM entities without segmented keys had a limit

of 10 characters. The following entities had the lower character limits for IDs: cases, marketing lists, campaigns, mass emails, opportunities, sales quotes, and project quotes. If a system administrator configured the numbering sequence of any of these entities to have more than 10 symbols, an error occurred.

Starting in MYOB Advanced 2022.2, the length of a record's ID may have up to 15 characters on the following forms:

- Cases (CR306000)
- Marketing Lists (CR204000)
- Marketing Campaigns (CR202000)
- Mass Emails (CR308000)
- Opportunities (CR304000)
- Sales Quotes (CR304500)

Also, the maximum length of the project quote ID on the Project Quotes (PM304500) form has been increased and now may consist of up to 15 characters.

The Ability to Create a Contact in a Sales Quote

In MYOB Advanced2022.2, users can create a new contact or business account associated with a sales quote directly from the Sales Quotes (CR304500) form. On the More menu (under **Record Creation**), the **Create Contact** and **Create Account** commands have been added (see the following screenshot). The **Create Contact** command is available if the quote has the *Draft* status and the **Contact** field in the Summary area is empty. The **Create Account** command is available if the quote has the *Draft* status and the **Business Account** field in the Summary area is empty.

Enhancements to the Changing of a Contact in CRM Entities, Project Quotes, and Sales Orders

Starting in MYOB Advanced 2022.2, the system uses new rules to insert a contact in the **Contact** field of particular forms. These rules apply if a user changes or initially specifies the business account in the **Business Account** field of the Summary area of the following forms:

- Opportunities (CR304000)
- Sales Quotes (CR304500)
- Cases (CR306000)
- Project Quotes (PM304500)

To insert the new contact in the **Contact** field of these forms, the system uses the following rules, which are based on the business account's settings on the Business Accounts (CR303000) form:

- If the business account has an active primary contact specified on the **General** tab, it inserts this contact.
- If the business account has only one active contact specified on the **Contacts** tab, it inserts this contact.
- If the business account has no active primary contact and no associated active contacts specified on the
- **Contacts** tab, or the account has more than one active contact, it leaves the field empty.
- If the business account has no active primary contact and more than one associated active contact specified on the **Contacts** tab, it leaves the field empty.

If a user changes or initially specifies the customer in the **Customer** field on the Sales Orders (SO301000) form for a sales order, the system uses the following rules, which are based on the customer's settings on the Customers (AR303000) form, to find and insert the contact in the **Contact** field:

- If the customer has an active primary contact specified on the **General** tab, it inserts this contact.

- If the customer has only one active contact specified on the **Contacts** tab, it inserts this contact.
- If the customer has no active primary contact and no associated active contacts specified on the **Contacts**
- tab or the customer has more than one active contact, it leaves the field empty.
- If the customer has no active primary contact and more than one associated active contact specified on the
- **Contacts** tab, it leaves the field empty.

> **Note:** If a contact is specified in the **Contact** field on the Opportunities, Sales Quotes, Cases, Project Quotes, or Sales Orders form, and a user clears the **Business Account** field and saves changes to the form, the contact remains unchanged.

Extended Data in CRM Records

Starting in MYOB Advanced 2022.2, new available columns have been added to CRM lists of records. Before a user exports records to Excel, the user can add these columns to the list of selected columns by using the **Column Configuration** dialog box, and this data will also be exported.

List of Records	Added Column or Columns
Leads (CR3010PL)	**Lead Contact ID**
Contacts (CR3020PL)	**Contact ID**
Business Accounts (CR3030PL)	**Primary Contact ID**
Cases (CR3060PL)	• **Contact ID** • **Contact Email**
Opportunities (CR3040PL)	• **Source Lead Contact ID** • **Main Contact ID**

A column that contains the contact associated with the applicable entity has been added to the list of available columns on the following tabs of CRM data entry forms.

Form Name	Tab Name	Column Name
Contacts (CR302000)	**Leads**	**Lead Contact ID**
Business Accounts (CR303000)	**Leads**	**Lead Contact ID**
Business Accounts	**Opportunities**	• **Source Lead Contact ID** • **Main Contact ID**

Form Name	Tab Name	Column Name
Business Accounts	**Cases**	**Contact ID**

Also, on the Customers (AR303000) and Suppliers (AP303000) forms, the **Contact ID** column, which contains the associated contact's ID, has been added to the table on the **Contacts** tab.

Documentation

Improvements in User Guides

In MYOB Advanced 2022.2, multiple improvements have been made to the content and structure of the guides that make up the documentation, as described in the following sections.

Implementation Guide

The following changes and enhancements have been made in the Implementation guide:

- The Implementing Taxes part of the guide has been updated with new chapters describing how to set up a value-added tax (VAT) and a withholding tax. Activities related to VAT and withholding taxes have been added to the chapters that describe the setup of a tax agency, a tax report, and tax zones and categories.
- The Implementing Service Management part of the guide has been updated with new chapters describing how to create the following entities, which are required for the implementation of the service management functionality:

  - Branch locations
  - Service classes
  - Billing cycles
  - Skills
  - Licenses
  - Services
  - Service areas
  - Staff members
  - Staff schedules
    The following chapters have been expanded and updated:
  - Basic Service Management Configuration
  - Service Management with Inventory Sales

- The Implementing Manufacturing part of the guide has been updated with the new Implementing Production with Scrap, Waste, and By-Products chapter, in which users will learn how to perform the minimum configuration of the item production, which may include scrap, waste, and by-products.

Customer Relationship Management Guide

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

- The Managing Marketing Lists and Managing Marketing Campaigns chapters have been significantly updated, including the activities that users can perform by using the *U100* dataset.
- In the Creating Opportunities chapter, an activity has been added to describe the creation of an opportunity with an item that has no inventory ID. Users can perform this activity by using the *U100* dataset.

- In the Managing Opportunities chapter, a topic about currency in opportunities and sales quotes has been added.
- In the Managing Relations chapter, a topic about the relational roles for a sales order has been added.

Financial Management Guide

The Taxes part of the Financial Management guide has been updated with new chapters describing how to process AR and AP documents with VAT, pay taxes directly to the tax agency, process documents with withholding taxes, prepare a tax report with VAT, and apply VAT variations to documents (a deductible VAT, a reverse VAT, and a pending VAT). These chapters in the guide include activities that users can perform by using the *U100* dataset.

Manufacturing Guide

In the Manufacturing guide, the Tracking Scrap and Waste in Production chapter has been added, in which users will learn how to track scrap and waste during production in MYOB Advanced Manufacturing Edition.

Service Management Guide

Multiple changes and enhancements have been made in the Service Management guide. All chapters have been significantly updated, and all the activities can now be performed by using the *U100* dataset. New chapters have been added that include general information topics and activity topics.

Email Processing

Support of OAuth 2.0 for Google Suite
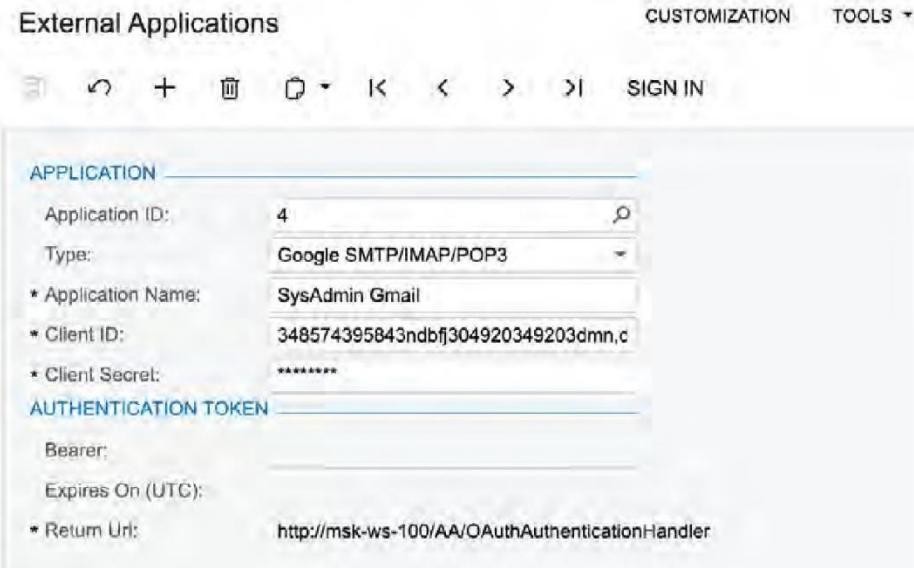
To mitigate the possibility of access being turned off for less secure apps (LSAs) to Google Suite, MYOB Advanced 2022.2 provides support for OAuth 2.0 authentication for IMAP, POP3, and SMTP protocols.

We recommend that customers change their settings to the OAuth2 method if they have configured email processing for Google services by using the username and password authentication method.

Configuration of OAuth2 Authentication

On the **Service** tab of the System Email Accounts (SM204002) form, the *Azure Modern Authentication* option in the **Authentication Method** drop-down list has been replaced with *OAuth2*.

A system administrator needs to configure OAuth 2.0 authentication for integration with Exchange Server, Exchange Online, or Gmail. The system administrator registers an account with some of the mail services and then obtains credentials for registering a corresponding external application in MYOB Advanced by using the External Applications (SM301000) form. The following screenshot demonstrates a sample configuration of a connector for the Gmail mail server.

After the connector is configured, the system administrator configures an email account on the System Email Accounts (SM204002) form, selects the *OAuth2* option in the **Authentication Method** field, and specifies the configured connector in the **External Application** field. (See the following screenshot.)

With this configuration, the **Sign In** button becomes available on the form toolbar of the System Email Accounts form. The system administrator can click **Sign In** to verify that the system can sign in to the specified external application using provided configuration.

Email Template Enhancements

MYOB Advanced 2022.2, the lookup table used to specify the placeholders of email recipients has been redesigned.

Additionally, support for the use of templates in mass emails has been added. In earlier versions of MYOB Advanced, templates could be used only for an email activity.

The Redesigned Lookup Table

The *Notification Templates* (SM204003) form has been renamed to Email Templates. The redesigned lookup table is now used for the following fields on the Email Templates (SM204000) form: **To**, **CC**, and **BCC**.

The list of placeholders for employee email addresses is available for selection on the **Emails** tab of the selector. A user can search for an employee by using the search field on the tab, as the following screenshot shows.
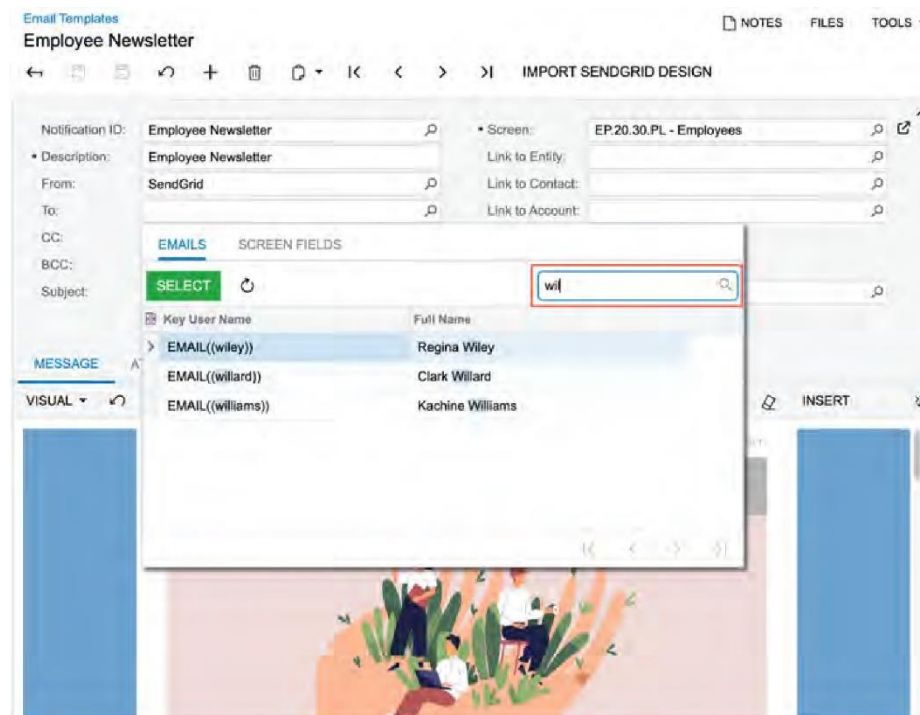
On the **Screen Fields** tab of the selector, a user can select data fields that store an email address provided by the form or a generic inquiry specified in the **Screen** field. The user can search for a data field as well (see the following screenshot).
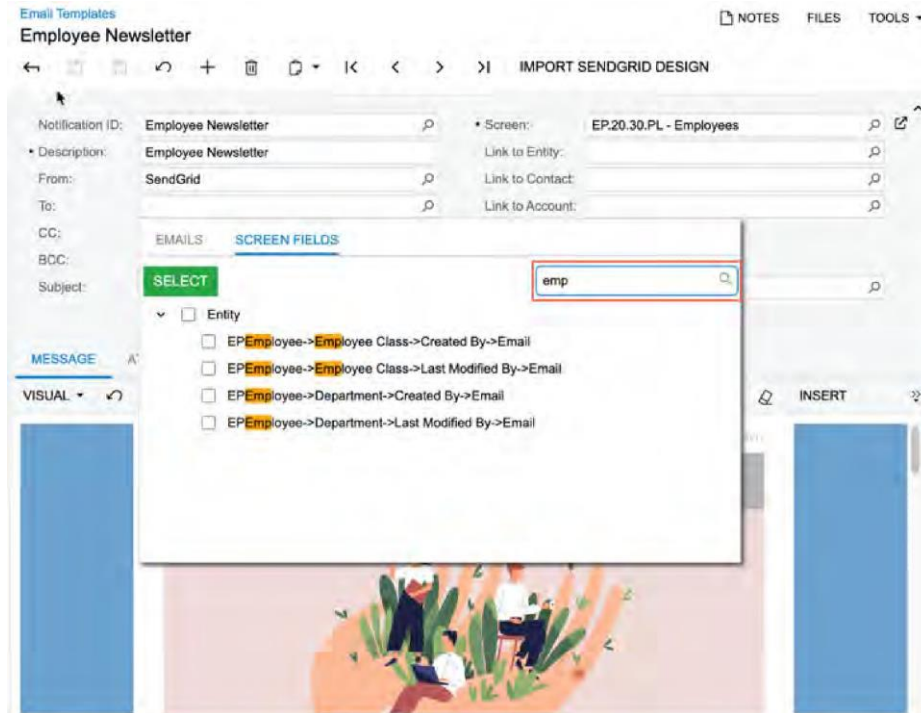
The Use of Email Templates for Mass Email

The **Select Template** button has been added to the toolbar of the Mass Emails (CR308000) form (see the following screenshot). The button becomes available after a user saves a mass email for the first time. When the user clicks **Select Template**, the system opens the **Select Template** dialog box, where the user can select the email template whose content will replace or be appended to the text entered on the **Message** tab of the mass email.
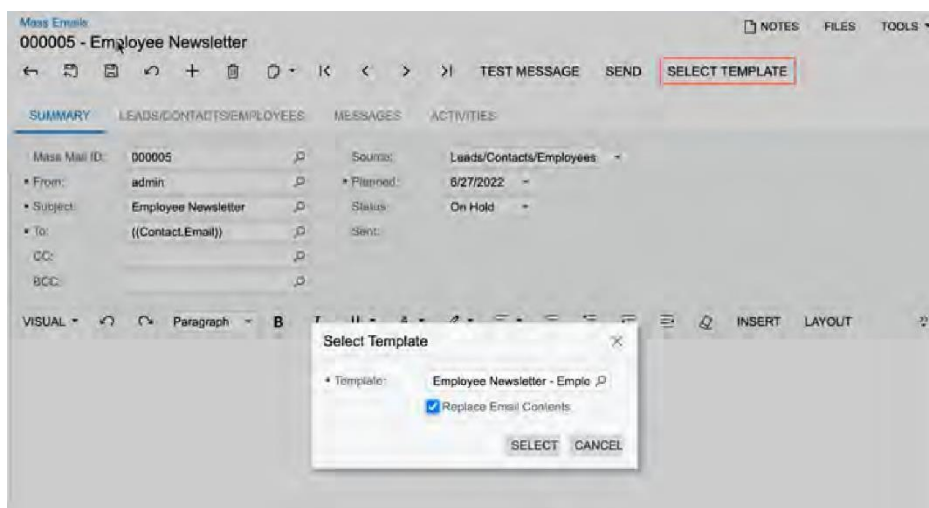
Field Services

Appointment Schedule Optimisation with Consideration of the Staff Members' Skills

In MYOB Advanced, the system can be integrated with the third-party service WorkWave Route Optimiser. This service is used to optimise the scheduling of appointments—that is, the system automatically assigns staff members to appointments according to the available hours in the staff members' work calendars. An administrative user configures the integration with WorkWave by enabling the *Workwave Route Optimisation* feature in the *Third Party Integrations* group of features on the Enable/Disable Features (CS100000) form, and specifying the WorkWave API URL and the valid license key in the **Schedule Optimisation Settings** section of the Service Management Preferences (FS100100) form. Once the integration has been configured, a user runs the process of appointment optimisation on the Optimise Appointment Scheduling (FS501400) form.

Starting in MYOB Advanced 2022.2, the appointment scheduling optimisation functionality has been enhanced so that the system considers a staff member's skills when assigning staff members to appointments. Now when a user runs the optimisation process on the Optimise Appointment Scheduling form with the new **Consider Skills** checkbox selected, the system assigns staff members to appointments not only according to staff members' work calendars but also by considering the staff members' skills.

With the new functionality, the system can assign an appropriate staff member to each appointment, and each staff member has the proper skill set needed to perform the services specified in each particular appointment.

Processing the Appointment Schedule Optimisation with Consideration of Staff Members' Skills

To run the appointment scheduling optimisation process—that is, to assign staff members automatically to appointments with consideration of staff members' work calendars and skills, on the Optimise Appointment Scheduling (FS501400) form, a user should do the following:

- Select *Unassigned Appointments* in the **Type** field of the Summary area (see Item 1 in the following screenshot)
- Fill in the **Branch**, **Branch Location**, and **Date** fields (Item 2)
- Select the new **Consider Skills** checkbox (Item 3)

Then in the staff member list (the right table), the user selects the staff member or staff members for which appointment schedule optimisation should be performed, and in the appointment list (the left table), the user selects the appointments to be optimised.

Once the user clicks **Process** on the form toolbar, the system selects the staff member to be assigned to each particular appointment while considering all of the following

- The skills specified for each staff member on the **Skills** tab of the Employees (EP203000) form
- The skills needed for performing the appointment's services, which are specified for each service on the
- **Service Skills** tab on the Non-Stock Items (IN202000) form
- The time availability of each employee, which has been entered in the work calendar specified in the
- **Calendar** field on the **General Info** tab of the Employees form

The system also calculates the optimal schedule for each selected staff member for the selected date by updating the scheduled start times of the assigned appointments.

Troubleshooting Any Issues That Occur

If the appointment schedule optimisation process fails, it may be due to one of the following reasons:

- No employee satisfies the skills required to perform appointment's services: If during the appointment schedule optimisation process with the **Consider Skills** checkbox selected, the system could not find any employee with the skill set required to perform services specified in the appointment, the system shows the following error message: *This appointment could not be assigned to a staff member because no employee satisfies the skills required to perform the services in this appointment.*

  In this case, the user running the process can verify which skills are required to perform services by clicking the appointment reference number in the **Appointment Nbr.** column in the appointment list, which is in the left table of the Optimise Appointment Scheduling (FS501400) form. The system will open the Appointments (FS300200) form, on which the user should open the **Add Staff** dialog box by clicking **Add Staff** on the table toolbar of the **Details** tab, and view the required skills for each service of the appointment. To view the needed skills for each service of the appointment, this user should select a particular service in the **Service Ref. Nbr.** field in the Selection area of the dialog box. (See the following screenshot.)
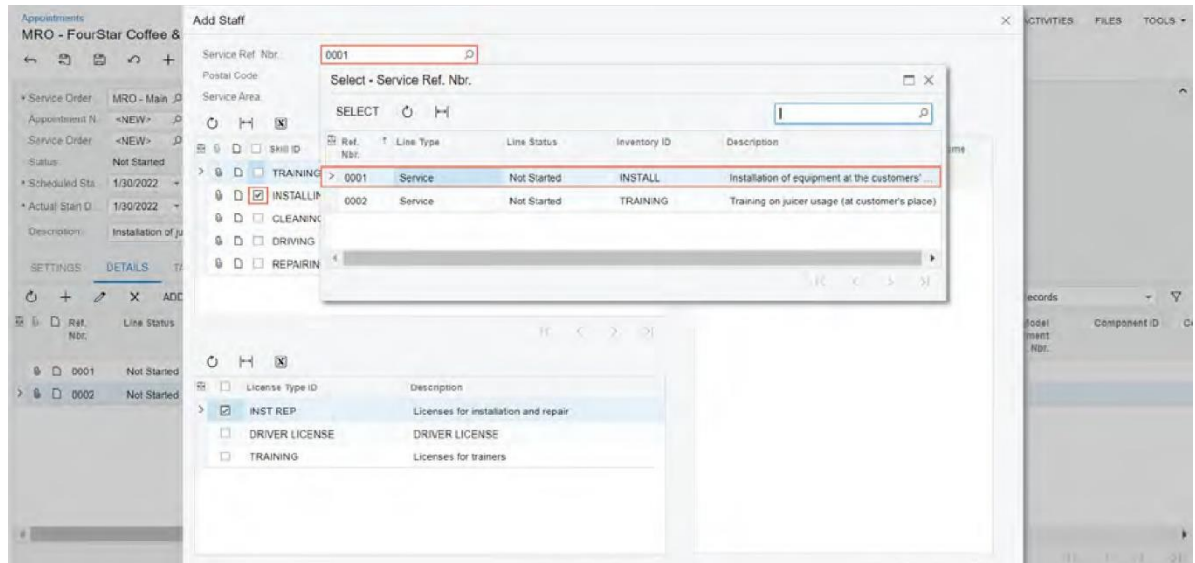
- If there are no appropriate employees who have the needed skills, the user can clear the **Consider Skills** checkbox on the Optimise Appointment Scheduling form, and continue appointment schedule optimisation based on the staff members' working hours without the consideration of their skills.

No employee has available working hours: If during the appointment schedule optimisation process, the system cannot find the available working hours in the work calendars of the selected employees, the system shows the following error message, which has been improved in MYOB Advanced 2022.2: *This appointment cannot be optimised because the selected employee or employees have no available working hours in their work calendars.*

In this case, the user can assign appointments to another day of the work calendar. To do this, the user must open each appointment directly on the Appointments form and manually change the date and time in the **Scheduled Date and Time** section of the **Settings** tab.

Improved Titles Related to Total Amounts on the Service Orders and Appointments Forms

In the previous versions of MYOB Advanced, on the Service Orders (FS300100) and Appointments (FS300200) forms, there were inconsistencies in the names of the UI elements related to total amounts as well as in the logic in the naming of those elements. In MYOB Advanced 2022.2, these names have been revised and optimised.

The benefits of these optimised names for the users of the Service Orders form include the following:

- A user (for example, a call centre agent) can quickly find the estimated duration of the services and the estimated total amount to be paid for the whole service order, and provide this information to the customer.
- A user (for example, a billing agent) can quickly find the total amount to be paid by a customer for the service order depending on the billing settings specified for the customer, and provide this information to the customer.
- A user (for example, a service manager) can easily understand how the billing amounts are calculated. The benefits of these improved names on the Appointments form include the following:
- A user (for example, a service manager) can quickly find the actual duration of the services and the actual total amount to be paid for an appointment.
- A user (for example, a billing agent or a service manager) can quickly find the total amount that the company bills for a particular appointment if the customer's billing cycle is set up to run billing for appointments.

Optimisation of the Titles in the Summary Area of the Service Orders Form

In the Summary area of the Service Orders (FS300100) form, the set and names of the UI elements displaying the total amounts have been optimised (see the screenshot below):

- **Estimated Billable Total**: The newly added field shows the total amount of the service order, which the system calculates as the sum of the values of the **Amount** column of all lines on the **Details** tab.
- **Estimated Tax Total**: In previous versions of MYOB Advanced, this field was called **Tax Amount**. It shows the total amount of the tax to be paid for the service order, which the system calculates as the sum of tax amounts of all lines on the **Tax Details** tab.
- **Estimated Total**: This field, which was called **Total** in previous versions of MYOB Advanced, shows the estimated service order total amount, which is calculated as the sum of the **Estimated Billable Total** and the **Estimated Tax Total** amounts.
- The **Estimated Billable Total** and **Estimated Tax Total** fields are located before the **Estimated Total**, which gives a user a clear view of how the service order's estimated total amount has been composed.
- **Invoice Total**: In previous versions of MYOB Advanced, this field was called **Billable Total**. This field shows the actual total amount to be paid for the service order. The system calculates the amount that it inserts in this field based on the setting of the billing cycle assigned to the customer, which the system copies to the **Billing By** field:

- If *Appointments* is displayed in the **Billing By** field (which means that the billing cycle of the customer is set up to run billing for appointments), the system inserts into the **Invoice Total** field the actual billable amount paid for the appointment or appointments related to the selected service order. This amount is the sum of the **Invoice Total** amounts specified in the Summary area of the Appointments (FS300200) form for each appointment related to the service order.
- If *Service Orders* is specified in the **Billing By** field (which means that billing cycle of the customer is set up to run billing for service order), the system copies the **Estimated Total** amount of the service order to the **Invoice Total** field.
- **Billing By**: This newly added read-only field indicates whether the billing cycle of the customer is set up to run billing for appointments or service orders. The system fills in this field with the setting specified on the Billing Cycles (FS206000) form for the billing cycle assigned to the customer on the **Billing** tab of the Customers (AR303000) form.

In the previous version of MYOB Advanced, this field was displayed on the **Totals** and **Financial** tabs of the Service Orders form. In MYOB Advanced 2022.2, it has been moved to the Summary area of the form so that a user can quickly identify that the service order is billed based on the either service order's **Estimated Total** or the **Invoice Total** amount of the included appointment or appointments.

Optimisation of the Titles on the Totals Tab on the Service Orders Form

In the **Service Order Totals** section of the **Totals** tab of the Service Orders (FS300100) form, the following UI elements have been renamed to be consistent with the corresponding UI elements of the Summary area of the form:

- **Estimated Billable Total**: This field was named **Line Total** in previous versions of MYOB Advanced.
- **Estimated Tax Total**: This field was named **Tax Total** in previous versions of MYOB Advanced.
- **Estimated Total**: The name of this field was **Total** in previous versions of MYOB Advanced. These elements are shown in the following screenshot.

The following UI changes have also been made in the **Service Order Totals** section of the tab:

- The field named **Estimated Total** in previous versions of MYOB Advanced is now named **Ext. Price Total**. It shows the total price of the service order, which is the sum of the values of the **Amount** column of all line items of the **Details** tab.
- The **Cost Total** field has been moved from the Summary area of the Service Orders form.

In the **Appointment Totals** section of the **Totals** tab of the Service Orders form, the following UI elements have been renamed to be consistent with the corresponding UI elements of the Summary area of the Appointments (FS300200) form:

- **Actual Billable Total**: This field was named **Line Total** in previous versions of MYOB Advanced.
- **Actual Tax Total**: This field was named **Tax Total** in previous versions of MYOB Advanced.
- **Invoice Total**: This field was named **Total** in previous versions of MYOB Advanced.

Optimisation of the Titles on the Appointments Tab on the Service Orders Form

On the **Appointments** tab of the Service Orders (FS300100) form, two additional columns, **Actual Billable Total** and **Actual Tax Total**, have been added to give a user the ability to view the amounts from which the final amount to be paid for an appointment by the customer (**Invoice Total**) is calculated. The **Invoice Total** column was named **Billable Amount** in the previous version of MYOB Advanced.

If the billing cycle assigned to a customer is set up to run billing for appointments (that is, if the *Appointments* is specified in the **Billing By** field in the Summary area of the form) and the service order has only one appointment, then the system inserts the amount specified in the **Invoice Total** column of the **Appointments** tab as the **Invoice Total** in the Summary area of the form (see the following screenshot). If multiple appointments are associated with the service order, the system adds the values of the **Invoice Total** column of the **Appointments** tab, and inserts the sum of these amounts in the **Invoice Total** field in the Summary area of the form.
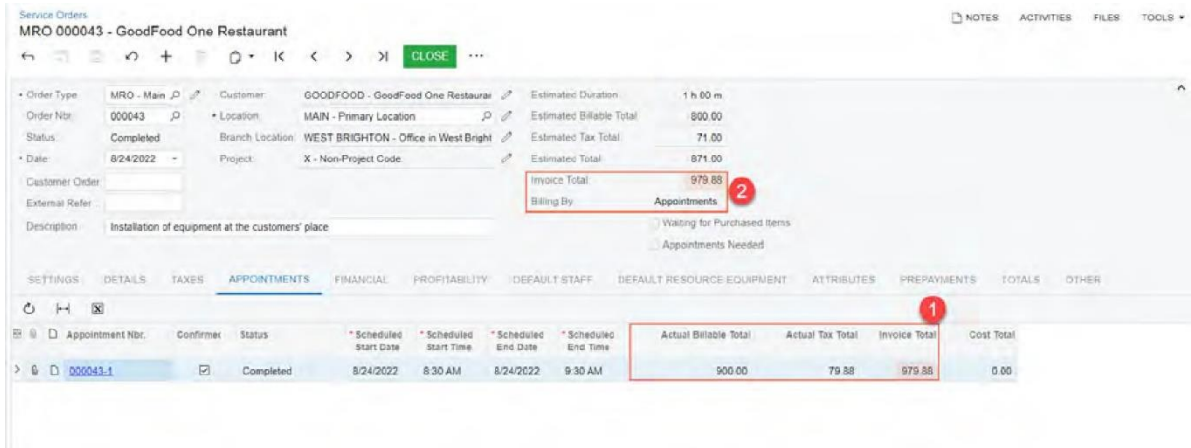
Other Improvements in the Summary Area of the Service Orders Form

On the Service Orders (FS300100) form, in the Summary area, the names of the following fields have been optimised (as the screenshot below shows) so that a user can view the full field name without hovering over the label:

- **Service Order Type** has been renamed to **Order Type**.
- **Service Order Nbr.** has been renamed to **Order Nbr.**.
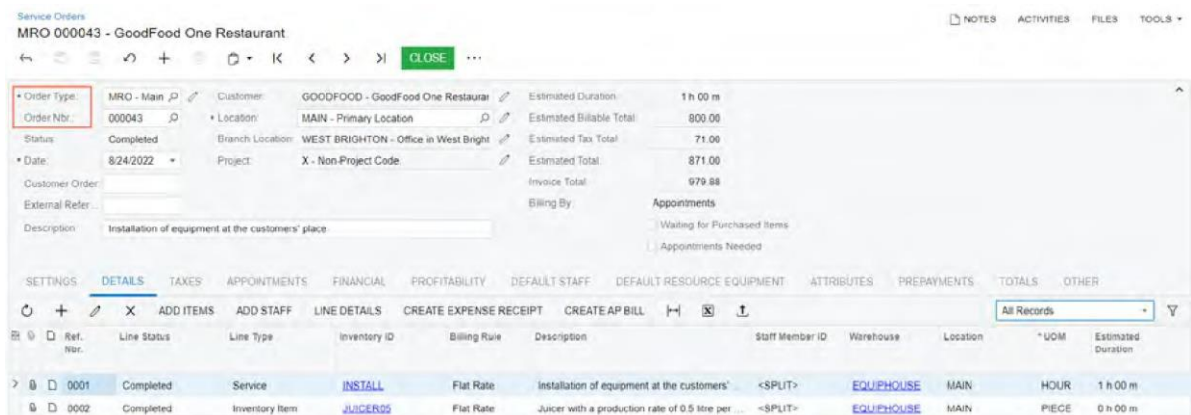
Optimisation of the Titles in the Summary Area on the Appointments Form

In the Summary area of the Appointments (FS300200) form, the list of UI elements displaying the total amounts and their names have been optimised, as shown in the following screenshot.
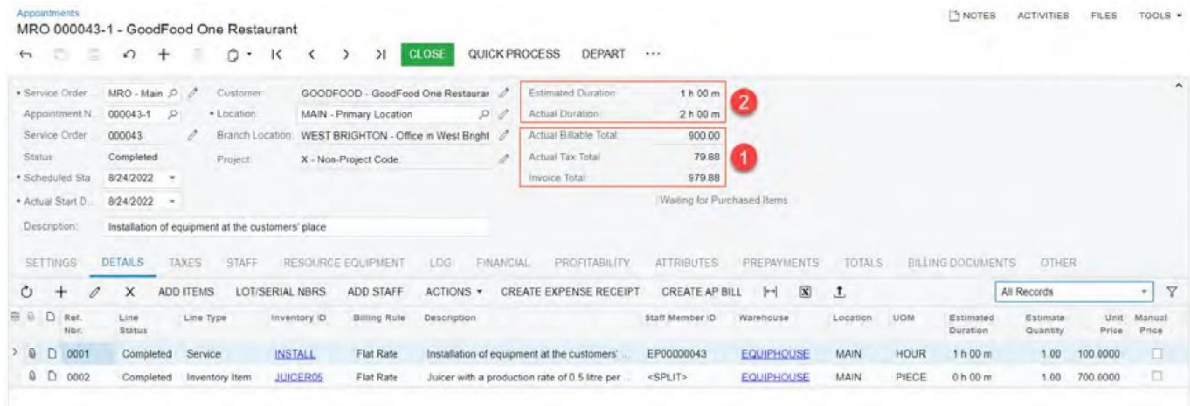
The following elements combine to give a user a clear view of the actual amounts to be billed for the appointment:

- **Actual Billable Total**: This newly added field displays the total billable amount of the appointment, which is calculated as the sum of the amounts of the **Billable Amount** column of the **Details** tab.
- **Actual Tax Total**: This field displays the total amount of tax paid for the appointment, which is the sum of the tax amounts of all lines on the **Tax Details** tab of the current form.
- **Invoice Total**: In previous versions of MYOB Advanced, this field was called **Appointment Total**. It shows the final amount billed to the customer for the appointment, which is calculated as the sum of the amounts in the **Actual Billable Total** field and the **Actual Tax Total** field.

In the Summary area of the Appointments form, the following UI names have also been optimised so that a user can view the full field name without hovering over the label:

- Estimated Service Duration has been renamed to Estimated Duration.
- Actual Service Duration has been renamed to Actual Duration.

Optimisation of the Titles on the Totals Tab on the Appointments Form

In the **Appointment Totals** section of the **Totals** tab of the Appointments (FS300200) form, the UI elements have been renamed to be consistent with the corresponding UI elements of the Summary area of the form, as shown in the following screenshot.
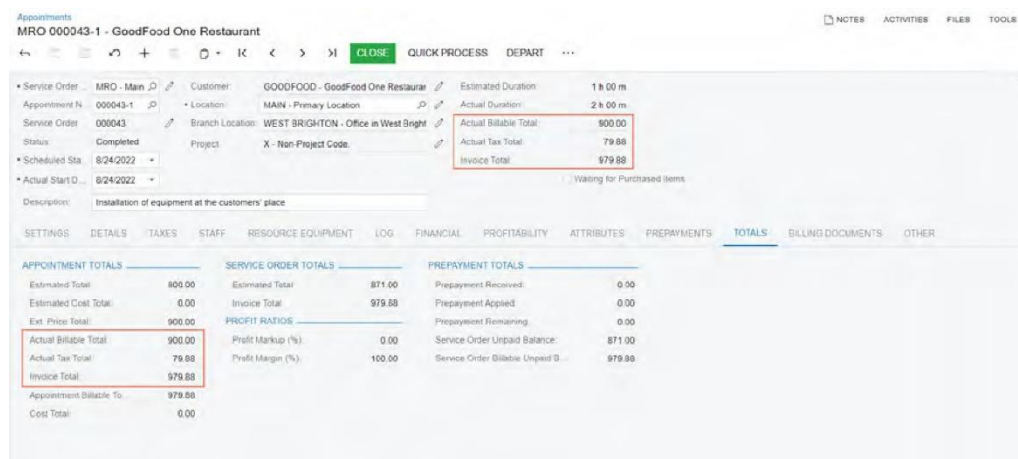
The following UI changes have been made in the **Appointment Totals** section the **Totals** tab:

- **Ext. Price Total** was named **Actual Total** in previous versions of MYOB Advanced. This field contains the total price of the appointment, which is the sum of the values of the **Actual Amount** column of all lines of the **Details** tab.
- **Actual Billable Total** was named **Line Total** in previous versions of MYOB Advanced.
- **Actual Tax Total** was named **Tax Total** in previous versions of MYOB Advanced.
- **Invoice Total** was named **Appointment Total** in previous versions of MYOB Advanced.
- The **Cost Total** field was moved to this section from the Summary area of the form.

In the **Service Order Totals** section of the **Totals** tab, the following fields have been renamed to be consistent with the corresponding UI elements on the Service Orders (FS300100) form:

- Total has been renamed to Estimated Total.
- Billable Total has been renamed to Invoice Total.

Report Improvements

The Service Order Summary (FS651000) and Appointment Summary (FS652500) reports have been enhanced.

In the Service Order Summary report, the **Transaction Amount** column has been renamed to **Estimated Billable Total** to be consistent with the corresponding UI element located in the Summary area of the Service Orders (FS300100) form.

In the Appointment Summary report, the **Transaction Amount** column has been renamed to **Actual Billable Total** to be consistent with the corresponding UI element located in the Summary area of the Appointments (FS300200) form. The following screenshot presents an example of the Appointment Summary report.

Profit Margin Calculation

In previous versions of MYOB Advanced, only the profit markup value (but not the profit margin) of a service order and an appointment was calculated by the system and displayed on the Service Orders (FS300100) and Appointments (FS300200) forms. In MYOB Advanced 2022.2, in addition to the profit markup, the profit margin is calculated for a service order and appointment.

On the **Totals** tab of the Service Orders and Appointments forms, the new **Profit Ratio** section has been added, in which the **Profit Markup (%)** and **Profit Margin (%)** fields are displayed. In these fields, the values calculated for the entire service order or the appointment, respectively, are shown.

On the **Profitability** tab of the Service Orders and Appointments forms, the new **Profit Markup (%)** and **Profit Margin (%)** columns have also been added. These columns show the values calculated for each line item displayed on the tab.

The following sections describe the changes on the UI of these forms, as well as the calculation of the profit-related elements.

Profit Markup and Profit Margin on the Service Orders Form

The new **Profit Ratios** section has been added on the **Totals** tab of the Service Orders (FS300100) form, as the following screenshot shows.

The calculation of the profit markup and profit margin percentages for the service order is based on the settings of the billing cycle assigned to the selected customer. Under **Run Billing For** on the Billing Cycles (FS206000) form, the appropriate option button is selected to indicate whether billing is run for service orders or appointments.

If the billing cycle of the customer is set up to run billing for service orders, the system uses the following formulas:

```
Profit Markup (%) = (Estimated Billable Total – Cost Total) / Cost Total * 100
```

```
Profit Margin (%) = (Estimated Billable Total – Cost Total) / Estimated Billable Total
 * 100
```

If the billing cycle of the customer is set up to run billing for appointments, the system uses the following formulas:

```
Profit Markup (%) = (Actual Billable Total – Cost Total) / Cost Total * 100
```

```
Profit Margin (%) = (Actual Billable Total – Cost Total) / Actual Billable Total * 100
```

The system calculates these values when a user saves a service order. The calculation does not depend on the status of the service order, so a user can clearly see the profitability of the service order based on the available totals, whether or not the linked appointments have started or completed.

On the **Profitability** tab of the Service Orders form, the **Profit Markup (%)** and **Profit Margin (%)** columns have been added, as the following screenshot shows.

On the tab, the **Profit Markup (%)** and **Profit Margin (%)** values are calculated for each line item of the service order. The user can review the profitability of each line item based on the cost and billable amount. The system calculates the values in these columns as follows:

```
Profit Markup (%) = (Billable Amount – Ext.Cost) / Ext.Cost * 100
```

```
Profit Margin (%) = (Billable Amount – Ext.Cost) / Billable * 100
```

Profit Markup and Profit Margin on the Appointments Form

The new **Profit Ratios** section has been added on the **Totals** tab of the Appointments (FS300200) form, as the following screenshot shows.
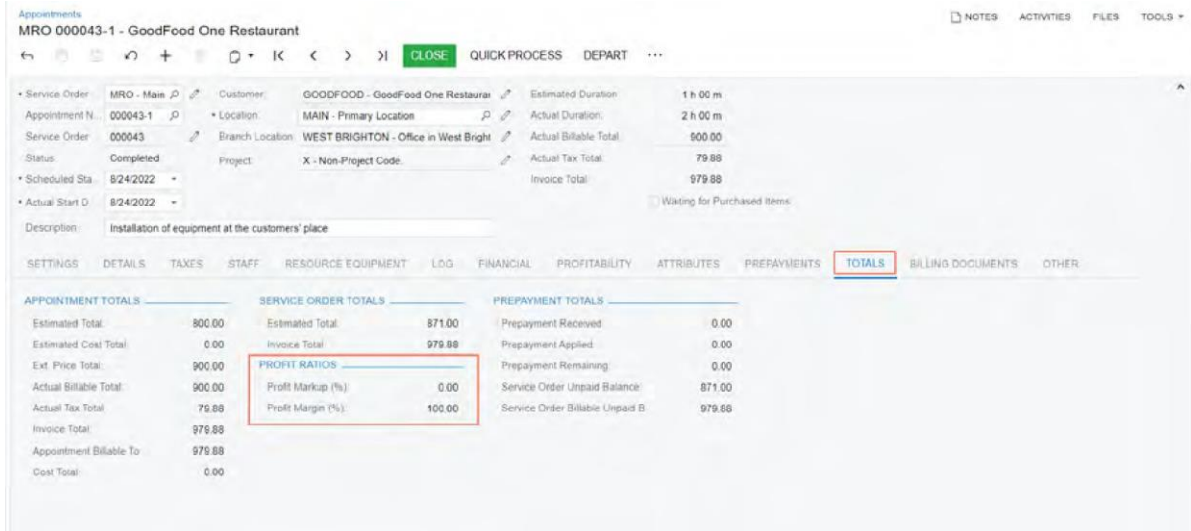
The **Profit Markup (%)** field displays the value that was displayed in the **Profit (%)** field in the Summary area in the previous versions of MYOB Advanced. The **Profit Margin (%)** field is a newly added field that shows the profitability of the billable amount before tax.

The system calculates the profit markup and profit margin percentages for the entire appointment by using the following formulas:

```
Profit Markup (%) = (Actual Billable Total – Cost Total) / Cost Total * 100
```

```
Profit Margin (%) = (Actual Billable Total – Cost Total) / Actual Billable Total * 100
```

The system calculates these values when a user saves the appointment. The calculation does not depend on the status of the appointment, so a user can clearly see the profitability of the appointment based on the available totals, whether or not the appointment has started or completed.

On the **Profitability** tab of the Appointments form, the **Profit Markup (%)** and **Profit Margin (%)** columns have been added, as the following screenshot shows.
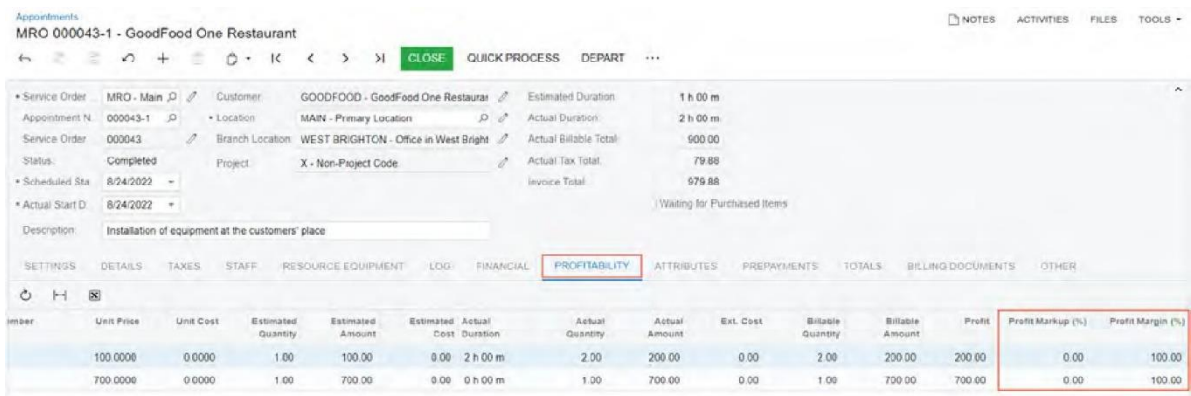
To calculate the profit markup and profit margin of each particular line on the **Profitability** tab, the system uses the values from the lines in the following formulas:

```
Profit Markup (%) = (Billable Amount – Ext.Cost) / Ext.Cost * 100
```

```
Profit Margin (%) = (Billable Amount – Ext. Cost ) / Billable Amount * 100
```

Improvements in the Mobile App

Because some of the UI elements have been revised and renamed on the Appointments (FS300200) form in MYOB Advanced 2022.2 (for details, see Field Services: Improved Titles Related to Total Amounts on the Service Orders and Appointments Forms), the similar UI elements have also been renamed on the *Appointments* screen of the MYOB mobile app for consistency.

The Renamed UI Elements of the Appointments Screen

On the *Appointments* screen, in the Summary area, the **Appointment Total** has been renamed to **Invoice Total**, as the following screenshot shows.

On the **Totals** tab of the *Appointments* screen, the following UI elements have been renamed for consistency with the corresponding UI elements on the **Totals** tab of the Appointments (FS300200) form of the MYOB Advanced (see the screenshot below):

- **Actual Total** has been renamed to **Ext. Price Total**.
- **Line Total** has been renamed to **Actual Billable Total**.
- **Tax Total** has been renamed to **Actual Tax Total**.
- **Appointment Total** has been renamed to **Invoice Total**.
- **Total** has been renamed to **Estimated Total** and placed in the new **Service Order Totals** section.
- **Billable Total** has been renamed to **Invoice Total** and placed in the new **Service Order Totals** section.

The new **Service Order Totals** section has been added to clearly distinguish the totals of the appointment and the service order in which it is included.

Updating the Unit Cost of Non-Stock Items to Be Purchased

When an item of the *Non-Stock Item* or *Service* type is included in a service order and an appointment, the system inserts the item's default unit cost, which it copies from the **Current Cost** field of the **Price/Cost** tab of the Non-Stock Items (IN202000) form. If the item is purchased (that is, if a purchase order is created for the service document), the unit cost may be changed in the associated purchase order or AP bill.

In previous versions of MYOB Advanced, the default unit cost in the service documents was not updated in this case.

Updating of the Unit Cost Column

In MYOB Advanced 2022.2, if the unit cost of an item has been updated in the purchase order or AP bill associated with a service document, the system updates the **Unit Cost** value for the corresponding line item in the service document.

Specifically, on the **Details** tab of the Service Orders (FS300100) and Appointments (FS300200) forms, the **Unit Cost** value will be updated in the lines with the *Service* and *Non-Stock Item* type and the **Mark for PO** checkbox selected if one of the following conditions occur:

- The unit cost of the item is changed in the purchase order that has been created from the service document (appointment or service order).
- The unit cost value is changed in the AP bill that has been created from the purchase order associated with the service document, and the bill is released.

The unit cost value is updated in the service orders and appointments regardless of their status. If multiple AP bills are released from the same purchase order, the appointment and service order are updated with the unit cost value of the last AP bill.

Ability to Edit the Unit Cost Column

On the **Details** tab of the Service Orders (FS300100) and Appointments (FS300200) forms, the **Unit Cost** column is available for editing in the applicable lines if any of the following conditions occurs:

- The detail line has the Non-Stock Item or Service type.
- The appointment document has any status except Closed, Cancelled or Billed
- The service order document has any status except Closed or Cancelled

The ability to edit the **Unit Cost** column manually has been implemented in order to provide users with the opportunity to adjust the unit cost in scenarios that are not covered by the current functionality.

> **Note:** Editing rights can be granted or limited for a role assigned to a user by setting up the role's access rights to the form elements, so that an administrative user can control access to any form elements. For details, see User Roles: Restriction Level Options in the in-product help.

Recalculation of Amounts That Use the Unit Cost

When the unit cost of a service order and an appointment is updated (whether by the system or by a user), the system recalculates the following amounts on the Service Orders (FS300100) and Appointments (FS300200) forms, which use the value in the **Unit Cost** column:

- **Cost Total** (on the **Appointments** and **Totals** tabs of the Service Orders form; on the **Totals** tab of the Appointments form)
- **Profit Markup (%)** and **Profit Margin (%)** (on the **Profitability** and **Totals** tabs of the Appointments form)
-
- **Ext. Cost** (on the **Details** and **Profitability** tabs of the Service Orders and Appointments forms)
- **Estimated Cost** (on the **Profitability** tab of the Service Orders and Appointments forms)
- **Estimated Cost Total** (on the **Totals** tab of the Appointments form)

Upgrade Notes

During an upgrade to MYOB Advanced 2022.2, the **Unit Cost** values on the Service Orders (FS300100) and Appointments (FS300200) forms will not be updated in the existing service orders and appointments, even if the purchase orders or AP bills created for these service documents contain updated unit costs.

To update the unit costs in the existing service documents, a user should follow the procedure described in the in the in-product help.: How to update the Unit Cost value in service order and appointment lines marked for PO after upgrade to MYOB Advanced 2022.2.

Finance

AP Debit Adjustments with Retainage

In previous versions of MYOB Advanced, users could not manually create AP debit adjustments with retainage if a small correction of an AP bill with retainage was required. The only way to create a debit adjustment with retainage in the system was to reverse a bill with retainage or a retainage bill. Also, debit adjustments paid by line could not be created in the system.

Starting in MYOB Advanced 2022.2, when processing debit adjustments, users can perform the following:

- Create debit adjustments with retainage.
- Create debit adjustments with or without retainage, which are paid by line.
- Reverse debit adjustments with or without retainage, which are paid by line.
- Add lines with negative amounts to AP documents paid by line. (The total balance of such documents will still be positive so that the documents can be released.)
- Process cash discounts for lines with negative amounts.

Changes to the Accounts Payable Preferences Form

On the Accounts Payable Preferences (AP101000) form, the **Automatically Release Retainage Bills** checkbox on the **General** tab has been renamed to **Automatically Release Retainage Documents**, as shown in the following screenshot.

Changes to the Bills and Adjustments Form

On the Bills and Adjustments (AP301000) form, the following UI changes have been introduced for documents with the *Debit Adj.* type (Item 1) selected in the **Type** field:

- The **Apply Retainage** and **Pay by Line** checkboxes (Item 2) appear in the Summary area of the form
- The **Retainage Percent** and **Retainage Amount** columns (Item 3) appear on the **Details** tab
- The **Retainage** tab (Item 4) appears on the form

For retainage documents, in the Summary area, the **Retainage Bill** checkbox has been renamed to **Retainage Document**, as shown in the following screenshot.

For a retainage debit adjustment that has the *On Hold* or *Balanced* status, the following settings can be edited: **Date**, **Post Period**, **Description**, **Location**, **AP Account**, **AP Subaccount**, **Payment Method**, **Cash Account**, **Workgroup ID**, and **Owner**.

The post period of a retainage debit adjustment must not be earlier than the post period of the original debit adjustment.

Reversal of Debit Adjustments with Retainage and Retainage Debit Adjustments

For original debit adjustments with retainage and retainage debit adjustments with the *Open* and *Closed* status, the **Reverse** command has been added to the More menu of the Bills and Adjustments

(AP301000) form. The **Reverse** command is not available for original and retainage debit adjustments created automatically on reverse of an original bill or a retainage bill.

If a user reverses a debit adjustment, the system performs the following actions on the Bills and Adjustments form:

1. Creates a credit adjustment with the *On Hold* or *Balanced* status, depending on whether the **Hold Documents on Entry** checkbox is selected on the Accounts Payable Preferences (AP101000) form.
2. For the credit adjustment, fills in the **Original Document** field on the **Financial** tab with the **Ref. Nbr.** of the debit adjustment being reversed.
3. On release of the credit adjustment, creates a GL transaction by using the same rules as for manually created credit adjustments.

> **Note:** On reverse of a debit adjustment created for a tax agency in a foreign currency, the system will not use the document rate to convert the amount to the base currency amount. The same rule is applied when a user is reversing a tax bill in a foreign currency.

An original debit adjustment cannot be reversed if it has open retainage debit adjustments or unreversed applications.

Changes to the Release AP Retainage Form

On the Release AP Retainage (AP510000) form, the system loads released debit adjustments with the *Open* status, which have an unreleased retainage, as shown in the following screenshot.

For debit adjustments, the amounts in the **Retainage to Release**, **Unreleased Retainage**, and **Total Amount** are shown with the negative sign.

Changes to the Checks and Payments Form

On the Checks and Payments (AP302000) form, debit adjustments that have the **Pay by Line** checkbox selected can be applied to checks and supplier refunds by selecting debit adjustment lines on the **Documents to Apply** tab, as shown in the following screenshot.
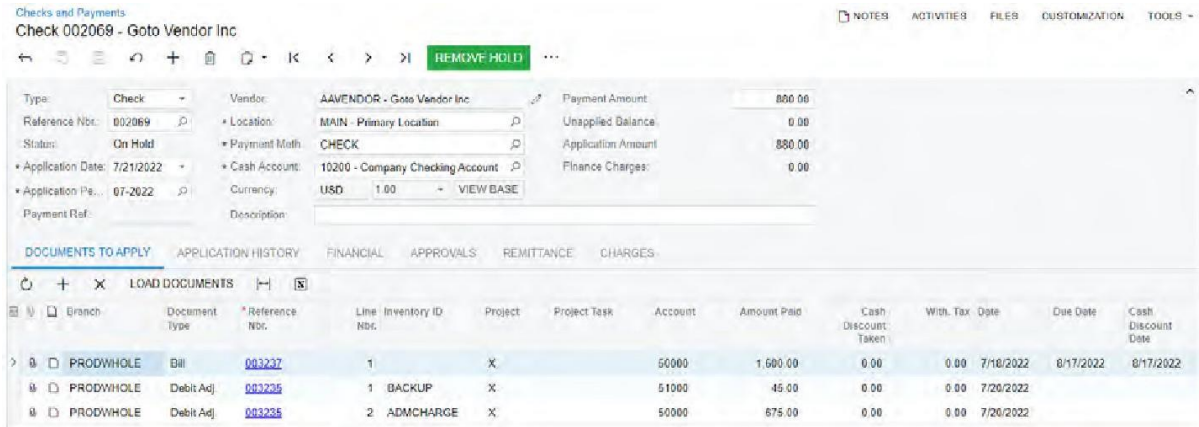
On the Checks and Payments form, if a user selects *Debit Adj.* in the **Type** field and a reference number of a debit adjustment with the **Pay by Line** checkbox selected, the system shows a warning message that such a document is paid by line and can be applied by creating a check and applying a bill and the debit adjustment lines to it.

Changes to the Prepare Payments Form

On the Prepare Payments (AP503000) form, the table shows individual lines of open debit adjustments with the **Pay by Line** checkbox selected, which have the line balance more than *0.00*, as shown in the following screenshot.
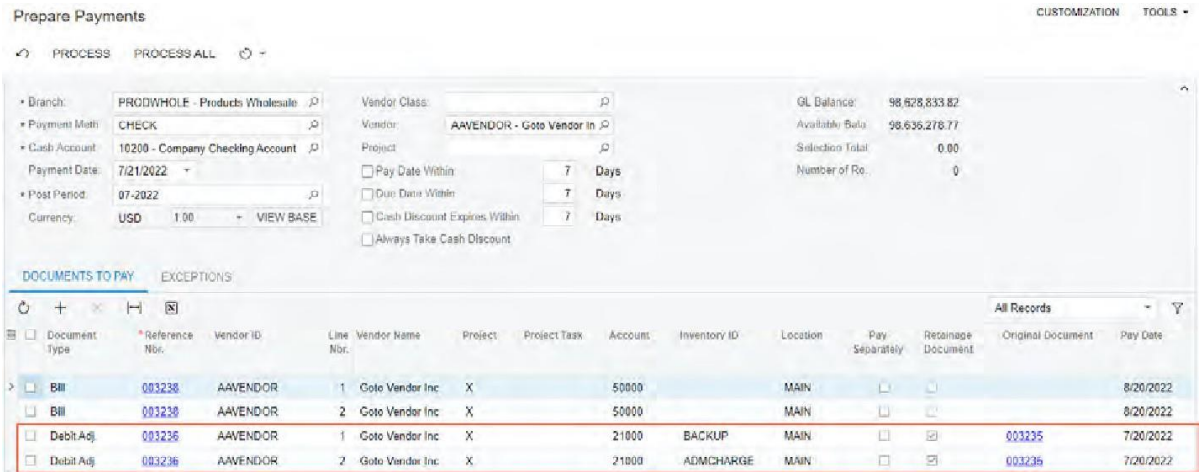
Addition of Lines with Negative Amounts to AP Documents Paid by Line

On the Bills and Adjustments (AP301000) form, AP documents with the **Pay by Line** checkbox selected can have lines with the negative amount in the **Ext. Cost**, **Retainage Amount**, and **Amount** columns on the **Details** tab, as shown in the following screenshot.

Such documents can be released if their balance is greater than or equal to *0.00*.

> **Note:** The system does not allow adding lines with negative amounts to documents with the **Pay by Line** and **Joint Payees** checkbox selected.

On reversal of an AP document with a negative amount in a line, a related document is created with the same signs of amounts in the document lines.

When releasing retainage for documents with retainage and paid by line, depending on the sign of the total retainage to release for each original document, the system will generate either a retainage bill if retainage to release is greater or equal to *0.00* or a retainage debit adjustment if retainage to release is less than *0.00*.

Processing of Cash Discounts for Lines with Negative Amounts

On the Bills and Adjustments (AP301000) form, for bills and debit adjustments that have lines with a negative amount, the cash discount amount will also be negative, as shown in the following screenshot.

For the document to be released, the total cash discount shown in the **Cash Discount** field in the Summary area must be greater than or equal to *0.00*.

On the Checks and Payments (AP302000) form, the amount in the **Cash Discount Taken** column for a line with a negative amount can be less than or equal to *0.00*, as shown in the following screenshot.

Changes in Calculation of Amounts in Reports and Forms

Multiple reports have been updated to support debit adjustments with retainage and retainage debit adjustments. On the following reports and forms, amounts of debit adjustments, which have the negative sign, are considered in the calculation of amounts:

- AP Open Documents by Supplier (AP634000)
- AP Open Documents by Project (AP634100)
- AP Retainage Register (AP634500)
- AP Aging (AP631000) with the Detailed with Retainage format
- AP Retained Balance (AP635000)
- Suppliers (AP303000), the **Retained Balance** field in the Summary area
- Supplier Details (AP402000)
- Supplier Summary (AP401000)

Additional Information

For details on creating debit adjustments with retainage, see To Enter a Debit Adjustment with Retainage in the in-product help.

For details on creating debit adjustments applied by line, see To Enter a Debit Adjustment that Can Be Applied by Line in the in-product help.

Approval of GL Transactions

Some companies require an approval process for journal transactions in the general ledger. Starting in 2022.2, MYOB Advanced makes it possible to release and post GL transactions only after they have been approved by an authorised employee. The system assigns the appropriate approver, which it determines based on an approval map defined by a company administrator, either unconditionally or if the transaction meets the specified conditions. These conditions depend on the properties of GL transactions, such as the amount or account. When multiple approvals are required, they can be configured to occur in parallel or in sequential steps (a multistep approval).

Only transactions entered directly from the general ledger on the Journal Transactions (GL301000) form are subject to approval. That is, approvals of GL transactions are not applied to transactions that have originated from accounts receivable, accounts payable, inventory, and other subledgers.

Administrators can configure rules describing who should approve transactions and under which conditions GL transaction approvals are needed. The rules can be specified for multiple types of batches of transactions. These types include batches created during consolidation, trial balance entry, allocation, and reclassification.

This functionality is available if the *Approval Workflow* feature is enabled on the Enable/Disable Features (CS100000) form.

Workflow for a Transaction Requiring Approval

In an approval process with one stage and a single approver, the approval workflow for each transaction subject to approval consists of the following steps:

1. The user who is entering GL transactions (the *requester*) creates a transaction on the Journal Transactions (GL301000) form, removes it from hold, and waits for transaction approval or rejection.
2. The approver receives an email notification about a transaction that needs approval.
3. The approver approves or rejects the transaction and specifies a comment, if comments are required.
4. If the transaction is approved, the requester completes the processing of the transaction.
5. Optional: If the transaction is rejected, the requester can delete the transaction or modify it according to the approver's comment, if one has been specified.
6. The requester resubmits the transaction for approval.
7. Optional: If an approved transaction has been modified, the requester submits it for approval again, and the approval process continues from Step 2.

Changes to the Approval Maps Form

On the Approval Maps (EP205015) form, the new *Journal Transaction* option has been added to the **Entity Type** field, as shown in the following screenshot.
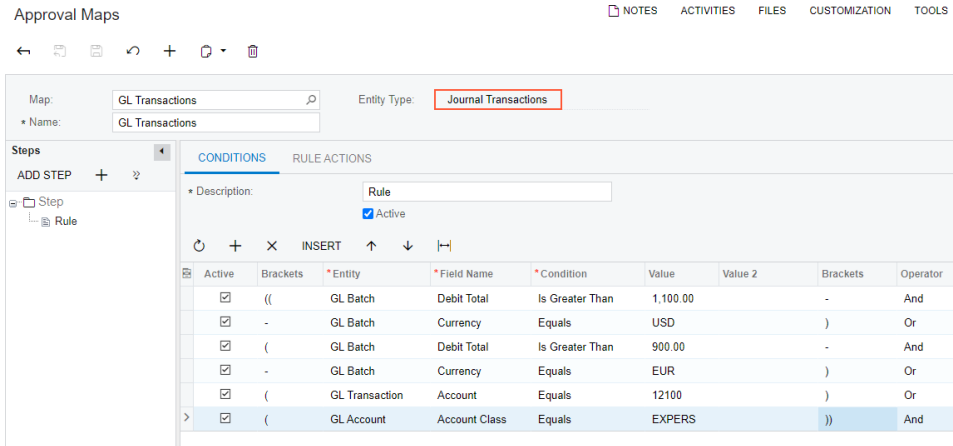
With this entity type selected, the created approval map applies to documents that are processed on the Journal Transactions (GL301000) form.

If *Journal Transactions* is selected in the **Entity Type** field of the Approval Maps form, the **Conditions** tab lists the conditions that the GL transaction must meet to be assigned for approval. In the **Entity** column, the administrator specifies the entity (which in this case indicates the database table) whose field will be used for the condition in the row. The administrator can select one of the following options:

- *Approval*: The system will use a field of the approval request in this condition.
- *GL Account*: The system will use a field that represents one of the GL accounts involved in the transaction in this condition.
- *GL Batch*: The system will use a field of the Summary area of the Journal Transactions form in this condition.
- *GL Transaction:* The system will use a field of the lines of GL transactions as a condition.

On the **Rule Actions** tab of the lower right pane, the **Reason Settings** section has been added with the **Reason for Approval** and **Reason for Rejection** fields, as shown in the following screenshot.
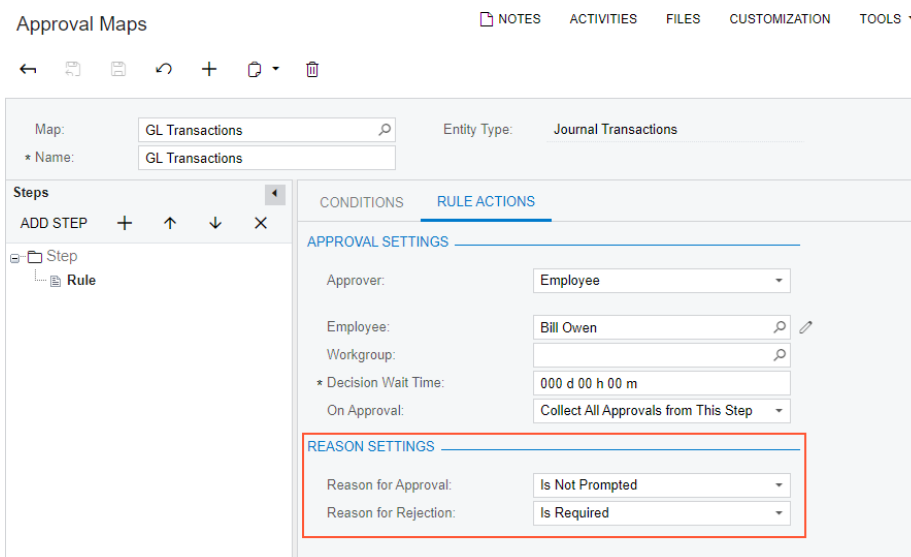
In these fields, an administrator can select one of the following options, which determine what happens during approval and rejection, respectively, of the GL transactions affected by the map:

- *Is Optional*: The approver is prompted to enter a reason when approving or rejecting a GL transaction, but the reason is an optional setting.
- *Is Required*: The approver is prompted to enter a reason when approving or rejecting a GL transaction and the reason must be specified.
- *Is Not Prompted*: The approver is not prompted to enter a reason when approving or rejecting a GL transaction.

The approval maps created for GL transactions on the Approval Maps forms are also visible on the Assignment and Approval Maps (EP205500) form.

Administrators can create different approval maps with different conditions and different approvers. They can then specify the appropriate map for multiple types of GL transactions that are processed on the **Approvals** tab of the General Ledger Preferences (GL102000) form. For details, see the *Changes to the General Ledger Preferences Form* section below.

Addition of New Email Template for Approvals

On the Email Templates (SM204003) form, formerly titled *Notification Templates*, a new email template—*Journal Transaction Approval*—has been added, as shown in the following screenshot.

An administrator can edit this predefined template and select it for any approval map listed on the **Approval** tab of the General Ledger Preferences (GL102000) form.

The administrator can create multiple templates and select a particular template for each transaction type listed on this tab. For details about the form, see the next section.

For a transaction that is subject to approval, the template specified for the transaction type is triggered automatically when the transaction's status changes from *On Hold* to *Pending Approval*.

Changes to the General Ledger Preferences Form

On the General Ledger Preferences (GL102000) form, all the UI elements that were available on the form before 2022.2, have been moved to the new **General** tab. The **Approval** tab has been added to the form, as shown in the following screenshot.
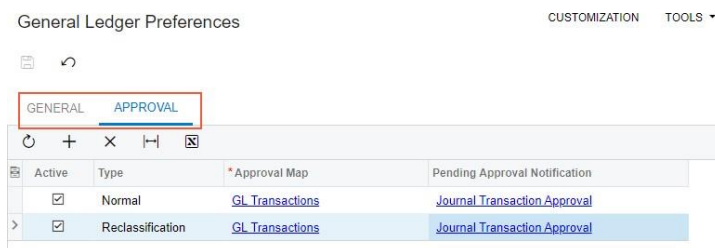
On the **Approval** tab, an administrator can add rows for different GL transaction types and select for each type an approval map with the *Journal Transactions* entity type that has been created on the Approval Maps (EP205015) form. Also, for each GL transaction type, the administrator can select an email template that has been created on the *Email Templates* (SM204003) form. A unique approval map and email template can be configured and specified for each type, or the same map and template can be used for multiple types.

The following table shows the GL transaction types that are available for selection in the **Type** column of the tab.

Type	Description	Scenarios After Which Approvals Can Be Applied
Normal	A GL transaction that has been manually created on the Journal Transactions (GL301000) form or generated by the system on the Generate Recurring Transactions (GL504000) form	Any of the following activities: • On the Journal Transactions form, a GL transaction is created with the *On Hold* status and is removed from hold. The resulting status is *Pending Approval*. • On the Journal Transactions form, a GL transaction is created for which the **Auto Reversing** checkbox is selected and the status is *On Hold*; the transaction is then removed from hold. **Note:** Approvals are not applied to automatically created reversing transactions for which the **Reversing Entry** checkbox is selected on the Journal Transactions form, because they are always created with the *Unposted* or *Posted* status. • On the Generate Recurring Transactions (GL504000), a GL transaction is created with the *On Hold* status and is removed from hold. The resulting status is *Pending Approval*.

Type	Description	Scenarios After Which Approvals Can Be Applied
Consolidation	A GL transaction generated by the system when a user runs the process of importing data from consolidation units to the parent company on the Import Consolidation Data (GL509000) form	On the Import Consolidation Data (GL509000) form, a new GL transaction is generated with the *On Hold* status and is removed from hold. The resulting status is *Pending Approval*.
Trial Balance	A GL transaction generated by the system when a user releases a trial balance on the Trial Balance (GL303010) form	On the Trial Balance form, a new GL transaction is generated with the *On Hold* status and is removed from hold. The resulting status is *Pending Approval*.
Reclassification	A GL transaction generated by the system when a user reclassifies a GL transaction with the *Normal* type on the Reclassify Transactions (GL506000) form	If on the General Ledger Preferences (GL102000) form, the **Automatically Release Reclassification Batches** checkbox is cleared and the **Hold Batches on Entry** checkbox is selected, a new reclassification transaction is generated on the Reclassify Transactions form. The system assigns the transaction the *On Hold* status but immediately removes the transaction from hold and changes its status to *Pending Approval*. **Note:** If an approval map is active for *Reclassification* transactions and the **Automatically Release Reclassification Batches** checkbox is selected on the **General Ledger Preferences** form, the system displays an error message when a user tries to save the changes on the **Reclassify Transactions** form. The administrator can remove the approval map, deactivate it on the **Approval** tab, or clear the **Automatically Release Reclassification Batches** checkbox.
Allocation	A GL transaction generated by the system when a user runs the allocation process on the Run Allocations (GL504500) form	On the Run Allocations form, an allocation transaction is generated with the *On Hold* status and is immediately removed from hold. The resulting status is *Pending Approval*.

The **Approvals** tab is visible on the form if the *Approval Workflow* feature is enabled on the Enable/Disable Features (CS100000) form.

Changes to the Journal Transactions Form

On the Journal Transactions (GL301000) form, the new **Details** tab has been added, which holds the table and table toolbar that were available on the form before 2022.2. The following UI changes, which are shown in the screenshot below, have also been introduced:

- The **Approval** tab has been added (Item 1 in the screenshot). This tab provides a row with the details of each approval or rejection of the GL transaction selected on the form.

- On the form toolbar, the **Approve** button (Item 2) has been added. The equivalent **Approve** command has been added to the More menu (under **Approval**). By clicking this button or command, an approver can approve the transaction selected on the form.
- On the form toolbar, the **Reject** button (Item 3) has been added. The equivalent **Reject** command has been added to the More menu (under **Approval**). By clicking this button or command, an approver can reject the selected transaction.

The **Approve** and **Reject** buttons and commands are displayed on the form if the selected GL transaction has the *Pending Approval* status.
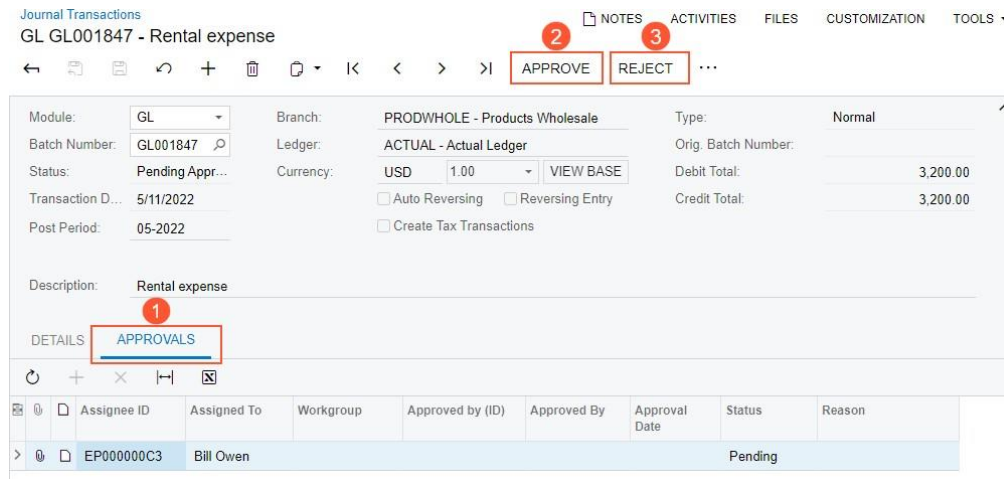
The approver may need to specify a reason for approval or rejection if *Is Optional* or *Is Required* is selected in the **Reason for Approval** or **Reason for Rejection** field of the Approval Maps (EP205015) form. In this case, when an approver clicks **Approve** or **Reject**, the system displays the **Enter Reason** dialog box, as shown in the following screenshot.
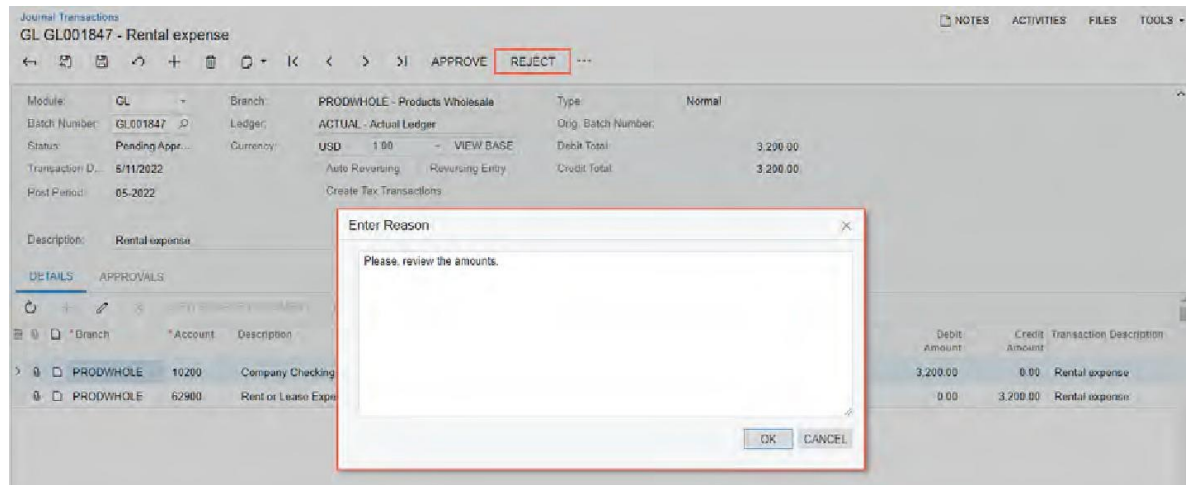
In this dialog box, the approver can or must (depending on the corresponding setting on the Approval Maps form) enter the reason for the approval or rejection of the GL transaction.

> **Note:** If on the Approvals (EP503010) form, the approver tries to approve or reject a transaction that requires a reason to be entered, the system displays an error message. The approver will have to approve or reject the transactions and enter a reason on the Journal Transactions form.

Workflow Changes

When the *Approval Workflow* feature is enabled on the Enable/Disable Features (CS100000) form and at least one approval map with the *Journal Transactions* entity type is selected and active on the General Ledger Preferences (GL102000) form, the system will use a new workflow of processing GL transactions that may require approvals. For the changed workflow, the following new statuses have been introduced for GL transactions.

Status	Description
Pending Approval	This status is assigned to a GL transaction when a user clicks **Remove Hold** on the Journal Transactions (GL301000) form if the transaction is subject to approval—that is, if it meets the conditions specified in an approval map. The approver must approve or reject the transaction on the Journal Transactions or Approvals (EP503010) form. If the transaction is approved, its status is changed to *Balanced* and it can be processed further.
Rejected	This status is assigned to a GL transaction when an approver clicks **Reject** on the Journal Transactions or the Approvals form. If a transaction is rejected, a user can assign it the *On Hold* status by clicking **Hold**, adjust it, and then resubmit it for approval. Alternatively, the user can delete the transaction.

Changes to the Manage Financial Periods Form

Transactions with the *Pending Approval* status prevent the system from closing a selected period, and transactions with the *Rejected* status do not prevent the system from closing periods. On the Manage Financial Periods (GL503000) form, if a user clicks **Unposted Documents** on the form toolbar, the system opens the Unposted GL Documents (GL656100) report in a separate tab and displays GL transactions with the *Pending Approval* status. GL transactions with the *Rejected* status are not shown on the report.

Other UI Changes

The following reports and inquiries now display transactions with the *Pending Approval* and *Rejected* statuses:

- Account Details (GL404000) when the **Include Unreleased** checkbox is selected on that form
- GL Edit Summary (GL611500)
- GL Edit Detailed (GL610500)
- GL Edit Account Distribution (GL611000)

Additional Information

For details about settings up approvals of GL transactions and processing GL transactions with approvals, see Processing Transactions with Approvals in the in-product help.

Approval of GL Transactions in the Mobile App

The MYOB mobile app connected to an instance of MYOB Advanced 2022.2 now supports approvals of GL transactions. For more details on GL transaction approvals, see Finance: Approval of GL Transactions in the in-product help.

In the MYOB mobile app, a user with appropriate access rights can do the following:

- Review a list of GL transactions with the *Pending Approval* status
- Approve or reject a transaction on the *Approvals* screen
- Use the *Journal Transactions* screen to review a transaction submitted for approval
- Approve or reject a transaction on the *Journal Transactions* screen

Changes to the Approvals Screen

GL transactions with the *Pending Approval* status are displayed on the *Approvals* screen, as shown in the following screenshot.
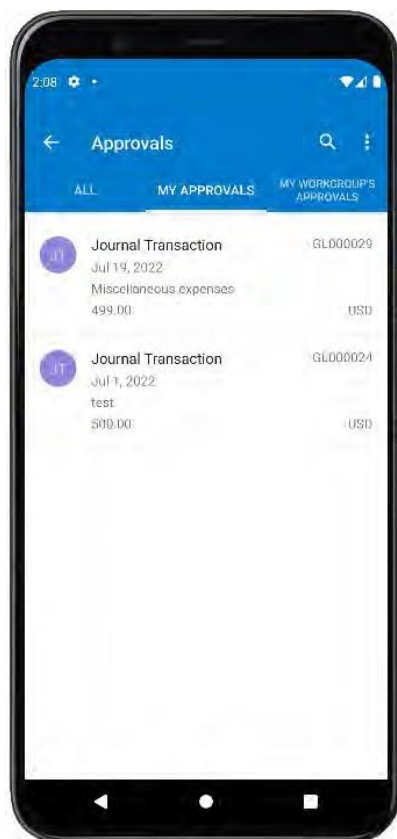
The user should tap the record in the list and tap the More button on the screen toolbar to open the toolbar menu, where the user can either approve or reject the transaction, as shown in the following screenshot.
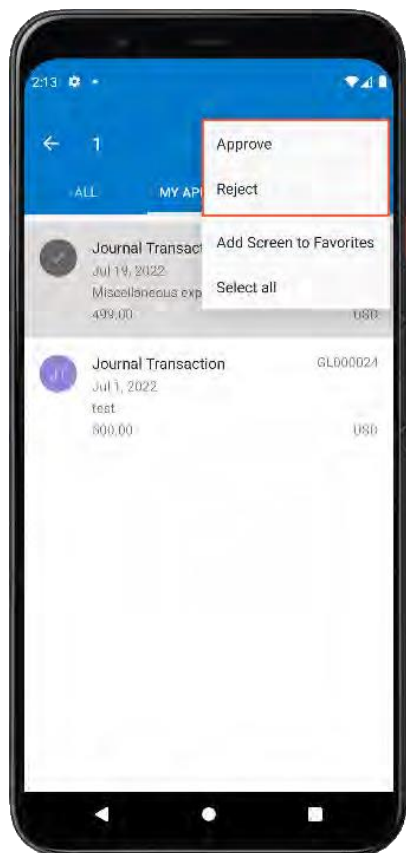
The Journal Transactions Screen

If the user selects a GL transaction on the *Approvals* screen by tapping the transaction header, the mobile app opens the GL transaction on the *Journal Transactions* screen, where the user can review the details of the transaction, as shown in the following screenshot. This screen is the mobile version of the Journal Transactions (GL301000) form.
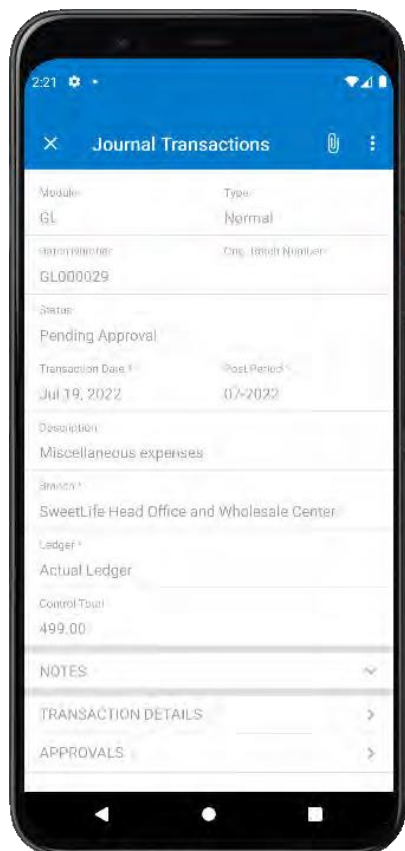
> **Note:** The *Journal Transactions* screen is not available in the mobile site map, and users cannot create GL transactions from the MYOB mobile app.

On the *Journal Transactions* screen, the user can tap **Batch Summary**, **Notes**, **Transaction Details**, and **Approvals** to view more information related to the transaction.

The user taps **Transaction Details** to view the list of entries in the selected batch of transactions, including the account, subaccount, debit and credit amounts, and transaction description, as shown in the following screenshot.
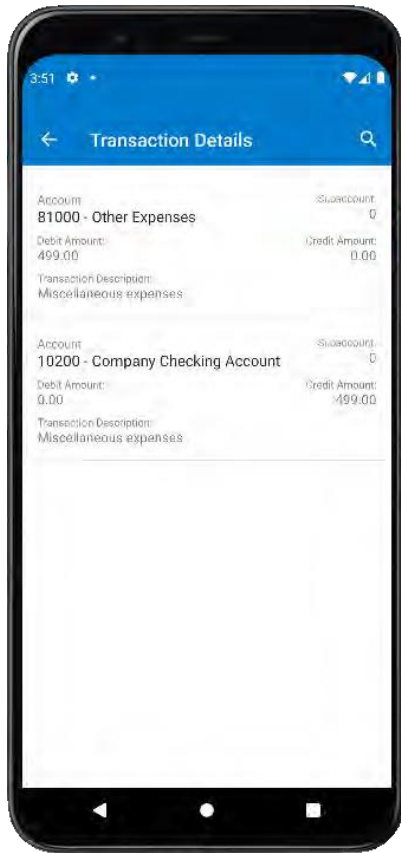
To approve a GL transaction, the user should tap **Approve** on the More menu. The transaction status is changed to *Approved*, as shown in the following screenshot.

To reject a GL transaction, the user should tap **Reject** on the More menu, as shown in the first screenshot below. The transaction status is changed to *Rejected*, as shown in the second screenshot.
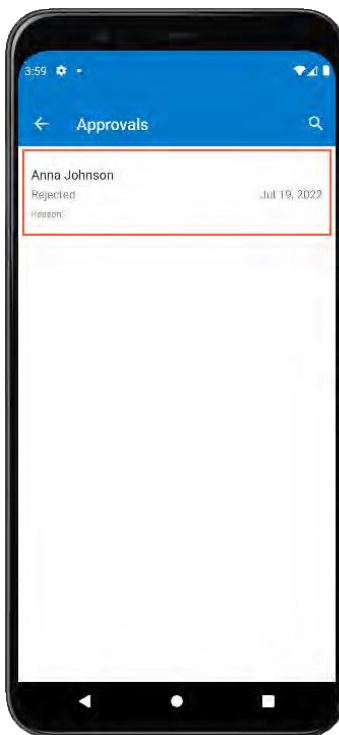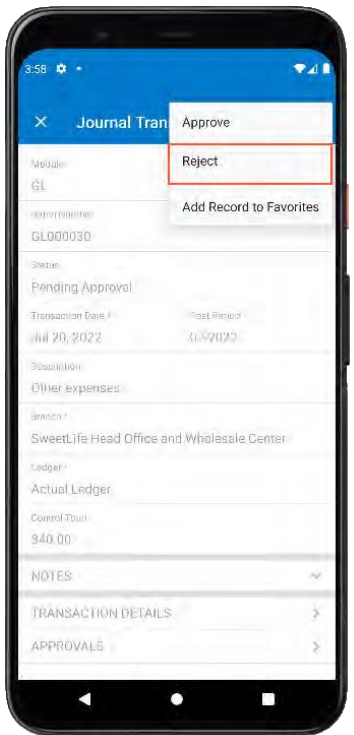
Automatic Assignment of the Tax Zone to Sales Orders and Invoices

In previous versions of MYOB Advanced, when a sales document (a sales order or an SO invoice) was created, the tax zone for the document was copied from customer location settings on the Customer Locations (AR303020) form. If no tax zone was specified for the customer location, the system searched for a tax zone for which the needed postal code was specified on the **Zip Codes** tab of the Tax Zones (TX206000) form.

On this tab, it was not possible to specify a range of postal codes for which a tax zone was applicable. A tax zone could not be defined to apply to a country, country and state, or country and postal code.

To address this issue, in MYOB Advanced 2022.2, the following enhancements have been introduced:

- On the Tax Zones form, tax zones can be defined more flexibly based on combinations of country, state, and postal code, and ranges of postal codes can be specified. The system supports three types of tax zones:

  - Tax zones based on one country or multiple countries. With this type of tax zone, a user can include entire countries in the tax zone.
  - Tax zones based on one state or multiple states. A user can assign any combination of states of the same country to this tax zone. With this type, the tax zone consists of the entire state or states.
  - Tax zones based on one postal code or multiple postal codes. Multiple ranges of postal codes within the same country can be assigned to this tax zone.

- On data entry forms where the tax zone corresponding to the shipping address was copied from the **Zip Codes** tab on the Tax Zones form, the logic of the system's search for a tax zone has been modified. If a customer has an empty tax zone, the system searches for a tax zone that matches the range of postal codes specified on the Tax Zones form. If no tax zone is found, the system continues searching for a tax zone that matches the state of the shipping address. If no tax zone is found, the system searches for a tax zone that matches the country of the shipping address.
  This behaviour has been implemented on the following forms: Invoices and Memos (AR301000), Sales Orders (SO301000), Invoices (SO303000), Opportunities (CR304000), Project Quotes (PM304500), Sales Quotes (CR304500), Service Orders (FS300100), and Appointments (FS300200).
- The system now considers the combination of the country, state, and postal code in the shipping address while searching for a matching tax code.

Changes to the Tax Zones Form

On the Tax Zones (TX206000) form, the **Zip Codes** tab has been replaced with the **Ship-To Address** tab, which is shown in the following screenshot.

In the **Tax Zone Is Based On** field on this tab, a user can select one of the following options:

- *Countries* (default): The tax zone is based on any number of countries. If the user selects this option, the **Country** field on this tab becomes unavailable. To add each country in the tax zone, the user clicks **Add Row** on the table toolbar and selects the country from the list in the **Country** column.
- *States*: The tax zone is based on any number of states of a specific country. If the user selects this option, the **Country** field on this tab becomes available. The user selects a country in the **Country** field and then adds each state in the tax zone by clicking **Add Row** on the table toolbar and selecting the state in the list in the **State** column.
- *Postal Codes*: The tax zone is based on any number of ranges of postal codes within a specific country. If this option is selected, the **Country** field on this tab is available. The user selects a country in the **Country** field and then adds each range of postal codes in the tax zone by clicking **Add Row** on the table toolbar and entering the needed values in the **From Postal Code** and **To Postal Code** columns.

Upgrade Notes

After an upgrade to MYOB Advanced 2022.2, on the Tax Zones (TX206000) form, for each tax zone, the settings on the deprecated **Zip Codes** tab will be converted to settings on the **Ship-To Addresses** tab as follows:

- The **Tax Zone Is Based On** field will be filled in with the *Postal Codes* option. The **Country** field will be left empty.
- Each row in the table on the deprecated **Zip Codes** tab will be converted into one row on the **Ship-To Addresses** tab. The rows will be converted according to the following rules:
  - If *1* was specified in the **Zip Code+4 (Min)** column and *9999* was specified in the **Zip Code+4 (Max)** column, the **From Postal Code** and **To Postal Code** columns will be filled in with the one that had been specified in the **Zip Code** column for the row.
    If settings other than *1* and *9999* were specified in the **Zip Code+4 (Min)** and **Zip Code+4 (Max)** columns, respectively, the **From Postal Code** column will be filled in with the postal code followed by a hyphen and then the value in the **Zip Code+4**

(Min) column. The **To Postal Code** column will be filled in with the postal code followed by a hyphen and then the value in the **Zip Code+4 (Max)** column.

- The values in the **Zip Code+4 (Min)** and **Zip Code+4 (Max)** columns, when concatenated with a postal code added after a postal code and a hyphen, will be formatted to four digits with leading zeroes.

The following table shows an example of how the settings on the deprecated **Zip Codes** tab are converted to the Ship-To Addresses tab.

Zip Codes Tab			Ship-To Addresses Tab	
Zip Code	Zip Code+4 (Min)	Zip Code+4 (Max)	From Postal Code	To Postal Code
12345	1	9999	12345	12345
12345	67	890	12345-0067	12345-0890
A1A 1A1	1	9999	A1A 1A1	A1A 1A1

Dunning Level by Customer Class

In MYOB Advanced 2022.2, if dunning levels have been defined on the Accounts Receivable Preferences (AR101000) form, these dunning levels can also be specified for specific customer classes. For example, different dunning processes can be required for business-to-business (B2B) customers and business-to-consumer (B2C) customers, for key customers and regular customers, and for customers located in different countries.

Changes to the Customer Classes Form

On the Customer Classes (AR201000) form, the **Dunning** tab has been added, as shown in the following screenshot. The tab contains a table specifying the dunning levels for customers of this customer class. These dunning levels are used when preparing and releasing dunning letters.

Dunning Letter Level	Days Past Due	Days to Settle	*Description	Dunning Fee
1	30	3	30 Days	0.00
2	60	3	60 Days	0.00
3	90	3	90 Days Past Due	0.00
4	120	3	120 Days Past Due	0.00

This tab appears on the form if the *Dunning Letter Management* feature is enabled on the Enable/Disable Features (CS100000) form.

When a user creates a new customer class on the Customer Classes form, the list of dunning levels are copied to the **Dunning** tab from the Accounts Receivable Preferences (AR101000) form.

The user can delete unneeded levels, change the settings of existing levels, and add new levels not defined on the Accounts Receivable Preferences form. Dunning levels specified for a customer class on the Customer Classes form and on the Accounts Receivable Preferences form can be changed at any time.

The dunning levels specified on the Accounts Receivable Preferences form are used for creation of new customer classes. If the dunning settings on the Accounts Receivable Preferences form are changed, the dunning level settings defined for existing customer classes are not updated. To change the dunning levels for existing customers, the user should update the dunning levels of the appropriate customer class on the Customer Classes form.

Changes to the Prepare Dunning Letters Form

On the Prepare Dunning Letters (AR521000) form, the process of preparing dunning letters uses the dunning level settings defined for the customer class that a user selects on the form.

If no customer class is selected (Item 1 in the following screenshot) and the **Dunning Letter Level** option button is selected, the setting in the **To** field (Item 2) is used as the maximum dunning level in all customer classes when the dunning letters are prepared. The following screenshot illustrates these settings.

If a customer class is selected, the setting in the **To** field is used as the maximum dunning level in the selected customer class when the dunning letters are prepared.

If the *Parent-Child Customer Relationship* feature is enabled on the Enable/Disable Features (CS100000) form, in the table, a single row for a parent and its child customers is shown with the customer class of the parent customer and the balances and number of documents totalled from the documents of all these customers. When the system processes the documents of these customers, to populate the table and create dunning letters, the system uses the dunning levels configured for the customer class of the parent customer. Thus, the dunning levels configured for the child customers will be ignored. When one of these dunning letters is released, the system applies the dunning fee from the customer class of the parent customer.

Upgrade Notes

During an upgrade to MYOB Advanced 2022.2, the system will copy the dunning levels from the **Dunning** tab of the Accounts Receivable Preferences (AR101000) form to the **Dunning** tab on the Customer Classes (AR201000) form for each customer class.

Exclusion of Payments and Voided Payments from Open Item Statements

In previous versions of MYOB Advanced, when a customer statement was generated, the document balances were calculated based on the document applications on the statement date. If a document with an open balance, such as a payment, was voided, it was still shown on the customer statement, even if the customer's statement type was *Open Item*.

Starting in MYOB Advanced 2022.2, the logic of generating customer statements with the *Open Item* type has been modified so that the documents closed before or on the statement date are not included in the customer statement.

If a customer has *Open Item* selected in the **Statement Type** field on the **Billing** tab of the Customers (AR303000) form, when a statement is generated, the system performs an additional verification for all documents included in the statement: payments, voided payments, customer refunds, and voided customer refunds. If a document is closed on a date earlier than or the same as the statement date, this document is not included in the statement.

The system performs this verification on the following forms:

- Prepare Statements (AR503000)
- Print Statements (AR503500) when a user selects *Regenerate Statement* in the **Actions** field of this form
- Customers, when a user clicks **Generate on Demand** and then **Regenerate Last Statement** on the More menu (under **Statements**)

Inclusion of All Documents with Open Balances in Dunning Letters

In previous versions of MYOB Advanced, dunning letters included only invoices and debit memos with open balances. Other documents with open balances, such as credit memos and payments, were not included in dunning letters. Consequently, dunning letters did not accurately reflect customers' balances for a specific date.

Starting in MYOB Advanced 2022.2, users can also include the following documents, in addition to overdue and open invoices and debit memos, in dunning letters:

- Open credit memos
- Open payments, prepayments, and customer refunds

Changes to the Accounts Receivable Preferences Form

On the **Dunning** tab of the Accounts Receivable Preferences (AR101000) form, the following UI changes have been introduced:

- The **Dunning Letter Settings** section has been added (Item 1 in the screenshot below).
- The **Include Other Unpaid Documents** checkbox has been renamed to **Add Coming-Due Invoices** (Item 2) and moved from the **Dunning Process Settings** section to the **Dunning Letter Settings** section. This checkbox is selected by default.
- The **Add Open Payments and Credit Memos** checkbox (Item 3) has been added to the **Dunning Letter Settings** section. This checkbox is cleared by default.

Changes to the Prepare Dunning Letters Form

On the Prepare Dunning Letters (AR521000) form, the following UI changes have been made to the Selection area:

- The **Include Other Unpaid Documents** checkbox has been renamed to **Add Coming-Due Invoices** (Item 1 on the screenshot below). By default, the state of this checkbox is the same as

the state of the **Add Coming-Due Invoices** checkbox on the Accounts Receivable Preferences (AR101000) form.

- The **Add Open Payments and Credit Memos** checkbox (Item 2) has been added. By default, the state of this checkbox is the same as the state of the **Add Open Payments and Credit Memos** checkbox on the Accounts Receivable Preferences form.
- The **Include** section has been removed and replaced by the **Include** label (Item 3). The section had appeared on the form if on the Accounts Receivable Preferences form, *By Document* was selected in the **Dunning Process** field (**Dunning** tab). The option buttons from the **Include** section are now right of the **Include** label, but the **From** and **To** fields have been moved out of the **Include** section.

Depending on the states of the **Add Coming-Due Invoices** and **Add Open Payments and Credit Memos** checkboxes, the following documents can be included in the generated dunning letters.

Add Coming-Due Invoices	Add Open Payments and Credit Memos	System Behaviour
Cleared	Cleared	Overdue invoices and debit memos are included in the dunning letter. (This system behaviour existed before 2022.2 and has not changed.)
Selected	Cleared	Open invoices and debit memos are included in the dunning letter. (This system behaviour existed before 2022.2 and has not changed.)
Cleared	Selected	Overdue invoices, overdue debit memos, open credit memos, and open payments are included in the dunning letter. (This system behaviour is new to 2022.2.)
Selected	Selected	Open invoices, open debit memos, open credit memos, and open payments are included in the dunning letter. (This system behaviour is new to 2022.2.)

Inclusion of Additional Documents on the Dunning Letters Form

If the **Add Open Payments and Credit Memos** checkbox has been selected on the Prepare Dunning Letters (AR521000) form, when a user clicks a row and clicks **View Dunning Letter** on the table toolbar

of the Print/Release Dunning Letters (AR522000) form, the system includes all documents with open balances in the dunning letter that opens on the Dunning Letter (AR306000) form.

On the Print/Release Dunning Letters form, the amount in the **Overdue Balance** column in the table is calculated without the amounts of credit memos, payments, prepayments, and customer refunds.

Changes to the Dunning Letter Report

When a user runs the Dunning Letter (AR661000) report, the amounts of documents are shown with the plus sign (+) to increase the customer's balance and with the minus sign (–) to decrease the customer's balance.

The following table lists the types of documents that can be included in the dunning letter and notes the amount sign of each.

Document Type	Amount Sign
Invoice	+
Debit Memo	+
Overdue Charge	+
Credit Memo	–
Payment	–
Prepayment	–
Customer Refund	+

The layout of the Dunning Letter report has been changed as follows:

- The **Invoice Number** column has been replaced with two columns—**Doc. Type** and **Ref. Number**.
- The **Falling Due** column has been renamed to **Due Date**.
- For invoices, debit memos, and overdue charges, the **Due Date** column shows *Current* if the document is not overdue. For credit memos, payments, prepayments, and customer refunds, the **Due Date** column is empty.
- The amounts in the **Original Amount**, **Outstanding**, and **Outstanding <base currency>** columns are shown with a sign that depends on the document type.
- The **Total Due** amount is calculated based on the signs of the amounts.
- If *By Document* is selected in the **Dunning Process** field on the **Dunning** tab of the Accounts Receivable Preferences (AR101000) form, all documents are split into groups with same **Dunning Letter Level**. Within each group, documents are sorted by their **Doc. Date** and **Ref. Number**.

> **Note:** Because credit memos, payments, prepayments, and customer refunds have the **Dunning Letter Level** of *0*, all these documents are shown in the last listed group along with invoices that are not yet due.

- If *By Customer* is selected in the **Dunning Process** field on the **Dunning** tab of the Accounts Receivable Preferences form, all documents are shown in the same group. Within this single group, documents are sorted by their **Doc. Date** and **Ref. Number**. Credit memos, payments, prepayments, and customer refunds are shown within this group.

The following screenshot illustrates the Dunning Letter report if the *By Document* option is selected on the Accounts Receivable Preferences form.

DUNNING LETTER

Date: May 12 2022

Acumatica
The Cloud ERP

Products Wholesale
11235 SE 6th St.
Suite 140
Bellevue, WA, 98004
Phone: 206-555-1212
Web: www.revisiontwo.com

ADDRESS:

Star America Toys
6780 58th Ave
Vero Beach FL 32967
United States of America

Dear Customer,

The following invoices had not been paid by 5/12/2022. Would you please settle these accounts by 5/15/2022? Our accounts reflect payments received until 5/12/2022. If you made the payment after this date please ignore this letter.

TOYSTAR

					Reminder Nbr.:		1
NO.	Doc. Type	Ref.Number	Date	Due Date	Currency	Original Amount	Outstanding	Outstanding USD
1	INVOICE	AR010353	11/11/2021	12/11/2021	USD	141,905.40	141,905.40	141,905.40
2	INVOICE	AR010460	12/15/2021	1/14/2022	USD	232,163.40	232,163.40	232,163.40
3	INVOICE	AR010466	12/19/2021	1/18/2022	USD	114,131.60	114,131.60	114,131.60
4	INVOICE	AR010560	1/9/2022	2/8/2022	USD	228,343.20	228,343.20	228,343.20
5	INVOICE	AR010616	1/28/2022	2/27/2022	USD	118,999.20	118,999.20	118,999.20
6	OVERDUE CHARGES	AR010723	2/28/2022	2/28/2022	USD	14,407.06	14,407.06	14,407.06
7	INVOICE	AR010670	2/6/2022	3/8/2022	USD	115,199.40	115,199.40	115,199.40

					Reminder Nbr.:		0
NO.	Doc. Type	Ref.Number	Date	Due Date	Currency	Original Amount	Outstanding	Outstanding USD
8	CREDIT MEMO	AR010726	3/8/2022		USD	-3,659.00	-3,659.00	-3,659.00

Total Due (USD):	961,490.26
Overdue Amount (USD):	965,149.26

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Upgrade Notes

After an upgrade to MYOB Advanced 2022.2, the system will apply the following changes on the **Dunning** tab of the Accounts Receivable Preferences (AR101000) form:

- The **Add Coming-Due Invoices** checkbox will inherit its state from the **Include Other Unpaid Documents** checkbox of the previous version.

- The new Add Open Payments and Credit Memos checkbox will be cleared.

Customised dunning letter reports will still work, but if on the Accounts Receivable Preferences form, the **Add Open Payments and Credit Memos** checkbox is selected, the system administrator should review how credit memos and payments are shown in these reports. If they are not shown in an acceptable way, we recommend that standard reports be used instead of customised ones, or that the company create a new customised report.

Improved Processing of Batch Payments

In previous versions of MYOB Advanced, after the release of a batch of Automated Clearing House (ACH) payments, the batch could be exported to a file that would be sent to a bank. As a result, if the bank rejected one payment in the batch, a user had to void all payments in the batch, create new payments again, and create a new batch of payments that excludes the rejected payment. Starting in MYOB Advanced 2022.2, the following improvements have been made to ease the processing of ACH payment batches:

- A batch can be exported before release.
- An exported batch can be corrected so that incorrect payments can be excluded from the batch.
- Suppliers' payment details can be changed, and a batch can be reexported.
- A batch payment can be cancelled, and all released payments in the batch can be voided at once.
- A released batch payment can be voided, which causes all the payments in the batch to be voided at once.
- Payments can be added to an existing batch.

The following sections provide more information about these improvements and the related changes that have been made to forms.

Changes to the Payment Methods Form

On the **Settings for Use in AP** tab of the Payment Methods (CA204000) form, the **Release Batch Payments Before Export** checkbox has been added, as shown in the following screenshot.

If this checkbox is cleared, batches can be exported before they are released. In this case, if a bank rejects a payment or if there is an error in the payment details, a user can roll back the batch status to *Balanced* and edit the batch by excluding the payment or updating the details. The batch can then be exported again.

If this checkbox is selected, batches can be exported after they are released. (This was the system behaviour in MYOB Advanced versions prior to 2022.2.)

Changes to the Batch Payments List of Records

On the *Batch Payments (AP3050PL)* list of records, the following UI changes have been introduced:

- The **New Record** button (see Item 1 in the following screenshot) has been added to the form toolbar. By clicking this button, a user can create a new batch and add payments with the *Pending Print* status to this batch.
- The **Status** column (Item 2) has been added to the table.

On the Batch Payments (AP305000) form, the UI changes shown in the screenshot below have been introduced:

- The **Add Payments** button (see Item 1 in the following screenshot) has been added to the table toolbar.
- When the user clicks **Add Payments**, the system opens the **Add Payments** dialog box (Item 2), where the user can select the payments that should be added to the batch.
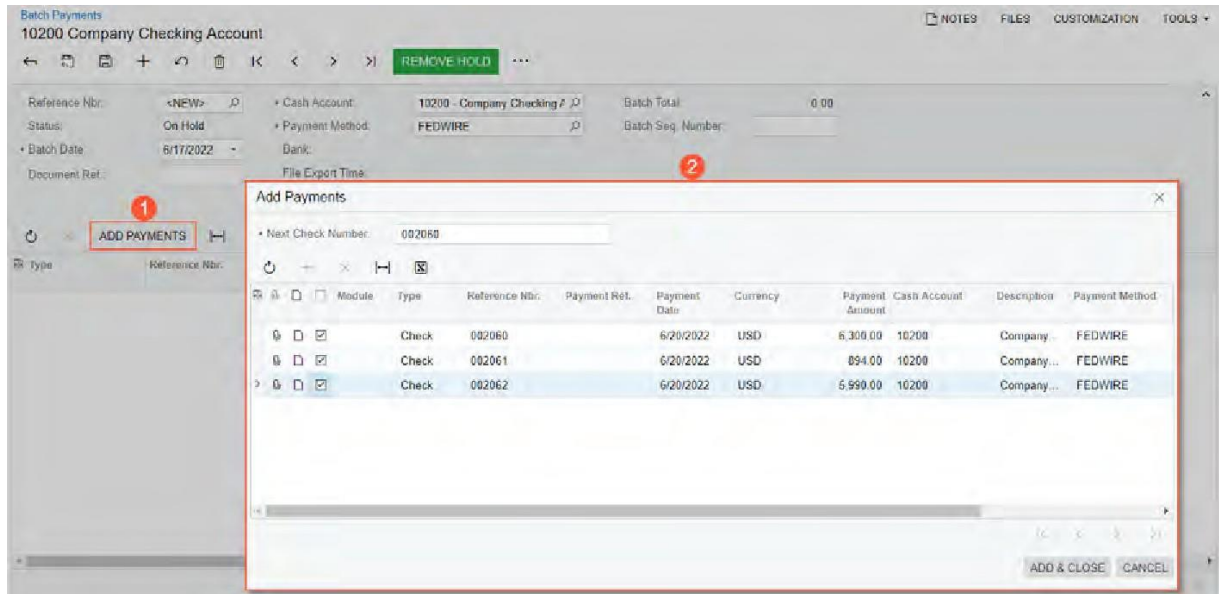
If a batch is created on the Batch Payments form, the **Cash Account** and **Payment Method** settings of the Summary area are required. The values in these two fields are used as selection criteria when the system loads payments in the **Add Payments** dialog box.

In the **Add Payments** dialog box, when the user specifies a value in the **Next Check Number** field, selects payments, and clicks **Add & Close**, the selected payments are added to the batch. For each payment, the status is changed to *Printed*, and the **Batch Payment Nbr.** is set to the **Reference Nbr** of the payment.

On the More menu of the Batch Payments form, the **Corrections** category has been added, as shown in the screenshot below. The category includes the following commands:

- **Correct**: Changes the batch's status from *Exported* to *Balanced*, so that the user can add payments to or remove payments from the batch. This command is available if the status of the batch is *Exported*.
- **Cancel**: Removes all unreleased payments or voids released payments at once from the batch and assigns the *Cancelled* status to the batch. This command is available if the status of the batch is *Exported*.
- **Void**: Voids the released payments in a released batch and the batch itself. The status of the batch is changed to *Voided*. This command is available if the status of the batch is *Released*.
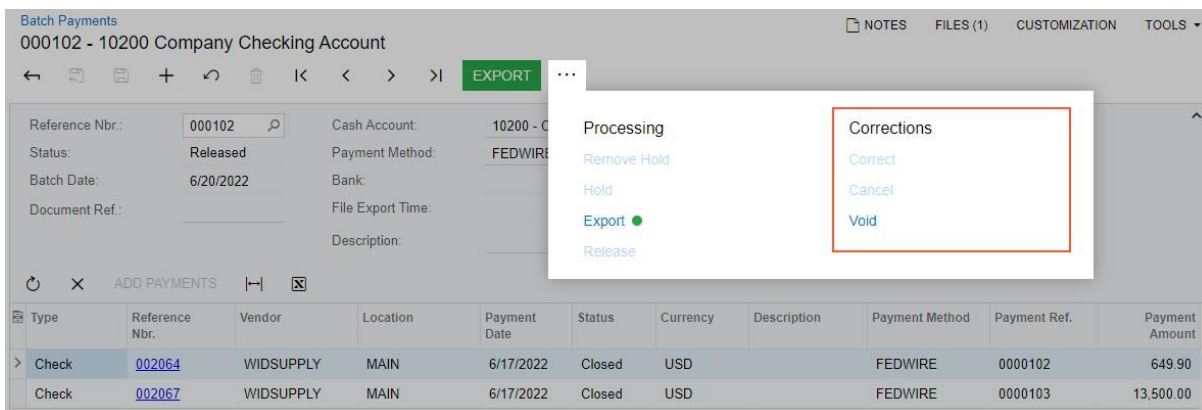
Changes to the Workflow of Batch Payment Processing

The workflow of processing batch payments has been changed. The following table shows the statuses that can be assigned to a batch and the commands available for each status on the More menu of the Batch Payments (AP305000) form (some of which are also buttons on the form toolbar).

Status	Description	Available Commands/Buttons
Balanced	The batch has been created and can be exported if the **Release Batch Payments Before Export** checkbox is cleared on the Payment Methods (CA204000) form for the payment method or released if the **Release Batch Payments Before Export** checkbox is selected. This status is also assigned to a batch that was unsuccessfully exported. This status is assigned to a new batch if the **Hold Documents on Entry** checkbox is cleared on the Accounts Payable Preferences (AP101000) form. Users can add payments to a batch of this status or delete payments from the batch if the payments are not released.	• **Hold** • **Release** (if the **Release Batch Payments Before Export** checkbox is selected on the Payment Methods (CA204000) form) • **Export** if the **Release Batch Payments before Export** checkbox is cleared on the Payment Methods form • **Cancel**
On Hold	The batch has been created and can be edited. This status is assigned to a new batch if the **Hold Documents on Entry** checkbox is selected on the Accounts Payable Preferences form. Users can add payments to a batch with this status or delete payments from the batch if the payments are not released.	**Remove Hold**

Status	Description	Available Commands/Buttons
Released	All the payments in the batch have been released.	• **Void** • **Export** if the **Release Batch Payments before Export** checkbox is selected on the Payment Methods form
Exported	The batch has been exported to a file and is locked for editing. The unreleased payments in the batch remain unreleased.	• **Correct** • **Cancel** • **Release** if the **Release Batch Payments before Export** checkbox is cleared on the Payment Methods form
Cancelled	All unreleased or voided released payments have been removed from the batch.	N/A
Voided	All payments included in the batch have been voided and the GL transactions generated for the payments have been voided.	N/A

Voiding of Batch Payments

If a user voids a batch by clicking **Void** on the More menu of the Batch Payments (AP305000) form, the system displays the **Void Batch Payments** dialog box, as shown in the following screenshot.
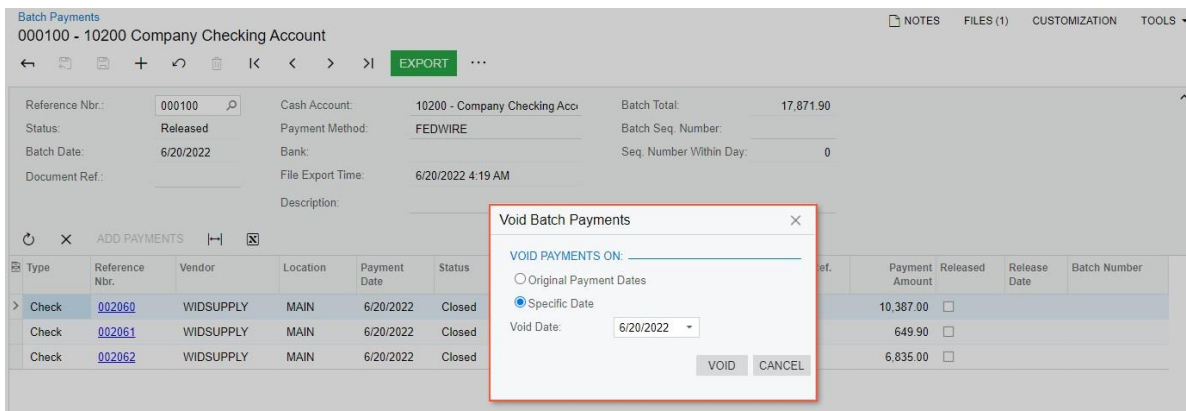
In this dialog box, the user can select an option button indicating the date or dates as of which the batch will be voided. The following option buttons are available:

• **Original Payment Dates**: The payments in the batch will be voided as of their dates.
• **Specific Date**: The payments in the batch will be voided on the specific date selected in the **Void Date** field, which appears in the dialog box. This date must be the same as or later than the date of the most recent payment in the batch.

Upgrade Notes

After an upgrade to MYOB Advanced 2022.2, the **Release Batch Payments Before Export** checkbox will be cleared for all ACH payment methods on the Payment Methods (CA204000) form.

Additional Information

For more details on how to correct batches, see To Correct a Batch of ACH Payments in the in-product help.

Improvements in the Straight-Line Depreciation Method

Starting in MYOB Advanced 2022.2, the logic for calculating depreciation by using the *Straight-Line* calculation method and the *Full Day* averaging convention has been reimplemented by using a new depreciation engine.

Changes to the Fixed Asset Classes Form

On the Fixed Asset Classes (FA201000) form, the state of the **Accelerated Depreciation for SL Depr. Method** checkbox is now ignored for *Straight-Line* calculation methods that use the *Full Day* averaging convention.

On the Fixed Assets (FA303000) form, the system shows a warning message advising the user to specify the *Remaining Value* calculation method for the asset if the following conditions are met:

- Also on the Fixed Assets form, the fixed asset has the *Straight-Line* depreciation method with the *Full Day* averaging convention.
- For the asset class specified for the asset, the **Accelerated Depreciation for SL Depr. Method** checkbox is selected on the Fixed Asset Classes form.

The message is shown on the **Balance** tab if the user clicks **Calculate Depreciation** on the More menu.

Changes to the Calculate Depreciation Form

The warning message shown on the Fixed Assets (FA303000) form is also shown on the Calculate Depreciation (FA502000) form after the end of processing if at least one book in the asset uses a depreciation method based on the *Straight-Line* calculation method and the *Full Day* averaging convention. The following screenshot illustrates the warning message shown on the Calculate Depreciation form.
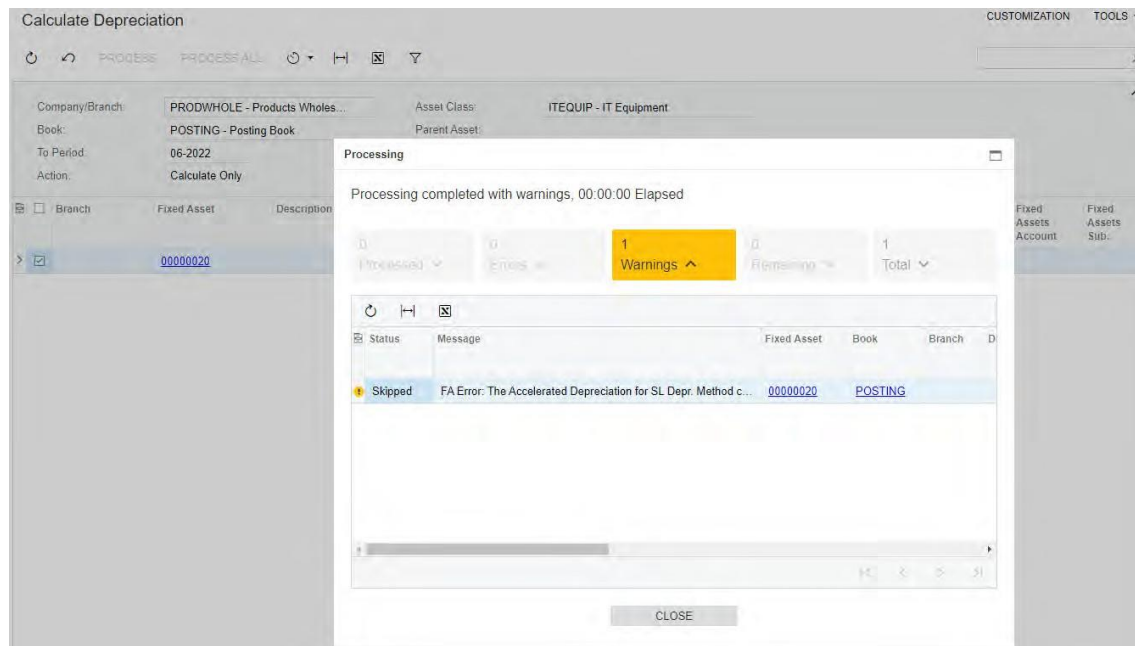
Prevention of the Depreciation of Assets with the Straight-Line Method

A fixed asset depreciated in the period specified in the **Depr. to Period** column on the **Balance** tab of the Fixed Assets (FA303000) form is assigned the *Fully Depreciated* status if the following conditions are met:

- The asset's depreciation method, which is selected on the **Balance** tab of the Fixed Assets form, has the *Straight-Line* calculation method and the *Full Period* or *Full Day* averaging convention specified on the Depreciation Methods (FA202500) form.
- On the Fixed Asset Classes (FA201000) form, the **Accelerated Depreciation for SL Depr. Method** checkbox is selected for the asset's depreciation method.
- On the Fixed Assets Preferences (FA101000) form, the **Automatically Release Depreciation Transactions** checkbox is selected.
- The asset's **Net Value** specified on the **Balance** tab of the Fixed Assets form may not be equal to *0* (if the asset has additions), although users expect the net value to be *0*.

To prevent this possible confusion, on the Calculate Depreciation (FA502000) form, the following enhancements have been introduced:

- The system excludes from depreciation the lines corresponding to the asset's book that has the following settings:

  - The *Straight-Line* calculation method with the *Full Period* or *Full Day* averaging convention
  - The **Accelerated Depreciation for SL Depr. Method** checkbox selected for the depreciation method on the Fixed Asset Classes form.
  - At least one addition was created outside of the period specified in the **Depr. From Period** column on the **Balance** tab of the Fixed Assets form

- If *Calculate Only* is selected in the **Action** field, the system displays a warning message but still processes the asset. If *Depreciate* is selected in the **Action** field, the system displays an error message and does not allow a user to select or process the asset.

Modification of Dunning Fees During the Dunning Process

Starting in MYOB Advanced 2022.2, the dunning process has been improved to allow more flexibility for users. Users can now review the documents included in dunning letters and dunning fees before they prepare and release a dunning letter. Specific documents can be excluded from the dunning letter, and the dunning fee amount can be modified. When the dunning letter is released, the system creates a dunning fee invoice based on the dunning fee specified in the dunning letter.

> **Note:** The *Dunning Letter Management* feature must be enabled on the Enable/Disable Features (CS100000) form for this functionality to be used.

On all forms where dunning fees can be specified, only positive values may be specified for dunning fees. A positive amount can be entered for a dunning fee if an item is selected in the **Dunning Fee Item** field on the **Dunning** tab of the Accounts Receivable Preferences (AR101000) form.

Users can modify dunning fees if the following conditions are met on the **Dunning** tab of this form:

- *By Document* is selected in the **Dunning Process** field.
- The **Automatically Release Dunning Letters** checkbox is cleared. Dunning letters are created with the *Draft* status and their settings can be modified.

> **Note:** If *By Customer* is selected in the **Dunning Process** field on the Accounts Receivable Preferences form, the **Automatically Release Dunning Letters** checkbox is always selected, and dunning letters are created with the *Released* status. The default dunning fees specified on the Customer Classes (AR201000) form for the customer class are used in these letters and cannot be modified by users.

The scenario in which a user can remove documents from the dunning letter, modify dunning fees, or perform both of these actions includes the following steps:

1. On the Prepare Dunning Letters (AR521000) form, the user prepares dunning letters.
2. On the Print/Release Dunning Letters (AR522000) form, the user reviews the prepared dunning letters by clicking **View Dunning Letter** on the table toolbar.
3. On the Dunning Letter (AR306000) form, which opens, the user reviews the dunning letter, removes documents and modifies the value in the **Dunning Fee** field of the Summary area if the dunning fee should be updated.
4. The user releases the dunning letters by clicking **Release** on the form toolbar of the Dunning Letter or Print/ Release Dunning Letters form.
5. For each released dunning letter, the system creates a dunning fee invoice with the dunning fee specified by the user. (The user can open the dunning fee invoice by clicking the link in the **Fee Reference Nbr.** field on the Dunning Letter form.)

Changes to the Prepare Dunning Letters Form

On the Prepare Dunning Letters (AR521000) form, the **Currency** column has been added to the table, as shown in the following screenshot. The column shows the base currency of the tenant to which the user is signed in. The column is visible on the form if the *Multicurrency Accounting* feature is enabled on the Enable/Disable Features (CS100000) form.

The **Dunning Fee** column has been removed from the table.

Changes to the Print/Release Dunning Letters Form

On the Print/Release Dunning Letters (AR522000) form, the following UI changes have been introduced:

- The **Dunning Fee** column (see Item 1 in the following screenshot) has been added to the table. The column is read-only.
- The **Currency** column (Item 2) has been added to the table. The column is read-only and appears on the form if the *Multicurrency Accounting* feature is enabled on the Enable/Disable Features (CS100000) form.

Changes to the Dunning Letters Form

On the Dunning Letter (AR306000) form, the following UI changes have been introduced:

- The **Customer** field (see Item 1 in the following screenshot) now displays the customer ID and customer name.

- The **Dunning Fee** field (Item 2) has been added. Users can edit the value in this field if the status of the dunning letter is *Draft*.
- The unnamed Currency field (Item 3) has been added to the right of the **Dunning Fee** field. The field shows the base currency of the tenant to which the user is signed in. The field appears on the form if the Multicurrency Accounting feature is enabled on the Enable/Disable Features form.

Upgrade Notes

After an upgrade to MYOB Advanced 2022.2, the **Dunning Fee** setting on the Dunning Letter (AR306000) form will be updated as follows:

- If the status of a dunning letter is *Draft*, the **Dunning Fee** field will be populated with the dunning fee specified for the customer class on the **Dunning** tab of the Customer Classes (AR201000) form.
- If the status of a dunning letter is *Released*, the **Dunning Fee** field will be populated with the **Detail Total** amount of the dunning fee invoice whose identifier is specified in the **Fee Reference Nbr.** field on the Dunning Letter form. If no dunning fee invoice was generated, the **Dunning Fee** field will be populated with *0.00*.

Preventing Creation of Documents with Dates in the Distant Future

In previous versions of MYOB Advanced (prior to 2019 R1), when a user was creating a document, dates were validated against the financial period: The financial period to which the date belonged had to exist in the system. When the *Multiple Calendar Support* feature was introduced, this validation was removed from the system. Thus, from MYOB Advanced 2019 R1 to 2022 R1, users could specify any date in the **Date** field on data entry forms.

This lack of validation created some problems. Sometimes a user accidentally entered an invalid year without noticing the mistake (for example *20/7/7020*). The system showed a warning message if the date was outside of the specified period, but the user could still process the document. The most typical issues with entering dates were the following:

- A user created a payment with an incorrect date in the future and then needed to void the payment. Such a payment could be voided only if on the **Settings for Use in AR** tab of the Payment Methods (CA204000) form, the **Default Void Date to Document Date** checkbox was selected.
- A user accidentally created an invoice with the incorrect date in the future. As a result, this invoice was never shown in aging reports. On the other hand, the payment to which the invoice is applied is shown in the aging reports for several years. Also, there were often errors in the application dates in such payments.
- A user accidentally created an invoice with an incorrect date in the past. This invoice was always shown in aging reports for any period while it retained the *Open* status.

Starting in MYOB Advanced 2022.2, the validation of dates has been implemented. On data entry forms, the system will not allow users to enter dates that do not correspond to any financial period specified on the Master Financial Calendar (GL201000) form. On all affected forms, the system will display an error message near the corresponding date field if the date is not valid. The new validation has been added on each data entry form where the financial period is inserted by default from the entered date.

The List of Affected Forms

The following table lists the form where the date validation has been implemented.

Area	Form	The Field Where the Date Validation Is Added
Manufacturing (Production Management)	Materials (AM300000)	**Date**
	Labour (AM301000)	**Date**
	Disassembly (AM301500)	**Date**
	Move (AM302000)	**Date**

Area	Form	The Field Where the Date Validation Is Added
	WIP Adjustment (AM308000)	**Date**
Accounts payable	Bills and Adjustments (AP301000)	**Date**
	Checks and Payments (AP302000)	**Application Date**
	Quick Checks (AP304000)	**Date**
	Prepare Payments (AP503000)	**Payment Date**
	Release AP Retainage (AP510000)	**Date**
Accounts receivable	Invoices and Memos (AR301000)	**Date**
	Payments and Applications (AR302000)	**Application Date**
	Cash Sales (AR304000)	**Date**
	Write Off Balances and Credits (AR505000)	**Doc. Date**
	Auto-Apply Payments (AR506000)	**Application Date**
	Release AR Retainage (AR510000)	**Date**
	Generate Payments (AR511000)	**Payment Date**
Cash management	Funds Transfers (CA301000)	**Transfer Date**, **Receipt Date**, **Doc. Date** (table column)
	Cash Transactions (CA304000)	**Tran. Date**
	Bank Deposits (CA305000)	**Deposit Date**
	Process Bank Transactions (CA306000)	**Payment Date** (the **Create Payment** tab with the **Create** checkbox selected)
Deferred revenue	Deferral Schedule (DR201500)	**Date**

Area	Form	The Field Where the Date Validation Is Added
Service Management	Run Appointment Billing (FS500100)	**Billing Date**
	Inventory Updates (FS500500)	**Document Date**
	Run Service Order Billing (FS500600)	**Billing Date**
	Run Service Contract Billing (FS501300)	**Billing Date**
General ledger	Journal Transactions (GL301000)	**Transaction Date**
	Trial Balance (GL303010)	**Import Date**
	Journal Vouchers (GL304000)	**Transaction Date**
	Run Allocations (GL504500)	**Allocation Date**
Inventory	Receipts (IN301000)	**Date**
	Issues (IN302000)	**Date**
	Adjustments (IN303000)	**Date**
	Transfers (IN304000)	**Date**
	Kit Assembly (IN307000)	**Date**
Projects	Project Transactions (PM304000)	**Date** (table column)
		Note: When the form is opened for the entry of a new record, the business date is inserted as the default setting and the validation is not performed. The date is validated only if the user manually changes the column value.
	Pro Forma Invoices (PM307000)	**Invoice Date**
	Run Project Billing (PM503000)	**Invoice Date**

Area	Form	The Field Where the Date Validation Is Added
Purchase orders	Purchase Receipts (PO302000)	**Date**
	Landed Costs (PO303000)	**Date**
Sales orders	Invoices (SO303000)	**Date**
Taxes	Tax Bills and Adjustments (TX303000)	**Date**

Support of Multiple Base Currencies for Contracts

The *Multiple Base Currencies* feature was implemented in MYOB Advanced in 2021 R1, although it could not be enabled if multiple other features were enabled, including *Contract Management*. Thus, it was not possible for companies to use both contract management and multiple base currencies.

Starting in MYOB Advanced 2022.2, contracts can be created and processed for companies in the same tenant with different base currencies. A contract can be successfully billed and an AR invoice can be created if the base currency of the contract's customer is the same as the base currency of the originating branch in the AR invoice. The sections below describe the details of multiple base currencies with contracts.

Changes to the Enable/Disable Features Form

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

The following sections describe changes in the logic of various forms in MYOB Advanced 2022.2 if the *Multiple Base Currencies* and *Contract Management* features are both enabled.

Changes to the Customer Contracts Form

On the Customer Contracts (CT301000) form, if a user is creating an invoice, the system displays an error message if the following currencies are different:

- The base currency of the shipping branch, which is specified for the contract in the **Shipping Branch** field of the **Summary** tab (**Billing Information** section). If no shipping branch is specified, the current branch (the branch to which the user is signed in) is used for comparison.
- The base currency of the customer to be billed; this customer is determined by the option in the **Bill To** field in the **Billing Information** section of the **Summary** tab. The base currency of the customer is specified in the **Currency ID** field (**Financial** tab) on the Customers (AR303000) form.

When the user makes changes to a contract that could affect pricing, the system recalculates the current and pending prices shown on the **Details** and **Recurring Summary** tabs of the Customer Contracts form in the contract currency, which is specified on the **Summary** tab (**Contract Settings** section) of the Customer Contracts form. The system selects and calculates the current and pending prices as follows:

- If the customer's base currency is the same as the contract currency, the system uses the default price of each inventory item on the **Details** tab, in the customer's base currency, for the current and pending prices. The default price of an item is specified in the **Default Price** field on the **Price/Cost** tab of the Non-Stock Items (IN202000) or Stock Items (IN202500) form.
- If the customer's base currency differs from the contract currency, the system recalculates the prices to the contract currency by using the base currency of the selected customer.
- If the selected customer has no base currency specified—that is, if the customer has been extended from a branch—the system recalculates the current and pending prices to the contract currency by using the base currency of the current branch.

Changes to the Run Contract Billing Form

For an invoice to the contract's bill-to customer, if a shipping branch is specified for the contract in the **Shipping Branch** field (**Summary** tab) of the Customer Contracts (CT301000) form, when a user is running contract billing on the Run Contract Billing (CT501000) form, the system will create an invoice by using this shipping branch as the originating branch and using the base currency of the shipping branch.

If no shipping branch is specified in the contract settings, the system will copy the current branch to the created invoice. If the base currency of the current branch differs from the base currency of the bill-to customer, the contract will not be billed, and the system will display an error message.

Changes to the Renew Contracts Form

For an invoice to the contract's bill-to customer, if a shipping branch is specified for the contract in the **Shipping Branch** field (**Summary** tab) of the Customer Contracts (CT301000) form, when a user is renewing a contract with creating an invoice on the Renew Contracts (CT502000) form, the system will create an invoice by using this shipping branch as the originating branch and using the base currency of the shipping branch.

If no shipping branch is specified in the contract settings, the system will copy the current branch to the created invoice. If the base currency of the current branch differs from the base currency of the bill-to customer, the contract will not be renewed, and the system will display an error message.

Changes to the Contract Usage Form

On the Contract Usage (CT303000) form, when contract usage is entered manually, the lookup table in the **Branch** column shows only the branches that have the same base currency as the contract's bill-to customer.

If the contract has a bill-to customer without a base currency—that is, if the customer has been extended from a branch—a user can select any branch in the lookup field in the **Branch** column.

Changes to the Cases and Release Cases Forms

If a contract is specified for a case in the **Contract** field on the **Additional Info** tab on the Cases (CR306000) form, and a user clicks **Release** on the Cases or Release Cases (CR507000) form to release the case and create contract usage, the system verifies whether the current branch has the same base currency as the bill-to customer specified for the contract. If these base currencies are different, the system displays an error message.

If the contract has a bill-to customer without a base currency—that is, if the customer has been extended from a branch—the case can be released regardless of the current branch.

Changes to the Release Time Activities Form

If a contract is selected in the **Contract** field of the Selection area of the Release Time Activities (EP507020) form and a user selects any activities to process them and create contract usage, the system verifies whether the current branch has the same base currency as the bill-to customer of the contract. If these base currencies are different, the system displays an error message.

If the contract has a bill-to customer without a base currency—that is, if the customer has been extended from a branch—the activity can be processed regardless of the current branch.

Changes to the Bill Expense Claims Form

In a claim of a customer, if a contract is specified in the **Project/Contract** column on the **Details** tab of the Expense Claim (EP301000) form, when a user is processing selected records on the Bill Expense Claims (EP502000) form and creates contract usage, the system verifies whether the current branch has the same base currency as the bill-to customer of the contract. If these base currencies are different, the system displays an error message.

If the contract has a bill-to customer without a base currency—that is, if the customer has been extended from a branch—the selected record can be processed regardless of the current branch.

Support of Multiple Base Currencies for the Dunning Process

The *Multiple Base Currencies* feature was implemented in MYOB Advanced in 2021 R1, although it could not be enabled if multiple other features were enabled, including *Dunning Letter Management*. Starting in MYOB Advanced 2022.2, the dunning process can be used and invoices with dunning charges can be created if multiple companies with different base currencies are configured in the same tenant.

Changes to the Enable/Disable Features Form

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

Depending on the system settings, if a user tries to enable the *Multiple Base Currencies* feature, the system displays error messages if any of the following pairs of settings is specified on the **General** tab (**Consolidation Settings** section) of the Accounts Receivable Preferences (AR101000) form:

- *Consolidated for All Companies* is selected in the **Prepare Statements** field, and *Consolidated for All Companies* is selected in the **Prepare Dunning Letters** field.
- *Consolidated for All Companies* is selected in the **Prepare Statements** field, and *For Each Branch* or *Consolidated for Company* is selected in the **Prepare Dunning Letters** field.
- *For Each Branch* or *Consolidated for Company* is selected in the **Prepare Statements** field, and *Consolidated for All Companies* is selected in the **Prepare Dunning Letters** field.

Changes to the Accounts Receivable Preferences Form

On the **General** tab (**Consolidation Settings** section) of the Accounts Receivable Preferences (AR101000) form, the **Consolidate Dunning Letters for all Branches** checkbox has been replaced with the **Prepare Dunning Letters** field (Item 1), which is shown in the following screenshot.

A user can select one of the following options in this field:

- *For Each Branch*: Dunning letters will be prepared separately for each branch of each company in the tenant.
- *Consolidated for Company* (Item 2): Dunning letters will be prepared for each company in the tenant. This is the default value.
- *Consolidated for All Companies*: Dunning letters will be consolidated for all companies in the tenant. This option is available if the *Multiple Base Currencies* feature is disabled.

The **Prepare Dunning Letters** field appears on the form if the *Dunning Letter Management* feature is enabled on the Enable/Disable Features (CS100000) form and either the *Multibranch Support* or *Multicompany Support*, or both features are enabled.

The **Dunning Letter from Branch** field appears on the form if the *Multiple Base Currencies* feature is disabled and is available if the *Consolidate for All Companies* option is selected in the **Prepare Dunning Letters** field.

Changes to the Companies Form

On the Companies (CS101500) form, the **Dunning Letter Branch** column has been added to the table on the **Branches** tab, as shown in the following screenshot. This checkbox must be selected for one branch of the company. If the user tries to select this checkbox in multiple rows, the system will leave the checkbox selected in one row and clear the checkbox in the other rows.

For the branch with this checkbox selected, when dunning letters are prepared, the system will use this branch as the originating branch of a dunning fee invoice (if an invoice should be created) and as the source of the name and address in the dunning letter.

This column appears on the form and is available if the *Dunning Letter Management* feature is enabled on the Enable/Disable Features (CS100000) form and *Consolidated for Company* is selected in the **Prepare Dunning Letter** field on the **General** tab of the Accounts Receivable Preferences (AR101000) form.

Changes to the Branches Form

On the Branches (CS102000) form, the **Dunning Process Settings** section has been added, as shown in the following screenshot. This section contains the **Dunning Letter Branch** checkbox.

This section appears on the form and the **Dunning Letter Branch** checkbox is available if the *Dunning Letter Management* feature is enabled on the Enable/Disable Features (CS100000) form and *Consolidated for Company* is selected in the **Prepare Dunning Letter** field on the Accounts Receivable Preferences (AR101000) form.

As is the case with this checkbox on the Companies (CS101500) form, if the checkbox is selected, when dunning letters are prepared, the system will use this branch as the originating branch of a dunning fee invoice and as the source of the name and address in each dunning letter.

Changes to the Prepare Dunning Letters Form

On the Prepare Dunning Letters (AR521000) form, the **Company** or **Company/Branch** lookup field has been added to the Selection area; the **Company** field is shown in the following screenshot.

If on the **General** tab of the Accounts Receivable Preferences (AR101000) form, *For Each Branch* is selected in the **Prepare Dunning Letters** field, this field is labelled as **Company/Branch** on the UI and is filled in by default with the branch to which the user is signed in. The user can select a company group, company, or branch in this field.

If on the Accounts Receivable Preferences form, *Consolidated for Company* is selected in the **Prepare Dunning Letters** field, this field is labelled as **Company** on the UI (as is the case in the screenshot above) and is filled in by default with the company of the branch to which the user is signed in. The user can select another company in this field. (Company groups and branches are not shown.)

This field appears on the form if *For Each Branch* or *Consolidated for Company* is selected in the **Prepare Dunning Letters** field on the Accounts Receivable Preferences form, regardless of whether the *Multiple Base Currencies* feature is enabled.

In the table on the form, the system loads the data related to the entity selected in the **Company** or **Company/ Branch** field. The system creates dunning letters and dunning fee invoices based on the consolidation option selected on the Accounts Receivable Preferences form. For example, if *For Each*

Branch is selected in the **Prepare Dunning Letters** field and a company group is selected in the **Company/Branch** lookup field, the system will prepare letters for each branch of the selected company group for which overdue documents exist.

If the *Multiple Base Currencies* feature is enabled, the **Currency** column on the Prepare Dunning Letters form shows the base currency of the branch shown in the **Branch** column. The option selected in the **Prepare Dunning Letters** field on the Accounts Receivable Preferences form determines what this branch is as follows:

- If *For Each Branch* is selected, the originating branch of the customer documents
- If *Consolidated for Company* is selected, the dunning letter branch specified on the Companies (CS101500) form

Changes to the Print/Release Dunning Letters Form

On the Print/Release Dunning Letters (AR522000) form, the **Company/Branch** lookup field has been added to the Selection area, as shown in the following screenshot.

If *For Each Branch* or *Consolidated for Company* is selected in the **Prepare Dunning Letters** field of the Accounts Receivable Preferences (AR101000) form, this field acts as a selection criterion for the letters in the table, regardless of whether the *Multiple Base Currencies* feature is enabled. A user can select a company group, company, or branch in this field.

If the *Multiple Base Currencies* feature is enabled, the **Currency** column appears on the form and shows the base currency of each dunning letter branch.

Changes to the Dunning Letters Form

On the Dunning Letter (AR306000) form, if the *Multiple Base Currencies* feature is enabled, the **Currency** field appears on the form and shows the currency of the dunning letter branch.

Changes to the Dunning Letter Report

The Dunning Letter (AR661000) report has been modified to support the new *Consolidated for Company* option in the **Prepare Dunning Letters** field of the Accounts Receivable Preferences (AR101000) form. When a user runs the report, the system displays it as follows, depending on the option selected in this field:

- If *Consolidated for Company* is selected, transactions related to all branches of the same company are included in one dunning letter. The dunning letter header shows the branch

name and address of the branch for which the **Dunning Letter Branch** checkbox is selected on the Branches (CS102000) form.

- If *For Each Branch* is selected, transactions related to each branch are included in a separate dunning letter.
- If *Consolidated for All Companies* is selected, transactions related to all branches are included in a single dunning letter. In the dunning letter header, the system uses the address, phone number, and email address of the branch selected in the **Dunning Letter from Branch** field on the Accounts Receivable Preferences form.

Upgrade Notes

During an upgrade to MYOB Advanced 2022.2, on the Accounts Receivable Preferences (AR101000) form, the system inserts the option in the **Prepare Dunning Letters** field based on the state of the **Consolidate Dunning Letters for all Branches** checkbox as follows:

- If the **Consolidate Dunning Letters for all Branches** checkbox was selected, the *Consolidate for All Companies* option is inserted in the **Prepare Dunning Letters** field.
- If the **Consolidate Dunning Letters for all Branches** checkbox was cleared, the *For Each Branch* option is inserted in the **Prepare Dunning Letters** field.

If your organisation uses customised reports, the system administrator should perform the steps described in *Upgrade Changes* in Release Notes for Developers.

Other Improvements

In MYOB Advanced 2022.2, multiple improvements to financial management processes have been introduced, as described below.

Changes to the Selection of the Retained Earnings Account on the General Ledger Preferences Form

Early in the process of implementing MYOB Advanced, an administrator or an implementation consultant specifies various system-wide settings related to the general ledger on the General Ledger Preferences (GL102000) form. In the **Chart of Accounts Settings** section of the **General** tab, the lookup table that opens in the **Retained Earnings Account** field (see Item 1 in the following screenshot) lists accounts with the *Liability* type only (Item 2).

If the administrator enters an account with another type in the **Retained Earnings Account** field, the system displays an error message.

Integrations

Ability to Change the Dimensions of the Box on the Fly

In previous versions of MYOB Advanced, users could not change the dimensions of boxes used for packing of items on the Shipments (SO302000) form. The only way one could perform this task was opening the (CS207600) form and changing the settings of an existing box or creating a new box which made it difficult to understand if the box fit the items in the shipment or to re-use boxes received from suppliers. In MYOB Advanced 2022.2, the ability to change box dimensions on the Shipments, Pick, Pack, and Ship (SO302020) forms (in Ship mode), or in the **Shop for Rates** dialog box on the Sales Orders (SO301000) form has been introduced.

Changing the Dimensions of a Box in a Shipment

When a shipment is prepared for a sales order, the user can specify the parameters of the package for the shipment.

On the **Packages** tab of the Shipments (SO302000) form, if the user packs items to a custom box, whose dimensions differ from the dimensions of the boxes that have been predefined in the system, the user can now change the dimensions of the box in the new **Length**, **Width**, **Height** columns (shown in the following screenshot). Any changes made by the user to the values of **Length**, **Width**, **Height** columns on the **Packages** tab of the Shipments form will be reflected in the **Shop For Rates** dialog box of the Sales Orders (SO301000) form and on the **Packages** tab of the Pick, Pack, and Ship (SO302020) form in Ship mode for the shipment and vice versa.

Also, the **Linear UOM** column has been added to the **Packages** table on the Shipments, Pick, Pack, and Ship forms and in the **Shop For Rates** dialog box of the Sales Orders form. The value of this column for the selected box is inherited from the **Linear UOM** column on the Boxes (CS207600) form.

If an external carrier service is used to deliver the package, the updated values of the **Length**, **Width**, **Height** columns are sent to the carrier service instead of the default values of the box dimensions to get the proper carrier rates.

Inventory and Order Management

Calculation of Inventory Turnover

In previous versions of MYOB Advanced, a user could evaluate the efficiency of the inventory management by using the functionality of ABC codes and movement classes.

MYOB Advanced 2022.2 introduces the new Inventory Turnover (IN407010) inquiry form. By using this inquiry form, a user can calculate the stock item turnover, item average inventory for the selected period, and the average number of days (DSI) required to turn the average inventory into sales.

The inventory turnover is one of the main indexes of the inventory efficiency. This ratio can be used to achieve the following goals:

- Understand the number of times a stock item is sold and replaced during a period
- Calculate the number of days a stock item needs to be converted to sales
- Compare the benchmark ratio by the industry

The Inventory Turnover Inquiry Form

In MYOB Advanced 2022.2, the Inventory Turnover (IN407010) inquiry form (shown in the following screenshot) is available in the **Inquiries** category of the **Inventory** workspace.

Before calculating the turnover, the user must specify criteria in the following fields in the Selection area:

- **Company/Branch**: The company, branch, or a group of companies for which the user wants to calculate inventory turnover
- **From Period**: The first period of the period range for which inventory turnover will be calculated
- **To Period**: The last period of the period range for which inventory turnover will be calculated

The user can further narrow the results of the inquiry by specifying values in the following optional fields in the Selection area:

- **Warehouse**: The warehouse of the items for which inventory turnover should be calculated.
- **Item Class**: The class of the items for which inventory turnover should be calculated.

- **Inventory ID**: The inventory ID of the item for which inventory turnover should be calculated. The user can click the **List** button next to this field and add rows with the items in the **Inventory Item List** dialog box (shown in the following screenshot).

After specifying values in the mandatory and optional fields in the Selection area, the user clicks the **Calculate Turnover** button on the form toolbar. If a warehouse is not specified, the system calculates the turnover of the listed stock items (those that meet the other selection criteria) separately for each warehouse, with each item having one row per warehouse.

The system saves the results of each turnover calculation. If the same values are specified in the **Company/Branch**, **From Period**, and **To Period** fields as were specified for one of the previous calculations, the system displays the existing calculation.

Calculation Rules

The turnover ratio is calculated according the following formula: `Turnover = Cost of Goods Sold / Average Inventory`. The `Cost of Goods Sold` value represents the total cost of the sold quantity of the item and is calculated in the base currency, and the `Average Inventory` value represents the average inventory cost of the item within a selected period range and is calculated in the base currency and unit.

Depending on the business needs, the user can adjust which documents and lines should be taken into account in the calculation of the `Cost of Goods Sold` value. In MYOB Advanced 2022.2, the **Inventory Turnover**

Settings section has been added to the Inventory Preferences (IN101000) form (shown in the following screenshot) to give an administrative user the ability to configure the calculation.

Inventory Preferences

GENERAL   MAILING & PRINTING   WAREHOUSE MANAGEMENT   GS1 UNITS

NUMBERING SETTINGS

* Batch Numbering Sequence:	BATCHIN - IN Batch
* Receipt/Transfer Numbering Se...	INRECEIPT - IN Receipt
* Issue Numbering Sequence:	INISSUE - IN Issue
* Adjustment Numbering Sequence:	INADJUST - IN Adjustment
* Kit Assembly Numbering Seque...	INKITASSY - Predefined
* PI Numbering Sequence:	PIID - Physical Inventory ID
* Replenishment Numbering Seq...	INREPL - IN Replenishment

INVENTORY OPTIONS

☐ Replan Back Orders
☑ Allocate Items in Documents on Hold

ACCOUNT SETTINGS

AR Clearing Account:	11010 - AR Accrual Account
* In-Transit Branch:	HEADOFFICE - SweetLife He
* In-Transit Account:	12300 - Goods in Transit
* Work In-Progress Account:	

POSTING SETTINGS

☑ Update GL
☐ Post Summary on Updating GL
☑ Automatically Post on Release

DATA ENTRY SETTINGS

☐ Hold Documents on Entry
☐ Validate Document Totals on Entry
☐ Add One Unit per Barcode
☐ Automatically Add Receipt Line for Barcode

Default Stock Item Class:	
Default Non-Stock Item Class:	

DEFAULT REASON CODES

* Receipt Reason Code:	INRECEIPT - Direct Receipts
* Issue/Return Reason Code:	INISSUE - Direct Issues
* Adjustment Reason Code:	INADJUST - Direct Adjustmer
* Phys.Inventory Reason Code:	PHYINVADJ - Physical Invent

PHYSICAL INVENTORY SETTINGS

☐ Use Tags

Last Tag Number:	0
Turnover Periods per Year:	12

☑ Release PI Adjustment Automatically

INVENTORY TURNOVER SETTINGS

Calculation Rules:

☑ Include Sales
☐ Include Production Orders
☐ Include Assemblies
☐ Include Issues and Adjustments
☐ Include Transfers

The section contains the following checkboxes:

- **Include Sales**: A checkbox that indicates that sales of stock items are taken into account in the calculation of the `Cost of Goods Sold` value. This checkbox is selected and unavailable. Because it is selected, the following lines of inventory transactions increase the `Cost of Goods Sold` value when the inventory transactions are released:

  - Lines with the *Invoice*, *Debit Memo*, and *Issue* transaction types in inventory issues that are generated for sales-related documents
  - Lines with the *Invoice* and *Debit Memo* transaction types in inventory issues that are created directly on the Issues (IN302000) form

The following lines of inventory transactions decrease the `Cost of Goods Sold` value when the inventory transactions are released:

  - Lines with the *Return* and *Credit Memo* transaction types in inventory issues that are generated for sales-related documents
  - Lines with the *Credit Memo* transaction type in inventory issues that are created directly on the Issues form

- **Include Production Orders**: A checkbox that indicates (if selected) that the lines of inventory transactions from documents related to the manufacturing functionality are taken into account in the calculation of the `Cost of Goods Sold` value. By default, this checkbox is

cleared. When it is selected, the following lines of inventory transactions increase the `Cost of Goods Sold` value when the inventory transactions are released:

- Lines with the *Issue* transaction type in inventory issues generated from documents related to the manufacturing functionality
- Lines with negative quantities in inventory adjustments generated from documents related to the manufacturing functionality

Lines of inventory transactions generated for material returns decrease the `Cost of Goods Sold` value when the inventory transactions are released.

The **Include Production Orders** checkbox appears on the *Inventory Preferences* form only if the *Manufacturing* feature is enabled on the *Enable/Disable Features* (CS100000) form.

- **Include Assemblies**: A checkbox that indicates (if selected) that the assembly and disassembly operations for kits and their components are taken into account in the calculation of the `Cost of Goods Sold` value. By default, this checkbox is cleared.
- This checkbox appears on the Inventory Preferences form only if the Kit Assembly feature is enabled on the Enable/Disable Features form.
- **Include Issues and Adjustments**: A checkbox that indicates (if selected) that the following lines of inventory transactions are taken into account in the calculation of the `Cost of Goods Sold` value when the inventory transactions are released:

  - Lines with the *Issue* transaction type in inventory issues that are created directly on the Issues form
  - Lines with a negative quantity in inventory adjustments that are created directly on the Issues form or generated on release of a PI count

This checkbox is cleared by default.

- **Include Transfers**: A checkbox that indicates (if selected) that lines of outgoing transfers are taken into account in the calculation of the `Cost of Goods Sold` value. This checkbox is cleared by default.

> **Note:** Transfers between different locations of the same warehouse are not taken in account in the calculation of the `Cost of Goods Sold` value.

If the inventory turnover settings have been specified and the updated settings include documents that have already been processed in the system, the user needs to recalculate the quantities of the stock items on the Recalculate Inventory (IN505000) form with the **Rebuild Item History** checkbox selected in the Selection area. The recalculation must be performed for all periods that will be included in the turnover calculation.

Manage Turnover History form

The calculations of turnover are stored in the database. MYOB Advanced 2022.2 gives users the ability to create new calculations and manage the existing calculation results on the new Manage Turnover History (IN507000) form (shown in the following screenshot).

Manage Turnover History

* Action:	Calculate Turnover	▼
* Company/Branch:	HEADOFFICE - SweetLife Head Offi...	▼
* From Period:	01-2022	🔍
* To Period:	07-2022	🔍
* Calculate By:	Selected Range	▼

	Branch	From Period	To Period	Warehouse	Item Class	Inventory ID	Calculation Date and Time
▸ □	HEADOFFICE	01-2022	07-2022				

The user can select one of the following options in the **Action** field:

- *Calculate Turnover*: When this option is selected, the user can calculate the turnover for warehouses of the branch, company, or a group of companies. Also, the *Calculate By* field appears in the Selection area, and the user can select one of the following options.

    - *Period*: The system will calculate the turnover for each period in the range that is specified in **From Period** and **To Period** fields.
    - *Year*: The system will calculate the turnover for each calendar year in the range that is specified in **From Period** and **To Period** fields.
    - *Selected Range* (default): The system will calculate the turnover for the selected period range that is specified in **From Period** and **To Period** fields.

- *Delete Records*: When this option is selected, the system lists in the table all existing calculations for the range that is specified in **From Period** and **To Period** fields. If these fields are empty, the system lists all calculations that exist in the system. The user can select the unlabelled checkbox in any lines with turnover calculation records and delete the lines by clicking **Process** on the form toolbar; alternatively, the user can delete all records by clicking **Process All**.

An administrative user can automate the turnover calculation by using automation schedules. For automated turnover calculation, the administrative user can specify a period range or number of periods before the current period with the new *Calculate for Last N Periods* filter value on the **Filter Values** tab of the **Automation Schedules** form (shown in the following screenshot).
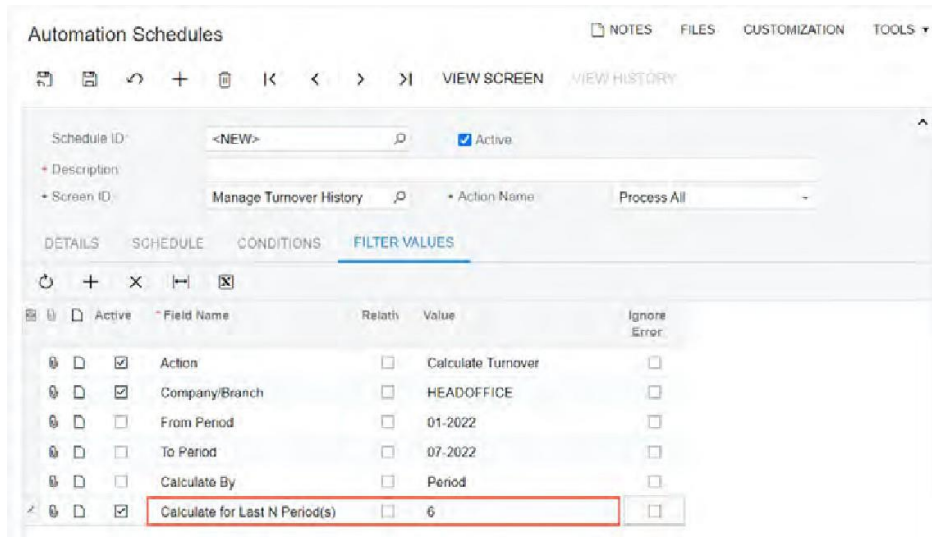
Changes to the Historical Inventory Balance and Historical Inventory Valuation Reports

During the implementation of the Inventory Turnover (IN407010) inquiry form, changes have been made in MYOB Advanced 2022.2 to the release of inventory transactions, which record the movement of inventory items to and from warehouses. During this release, some data related to the documents that caused these movements of inventory items is computed differently, causing differences in particular columns of the Historical Inventory Balance (IN616000) and Historical Inventory Valuation (IN617000) reports. The specific changes depend on the documents that caused the movements of inventory items

During the release of particular inventory transactions, data related to the manufacturing documents that caused these movements of inventory items is computed differently as follows:

- During the release of an inventory issue that contains a line with the *Issue* transaction type and that is generated from documents related to the manufacturing functionality, the amount and quantity of the line increases the value in the **Assembly Out** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Issue** column of these reports.
- During the release of an inventory issue that contains a line with the *Return* transaction type and that is generated from documents related to the manufacturing functionality, the amount and quantity of the line decreases the value in the **Assembly Out** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity decreased the value in the **Issue** column of these reports.
- During the release of an inventory receipt that contains a line with the *Receipt* transaction type and that is generated from documents related to the manufacturing functionality, the amount and quantity of the line increases the value in the **Assembly In** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Receipt** column of these reports.
- During the release of an inventory adjustment that contains a line with a negative quantity and that is generated from documents related to the manufacturing functionality, the amount and quantity of the line increases the value in the **Assembly Out** column of the Historical

Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Adjustment** column of these reports.

During the release of particular inventory transactions, data related to the sales orders that caused these movements of inventory items is computed differently as follows:

- • During the release of an inventory issue that contains a line with the *Issue* transaction type and that is generated from a sales order, the amount and quantity of the line increases the value in the **Sales** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Issue** column of these reports.

- During the release of an inventory issue that contains a line with the *Return* transaction type and that is generated from a sales order, the amount and quantity of the line increases the value in the **Credit Memo** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity decreased the value in the **Issue** column of these reports.

During the release of particular inventory transactions, data related to the purchase orders that caused these movements of inventory items is computed as follows:

- During the release of an inventory issue that contains a line with the *Issue* transaction type and that is generated from a purchase order, the amount and quantity of the line decreases the value in the **Receipt** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Issue** column of these reports.

During the release of directly entered inventory transactions, data related to these transactions is computed as follows:

- When the user releases an IN adjustment with a nonzero quantity:

  - The positive amount and quantity increases the value in the **Receipt** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity increased the value in the **Adjustment** column of these reports.

  - The negative amount and quantity increases the value in the **Issue** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity decreased the value in the **Adjustment** column of these reports.

- When the user releases an inventory issue that contains a line with the *Return* transaction type, the amount and quantity of the line increases the value in the **Receipt** column of the Historical Inventory Balance and Historical Inventory Valuation reports. Before the change, the amount and quantity decreased the value in the **Issue** column of these reports.

Conversion of the Stock Status of the Item

In MYOB Advanced 2022.2, the ability to change the stock status of items has been added. This means that users can now convert stock items to non-stock items and non-stock items to stock items. These new capabilities increase the versatility of item-related scenarios.

A user can change the status of a specific item on the form where it was created or use a new mass-processing form to change the stock status of multiple items. Also, an inquiry form has been added to display a log of converted items.

The conversion of stock status of items is available if the *Inventory* feature is enabled on the Enable/Disable Features (CS100000) form.

> **Note:** The UI changes related to this new functionality do not appear if at least one of the following features is enabled on the Enable/Disable Features (CS100000) form: *Manufacturing*, *Projects*, *Time Management*, *Service Management*, and *Payroll*.

Conversion Scenarios

The following scenarios illustrate the possible usage of the conversion of the item stock status:

- A company is going to stop selling a certain type of goods, which is recorded as a stock item in the system. The company does not plan to purchase this item for reselling it. The company can issue the remaining quantity from the stock and then convert the stock item in the system to a non-stock item to stop tracking the item in inventory.
- A company has bought prototypes of several devices. These items are registered as non-stock items in the system. After successful testing of these prototypes, the company has decided to make a purchase order for a large quantity of the devices for further reselling. To be able to track the devices in inventory, the non-stock items can be converted to stock items.

Items That Can Be Converted

An item must meet particular conditions for its stock status to be changed. When a user clicks a command or button to begin the process of changing the stock status of one item or multiple items, the system checks the conditions in the following table to be sure the items are eligible for conversion. The following table summarises the conditions that the system checks before it begins the process of converting each item.

Type of Item	Condition
Stock or non-stock	All documents that include the item must be processed to completion.
Stock	The quantity of the item in stock must be zero.
Non-stock	On the **General** tab of the Non-Stock Items (IN202500) form, the item must have the *Non-Stock Item* type, and the **Require Receipt** and **Require Shipment** checkboxes must be selected.

Type of Item	Condition
Stock or non-stock	The item cannot be a kit. That is, the **Is a Kit** checkbox is cleared on the **General** tab of the Stock Items (IN202500) or Non-Stock Items form.
Stock	The item is not a matrix item. That is, the **Template ID** field is empty on the **General** tab of the Stock Items form.

New Item Conversion Commands

New commands for converting the stock status of items have been added to the More menu of the item creation forms: **Convert to Non-Stock Item** has been added to the Stock Items (IN202000) form, and **Convert to Stock Item** has been added to the Non-Stock Items (IN202000) form. Each of these commands can be used to change the stock status of the item selected on the form.

The use of these commands is described in the *Conversion of the Item's Stock Status* on the Stock Items Form and *Conversion of the Item's Stock Status* on the *Non-Stock Items Form* sections of this topic.

New Mass-Processing Form for Changing Stock Statuses

The new Change Stock Status of Items (IN503000) mass-processing form has been added to the system (shown in the following screenshot). The new mass-processing form is available in the **Processes** category of the **Inventory** workspace.

In the Selection area of the mass-processing form, the following options are available in the **Action** field:

- *Convert Non-Stock to Stock*: When this option is selected, the system displays non-stock items in the table. The user can narrow the list of items by specifying an item class, an item, or both settings in the Selection area. In the **Stock Item Settings** section, the user must specify the settings of stock items to which the non-stock items will be converted. That is, the **Item Class**, **Posting Class**, **Valuation Method**, and **Lot/Serial Class** fields must be filled in
- *Convert Stock to Non-Stock*: When this option is selected, the system displays stock items in the table. The user can narrow the list of items by specifying an item class, an item, or both settings in the Selection area.
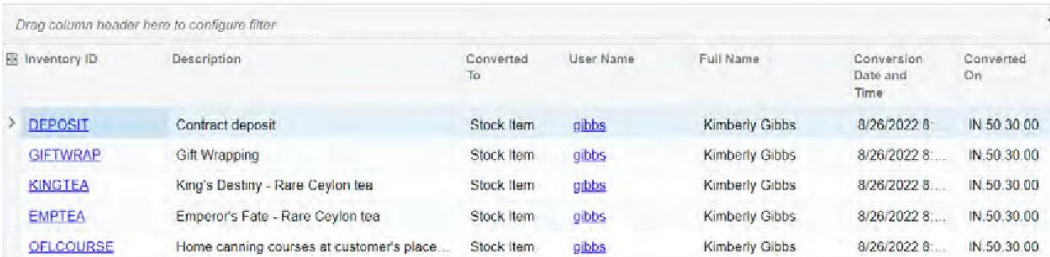
In the **Non-Stock Item Settings** section, the user can specify the settings of non-stock items to which the stock items will be converted. The **Posting Class** setting is mandatory, and the **Item Class** setting is optional.

For the new non-stock items, the system inserts the *Non-Stock Item* type and selects the **Require Receipt** and **Require Shipment** checkboxes on the **General** tab of the Non-Stock Items (IN202000) form; these settings are unavailable for editing.

Item Conversion Log Inquiry Form

A new Item Conversion Log (IN408500) inquiry form has been added to the system (shown in the following screenshot). On this form, users can view the details of each item conversion operation, including the date of the conversion, the user who converted the item, the form on which the item was converted, and new stock status of the item after conversion (in the **Converted To** column). The new inquiry form is available in the **Inquiries** category of the **Inventory** workspace.

Conversion of the Item's Stock Status on the Stock Items Form

When the user invokes the **Convert to Non-Stock Item** command on the Stock Items (IN202500) form for a stock item, the system checks whether the quantity of the item in stock is zero and whether there are the documents with this item that have not been processed to completion. If these conditions are not met, the system shows an error message, and the conversion is prohibited.

If the quantity is zero and all documents with this item have been processed, the system opens the item on the Non-Stock Items (IN202000) form. On the **General** tab, the system inserts the *Non-Stock Item* type and selects the **Require Receipt** and **Require Shipment** checkboxes for the new non-stock item; these settings are unavailable for editing. Some settings—such as tax category, default warehouse, UOMs, price and cost information, and deferrals—are inherited from the stock item settings. Once the item class is selected for the non-stock item, the inherited settings are not replaced with the settings of the new item class. The user can change these settings manually. The conversion of the item is not complete until the user saves the item on the Non-Stock Items form.

When the conversion is complete, the user can view all the reports related to this item for the periods when it was a stock item. The user can also reverse AP bills and SO invoices and reopen sales and purchase orders that contain the item as a stock item. In the reopened order, the lines with the converted item cannot be edited.

When the user adds the converted item to any new documents, the item is processed as any other non-stock item would be.

If the COGS account specified in the **Shipped-Not-Invoiced Account** field on the Order Types (SO201000) form was used in a sales order, a shipment for this sales order was confirmed, and the inventory was updated for a stock item that was converted to a non-stock item later, then when you release the SO invoice after the conversion, the COGS account is copied from the non-stock item settings.

Conversion of the Item's Stock Status on the Non-Stock Items Form

When the user invokes the **Convert to Stock Item** command on the Non-Stock Items (IN202000) form for a non-stock item, the system checks whether there are documents with this item that have not been processed to completion. If any documents with the item have not been processed to completion, the system shows an error message, and the conversion is prohibited.

If all documents with this item have been processed to completion, the system opens the item on the Stock Items (IN202500) form. Some settings—such as tax category, default warehouse, UOMs, price and cost information, and deferrals—are inherited from the non-stock item settings. Once the item class is selected for the non-stock item, the inherited settings are not replaced with the settings of the new item class. The user can change these settings manually. The conversion of the item is not complete until the user saves the item on the Stock Items form.

The user can reverse AP bills, SO invoices, AR invoices, cash entry documents, cash sale documents, and void quick checks that contain the item as a non-stock item. The user can also reopen sales and purchase orders that contain the item as a non-stock item. In the reopened order, the lines with the converted item cannot be edited.

When the user adds the converted item to any new documents, the item is processed as any other non-stock item would be.

If the **Accrue Cost** checkbox was selected on the **Price/Cost** tab of the Non-Stock Items form for the non-stock item, and a shipment was confirmed with this item but no invoice was prepared, then after the conversion to the stock item, when the user releases the SO invoice for the shipment, the system will not post any transactions to Cost of Goods Sold and Expense Accrual accounts. The system will show the item's standard cost (if the standard cost is defined) from this invoice in the sales profitability reports.

Limitations After Item Conversion

The following limitations apply to items that have been converted:

- The user cannot process a return of the converted item by selecting the unlabelled checkbox in PO receipt line on the Purchase Receipts (PO302000) form in a purchase receipt that was created before the conversion and clicking **Return** on the form toolbar. To process the return of the converted item, the user should add the item directly to a PO return document on the Purchase Receipts form.
- The user cannot process a landed cost for a PO receipt line with the converted item if the purchase receipt was created before the conversion. To add the landed cost amount for the converted item, the user should use the Adjustments (IN303000) form if it was a non-stock item that was converted to a stock item or the Journal Transactions (GL301000) form if it was a stock item that was converted to a non-stock item.

- If a debit adjustment is created on the reversal of an AP bill linked to a purchase order or purchase receipt, and the adjustment includes a non-stock item that was converted to a stock item after the release of the bill, the Inventory ID column on the Details tab of the Bills and Adjustments (AP301000) will be empty for the line with this stock item. The **Account** and **Subaccount** columns on this tab will be empty for all lines with converted stock and non-stock items. The user should manually specify the value of these columns for the lines with converted items. On release of this debit adjustment, the purchase receipt and purchase order lines with the converted items will not be marked as unbilled.
- If a shipment contains only non-stock items and at least one of the items was converted to a stock item, the shipment cannot be corrected.

Conversion of Items with Multiple Base Currencies

If the **Multiple Base Currencies** feature is enabled on the Enable/Disable Features (CS100000) form when an item is converted, the currency-specific item settings are inherited only for the base currency of the current branch.

Supplier and Customer Prices and Discounts in Converted Items

If supplier or customer prices are defined and supplier or customer discounts are applied to a stock or non-stock item, these prices and discounts will be retained for the converted item.

Selection of a Cost Layer Type for Inventory Transactions

In earlier versions of MYOB Advanced, a separate cost centre for project costs was introduced. MYOB Advanced 2022.2 has expanded this functionality by adding the ability to select the type of the cost layer that will be affected by the release of inventory transactions.

New Settings on Inventory Forms

On the Receipts (IN301000), Issues (IN302000), Adjustments (IN303000), and Transfers (IN304000) forms, the new **Cost Layer Type** column has been added to the **Details** tab (shown in the screenshot below for the Receipts form). The option in the column defines the type of the cost layer affected by the inventory transaction in the row.

> **Note:** The **Cost Layer Type** column appears on these forms only if the *Project-Specific Inventory* feature is enabled on the Enable/Disable Features (CS100000) form.

The column has the following options:

- *Normal* (default): The cost layer for inventory transactions that are not related to project tracked by quantity and cost.
- *Project*: A project-specific cost layer for inventory transactions which are created for project items. This option can be used only for projects that have the *Track by Project Quantity and Cost* option selected on the **Inventory Tracking** field on the **Summary** tab of the Projects (PM301000) form.

Also, on the Transfers form, the **To Cost Layer Type** column has been added to the **Details** tab. The **To Cost Layer Type** column appears by default only for single-step transfers.

If a user is creating an inventory document manually on any form where the cost layer type can be specified and the user intends to select the *Project* option in the **Cost Layer Type** column (and in the **To Cost Layer Type** column for single-step transfers), the user should specify this option before adding the settings of the project to the line.

In the application database, the new `INCostCentre` table has been added to support this functionality. This table will now store the parameters of the cost centres, including project cost centres (the table will be used instead of the `PMCostCentre` table).

Other Improvements

In MYOB Advanced 2022.2, improvements to order management processes have been introduced, as described below.

Changes to the Copying Settings for Notes and Attachments

In previous versions of MYOB Advanced, the copying settings of notes and attachments were situated in the **Order Settings** section of the **General** tab of the Order Types (SO201000) form along with other settings, which could reduce the visibility of the settings and degrade the user experience. These settings are checkboxes that determine whether notes and attachments are copied when an order of the order type is copied.

In MYOB Advanced 2022.2, a new **Copying Settings** section has been added to the **General** tab of the Order Types form. The copying settings of notes and attachments have been moved to the new section (see the following screenshot).

Also, four new checkboxes have been added to the copying settings:

- **Copy Header Notes to Shipment**: A checkbox that indicates (if selected) that when a shipment is created for a sales order, the system should copy the note attached to the sales order record to the shipment record. This note is attached to the record as a whole.

- **Copy Header Attachments to Shipment**: A checkbox that indicates (if selected) that when a shipment is created for a sales order, the system should copy any files attached to the sales order record to the shipment record. These files are attached to the record as a whole.
- **Copy Header Notes to Invoice**: A checkbox that indicates (if selected) that when an invoice is created for a sales order, the system should copy the note attached to the sales order record to the invoice record. This note is attached to the record as a whole.
- **Copy Header Attachments to Invoice**: A checkbox that indicates (if selected) that when an invoice is created for a sales order, the system should copy any files attached to the sales order record to the invoice record. These files are attached to the record as a whole.

The visibility of these new checkboxes on the Order Types form depends on the following settings of the order type:

- If the order type has the *Blanket Order* or *Quote* option in the **Automation Behaviour** field (**Template** tab), the new checkboxes do not appear on the form.
- If the order type has the *Invoice* or *Credit Memo* option in the **Automation Behaviour** field (**Template** tab), the **Copy Header Notes to Shipment** and **Copy Header Attachments to Shipments** checkboxes do not appear on the form.
- If the order type has the *No Update* option in the **AR Document Type** field (**Template** tab), the **Copy Header Notes to Invoice** and **Copy Header Attachments to Invoice** checkboxes are unavailable on the form.

If a user creates one shipment or invoice for multiple sales orders and any new checkboxes are selected for the types of the orders, the following rules apply to the notes and attachments:

- The note attached to only the first sales order in the shipment or invoice are copied to the shipment or invoice.
- The files attached to all sales order in the shipment or invoice are copied to the shipment or invoice.

Side Panel Support

In MYOB Advanced 2022.2, a side panel has been added to various lists of records and data entry forms related to the inventory and order management functionality, which gives a user the ability to view the list of records while simultaneously viewing (and modifying, if necessary) various information related to any listed record or opened entity on a data entry form.

A side panel may have only one tab with a form related to the selected record, or it may have multiple tabs. If the side panel has multiple tabs, a user views a tab by clicking its icon.

The following screenshot shows the side panel for the *Sales Orders (SO3010PL)* list of records. Notice that for the selected record, the side panel has icons for six tabs.
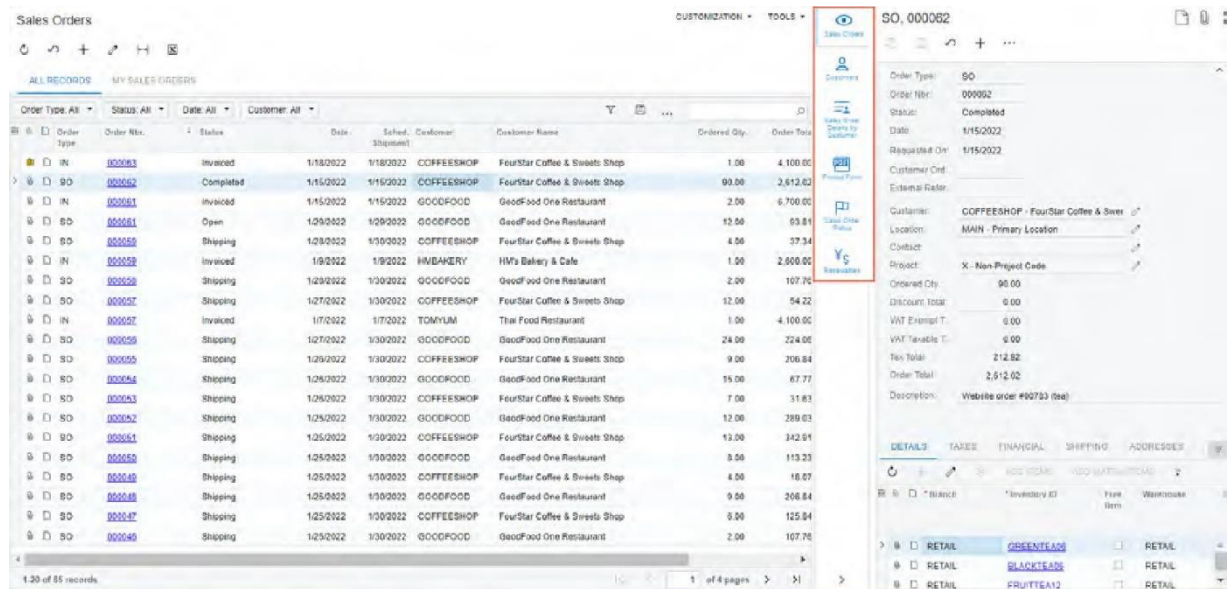
The following table notes each list of records or data entry form to which a side panel has been added, along with the tab or tabs on the side panel for this list of records or form.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
Sales Orders (SO3010PL) list of records	**Sales Orders**: The *Sales Orders* (SO301000) form	The settings of the selected sales order and any files and notes applied to this sales order. The user can modify the data in the order.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Customers: The Customers (AR303000) form	The settings of the customer specified in the selected sales order and any files and notes applied to the customer record. The user can modify the data in the customer's record. This tab is not displayed if the selected sales order has an order type with the *Transfer Order* automation behaviour.
	Sales Order Details by Customer: The Sales Order Details by Customer (SO611000) report	The details of sales orders created for the customer specified in the selected sales order for the month before the order date. The user can view the details of sales orders created for the past month, navigate to a sales order that was previously placed, and copy and paste any order to create a new one. This tab is not displayed if the selected sales order has an order type with the *Transfer Order* automation behaviour.
	Printed Form: • The Sales Order (SO641010) report unless the selected sales order has a type with *Quote* or *Blanket Order* automation behaviour • The Blanket Sales Order (SO641040) report if the selected sales order has a type with *Blanket Order* automation behaviour • The Quote (SO641000) report if the selected order has a type with *Quote* automation behaviour	A printed form with the settings of the selected sales order, to give the user the ability to print and email this order.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Sales Order Status: The *Sales Order Status (SO3010DB)* dashboard **Note:** This dashboard was introduced in MYOB Advanced 2022 R1 with the *Sales Orders* title. In MYOB Advanced 2022.2, some minor changes have been made to the dashboard to extend and improve the provided data.	A dashboard with widgets that show the details of all sales orders related to the customer specified in the selected sales order, including open and completed sales orders and the number of late sales orders. This tab is not displayed if the selected sales order has a type with the *Transfer Order* automation behaviour.
	Receivables: The *Receivables (AR3010DB)* dashboard **Note:** This dashboard was introduced in MYOB Advanced 2022 R1. In MYOB Advanced 2022.2, some minor changes have been made to the dashboard to improve the provided data.	A dashboard with widgets that show the details of customer invoices created for the customer specified in the selected sales order, including the customer's balance and payment history. This tab is not displayed if the selected sales orders has a type with the *Transfer Order* automation behaviour.
Sales Orders (SO301000) data entry form	**Invoices and Memos**: The *Invoices for Sales Orders (SO3031SP)* inquiry form	An inquiry form that displays a list of the financial documents linked to the sales order and to the orders related to this sales order. For example, for an order with the *CM* type that was created for an order with the *IN* type, the system will display the credit memo related to the order and the invoice related to the *IN* order. If the selected order is a blanket order, the financial documents related to its child orders are displayed. This tab is not displayed if the selected sales order has a type with the *Transfer Order* or *Quote* automation behaviour.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Customer Details: The Customer Details (AR402000) report	The details of the customer specified in the order selected on the form. This tab is not displayed if the sales order has a type with the *Transfer Order* automation behaviour.
Shipments (SO3020PL) list of records	**Shipments**: The Shipments (SO302000) form	The settings of the selected shipment and any files and notes applied to this shipment. The user can modify the data in the shipment.
	Shipment Confirmation: The Shipment Confirmation (SO642000) report	A printed form with the settings of the selected shipment, to give the user the ability to print and email this shipment.
	Shipment Details by Customer: The Shipment Details by Customer (SO621000) report	The details of the shipments for the customer of the selected shipment for the month before the shipment's date. The user can view the details of the shipments created for the past month, navigate to a shipment that was previously created, and review the shipping terms and other details. This tab is not displayed if the selected shipment has the *Transfer* type.
Invoices (SO3030PL) list of records	**Invoices**: The Invoices (SO303000) form	The settings of the selected invoice and any files and notes applied to this invoice. The user can modify the data in the invoice.
	Customers: The Customers (AR303000) form	The settings of the customer specified in the selected invoice and any files and notes applied to the customer's record. The user can modify the data.
	Sales Orders: The *Sales Orders (SO3012SP)* inquiry form	An inquiry form that displays a list of the sales orders linked to the selected invoice.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Printed Form: The Invoice & Memo (SO643000) report	A printed form with the settings of the selected invoice, to give the user the ability to print and email this invoice.
	Receivables: The *Receivables (AR3010DB)* dashboard **Note:** This dashboard was introduced in MYOB Advanced 2022 R1. In MYOB Advanced 2022.2, some minor changes have been made to the dashboard to improve the provided data.	A dashboard with widgets that show the details about any invoices created for the customer specified in the selected invoice, including the customer balance and payment history.
Purchase Orders (PO3010PL) list of records	**Purchase Orders**: The Purchase Orders (PO301000) form	The settings of the selected purchase order and any files and notes applied to this purchase order. The user can modify the data in the purchase order.
	Suppliers: The Suppliers (AP303000) form	The settings of the supplier specified in the selected purchase order and any files and notes applied to the supplier's record. The user can modify the details in the supplier's record.
	Purchase Order Details by Supplier: The Purchase Order Details by Supplier (PO611000) report	The details of the purchase orders for the supplier specified in the selected purchase order for the month before the order date. The user can view the details of purchase orders created for the past month, navigate to a purchase order that was previously placed, and copy and paste any order to create a new one.
	Printed Form: The Purchase Order (PO641000)	A printed form with the settings of the selected purchase order, to give the user the ability to print and email this purchase order.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Purchase Order Status: The *Purchase Order Status (PO3010DB)* dashboard	A dashboard with widgets that show the details of all purchase orders related to the supplier specified in the selected purchase order, including open, completed, and closed purchase orders and the number of late purchase orders.
	Payables: The *Payables (AP3010DB)* dashboard	A dashboard with widgets that show the details about any bills and adjustments related to the supplier specified in the selected purchase order, including the pre-payment balance and the history of payments to the supplier.
Purchase Orders (PO301000) data-entry form	**Preferred Supplier Items**: The *Preferred Supplier Items (IN2025SP)* inquiry form	The inquiry form that displays the list of the stock items for which the supplier of the selected purchase order is specified in the **Preferred Supplier** field on the Item Warehouse Details (IN204500) form or is selected as the default supplier on the **Suppliers** tab of the Stock Items (IN202500) form.
	Supplier Details: The Supplier Details (AP402000) form	The details of the supplier specified in the selected purchase order.
Purchase Receipts (PO3020PL) list of records	**Purchase Receipts**: The Purchase Receipts (PO302000) form	The settings of the selected purchase receipt and any files and notes applied to this purchase receipt. The user can modify the data in the purchase receipt.
	Purchase Receipt Allocated and Backordered: The Purchase Receipt Allocated and Backordered (PO622000) report	Detailed information about the items in the selected receipt by supplier for the month before the receipt date. This tab is not displayed if the selected receipt has the *Transfer Receipt* type.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Purchase Receipt Details by Supplier: The Purchase Receipt Details by Supplier (PO621000) report	The details of the purchase receipts for the supplier of the selected purchase receipt for the month before the receipt date. This tab is not displayed if the selected receipt has the *Transfer Receipt* type.
	Printed Form: The Purchase Receipt (PO646000)	A printed form with the settings of the selected purchase receipt, to give the user the ability to print and email this purchase receipt.
Non-Stock Items (IN2020PL) list of records	*Non-Stock Items*: The Non-Stock Items (IN202000) form	The details of the selected non-stock item and any files and notes applied to this non-stock item. The user can modify the data in the non-stock item settings.
Non-Stock Items (IN202000) data-entry form	**Item Sales Prices**: The Sales Prices (AR202000) form	The sales prices for the item selected on the form.
	Item Supplier Prices: The Supplier Prices (AP202000) form	The supplier prices for the item selected on the form.
	Kit Specifications: The Kit Specifications (IN209500) form	The settings of the kit specification for the revision that was last modified. The tab is displayed if for the selected non-stock item, the **Is Kit** checkbox is selected on the Non-Stock Items form.
Stock Items (IN2025PL) list of records	**Stock Items**: The Stock Items (IN202500) form	The settings of the selected stock item and any files and notes associated with this stock item. The user can modify the data in the stock item settings.
Stock Items (IN202500) data entry form	**Item Sales Prices**: The Sales Prices (AR202000) form	The sales prices for the item selected on the form.
	Item Supplier Prices: The Supplier Prices (AP202000) form	The supplier prices for the item selected on the form.

List of Records or Form	Tab or Tabs of the Side Panel	Description of the Tab
	Inventory Summary: The Inventory Summary (IN401000) form	Summary information about the available quantities of the item selected on the form.
	Inventory Allocation Details: The Inventory Allocation Details (IN402000) form	Detailed information on how the quantities of the item selected on the form are allocated among warehouses and locations.
	Inventory Transaction History: The Inventory Transaction History (IN405000) form	Detailed information on inventory transactions posted with the item that is selected on the form.
	Dead Stock: The Dead Stock (IN405500) form	Information about the dead stock quantity for the item selected on the form. By default, the information is displayed for the warehouse that is selected as the default one for the item, but the user can change this warehouse.
	Kit Specifications: The Kit Specifications (IN209500) form	The settings of the kit specification for the revision that was last modified. The tab is displayed if for the selected stock item, the **Is Kit** checkbox is selected on the Stock Items form.
Kit Assembly (IN3070PL) list of records	**Kit Assembly**: The Kit Assembly (IN307000) form	The settings of the selected kit assembly and any files and notes applied to this kit assembly record. The user can modify the data in the kit assembly record.
Template Items (IN2030PL) list of records	**Template Items**: The Template Items (IN203000) form	The settings of the selected template item and any files and notes applied to the selected template item. The user can modify the data in the template item.

For details about side panels, see Side Panels of Generic Inquiry Forms in the in-product help.

Tracking Data and Processes by Using Predefined Dashboards

In previous versions of MYOB Advanced, users of the inventory and order management functionality did not have predefined dashboards to track the data and processes related to inventory, sales, and purchases.

In MYOB Advanced 2022.2, a variety of predefined dashboards have been implemented to give employees a window into the current state of the company's inventory, sales, and purchases.

New Predefined Dashboards by Job Duties

Each of the new predefined dashboards has been developed for employees with specific job duties in the company, so that they can view the information that is most pertinent to their work. The following predefined dashboards are now available:

- *Sales Manager (SO3015DB)*: A dashboard designed for a sales manager who oversees the work of a sales team. On this dashboard, the sales manager can review the current state of open orders and invoices, as well as quarterly statistics related to income, trends, customer growth, and the productivity of each salesperson. The dashboard also presents information about the top customers, top products, and overall income for sales.

  Note: The dashboard does not contain information related to customer relationship management (CRM). It is designed to be used if the CRM functionality of MYOB Advanced is not enabled in the system.

- *Purchasing Manager (PO3015DB)*: A dashboard tailored to the needs of a purchasing manager who oversees purchasing operations for the company or a particular branch. On the dashboard, this manager can review basic metrics related to purchase orders, some statistics related to the purchased products, and suggestions for purchase.
- *Warehouse Manager (IN3015DB)*: A dashboard developed for a warehouse manager who is responsible for controlling and planning warehouse operations. By using the dashboard, the warehouse manager can review information about productivity during the day, as well as expected shipments, receipts, and the current state of open sales orders and purchase orders. The manager can also analyse metrics that will help them to plan future work.
- *Receiving Clerk (PO3025DB)*: A dashboard geared toward a receiving clerk who manages incoming deliveries to a warehouse by verifying and signing for receipts, unloading and storing the received items, and processing incoming returns. On the dashboard, the receiving clerk can review information about purchase orders that are expected to be received on the current day, as well as statistics about late receipts and sales returns that may arrive. The receiving clerk can also review a list of items that have not been put away yet.
- *Shipping Clerk (SO3025DB)*: A dashboard designed for a shipping clerk who manages the work of a team and tracks the outgoing shipments. On the dashboard, the shipping clerk can review information about the shipments to be shipped today, as well as the overall status of shipments and orders to be shipped.

The predefined dashboards are made up of widgets that are grouped logically and designed to make key information easy to comprehend. Each widget is a component that provides a particular type of information, such as a key performance indicator (KPI), metric, or chart. Many of these widgets use

generic inquiries to gather the underlying data. Users can access the dashboards from the **Dashboards** workspace, where they are listed under the **Dashboard: Inventory** category.

The contents of these dashboards are described in the following sections.

The Sales Manager Dashboard

The *Sales Manager (SO3015DB)* predefined dashboard is shown in the following screenshot.

In the **Branch** field at the top of the dashboard, the user can select the branch whose data will be shown on the dashboard.

The **Current Sales Status** section of the dashboard contains the following widgets:

- *Open Quotes*: The number of sales orders with the *Quote* automation behaviour and the *Open* status.
- *Open Orders*: The number of sales orders with the *Sales Order* or *Invoice* automation behaviour and the *Open* status.
- *Orders Pending Approval*: The number of sales orders with the *Pending Approval* status.
- *Orders Awaiting Payments*: The number of sales orders with the *Awaiting Payments* status.
- *Orders Awaiting Purchases*: The number of sales orders with the *Sales Order* automation behaviour that have lines with the **Mark for PO** checkbox selected on the **Details** tab of the Sales Orders (SO301000) form, and for which purchase orders have not yet been created for the full quantity of at least one sales order line.
- *Late Orders*: The number of sales orders with the *Sales Order* or *Invoice* automation behaviour and the *Open* status for which the date in the **Requested On** field in the Summary area of the Sales Orders form is earlier than today's date.
- *Invoices Awaiting Payments*: The number of sales order invoices with the *Open* status.
- *Overdue Invoices*: The number of sales order invoices with the *Open* status for which the date in the **Due Date** field in the Summary area of the Invoices (SO303000) form is earlier than today's date.

The **Profitability This Quarter** section of the dashboard contains the following widgets:

- *Net Sale Trend*: The trend of net sales for the current quarter in comparison with the previous quarter.
- *Profitability Trend*: The trend of profitability for the current quarter in comparison with the previous quarter.
- *Deal Size Trend*: The trend of the deal size for the current quarter in comparison with the previous quarter.
- *New Customers*: The number of new customers that have received an invoice from the company or branch for the first time in the current quarter.
- *Completed Orders*: The number of orders that have been fully shipped and billed this quarter. The **Overall Statistics** section of the dashboard contains the following widgets:
- *Net Sale (Last 12 Months)*: The net sales for the last 12 months.
- *Top Sold Items (Quarter)*: The most sold items (by amount) for the quarter.
- *Sales by Person (Quarter)*: The total amount on invoices for each salesperson for the current quarter.
- *Top 10 Customers (Quarter)*: Ten customers with the highest amount on all open and closed sales order invoices for the quarter.

Purchasing Manager Dashboard

The following screenshot shows the *Purchasing Manager (PO3015DB)* predefined dashboard.

In the **Branch** field at the top of the dashboard, the user can select the branch for which the dashboard will display data.

The **Current Purchase Status** section of the dashboard contains the following widgets:

- *Open Orders*: The number of purchase orders with the *Open* status.
- *Orders Pending Approval*: The number of purchase orders with the *Pending Approval* status.
- *Rejected Orders*: The number of purchase orders with the *Rejected* status.
- *Late Orders*: The number of purchase orders with the *Open* status whose expected arrival date is earlier than today's date.

- *Orders Awaiting Bills*: The number of unbilled purchase orders with the *Open* status and with suppliers that have the **Allow AP Bill Before Receipt** checkbox selected on the **Purchase Settings** tab of the Suppliers (AP303000) form.
- *Unbilled Receipts*: The number of receipts for which no supplier bill has been received.
- *Sales Awaiting Purchases*: The number of sales orders that include lines with the **Mark for PO** checkbox selected on the **Details** tab of the Sales Orders (SO301000) form and for which a purchase order has not yet been created for the full quantity.
- *Purchasing Trends Quarter*: The total purchase amount by quarter and the trend in comparison with the previous quarter.
- *Purchase Suggestions*: The items for which the value in the **Reorder Point** column on the **Replenishment** tab of the Stock Items (IN202500) form is less than the available quantity. The **Need to Order** quantity is calculated as the maximum quantity minus the available quantity for items with the *Min./Max.* replenishment method selected on the **Replenishment** tab of the Item Warehouse Details (IN204500) form and as the minimum quantity minus the available quantity for items with other replenishment methods.
- *Orders by Status (Month)*: The number of purchase orders of each status for the current month. The **Purchased Product Statistics** section of the dashboard contains the following widgets:
- *Highest Turnover Items*: 10 items with the highest turnover ratio calculated as an average of turnover ratios that have been calculated for warehouses at which the item was processed during the past year.
- *Lowest Turnover Items*: 10 items with the lowest turnover ratio calculated as an average of turnover ratios that have been calculated for warehouses at which the item was processed during the past year.
- *Top Products*: The items that were ordered the most for the quarter (by quantity).
- *Supplier Purchasing Trends*: The trends in purchasing by amount in the quarter.

> **Note:** In order to have data displayed in the *Highest Turnover Items* and *Lowest Turnover Items*, the inventory turnover should be calculated on the Inventory Turnover (IN407010) form. For details on the inventory turnover calculation, see Inventory Turnover: General Information in the in-product help. If the user wants to view the turnover of items for a different period of time, the *Inventory Turnover for Past Year (IN4070BI)* generic inquiry, which is used for these widgets, should be modified.

Warehouse Manager Dashboard

In the following screenshot, the *Warehouse Manager (IN3015DB)* predefined dashboard is shown.
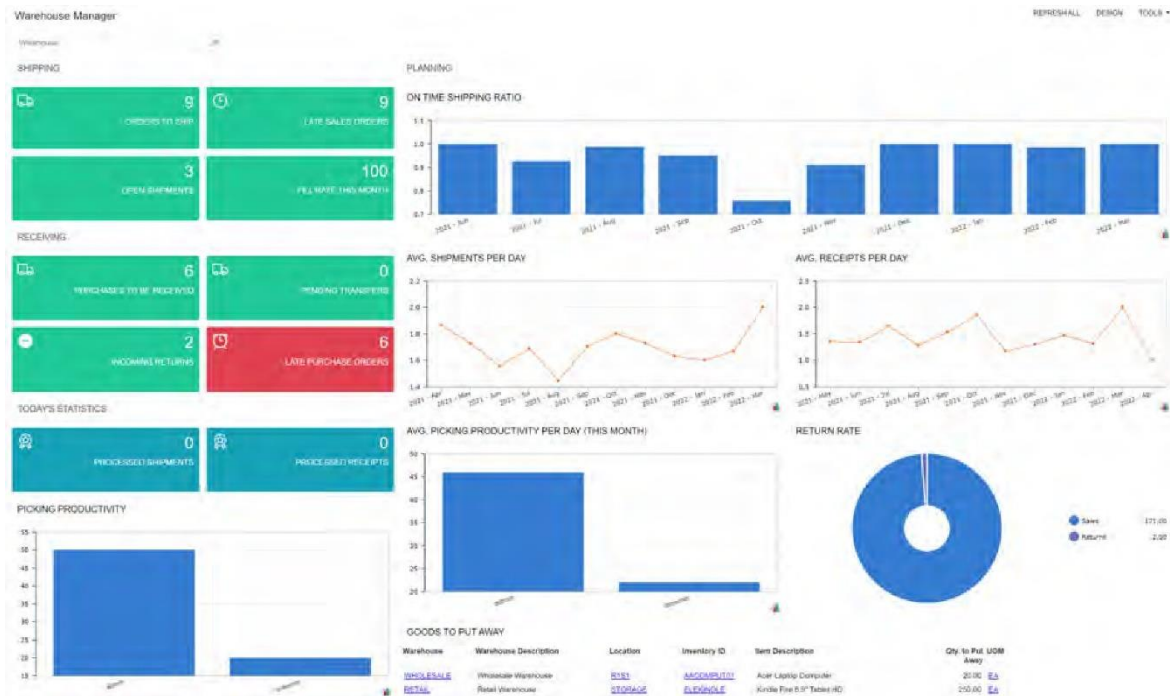
In the **Warehouse** field at the top of the dashboard, the user can select the warehouse for which the dashboard will display data.

The **Shipping** section of the dashboard contains the following widgets:

- *Orders to Ship*: The quantity of sales orders with the *Sales Order* automation behaviour and with the *Open* or *Shipping* status.
- *Late Sales Orders*: The quantity of sales orders with the *Sales Order* automation behaviour and with the *Open*, *Back Order*, or *Shipping* status and for which the date in the **Requested On** field in the Summary area of the Sales Orders (SO301000) form is earlier than today's date.
- *Open Shipments*: The number of shipments with the *Open* status for the warehouse.
- *Fill Rate (This Month)*: The percent of the order fill rate for the current month. The fill rate is calculated as follows: `(the number of shipped items / the number of placed items) * 100`.

The **Receiving** section of the dashboard contains the following widgets:

- *Purchases to Be Received*: The number of purchase orders with the *Open* status and at least one item that has not yet been fully received.
- *Pending Transfers*: The number of transfers to be received at the warehouse.
- *Incoming Returns*: The number of orders to be returned to the warehouse.
- *Late Purchase Orders*: The number of purchase orders with the *Open* status whose expected arrival date is earlier than today's date.

The **Today's Statistics** section of the dashboard contains the following widgets:

- *Processed Shipments*: The number of shipments of the *Issue* type that have been confirmed today.
- *Processed Receipts*: The number of receipts that have been released today.

- *Picking Productivity*: The number of items that have been picked by each worker today. This widget contains data only if the *Paperless Picking* feature is enabled on the Enable/Disable Features (CS100000) form.

The **Planning** section of the dashboard contains the following widgets:

- *On-Time Shipping Ratio*: The ratio of on-time shipments by month.
- *Avg. Nbr. of Shipments per Day*: The average number of confirmed shipments per day to the previous 12 months.
- *Avg. Nbr. of Receipts per Day*: The average number of released receipts per day to the previous 12 months.
- *Avg. Picking Productivity per Day (This Month)*: The average number of items picked by picker per day for this month. This widget contains data only if the *Paperless Picking* feature is enabled on the Enable/Disable Features form.
- *Return Rate*: The percentage of sales against returns for the current quarter.
- *Goods to Put Away*: The list of items to put away (that is, the items that have been received but have not yet been transferred to the destination warehouse or location). This widget contains data only if the *Receiving* feature is enabled on the Enable/Disable Features form.

Receiving Clerk Dashboard

The *Receiving Clerk (PO3025DB)* predefined dashboard is shown in the following screenshot.

In the **Warehouse** field at the top of the dashboard, the user can select the warehouse for which data will be shown in the dashboard.

The dashboard contains the following widgets:

- *Receipts Expected Today*: The number of purchase orders with the *Open* status whose items which have not yet been fully received.
- *Pending Transfers*: The number of transfer orders to be received at the warehouse.
- *Incoming Returns*: The number of orders to be returned to the warehouse.
- *Late Orders*: The number of open purchase orders whose expected arrival date is earlier than today's date.
- *Received Today*: The number of released receipts with the current date.
- *Goods to Put Away*: The list of items to put away (that is, items that have been received but have not yet been transferred to the destination warehouse or location). This widget contains data only if the *Receiving* feature is enabled on the Enable/Disable Features (CS100000) form.

Shipping Clerk (SO3025DB) Dashboard

The following screenshot displays the *Shipping Clerk (SO3025DB)* predefined dashboard.
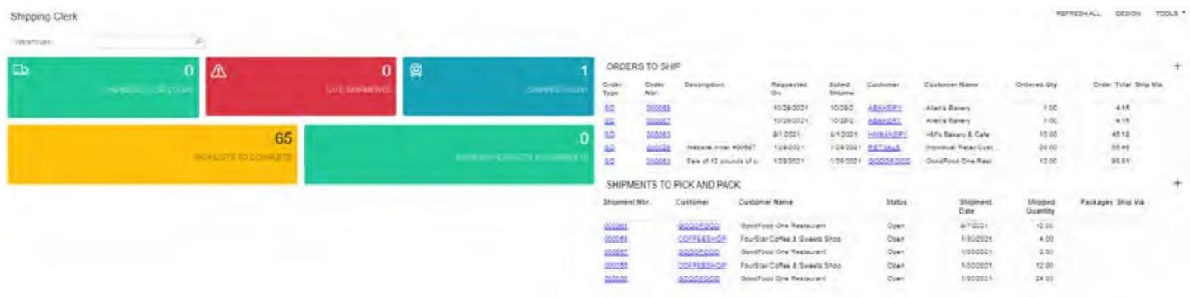
In the **Warehouse** field at the top of the dashboard, the user can select the warehouse for which data will be shown in the dashboard.

The dashboard contains the following widgets:

- *Shipments for Today*: The number of open shipments for which the shipment date is the current date.
- *Late Shipments*: The number of open shipments that have a shipment date that is earlier than the current date.
- *Shipped Today*: The number of confirmed shipments for which the shipment date is the current date.
- *Pick Lists to Complete*: The number of pick lists with the *Added to Queue* or *Assigned* status and the current date. This widget contains data only if the *Paperless Picking* feature is enabled on the Enable/Disable Features (CS100000) form.
- *Urgent Pick Lists to Complete*: The number of pick lists with the *Added to Queue* or *Assigned* status, the *Urgent* priority, and the current date. This widget contains data only if the *Paperless Picking* feature is enabled on the Enable/Disable Features form.
- *Orders to Ship*: The list of orders with the *Open* status and the *Sales Order* automation behaviour.
- *Shipments to Pick and Pack*: The list of shipments with the *Open* status and the *Issue* operation type.

Manufacturing

Engineering Workbench

A manufacturing engineer may need to create and modify multilevel bills of material (BOMs)—that is, BOMs that contain subassemblies. In the previous versions of MYOB Advanced Manufacturing Edition, to work with multilevel BOMs, the engineer had to create a BOM for each level separately by using the Bill of Material (AM208000) form. They could then view the components of the top-level BOM by using the Visual BOM (AM216000) form, but they could not modify any of the components.

In MYOB Advanced Manufacturing Edition 2022.2, a manufacturing engineer can view, create, and modify a multilevel bill of material displayed in a tree structure by using the new Engineering Workbench (AM208100) form.

The Engineering Workbench Form

The Engineering Workbench (AM208100) form consists of the following main parts, which are shown in the following screenshot:

1. Summary area (see Item 1 in the screenshot): A manufacturing engineer can select an existing BOM in the **BOM ID** field and view its general information. The engineer can also select the **Hold** checkbox to modify the BOM.
2. Left pane (Item 2): The engineer can view the BOM structure in the tree and modify the BOM by dragging the tree nodes to the needed locations.
3. Right pane (Item 3): The engineer can view the settings of the selected tree node, such as an operation or a material, and make changes if needed.

The More menu on the form toolbar contains the commands shown in the following screenshot. This set of commands includes most of the same commands that are on the *Bill of Material* (AM208000) form, except for **Visual BOM** and **Engineering Workbench**.
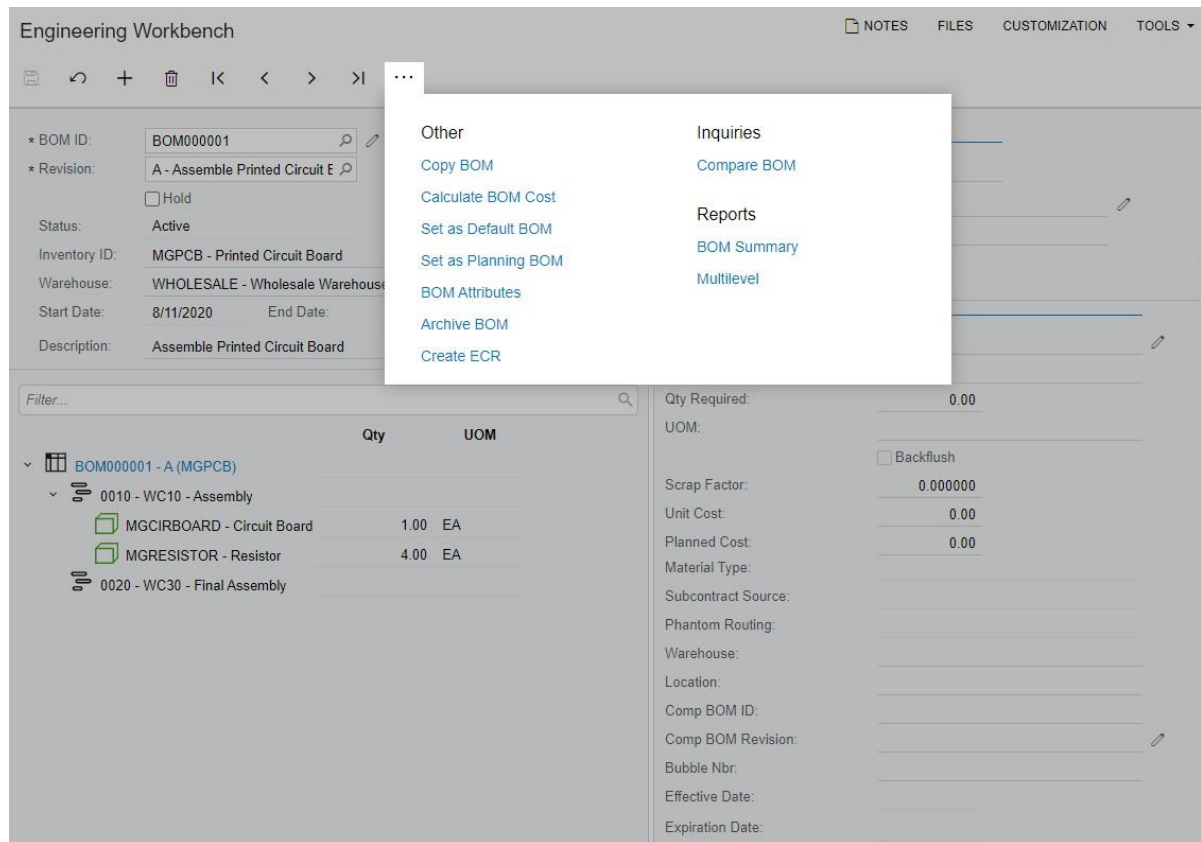
The left and right panes are described in detail in the following sections.

Engineering Workbench: BOM Tree

The BOM tree on the left pane of the Engineering Workbench (AM208100) form contains the following elements (see the screenshot below):

1. The **Filter** field (Item 1 in the screenshot). If a user enters keywords, the system displays only the tree nodes that contain the keywords in the ID or description.
2. The BOM tree (Item 2), which displays the operations and materials. If a material is a subassembly, all the nested operations and materials are also displayed.
3. The **Qty** and **UOM** columns (Item 3), which display the quantity and the unit of measure for each material.
4. The Commands column (Item 4). When commands are applicable for the tree node, the column contains the More button, which the user can click to view these commands on the More menu. The following table describes the possible commands.

Command	Description
If the tree node is a bill of material, the following command is available in the More menu.	
Add child	Adds a new operation.
If the tree node is an operation, the following commands are available in the More menu.	
Add sibling	Adds a new operation on the same level as the current operation.
Add child	Adds a new material beneath the operation.
Delete	Deletes the operation.
If the tree node is a material, the following commands are available in the More menu.	
Add sibling	Adds a new material on the same level as the current material.
Delete	Deletes the material.

In the BOM tree, a manufacturing engineer can do any of the following when the **Hold** checkbox in the Summary area is selected:

- Change the order of operations
- Change the order of materials within an operation
- Move materials between operations
- Add new operations or materials
- Delete operations or materials

To move a node within the tree, the engineer drags the node to the needed position. Some movements are forbidden, such as the movement of an operation under another operation or the movement of a material under another material. If the engineer attempts a forbidden movement, the system displays an error message and does not move the node.

Icons in the BOM Tree

Depending on the BOM structure, the BOM tree on the left pane of the *Engineering Workbench (AM208100)* form may display any of the icons listed and described in the following table.

Icon	Description
	The top-level bill of material.
	An operation that is performed internally.
	An outside operation.
	A material that is a subassembly. This material has an assigned bill of material.
	A material that is a phantom subassembly.
	A material of an outside operation that is a subassembly.

Icon	Description
	A material that is a finished stock item.
	A material that is a finished phantom item.
	A material of an outside operation that is a finished stock item.
	A material that is a non-stock item.
	A material that is a phantom non-stock item.
	A material of an outside operation that is a non-stock item.

Engineering Workbench: Operation and Material Details

In the right pane of the Engineering Workbench (AM208100) form, the manufacturing engineer can view the settings of the tree node selected in the left pane. The pane contains the following information, which depends on the selected tree node:

- For an operation: The pane displays the summary settings of the operation and the operation the detailed settings of the operation on the **Operation**, **Materials**, **Steps**, **Tools**, and **Overhead** tabs (see the following screenshot).
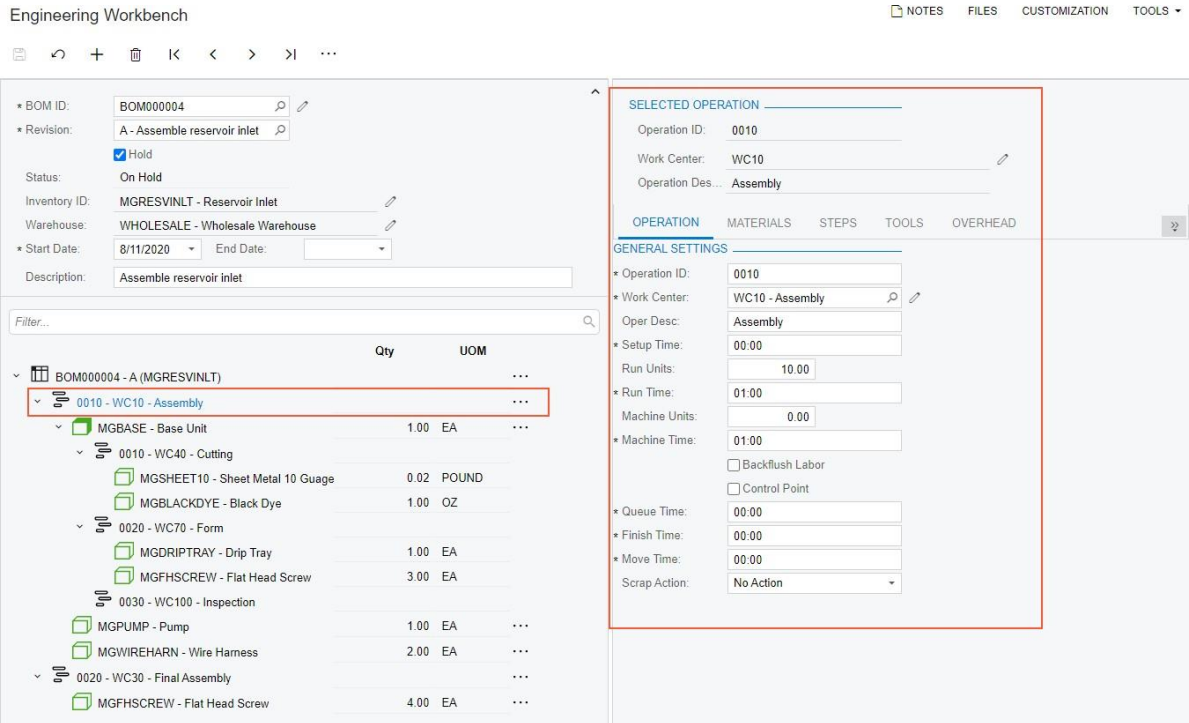
- For a material: The pane displays the summary settings of the operation and the settings of the material (see the following screenshot).
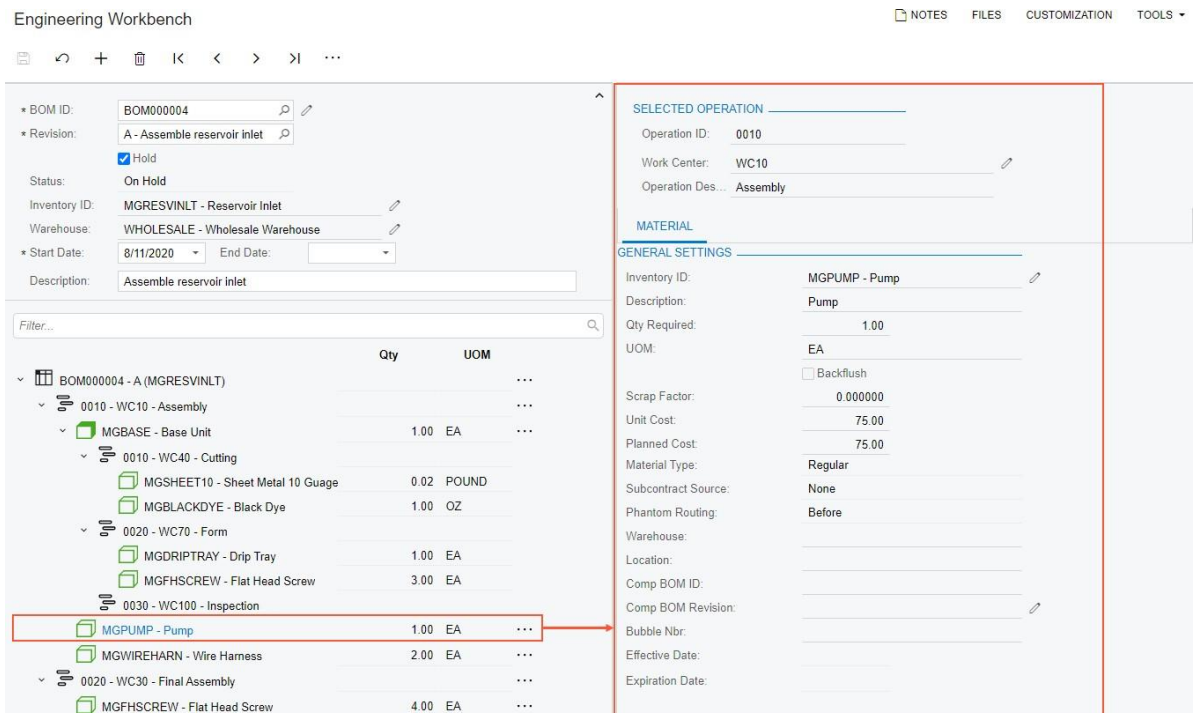
- For a material that is a subassembly: The pane displays the summary settings of the operation, the settings of the material, and general information about the bill of material that is used for the production of the material (see the following screenshot).

- For a material that is a part of a subassembly: The pane displays the summary settings of the subassembly bill of material and the operation, as well as the settings of the material (see the following screenshot).

Creation of a Bill of Material

To create a bill of material on the Engineering Workbench (AM208100) form, a manufacturing engineer does the following:

1. In the **Inventory ID** field of the Summary area, selects a stock item to be produced.
2. Optionally, in the **Warehouse** field, selects a warehouse and specifies other settings in the Summary area.
3. Saves these changes. The node for the bill of material appears in the tree.
4. In the More menu of the BOM node, selects **Add child**.
5. Clicks the **New Operation** node, which appears under the BOM node, and on the **Operation** tab of the right pane, specifies the needed settings for the operation.
6. Saves these changes.
7. If the operation requires materials, does any of the following for each material, which the engineer first selects in the BOM tree:

   a) On the **Material** tab of the right pane, clicks **Add Row** on the table toolbar and specifies the needed material settings, as is done on the Bill of Material (AM208000) form.
   b) On the More menu of the operation node, selects **Add child**. The engineer then clicks the **New Material** node that appears in the BOM tree and specifies the needed material settings on the **Material** tab of the right pane.

8. Specifies the steps, tools, overhead, or outside processing settings on the corresponding tabs of the right pane.
9. Saves these changes.
10. Adds as many operations as are needed.

Other UI Changes

On the Bill of Material (AM208000) form, the **Engineering Workbench** command has been added to the More menu (see the following screenshot). A user clicks this command to open the Engineering Workbench (AM208100) form for the bill of material that was selected on the Bill of Material form.

Additional Information

For detailed information about bills of material, see Bills of Material: General Information in the in-product help.

Enhanced Support for Transfers in MRP

In previous versions of MYOB Advanced Manufacturing Edition, when the system performed material requirements planning (MRP), it did not create planned orders for possible transfer orders. Instead, the planning engineer reviewed MRP results on the MRP Display (AM400000) form and determined whether an item could be transferred from another warehouse. If so, they created the needed transfer orders on the Sales Orders (SO301000) form and had to regenerate MRP so that the system considered the new transfer orders. Additionally, there was no specific setting for transfer lead time for items used in manufacturing.

In MYOB Advanced Manufacturing Edition 2022.2, during MRP, the system creates planned transfer orders for items that can be transferred from another warehouse and uses the new transfer lead time settings to calculate the action dates for the orders—that is, the dates in the **Action Date** column of the MRP Display form.

Planned Transfer Orders in MRP

The system generates a planned transfer order for an item during MRP when all of the following is true:

- The available item quantity in a warehouse specified in a demand document is insufficient to meet the demand
- The item can be transferred from a different (transfer) warehouse according to the item settings, that is, *Transfer* is specified in the **Replenishment Source** field and the transfer warehouse is specified in the **Replenishment Warehouse** field of the **Replenishment** tab on the Item Warehouse Details (IN204500) form for the combination of the item and the source warehouse

For a planned transfer order, the system creates the following records on the MRP Display (AM400000) form:

- The record for the demand document that contains the item (the same as in previous versions). This record has the source of *Transfer* and the transfer warehouse specified, as shown in the first line of the following screenshot.
- The supply record for the planned transfer order itself (the implemented behaviour). This record has the type of *Planned Transfer Demand*, as shown in the second line of the following screenshot.

The reference numbers of planned transfer orders are generated automatically and have the PLTR prefix (see the **Related Document** column in the second line of the screenshot above).

If the source and manufacturing warehouses are located far from each other and it takes a day or more to transfer items between warehouses, a planning engineer can specify the transfer lead times for the warehouses in the new **Transfer Lead Time** table on the **Manufacturing** tab of the Warehouses (IN204000) form, shown in the following screenshot. With the source warehouse selected on the form, the engineer lists each transfer warehouse for which items may be moved to the warehouse selected on the form. In the **Transfer Lead Time** column for the warehouse, the lead time between the warehouses is specified.

If the transfer lead time is item-specific for any item in a particular transfer warehouse, the planning engineer can specify the lead time in the new **Transfer Lead Time** field of the **Manufacturing** tab on the Item Warehouse Details form for the combination of the item and the transfer warehouse (see the following screenshot).

When the system calculates the action date of a planned transfer order, it now uses the requested date specified in a demand document (such as a sales order) and subtracts the transfer lead time from this date if the transfer lead time is specified either for the warehouse or for the combination of the item and the warehouse.

If a planning engineer decides to transfer items as was suggested by MRP, on the MRP Display form, the engineer selects the needed record or records in the table and clicks **Transfer** on the form toolbar. The system creates a transfer order on the Sales Orders (SO301000) form with a number of lines on the **Details** tab that is equal to the number of the selected records and a **Ship On** date for each line equal to the action date of each planned transfer order that was selected.

New Exception Messages

On the MRP Exceptions (AM403000) form, the following new exception messages have been added:

- *Transfer without Repl. Warehouse*: The replenishment source has been set as *Transfer* for the item and source warehouse combination on the **Replenishment** tab of the *Item* Warehouse Details (IN204500) form but the replenishment warehouse is not specified on the same tab.
- *Circular Transfer*: One or more warehouses make a closed loop for transferring the item.

Other UI Enhancements

The following UI enhancements have been introduced to make it easier to find the settings related to item planning:

- On the Detail Inquiry (AM404000) form, the **Replenishment Source**, **Replenishment Warehouse**, **Transfer Lead Time**, and **Lead Time** fields have been added to the Selection area (see the following screenshot)for the convenience of a planning engineer who is viewing information about planned documents for a particular item as a result of MRP. In addition, the **Warehouse Details** button (also shown in the following screenshot has been added to the form toolbar, which opens the Item Warehouse Details (IN204500) form in a new browser tab for the item specified in the **Inventory ID** field and the warehouse specified in the **Warehouse** field.

- The **General** section of the **Manufacturing** tab on the Warehouses (IN204000) form has been renamed to **MRP Settings**, as shown in the following screenshot.

- The **Replenishments** section of the **Manufacturing** tab on the Stock Items (IN202500) and Item Warehouse Details (IN204500) forms has been renamed to **Planning Settings** to better indicate that the settings in this section impact only planning in manufacturing. In addition, the **MRP Consolidation** section has been removed and the **Days of Supply** field has been moved to the **Planning Settings** section. These changes are shown in the following screenshots.

Additional Information

For information about setting up transfers in MRP, see MRP Configuration: General Information in the in-product help.

For details about planning transfers in MRP, see Material Requirements Planning: Planning Transfers in MRP in the in-product help.

Control of Excessive Item Quantity for Operations

In the previous versions of MYOB Advanced Manufacturing Edition, when a shop floor operator created a move transaction on the Move (AM302000) form or a labour transaction on the Labour (AM301000) form, the operator could mistakenly enter an excessive quantity of completed items for production operations or record completion of the same items several times. If the quantity of completed items exceeded the quantity to produce specified in the production order, the excessive quantity caused inaccurate cost of the production order.

In version 2022.2, to give production managers the ability to minimise or eliminate these data entry mistakes, the **Exceeding Qty. for Operations** setting (see Item 1 in the following screenshot) has been introduced on the Production Order Types (AM201100) form.

In the **Exceeding Qty. for Operations** field, a production manager can select an option that determines whether a shop floor operator can release a move or labour transaction with a quantity of completed items that exceeds the quantity to produce specified in a production order as follows:

- If the operator is allowed to release a move or labour transaction with any completed quantity, the manager selects *Allow*.
- If the operator is allowed to release a move or labour transaction with an excessive quantity of completed items, but the system should display a warning message, the manager selects *Warn*.
- If the operator is forbidden to release a move or labour transaction with an excessive quantity of completed items, the manager selects *Do Not Allow*; the system will display an error

message and prevent the operator from releasing the move or labour transaction. To release the transaction, the operator must reduce the completed quantity.

In addition, the setting previously named **Over Complete Orders** has been renamed to **Exceeding Qty. for Orders** (see Item 2 in the screenshot above). Note that the **Exceeding Qty. for Orders** setting controls only the quantity recorded for the last operation in a production order, but the **Exceeding Qty. for Operations** setting controls the quantity recorded for each operation.

Restricted Visibility of Customers and Suppliers

Starting in 2022.2, on forms of MYOB Advanced Manufacturing Edition, lists of customers and suppliers are displayed according to the access rights of the signed-in user and the restriction settings specified in customer or supplier classes. An implementation manager can restrict the visibility of customers or suppliers of a particular class by branch or by company.

This functionality is available only when the *Customer and Supplier Visibility Restriction* feature is enabled on the Enable/Disable Features (CS100000) form.

Manufacturing Forms that Support Visibility Restrictions

On the following forms, customer accounts that are displayed or available for selection may be limited based on visibility restrictions:

- Production Order Maintenance (AM201500)
- Forecast (AM202000)
- Generate Forecast (AM502000)

On the following forms, supplier accounts that are displayed or available for selection may be limited based on visibility restrictions:

- Supplier Shipments (AM310000)
- Production Order Details (AM209000)
- Critical Materials (AM401000)
- MRP Display (AM400000)
- Estimate Operation (AM304000)

Additional Information

For more information on restricting the visibility of customer or supplier accounts, see the following topics in the in-product help:

- Customer Visibility: General Information
- Supplier Visibility: General Information

Side Panel Support for Lists of Records

In MYOB Advanced Manufacturing Edition 2022.2, a side panel has been added to multiple lists of records. A side panel is a navigation option where users can drill down to relevant details about any record they select in a list of records. A side panel may have only one tab with a form related to the selected record, or it may have multiple tabs. If the side panel has multiple tabs, a user views a tab by clicking its icon.

The following screenshot shows the side panel for the *Production Order Maintenance (AM2015PL)* list of records. Notice that for the selected record, the side panel has icons for five tabs.
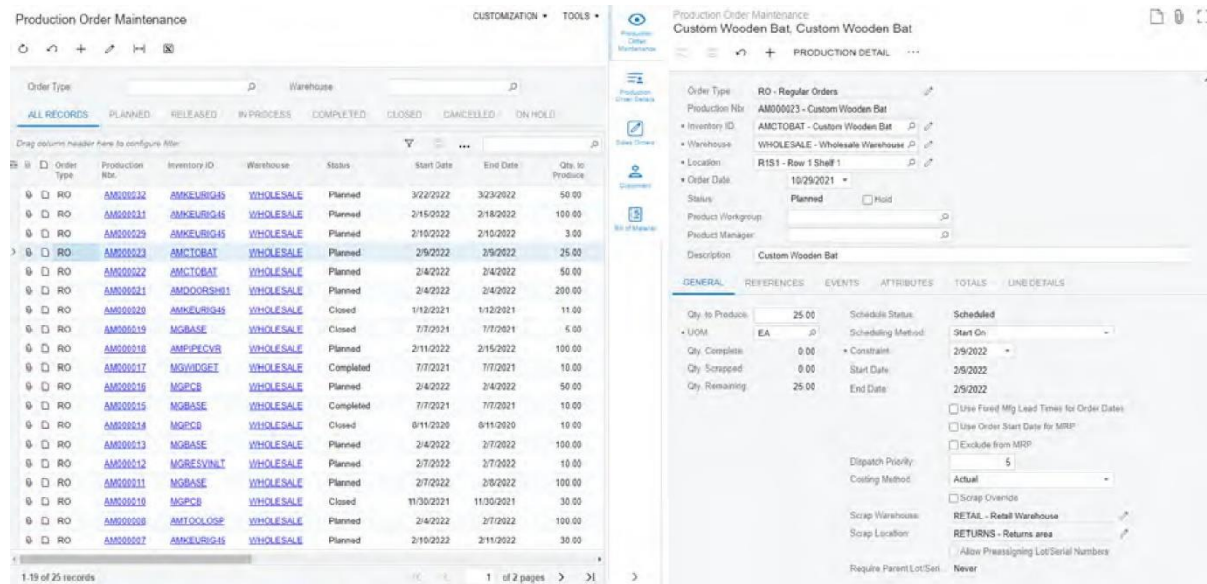
The following table notes each list of records to which a side panel has been added, along with the tab or tabs on the side panel for this list of records. The tabs whose icons are displayed on the side panel may vary depending on the settings of the record that is selected in the list of records; the **Availability** column describes when each tab is available.

List of Records	Tab or Tabs of the Side Panel	Availability
Production Order Maintenance (AM2015PL)	Production Order Maintenance (AM201500)	Always available.
	Production Order Details (AM209000)	Always available.
	Sales Orders (SO301000)	Available if for the selected record, a sales order is specified in the **SO Order Nbr.** field on the **References** tab of the Production Order Maintenance form.

List of Records	Tab or Tabs of the Side Panel	Availability
	Customers (AR303000)	Available if for the selected record, a customer is specified in the **Customer** field on the **References** tab of the Production Order Maintenance form.
	Bill of Material (AM208000)	Available if for the selected record, a bill of material is specified in the **BOM ID** field on the **References** tab of the Production Order Maintenance form.
	Projects (PM301000)	Available if for the selected record, a project is specified in the **Project** field on the **References** tab of the Production Order Maintenance form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.
	Project Tasks (PM302000)	Available if for the selected record, a project task is specified in the **Project Task** field on the **References** tab of the Production Order Maintenance form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.
Bill of Material (AM2080PL)	Bill of Material (AM208000)	Always available.
	BOM Attributes (AM208500)	Always available.
Engineering Change Request (AM2100PL)	Engineering Change Request (AM210000)	Always available.
	Engineering Change Order (AM215000)	Available if for the selected record, an engineering change order is specified in the **ECO ID** field in the Summary area of the Engineering Change Request form.
Engineering Change Order (AM2150PL)	Engineering Change Order (AM215000)	Always available.
	Engineering Change Request (AM210000)	Available if an engineering change request is specified in the **ECR ID** column of the *Engineering Change Order (AM2150PL)* list of records.
Configuration Maintenance	Configuration Maintenance (AM207500)	Always available.

List of Records	Tab or Tabs of the Side Panel	Availability
(AM2075PL)	Bill of Material (AM208000)	Always available.
Estimates (AM3030PL)	Estimate (AM303000)	Always available.
	Business Accounts (CR303000)	Available when for the selected record, both of the following conditions are met: • A business account is specified in the **Customer** field on the **References** tab of the Estimate form • The *Customer Management* feature is enabled on the Enable/Disable Features form.
	Opportunities (CR304000)	Available when for the selected record, both of the following conditions are met: • An opportunity is specified in the **Opportunity ID** field on the **References** tab of the Estimate form. • The *Customer Management* feature is enabled on the Enable/Disable Features form.
	Sales Quotes (CR304500)	Available when for the selected record, both of the following conditions are met: • A sales quote and an opportunity are specified in the **Quote Nbr** and **Opportunity ID** fields, respectively, on the **References** tab of the Estimate form. • If the *Sales Quotes* feature is enabled on the Enable/Disable Features form.
	Sales Orders (SO301000)	Available if for the selected record, values are specified in both the **Order Type** and **Order Nbr** fields of the **References** tab of the Estimate form.
	Quote (SO641000)	Available if for the selected record, *Sales Order* is specified in the **Quote Source** field of the Summary area and a reference number of a quote is specified in the **Quote Nbr** field on the **References** tab of the Estimate form.

List of Records	Tab or Tabs of the Side Panel	Availability
	Projects (PM301000)	Available if for the selected record, a project is specified in the **Project** field on the **References** tab of the Estimate form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.
	Project Tasks (PM302000)	Available if for the selected record, a project task is specified in the **Project Task** field on the **References** tab of the Estimate form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.
Estimate Operation (AM3040PL)	Estimate Operation (AM304000)	Always available.
	Estimate (AM303000)	Always available.
	Business Accounts (CR303000)	Available when for the estimate that contains the selected operation, both of the following conditions are met: • A business account is specified in the **Customer** field on the **References** tab of the Estimate form • The *Customer Management* feature is enabled on the Enable/Disable Features form.
	Opportunities (CR304000)	Available when for the estimate that contains the selected operation, both of the following conditions are met: • An opportunity is specified in the **Opportunity ID** field on the **References** tab of the Estimate form. • The *Customer Management* feature is enabled on the Enable/Disable Features form.

List of Records	Tab or Tabs of the Side Panel	Availability
	Sales Quotes (CR304500)	Available when for the estimate that contains the selected operation, both of the following conditions are met: • A sales quote and an opportunity are specified in the **Quote Nbr** and **Opportunity ID** fields, respectively, on the **References** tab of the Estimate form. • If the *Sales Quotes* feature is enabled on the Enable/Disable Features form.
	Sales Orders (SO301000)	Available if for the estimate that contains the selected operation, values are specified in the **Order Type** and **Order Nbr** fields on the **References** tab of the Estimate form.
	Quote (SO641000)	Available if for the estimate that contains the selected operation, *Sales Order* is specified in the **Quote Source** field of the Summary area and a value is specified in the **Quote Nbr** field on the **References** tab of the Estimate form.
	Projects (PM301000)	Available if for the estimate that contains the selected operation, a project is specified in the **Project** field on the **References** tab of the Estimate form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.
	Project Tasks (PM302000)	Available if for the estimate that contains the selected operation, a project task is specified in the **Project Task** field on the **References** tab of the Estimate form. The project-related functionality is available in the system only if the *Projects* feature is enabled on the Enable/Disable Features (CS100000) form.

For details about side panels, see Side Panels of Generic Inquiry Forms.

Support of Blanket Sales Orders in MRP

For companies that have long lead times to produce a finished good or have long lead times for purchase the components of a finished good, planning for future sales demand is critical to meet the dates when delivery to the customer was promised. These companies need material requirements planning (MRP) to include the lines of blanket sales orders as a part of the demand calculation. In MYOB Advanced Manufacturing Edition 2022.2, blanket lines of a blanket sales order that are planned for dates in the future are now included in MRP and are processed similarly to forecasts. Child sales orders generated from a blanket sales order are also included in MRP and are processed the same as regular sales orders are.

MRP uses the value of the **Sched. Shipment Date** column in the line or line detail (if details have been added for the line) on the **Details** tab of the Sales Orders (SO301000) form as the promise date on the MRP Display (AM400000) form. On this form, the planned orders based on blanket sales orders have the *Blanket Order* type, as shown in the following screenshot.

If the **Sched. Shipment Date** column of the blanket sales order line or line detail is empty on the Sales Orders form, the exception of the *Order Without Sched. Shipment Date* type is displayed on the MRP Exceptions (AM403000) form, as you can see in the following screenshot.

The system also uses data from blanket sales orders when calculating forecast that is dependent on sales orders.

A planning engineer can decide whether to include in MRP blanket sales orders that have expired. If the orders should be included in MRP calculation then the engineer selects the **Include Expired Blanket Sales Orders** checkbox on the MRP Preferences (AM100000) form, shown in the following screenshot. By default, expired blanket sales orders are excluded from MRP.

Other Enhancements

In MYOB Advanced Manufacturing Edition 2022.2, multiple improvements to the UI and manufacturing management processes have been introduced, as described below.

Management of the Initial Status for New BOM Revisions

In previous versions of the system, the initial status of each new revision of a bill of material (BOM) was *On Hold*. This could be inconvenient for organisations that create bills of material based on engineering change orders or that have integrated MYOB Advanced Manufacturing Edition with a product lifecycle management system and manage bills of material in this system.

Now a production manager can control whether all new BOM revisions will have a status of *On Hold*. The new **Hold BOM Revisions on Entry** checkbox has been added to the BOM Preferences (AM101000) form, as shown in the following screenshot. The production manager can clear this checkbox if they want all new BOM revisions to be created with the *Active* status; thus, the BOM revisions can be used in production immediately after creation. Otherwise, the revisions will be created with the *On Hold* status.

For companies that are upgrading their system from previous versions, the checkbox will be selected to preserve the existing behaviour.

Enhanced Calculation of the Ship On Date for Transferred Materials

When a production manager creates a transfer order for materials needed in a particular production order by using the Critical Materials (AM401000) form, the system now performs enhanced calculation of the **Ship On** date in the transfer order. The system inserts the calculated date in the **Ship On** column of the Sales Orders (SO301000) form (**Details** tab) for the item of the transfer order. The **Ship On** date is now calculated as the date at which the materials are required (based on the scheduling settings of the production order) adjusted to account for the transfer lead time for the item to be produced.

The transfer lead time is specified either in the new **Transfer Lead Time** table on the **Manufacturing** tab of the Warehouses (IN204000) form or in the new **Transfer Lead Time** field of the **Manufacturing** tab on the Item Warehouse Details (IN204500) form for the combination of the item and the warehouse. For more information about these settings, see Manufacturing: Enhanced Support for Transfers in MRP.

Mobile

Ability to Edit the Main Screen

In the MYOB mobile app connected to an instance of MYOB Advanced 2022.2, a user can now select which of the following sections should be displayed on the main screen and change their order:

- KPIs
- Recently visited records
- Favourite screens and records
- Workspaces

To edit the main screen of the mobile app, the user should do the following:

1. On the main screen of the MYOB mobile app, scroll toward the bottom of the screen until the **Edit main screen** button appears, as shown in the following screenshot.
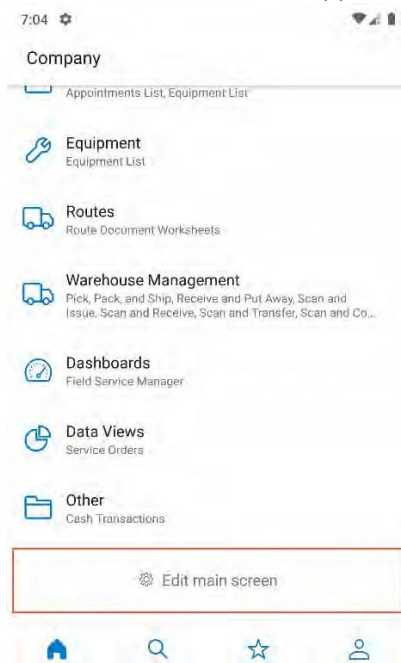
2. Tap Edit main screen.
3. On the *Edit Main Screen* screen, which opens, select the checkboxes of the sections that should be displayed, as shown in the following screenshot.
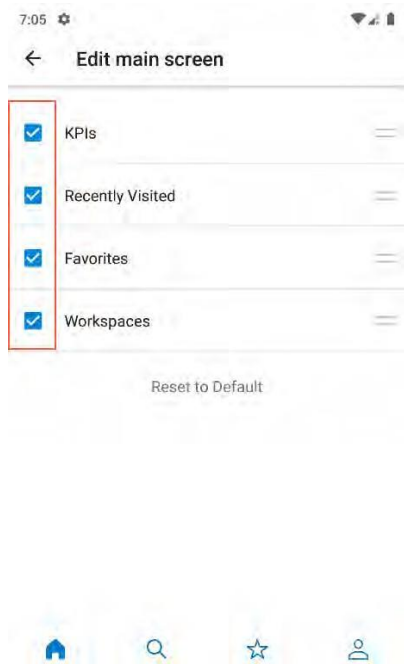
4. To change the order of the sections, the user should tap and hold the section name and drag it to the needed place.
5. Tap the back arrow to save the changes and return to the main screen. By default, all sections are displayed.

Adjustment of Colours to Fit the Company's Colour Scheme

The MYOB mobile app connected to an instance of MYOB Advanced 2022.2 now adjusts the colour of the UI elements on the following screens according to the primary colour specified on the Companies (CS101500), Branches (CS102000), or Site Preferences (SM200505) form:

- Sign-In screen
- Main menu
- Workspaces
- Screens that correspond to MYOB Advanced forms

The app changes the colour automatically when a user signs in to the instance.

Platform

Ability to Specify a Custom Title to Side Panels

In previous versions of MYOB Advanced, a user could only change the icon of a side panel tab. In MYOB Advanced 2022.2, the ability to specify a custom title of the tab has been added.

Changes to Generic Inquiry Settings

On the **Navigation** tab of the Generic Inquiry (SM208000) form, the new **Side Panel Settings** section has been added (shown in the following screenshot).

The **Side Panel Settings** contains the existing **Icon** field and new **Custom Title** field. By using the **Custom Title** field, the user can change the title of the side panel tab. If the **Custom Title** field is empty, the tab has the default title which is predefined in the system.

The new section appears if the *Side Panel* option is selected in the **Window Mode** column of the **Navigation Targets** table for the selected entity.

Ability to Generate GS1 EAN/UCC-128 Barcodes in Report Designer

In previous versions of Report Designer for MYOB Advanced, the system did not support the GS-128 EAN/UCC-128 barcodes. In Report Designer for MYOB Advanced 2022.2, the ability to generate barcodes of this type has been implemented.

Creation of a UCC-128 Barcode

To create a GS1 EAN/UCC-128 barcode, a user needs to add **PictureBox**, which is a barcode container, to the report and specify the *UCC128* value in the **Barcode Type** field and *Barcode* in the **Source** field. After that, the user may type human-readable values in the **Value** field to generate the required GS1 barcode (shown on the following screenshot).
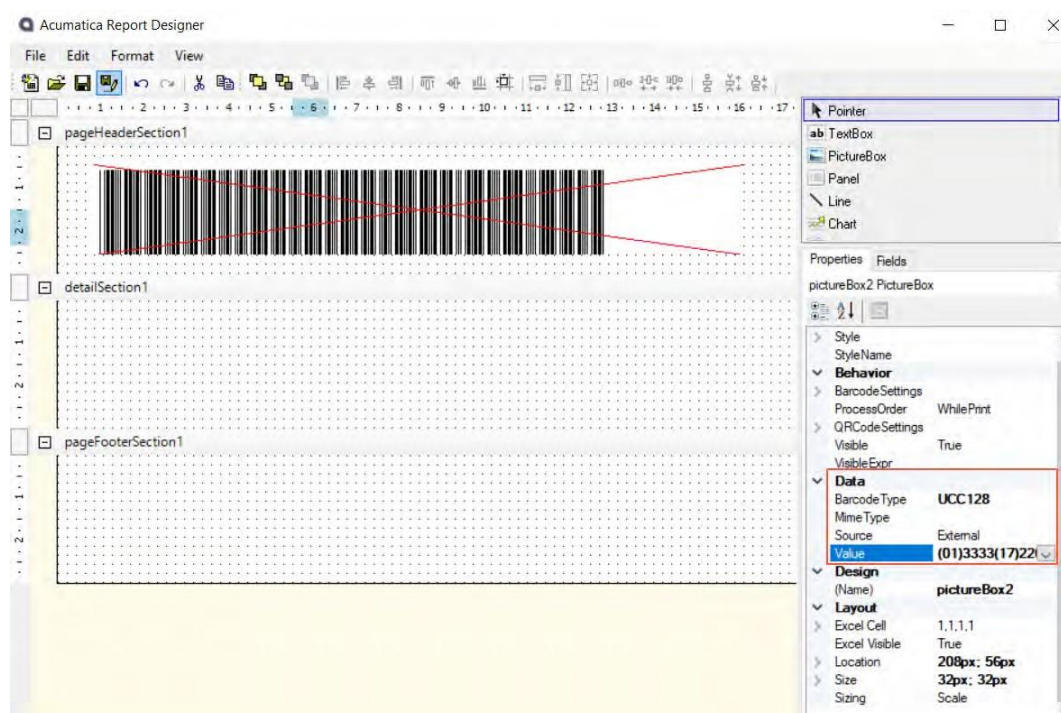
The user should use brackets as a separator for values in GS1 barcodes. That is, if the user needs to generate a GS1 barcode which contains the *Item Code*, *Expiration Date*, *Lot/Serial Nbr.* and *Quantity* values, they may specify the following value in the **Value** field: *(01)3333(17)220909(10)LREX50(37)15*. This value consists of the following elements:

- *(01)*: The GS1 code for the item ID.
- *3333*: The item ID
- *(17)*: The GS1 code for the expiration date
- *220909*: The expiration date in the *YYMMDD* format
- *(10)*: The GS1 code for the lot/serial number
- *LREX50*: The lot number
- *(37)*: The GS1 code for the quantity
- *15*: The quantity of the item in the lot

Depreciation of MSMQ for Internal Notification Queues

In MYOB Advanced 2022.2, Microsoft Message Queuing (MSMQ) technology has been replaced with a cross-platform technology that consists of the RabbitMQ message broker and a local file storage. This technology is supported in .NET Core and .NET 5.0. Internal queues—such as the queues for push notifications, business events, and commerce notifications—now use the RabbitMQ service by default.

Installation and Update Notes

By default, during the deployment of a new version of MYOB Advanced or during the update of an instance through the use of the MYOB Advanced Configuration Wizard, the following configuration steps are now performed:

- RabbitMQ is installed.
- MYOB Advanced is configured to use RabbitMQ and a local file storage for the processing of internal queues.

> **Note:** If RabbitMQ is already installed in the environment, the MYOB Advanced Configuration Wizard does not install RabbitMQ; it configures MYOB Advanced to use RabbitMQ and a local file storage.

If the **Don't install RabbitMQ** checkbox is selected in the MYOB Advanced Configuration Wizard during the installation or update, RabbitMQ is not installed and MSMQ is used, as it was in previous versions of MYOB Advanced.

If the instance is updated through the web interface and the `web.config` file of the instance is not configured to use RabbitMQ, the instance continues to use MSMQ.

Improved Diagnostics for Business Events and Push Notifications

In MYOB Advanced, push notifications and messages triggered by business events are queued for processing. In some circumstances queues may become overloaded and the system may stop queuing and processing messages. In 2022.2, the functionality of the System Queue Monitor (SM302010) form (formerly titled *System Queues Monitor*) has been reworked to provide tools for monitoring and troubleshooting a queue's health.

Management of Queues

In the Summary area of the System Queue Monitor (SM302010) form, the system lists the queues available for monitoring, which are the queues for push notifications, business events, and commerce. For each queue, a system administrator can view the current status, number of queued messages, queue size, and name (see the following screenshot).

For the queue selected in the Summary area, a system administrator can restart its processing by clicking the **Restart Dispatcher** button or clear the queue by using the **Clear Queue** button.

Viewing of Processing Errors

For a queue, a system administrator can view the list of errors by clicking the **Show Errors** button on the form toolbar. The system opens the **Errors** dialog box, where the system administrator can review the details of each notification whose processing raised an error (see the following screenshot).

Viewing of the Statistics for a Queue

For the queue selected in the Summary area, on the **Statistics** tab of the form, a system administrator can review the statistics of the queue performance and specify logging settings. The **Grouped by Hour** and **Grouped by Minute** tabs (see Item 3 in the following screenshot) display the same statistics grouped by hour and by minute, respectively.

In the **Keep Statistics and Log For (Days)** field (Item 1) of the tab, the system administrator can specify the number of days the system should keep statistics and long processing logs in the database. The records that are older than the specified period will be removed automatically. If there is no need to collect the statistics at all, *0* should be specified in this field.

Also, if the system administrator selects the **Log Trigger Details** checkbox (Item 2), the system will save detailed statistics for queue selected in the Summary area. The administrator can view the saved details by clicking a link in the **Date** column (Item 4) of the table on the **Grouped by Hour** or **Grouped by Minute** tab.

When the system administrator clicks a link in the **Date** column, the system opens the **Trigger Details** dialog box (see the following screenshot), where the user can review the list of fields from a generic inquiry that triggered the sending of the notification and the list of the involved DACs. By using this information, the administrator can adjust the list of monitored fields to improve performance, if needed.

Viewing of Performance Issues

For a queue selected in the Summary area, on the **Performance Issues** tab of the form, a system administrator can review processing details for queues whose processing time exceeds the specified threshold.

The administrator can also configure conditions for the system to save the processing details of a queue. In the **Number of Records in Detailed Log** field (see Item 1 in the following screenshot), the user specifies the number of log events to be logged during processing of a transaction. The log is to be displayed in the **Queue Processing Log** dialog box that is opened by clicking a link in the **Date** (Item 3) column from the table below.

In the **Processing Time Threshold (s)** field (Item 2), the user specifies the processing time threshold in seconds, which is set to *2* by default. If the processing time of a record exceeds this value, the system saves the processing details.

Upgrade Notes

After an upgrade to 2022.2, the default settings on the System Queue Monitor (SM302010) form will be changed as follows:

- The value of **Processing Time Threshold (s)** will be changed from *30* to *2* (meaning that the threshold will be two seconds).
- The value of **Keep Statistics and Log For (Days)** will be set to *2* (that is, two days).
- The **Log Trigger Details** checkbox will be cleared.

Projects and Construction

Enhancements in Change Management

In MYOB Advanced 2022.2, additional scenarios have been implemented for change management. Now users can close change requests that are linked to cost-only change orders, cancel change orders and change requests, and keep rejected change orders and change requests without these rejected documents affecting the project budget amounts.

Cost-Only Change Requests

If a customer has not approved the revenue part of the change request, a user may need to process a only the cost part of a change request and decline the revenue part of the change request. In MYOB Advanced 2022.2, the user can process a cost change order on the Change Orders (PM308000) form and then close the change request manually without processing a change order for the revenue part on the Change Requests (PM308500) form.

> **Note:** A cost change order is a change order of a change order class that has the **Cost Budget** checkbox selected and the **Revenue Budget** checkbox cleared on the Change Order Classes (PM203000) form.

To give the user this capability, the new **Close** button has been added to the form toolbar of the Change Requests form (see the following screenshot). This button appears on the toolbar for a change request that has the *Open* status and is linked to a cost change order that has the *Closed* status.

When the user clicks **Close**, the system assigns the change request the *Closed* status and decreases the **Potential CO Quantity** and **Potential CO Amount** in the corresponding revenue budget lines on the **Revenue Budget** tab of the Projects (PM301000) form.

New Document Statuses and Updated Rules of Project Budget Calculation

With previous versions of MYOB Advanced, users had to delete change orders and change requests with the *Rejected* status; if they were not deleted, these documents were added to the budgeted potential amounts, and the system did not exclude the documents after they were rejected. Also, there was no capability to keep the documents for which a project manager or a customer had

decided to stop the processing of these changes because unless they were deleted, these documents affected the potential values in the project budget.

In MYOB Advanced 2022.2, users can keep change orders and change requests with the *Rejected* status for historical purposes. These documents no longer affect any values in the project budget. Potential values in a project budget are now calculated excluding the following:

- The values of all rejected change requests
- The values of the rejected change orders and all change requests linked to these change orders.

Also, a new *Cancelled* status has been introduced for change requests and change orders. If a change request or a change order should not be processed, the user cancels the document by clicking **Cancel** on the More menu of the Change Requests (PM308500) or Change Orders (PM308000) form, respectively. The document is assigned the *Cancelled* status, and the quantity and amount of this document (which has been previously added to the potential values in the project budget) are subtracted from the **Potential CO Amount** and **Potential CO Quantity**.

Now the following values in project budgets on the Projects (PM301000) form are calculated by the described rules:

- **Potential CO Quantity** on the **Revenue** tab: The system calculates this quantity as the total quantity of the estimation lines of change requests that have the *Open* status (excluding the change requests that are linked to change orders that have the *Cancelled* or *Rejected* status) plus the total quantity of the revenue budget lines of change orders that have the *On Hold*, *Open*, or *Pending Approval* status and are associated with the same project, project task, account group, and cost code or inventory item.
- **Potential CO Amount** on the **Revenue** tab: This amount is calculated as the total amount of the estimation lines of change requests that have the *Open* status (excluding the change requests that are linked to change orders that have the *Cancelled* or *Rejected* status) plus the total amount of the revenue budget lines of change orders that have the *On Hold*, *Open*, or *Pending Approval* status and that are associated with the same project, project task, account group, and cost code or inventory item.
- **Potential CO Quantity** on the **Cost** tab: This quantity is calculated as the total quantity of the estimation lines of change requests that have the *Open* status plus the total quantity of the cost budget lines of change orders that have the *On Hold*, *Open*, or *Pending Approval* status and are associated with the same project, project task, account group, and cost code or inventory item.
- **Potential CO Amount** on the **Cost** tab: The system calculates this amount as the total amount of the estimation lines of change requests that have the *Open* status plus the total amount of the cost budget lines of change orders that have the *On Hold*, *Open*, or *Pending Approval* status and are associated with the same project, project task, account group, and cost code or inventory item.

Mobile App Enhancements

Previously, in the MYOB mobile app, a user could not work with the submittals and drawing logs that are available in MYOB Advanced Construction Edition.

In MYOB Advanced 2022.2, the new *Drawing Log* and *Submittal* mobile screens have been introduced. In the MYOB mobile app connected to an instance of MYOB Advanced 2022.2, the user can now view, create, and update drawing logs and submittals by using these screens.

Drawing Logs in the Mobile App

The **Drawing Log** menu item is now available in the **Project Management** workspace, as shown in the following screenshot.
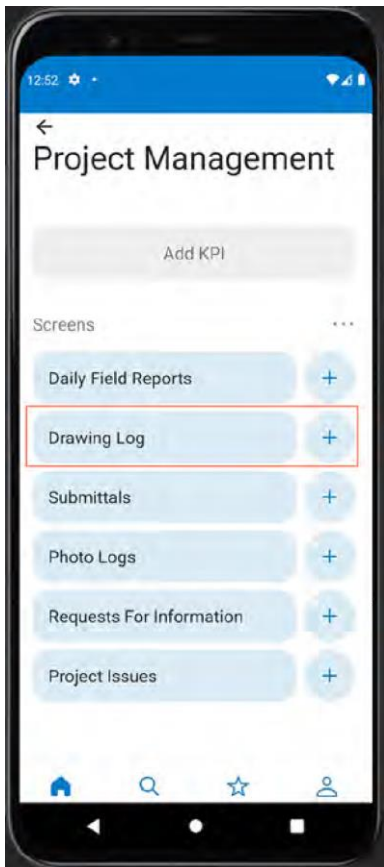
When a user opens the **Project Management** workspace and taps **Drawing Log**, the system opens the *Drawing Log* screen, which lists the existing drawing logs (see the screenshot below). For each drawing log, the system shows the following information:

- Drawing log ID
- Status
- Project
- Drawing date
- Title
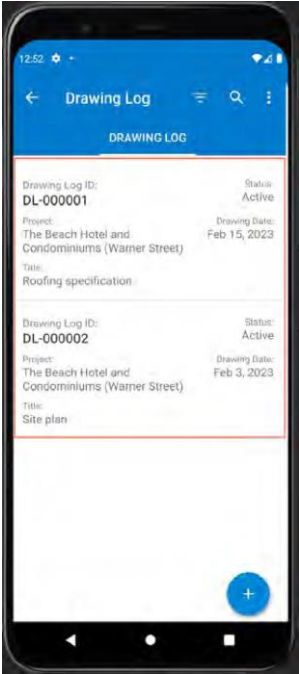
On the *Drawing Log* screen, the user can tap a record tile to open a drawing log and review its details, or create a new drawing log by tapping the Add button in the bottom of the screen.

In the top right area of the screen, the number that overlaps the Files button screen indicates the number of attached files (see the following screenshot). To review the files attached to the document or attach a new file, the user can tap the Files button.
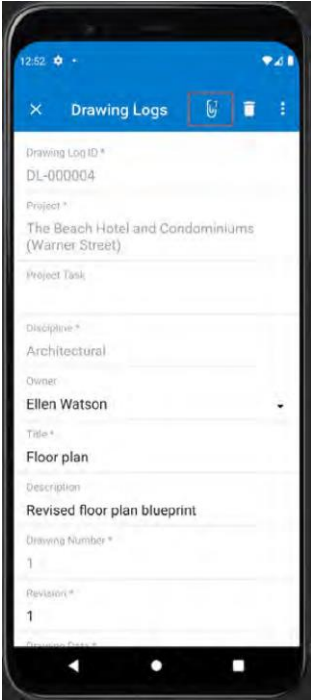
The system opens the preview of the files and photos attached to the drawing log, as shown in the following screenshot. The user can tap the **Camera** button to take and upload a photo, or tap the

Gallery button to upload a file from the mobile device and attach it to the document. In the top right of the screen, the user can delete any of these files or photos by selecting the file to be deleted and tapping the Delete button.

For each drawing log, the user can also review additional information related to the drawing log, as shown in the following screenshot.
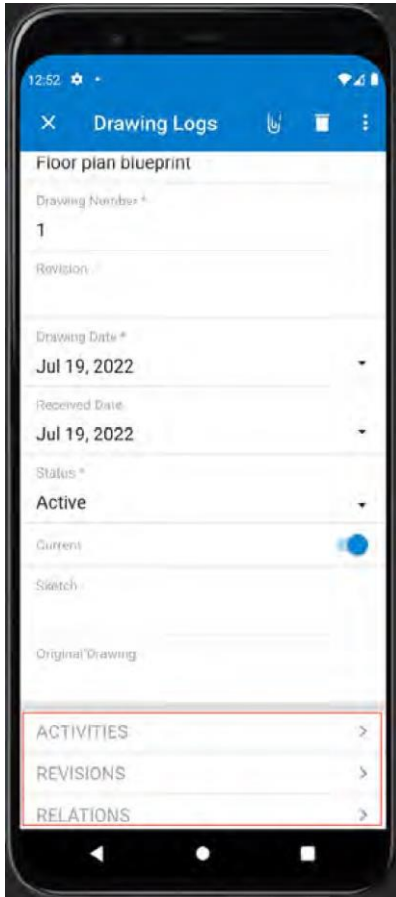
The following additional information can be reviewed for the drawing log:

- Activities (emails, events, work items, chats, messages, notes, phone calls, tasks, and escalations): When the user taps **Activities**, the system opens the list of activities linked to the drawing log. The user can tap the Add button in the bottom of the screen to create a new activity linked to the drawing log. The system then displays the list of activities that the user can create, as shown in the first screenshot below.

- Revisions of the current drawing log: When the user taps **Revisions** on the screen with the opened drawing log, the system opens the list of revisions that have been created for this drawing log, as shown in the second screenshot below. The user can tap the tile to open the revision for review.

- Requests for information and project issues linked to the current drawing log: When the user taps **Relations** on the screen with the opened drawing log, the system opens the list of requests for information and project issues that have been linked to this drawing log, as shown in the third screenshot below. The user can tap the tile to open the document for review.
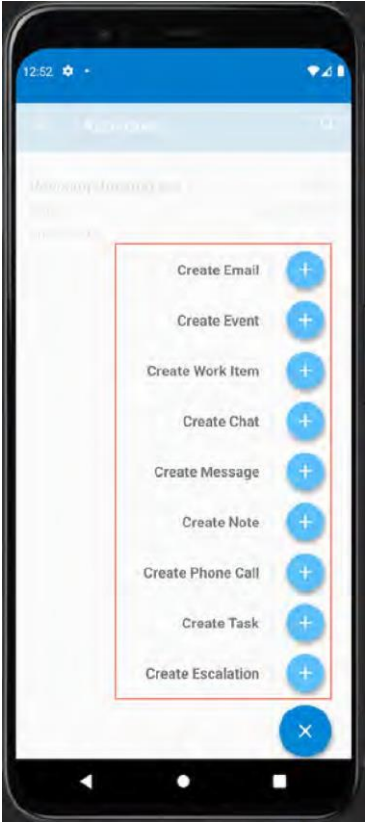
Submittals in the Mobile App

The **Submittals** menu item is now available in the **Project Management** workspace, as shown in the following screenshot.
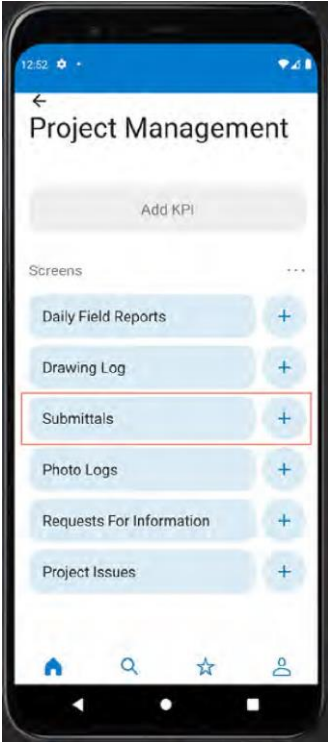
When the user opens the **Project Management** workspace and taps **Submittals**, the system opens the *Submittals* screen, which shows the list of existing submittals (see the screenshot below). For each submittal, the system shows the following information:

- Submittal ID
- Submittal type
- Project
- Status
- Owner
- Ball in court
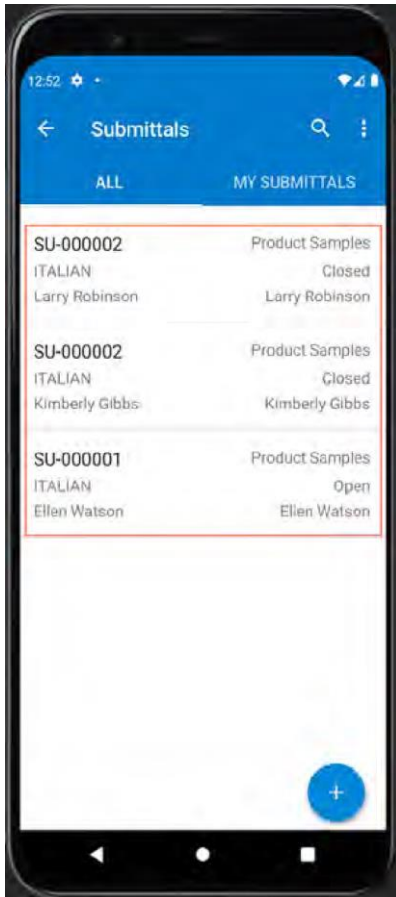
On the *Submittals* screen, the user can tap a record tile to open a submittal and review its details or create a new submittal by tapping the Add button in the bottom of the screen.

In the top right area of the screen, the number that overlaps the Files button, shows the number of attached files (see the following screenshot). To review the files attached to the document or attach a new file, the user can tap the Files button.
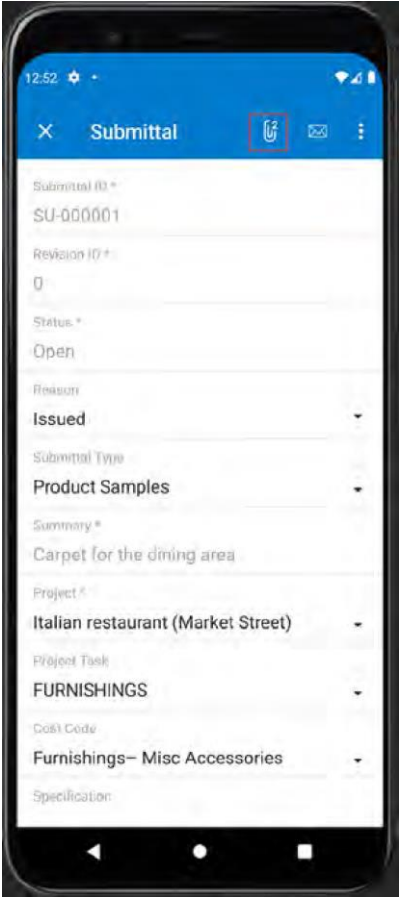
The system opens the preview of the files and photos attached to the submittal, as shown in the following screenshot. The user can tap the **Camera** button to take and upload a photo, or tap the **Gallery** button to upload a file from the mobile device and attach it to the document. In the top right of the screen, the user can delete any of these files or photos by selecting the file to be deleted and tapping the Delete button.

For each submittal, the user can also review the submittal workflow details and list of activities, as shown in the following screenshot.
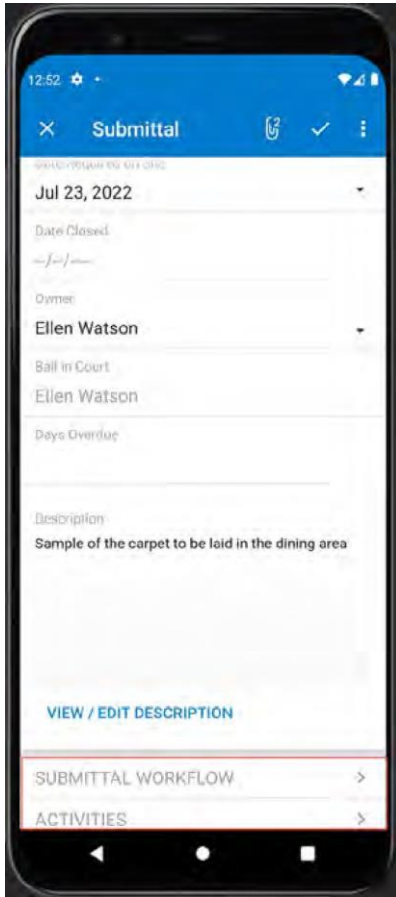
The following additional information can be reviewed for the submittal:

- Submittal workflow: When the user taps **Submittal Workflow** on the screen with the opened submittal, the system opens the list of responsible persons (submitters, approvers, and reviewers) that have been specified in the submittal (see the first screenshot below). The user can tap the tile to open the details for review.

- Activities (emails, events, work items, chats, messages, notes, phone calls, tasks, and escalations): When the user taps **Activities**, the system opens the list of activities linked to the submittal. The user can tap the Add button in the bottom of the screen to create a new activity linked to the submittal. The system then displays the list of activities that the user can create, as shown in the second screenshot below.
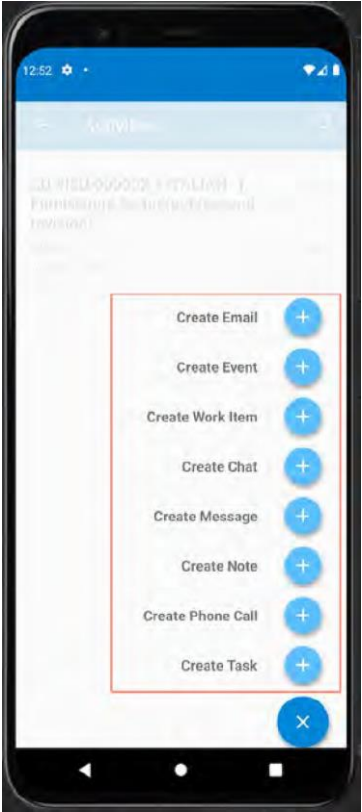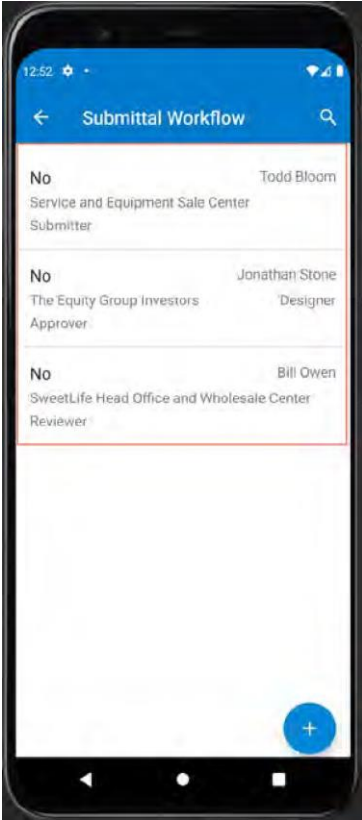
Known Limitations

Currently the following limitations apply to the drawing log and submittal functionality in the mobile app:

- A user cannot create a new revision of a drawing log.
- A user cannot delete a revision of a drawing log.
- A user cannot link a new project issue or request for information to a drawing log.
- A user cannot delete a project issue or request for information linked to a drawing log.
- A user cannot create a new revision of a submittal.
- A user cannot delete a submittal revision.
- A user cannot delete an activity linked to a submittal.

Tracking Project Progress by Unit

In previous versions of MYOB Advanced Construction Edition, foremen and site supervisors did not have the ability to capture units that were installed or used during the execution of a construction project task. Also, project managers did not have the ability to quickly track unit usage in projects.

In MYOB Advanced 2022.2, new functionality for tracking project productivity has been introduced. With this new functionality, employees working on a construction site can capture project activities on the unit level and track project progress by using a new type of document: progress worksheets. In the daily field report, a user can add cost budget lines and capture units used on the construction site during the working day. This functionality helps project managers to track project productivity and define the potential impact of these activities on the project schedule and cost budget.

New Progress Worksheet (PM303000) Form

To give users the ability to capture units used for projects, a new type of document—progress worksheet—has been introduced in MYOB Advanced 2022.2. A progress worksheet is entered on the new document entry form—Progress Worksheets (PM303000). This form is available in the system if the Construction feature is enabled on the Enable/ Disable Features (CS100000) form.

On this form, a user captures the units that have been installed during execution of each project task. The user creates a new progress worksheet, selects a project for which progress should be captured, adds cost budget lines, and specifies the quantity of units that have been used for the project.

The user may be able to add cost budget lines, depending on the option specified in the **Productivity Tracking** column on the **Cost Budget** tab of the Projects (PM301000) form for the selected project.

If the user clicks **Load Template** on the table toolbar of the **Details** tab of the *Progress Worksheets* form (see the following screenshot), the system automatically loads all cost budget lines of the selected project for which **Productivity Tracking** is set to *Template* on the Projects form.

If the user clicks **Select Budget Lines** on the **Details** tab of the Progress Worksheets form (see the following screenshot), the system opens the **Select Budget Lines** dialog box, in which the system shows the cost budget lines that the user can add manually. The table shows only the lines for which **Productivity Tracking** is set to *Template* and *On Demand* on the Projects form.
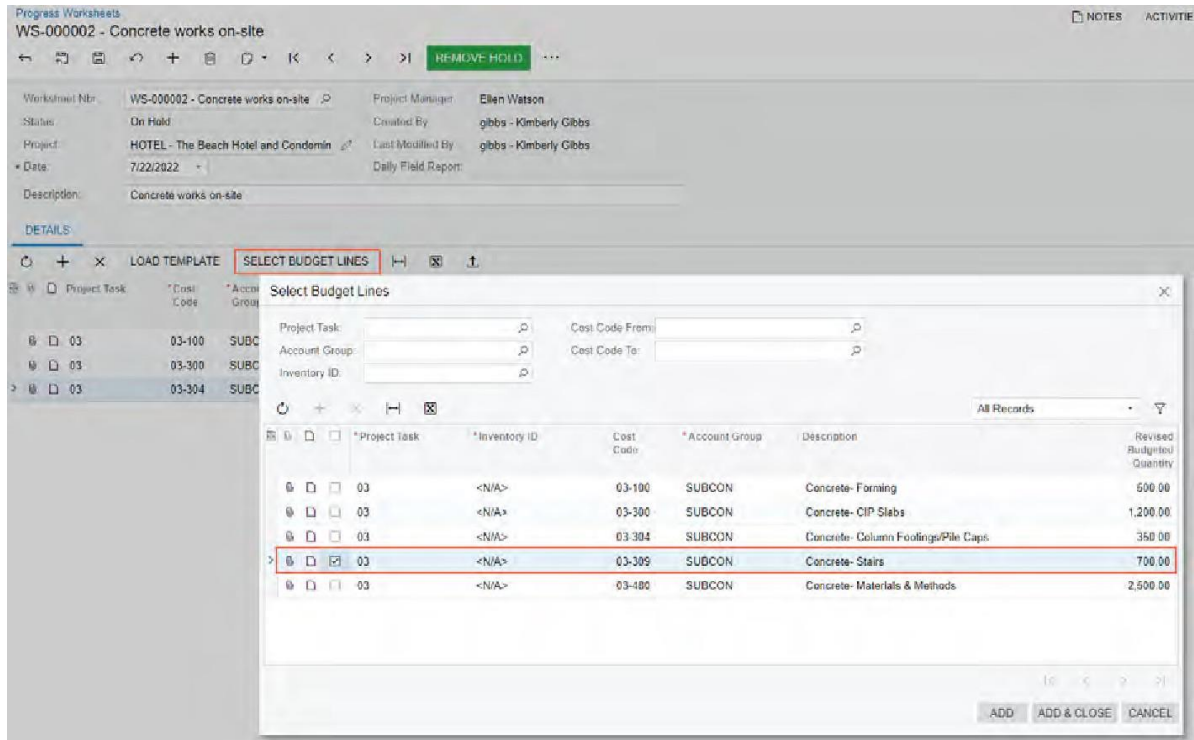
A progress worksheet has one of the following statuses:

- *On Hold*: The document was saved and can be edited.
- *Pending Approval*: The document needs to be approved by the responsible approvers, who are assigned according to the approval map specified on the **General** tab of the Projects Preferences form.
- This status is available only if the *Approval Workflow* feature is enabled on the Enable/Disable Features (CS100000) form and an approval map has been specified for progress worksheets on the Projects Preferences (PM101000) form.
- *Open*: The document is ready to be released.
- *Closed*: The document has been released.
- *Rejected*: The document has been rejected by the responsible approvers, who are assigned according to the approval map specified on the **General** tab of the Projects Preferences form.
- This status is available only if the *Approval Workflow* feature is enabled on the Enable/Disable Features form and an approval map has been specified for the progress worksheet on the Projects Preferences form.

For more information on the processing of progress worksheets, see Unit Tracking in Projects: General Information.

Recalculation of the Project Budget

If a progress worksheet has the *Closed* status, and a user has removed or modified the corresponding cost budget lines in the related project on the Projects (PM301000) form, the lines of progress worksheets may become inconsistent with the cost budget lines.

To update project progress related to deleted and restructured project budget lines, a user needs to runs the budget recalculation process. The user can run the process for only the inconsistent project on the Projects or for multiple inconsistent projects on the Recalculate Project Balances (PM504000) form. The system will recreate the cost budget lines based on the progress worksheets that have been processed.

Changes to the Daily Field Report (PJ304000) Form

On the Daily Field Report (PJ304000) form, which is available if the *Construction Project Management* feature is enabled on the Enable/Disable Features (CS100000) form, the new **Progress Worksheets** tab has been added (see the following screenshot). On this tab, a user can add cost budget lines and capture units used on-site during the working day.

When the user clicks **Complete** on the form toolbar of the Daily Field Report form, the system creates a progress worksheet linked to the daily field report and saves this progress worksheet with the *On Hold* status. The reference number and status of the created worksheet are shown in each of the lines on the **Progress Worksheets** tab.
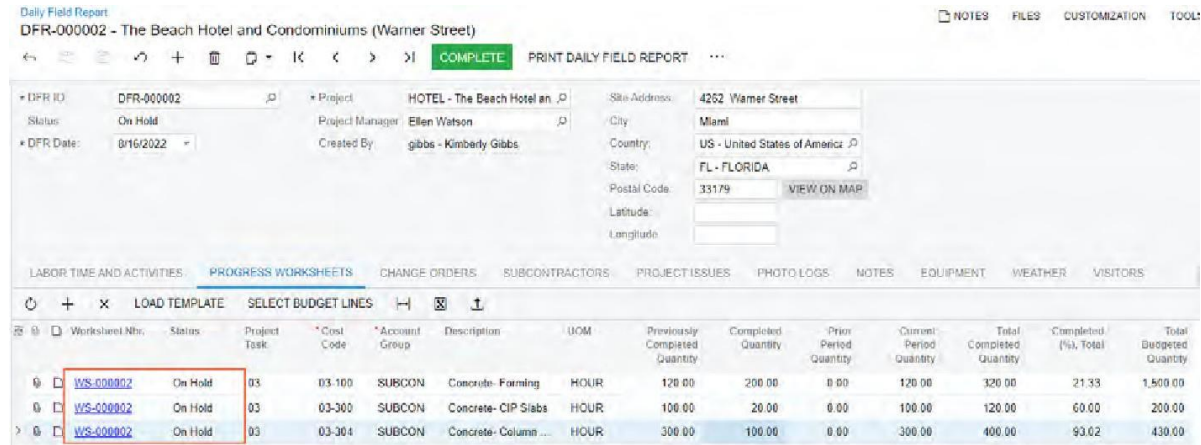
New Settings on Other Project-Related Forms

On the **Cost Budget** tab of the Projects (PM301000) form and the Project Templates (PM208000) form, the **Productivity Tracking** column has been added.

> **Note:** The column appears on these forms only if the *Construction* feature is enabled on the Enable/Disable Features (CS100000) form.

The column has the following options, as shown in the following screenshot:

- *Not Allowed* (default): The cost budget line cannot be added to a progress worksheet.
- *Template*: The cost budget line can be preloaded to a progress worksheet if a user clicks the **Load Template**
- button on the **Details** tab of the Progress Worksheets (PM303000) form, or the line can be added manually.
- *On Demand*: The cost budget line can be added to a progress worksheet manually.

On the **General** tab of the Projects Preferences (PM101000) form, the following fields have been added:

- **Progress Worksheet Numbering Sequence**: The numbering sequence used to number the newly created progress worksheets
- **Progress Worksheet Approval Map**: The map to be used to assign progress worksheet to employees for approval
- **Progress Worksheet Approval Notification**: The notification template that the system uses to generate notification emails for employees assigned to approve progress worksheet

Other Enhancements

On the Approval Maps (EP205015) form, the new *Progress Worksheet* entity type has been added to give administrators the ability to configure approvals for progress worksheets.

On the Numbering Sequences (CS201010) form, the new *PROGRESSWS* numbering sequence has been added. This numbering sequence is used by default for numbering progress worksheets.

Upgrade Notes

After the upgrade to MYOB Advanced 2022.2, the system specifies *Not Allowed* in the **Productivity Tracking** column of the **Cost Budget** tab of the Projects (PM301000) form and the Project Templates (PM208000) form for all cost budget lines of all projects and project templates, respectively. To start using the progress worksheet functionality in an existing project, a project manager should update the **Productivity Tracking** column in cost budget lines of applicable projects and project templates.

Known Limitations

In the **Select Budget Lines** dialog box on the Progress Worksheets (PM303000) and Daily Field Report (PJ304000) forms, a user can add cost budget lines only by using the **Add & Close** button. That is, at this time, the user cannot click **Add** to add a line and then click **Close** to close the dialog box.

System Administration

Trace Improvements

MYOB Advanced 2022.2 introduces an improved Trace page. The improved page allows users and system administrators to view the following:

- All recent operations performed by the current user on a single page
- All messages, SQL statements, and exceptions logged in the system
- Logs that will be sent to MYOB
- Information about the system performance, even if the Request Profiler is turned off

The information on the page is preserved even after a user's session expires, and is limited by only the number of requests.

Users and system administrators access the Trace page the same way as they did before: by clicking **Tools > Trace** on the title bar of any MYOB Advanced form.

Trace Page Overview

The Trace page consists of the following parts, which are shown in the following screenshot and described in detail in the following sections.

- Header (see Item 1 in the screenshot)
- Table with recent requests (Item 2)
- Local environment section (Item 3)
- **Request** section with general information about the selected request (Item 4)
- Table with the logged information (Item 5)

Header

The header contains the page title (**Last Requests**) and the **Submit Logs** button. If an administrator clicks this button, the **Logs Submitted** pop-up window is displayed (see the following screenshot).

Logs Submitted   ×

Technical details about the last actions have been submitted to Acumatica Inc. If you want to contact your
Acumatica support provider about this log, save the following trace log ID:

1833a46b-0b59-4048-9c5b-6114623314c6

In this pop-up window, the administrator can copy the trace log ID by clicking the Copy icon.

Last Requests Table

This table displays information about the last ten requests performed by the user on all forms and in all dialog boxes and pop-up windows. The requests are grouped by operation and sorted by their **Time (UTC)**.

If a user clicks a request in the table, the detailed information about this request is displayed in the **Request** section and in the table with messages. This information includes the ID of the form on which the request was performed, the type of the request, the command that the user invoked, the duration of the request, the number of issues that occurred on the form, and the time when the request occurred.

Local Environment Section

This section contains the following information about the user's environment:

- **User**: The current user's name, the tenant, and the branch to which the user is signed in
- **Version**: MYOB Advanced version
- **Local Time**: Local time and date
- **UTC Time**: UTC time and date
- **Customisations**: The customisation project or projects that are published in the current MYOB Advanced instance

Request Section

The **Request** section contains the **Request** and **Performance** columns. The **Request** column duplicates the information displayed in the **Last Requests** table for the selected request. In the **Performance** column, the user can see what resources the system used to process the request.

Table with Logged Information

In this table, a user can view information messages, SQL statements, and exceptions that have occurred in the system.

On the **Messages** tab of the table, the user views system messages, errors, and warnings. The displayed information depends on the type of request.

On the **SQL** tab, the user views the list of database tables involved in the request processing, the SQL statements that the system has generated, and the stack trace (see the following screenshot). For each record on this tab, the user can see the total time spent on the request, the number of code executions, and the number of affected table rows.

MESSAGES (0)   SQL (13)   EXCEPTIONS (4)

Tables	Total time	Executions	Rows
⌄ Widget	1	3	42

```
SELECT  /* DB.00.00.15 */[Widget].[DashboardID], [Widget].[WidgetID], [Widget].[OwnerName], [Widget].[Caption], [Widget].[Column], [Wi
FROM [Widget] [Widget]
WHERE ( [Widget].[CompanyID] IN ( 1, 3) AND 32 = SUBSTRING( [Widget].[CompanyMask], 1, 1) & 32) AND ( [Widget].[DashboardID] =
ORDER BY [Widget].[DashboardID], [Widget].[WidgetID] OPTION(OPTIMIZE FOR UNKNOWN)
```

```
    at PX.Common.PXStackTrace.GetStackTrace(Int32 skipFrames, Boolean needFileInfo)
    at PX.SM.PXPerformanceInfo.AddSqlSample(String cmdText, String parameterDeclaration, Boolean queryCache)
    at PX.Data.PXSqlDatabaseProvider.ExecuteReaderInternal(IDbCommand command, CommandBehavior behavior)
    at PX.Data.PXSelectResult.PXSelectResultEnumerator.System.Collections.IEnumerator.MoveNext()
    at PX.Data.PXView.GetResult(Object[] parameters, PXFilterRow[] filters, Boolean reverseOrder, Int32 topCount,
    at PX.Data.PXView.Select(Object[] currents, Object[] parameters, Object[] searches, String[] sortcolumns, Boo
    at PX.Dashboards.Tools.SelectWithinDelegate(PXView view)
    at PX.Dashboards.LayoutMaint.widgets()
    at _CustomMethod(Object , Object[] )
    at PX.Data.PXView.InvokeDelegate(Object[] parameters)
    at PX.Data.PXView.Select(Object[] currents, Object[] parameters, Object[] searches, String[] sortcolumns, Boo
    at PX.Data.PXView.SelectMultiBound(Object[] currents, Object[] parameters)
    at PX.Data.PXSelectBase`1.selectBound(Object[] currents, Object[] arguments)
    at PX.Data.PXSelectBase`1.SelectSingle(Object[] arguments)
    at PX.Dashboards.LayoutMaint.get_IsUserCopy()
    at PX.Dashboards.LayoutMaint.Dashboard_RowSelected(PXCache cache, PXRowSelectedEventArgs e)
    at PX.Data.PXCache.OnRowSelected(Object item)
    at PX.Dashboards.LayoutMaint.GenerateFilterFields()
    at PX.Data.PXGraph.CreateInstance(Type graphType, String prefix)
    at PX.Web.UI.PXDashboardDataSource.InstantiateDataGraph(Type type)
    at PX.Web.UI.PXBaseDataSource.CreateDataGraphAsSingleton(Type type)
    at PX.Web.UI.PXBaseDataSource.CreateDataGraph(Type type)
    at PX.Web.UI.PXBaseDataSource.get_DataGraph()
    at PX.Web.UI.PXBaseDataSource.PrepareDataBinding()
    at PX.Web.UI.PXBaseDataSource.OnInit(EventArgs e)
    at System.Web.UI.Control.InitRecursive(Control namingContainer)
    at System.Web.UI.Control.InitRecursive(Control namingContainer)
    at System.Web.UI.Control.InitRecursive(Control namingContainer)
    at System.Web.UI.Control.InitRecursive(Control namingContainer)
    at System.Web.UI.Control.InitRecursive(Control namingContainer)
    at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsy
    at System.Web.UI.Page.ProcessRequest(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPo
    at System.Web.UI.Page.ProcessRequest()
    at System.Web.UI.Page.ProcessRequest(HttpContext context)
    at PX.Web.UI.PXPage.ProcessRequest(HttpContext context)
```

	Total time	Executions	Rows
> @@DBTS, IDENT_CURRENT('WatchDog') OPTION(OPTIMIZE FOR UNKNOWN) /* */	0	3	0
> Dashboard	0	1	1

On the **Exceptions** tab, the user views the exceptions that occurred in the system during the request selected in the **Last Requests** table. The tab contains the name and type of the exception, the message, and the stack trace.

Usability

Built-In Infotips

In MYOB Advanced 2022.2, context-sensitive Help infotips have been introduced to give users an explanation of a UI element right on the spot. An infotip is a small pop-up window that describes the UI element the user is hovering over or pointing to.

Configuration of Displaying Infotips

Each user can select the way they display infotips by selecting the corresponding option in the **Infotip Settings** field on the User Profile (SM203010) form, as shown in the following screenshot. By default, the *Hover Over to Show* option is selected, which means that the system displays an infotip when the user has hovered over the label of a UI element for 1.5 seconds. If the user instead selects the *Ctrl+Alt+Click* option in the **Infotip Settings** field and saves these changes, the user can view an infotip by pressing Ctrl+Alt while clicking the label of the element.

The infotips can be turned off for an instance if an administrator changes the value of the`wiki:tooltips:enabled` key to *False* in its `web.config` file.

Infotip Usage

When a user initiates the display of an infotip, the system displays the first paragraph from the respective element description and the *More* link in a pop-up window.

To learn more about the element, the user can click *More* (see Item 1 in the following screenshot). To change the way the system displays the infotips, the user can click the gear icon (Item 2); the system opens the User Profile (SM203010) form in a new browser tab.
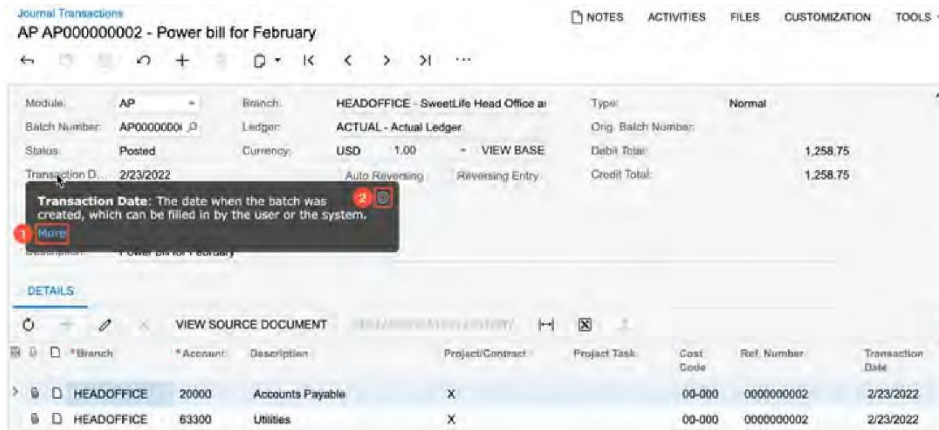
When a user clicks *More*, the system hides the infotip and opens a pane that partially overlaps the working area of the screen and contains the complete element's description, as the following screenshot shows.

At the bottom of the pane, there is a link to the complete reference topic for the form (see Item 2 in the following screenshot). If the user clicks the link, the system opens the corresponding wiki article in a new browser tab.

If the user clicks the arrow in upper left corner of the pane (Item 1), the system opens the Help menu for the form with the list of the links of the wiki articles that contain information regarding the form functionality.
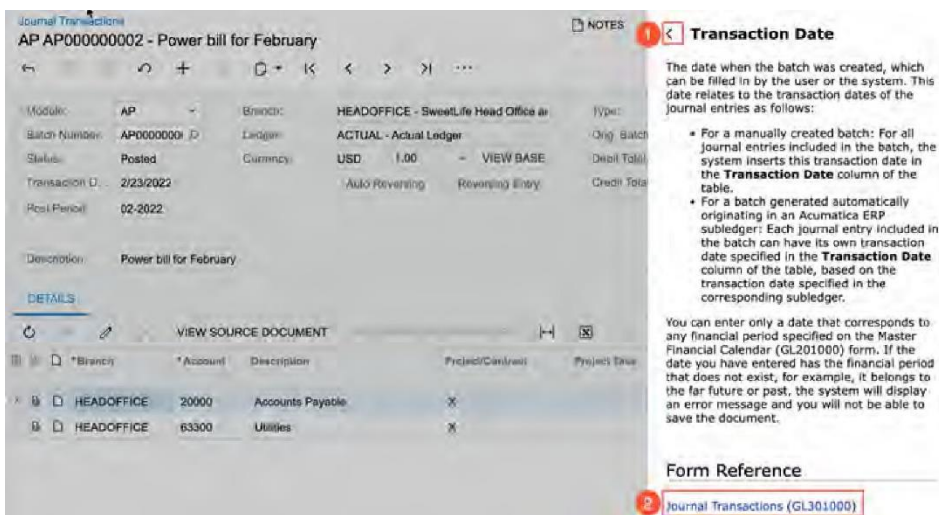
To close the pane (or the Help menu, if the user has switched to the menu), the user clicks somewhere on the form. If a user has the *Customiser* role assigned, this user can also view the description of the

element in the **Description** field of the **Element Properties** dialog box, as the following screenshot demonstrates. Also, the **Element Properties** dialog box is shown instead of the pop-up window if the *Ctrl+Alt+Click to Show* option is selected for this user in the **Infotip Settings** field on the User Profile (SM203010) form.
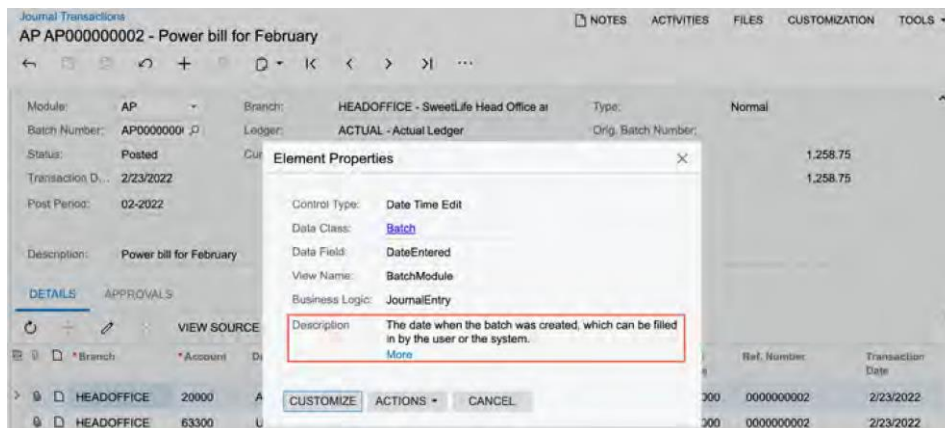
Infotip Limitations

In MYOB Advanced 2022.2, infotips are not shown for the following elements:

- Captions of tabs on a form
- Elements on the form title bar, form toolbar, and table toolbar
- Form-specific commands displayed on the **More** menu
- Dialog boxes or elements within them

Also, infotips are not supported for MYOB Advanced forms that are generic inquiry forms, report forms, or ARM reports.

Customisation

Independent Publishing and Unpublishing of Customisation Projects for the Self-Service Portal

In previous versions of MYOB Advanced, when a customisation project was published on the Self-Service Portal, the customisation items of this project were shared with the MYOB Advanced instance because the Self-Service Portal shares a database with the MYOB Advanced instance. Thus, if projects published for MYOB Advanced and the Self-Service Portal contained customisation items of the same type (particularly, components of a workflow), customisation items of this type could replace the existing ones.

Now customisation projects published on the Self-Service Portal are independent from the MYOB Advanced instance due to the addition of a new column to databases tables that store workflow customisation items. This column identifies whether the customisation item belongs to MYOB Advanced or to the Self-Service Portal.

Related In-Product Help Topics

- Customisation Projects: To Publish Projects

Publishing of a Customisation Project Using Web API

In MYOB Advanced 2022.2, a developer can publish and unpublish a customisation project via the web API. The new API gives developers the following capabilities:

- To import a customisation project
- To delete a customisation project
- To publish a customisation project for which the developer can do any of the following:

  - Specify the tenant or tenants where the customisation project should be published: the current tenant, a list of tenants, or all tenants
  - Apply changes only to the database and skip the update of the website
  - Execute all database scripts included in the customisation project (the same as the **Publish with Cleanup** menu command in the Customisation Project Editor)
  - Perform only validation of a customisation project

- To publish multiple customisation projects at once
- To unpublish all customisation projects
- To get the list of published customisation projects and all items in them To send requests, a developer should use POST methods and the following URL:

```
http://<MYOB Advanced instance URL>/CustomisationApi/<method>
```

> **Note:** Using the API, a customisation project can be published to MYOB Advanced or to the Self-Service Portal, depending on where sign-in was performed before the start of the publication.

Example of Publishing a Customisation Project

The publication of a customisation project via the API is implemented asynchronously. To start the publication, a developer should use the `PublishBegin` method. As soon as the developer gets a successful response, they should start calling the `PublishEnd` method until it returns `"isCompleted": true`. To check whether the publishing was completed successfully, a developer can check for the `"isFailed": false` in the response to the `PublishEnd` method.

Without a call to the `PublishEnd` method, the publication cannot be completed. Once a publication has started, a logical lock occurs in the database that prevents multiple publications from running simultaneously on the same database.

Suppose that a developer needs to publish the *VisualWorkflow* and *Dashboards* projects. Further suppose that the *Dashboards* project is already imported in the instance. To publish the customisation projects by using the API, a developer should do the following:

1. Sign in to the instance.
2. Import the VisualWorkflow customisation project by using the `Import` method. An example of the request body looks as follows.

```
{
    "projectLevel": 1,
    "isReplaceIfExists": true,
    "projectName": "VisualWorkflow",
    "projectDescription": "Workflow for Sales Orders form",
    "projectContentBase64": "UEsDBBQAAAAACauNVQAAA..."

}
```

The request above imports the VisualWorkflow project and replaces a project with the same name if one exists. The `projectContentBase64` parameter contains a zip file with a project in the Base64 format.
The response to the request looks as follows.

```
{
    "log":
    [
        {
            "timestamp": "2022-03-01T01:27:36.8487004Z",
            "logType": "information",
            "message": "Create new project: VisualWorkflow"

        }
    ]

}
```

3. Publish the customisation projects by using the `PublishBegin` method. An example of the request body looks as follows.

```
{
    "isMergeWithExistingPackages": false,
    "isOnlyValidation": false,
    "isOnlyDbUpdates": false,
    "isReplayPreviouslyExecutedScripts": false,

    "projectNames": [ "VisualWorkflow", "Dashboards" ],
    "tenantMode": "Current"

}
```

The request above publishes the projects listed in the `projectNames` parameter in the tenant where the developer signed in. The publication should be performed without cleanup according to the `isReplayPreviouslyExecutedScripts` parameter.
The response to the request looks as follows.

```
{
    "log":
    [
        {
            "timestamp": "2022-05-12T08:02:21.0555556Z",
            "logType":  "information",
            "message": "Publishing has started."

        }
    ]
}
```

4. Start calling the `PublishEnd` method without parameters to check whether the publication is completed. The response indicating that the publication is completed looks as follows.

```
{
"isComplete
d": true,
"isFailed":
false,
"log":    [

  {
  "timestamp": "2022-05-18T11:20:04.187",
  "logType": "information",
  "message": "Copying the website
  C:\\Builds\\ErpProduct_22.103.0018.0116\\Customization\\apicust3\\apicust3Va
  lidation\\apicust3Website"
  },
  {
  "timestamp": "2022-05-18T11:20:04.217",
  "logType": "information",
  "message": "Patching the file C:\\Builds\\ErpProduct_22.103.0018.0116
                \\Customization\\apicust3\\apicust3Validation\\apicust3Website
                \\CstPublished\\pages_so\\so301000.aspx"
  },
  {
  "timestamp": "2022-05-18T11:20:04.22",
  "logType": "information",
  "message": "Patching the file C:\\Builds\\ErpProduct_22.103.0018.0116
                \\Customization\\apicust3\\apicust3Validation\\apicust3Website
                \\CstPublished\\pages_so\\so301000.aspx.cs"
  },
  ...
  {
```

```
    "timestamp": "2022-05-18T11:21:19.91",

    "logType": "information",

    "message": "Sql Sql#xUpdatesDates(skipped, already applied)"

    },

    {

    "timestamp": "2022-05-18T11:21:19.94",

    "logType": information", "message": "Updating website files"

    },

    {

    "timestamp": "2022-05-18T11:21:57.57",

    "logType": "information",

    "message": "The website has started."

    },

    {

    "timestamp": "2022-05-18T11:21:57.677",

    "logType": "information",

    "message": "Plug-in ExternalCarriersCstPlugIn"

    },

    {

    "timestamp": "2022-05-18T11:21:57.72",

    "logType": "information",

    "message": "Post updating the company Company"

    },

    {

    "timestamp": "2022-05-18T11:21:57.727",

    "logType": "information", "message": "Updating the database"

    },

    {

    "timestamp": "2022-05-18T11:21:57.737",

    "logType": "information", "message": "Actions#SO301000"

    }

 ]

}
```

Related In-Product Help Topics

- To Manipulate Customisation Projects Using REST API

Developer Documentation

New Guides

In MYOB Advanced 2022.2, a developer can find new and reworked information in the following developer guides.

MYOB Unit Test Framework Guide

The Unit Test Framework Guide provides information about how to create unit tests for extension libraries that are used in customisation projects for MYOB Advanced. This guide explains how to use the MYOB Unit Test Framework for this purpose.

Barcode-Driven Engine Guide

With MYOB's barcode-driven engine, the developer can convert an MYOB Advanced form, which is operated via a mouse and keyboard, into a console-type experience for a barcode-driven form. A user interacts with this form mostly via text commands that the user enters into a special field of the form manually or by scanning a barcode. The barcode-driven form guides the user through a certain input route by showing input prompts. This console-type experience is useful when it is necessary to simplify the work with a particular form to the level of sequential text inputs.

In the Barcode-Driven Engine Guide, the developer can find information about how to customise existing MYOB Advanced forms that use the barcode-driven engine and how to implement custom barcode-driven forms.

Workflow API Guide

The Workflow API Guide describes how to develop a workflow by using the Workflow API. The topics in the guide are organised as activities that developers can perform by using the dataset from the *T220 Data Entry and Setup Forms* course. In addition to activities, the guide includes information about the following:

- Screen configuration
- The process of defining conditions
- The implementation and configuration of actions and action categories
- The configuration of field states
- The process of defining workflow states
- The implementation of workflow transitions
- The implementation of dialog boxes
- The implementation of workflow events and event handlers
- The customisation of a predefined workflow

Each concept contains lists of workflow API methods that can be used to configure the workflow element described in the concept.

Workflow UI Guide

The Workflow UI Guide describes how to work with workflows without the need to write code. The topics in the guide are organised as activities that users can perform by using the *U100* dataset. In addition to activities, the guide includes concepts that describe how to do the following:

- Use the tools that MYOB Advanced provides for workflow customisation
- Create custom workflows
- Create customised workflows
- Configure various elements in a workflow
- Test customisation projects that modify the workflows
- Upgrade customised workflows

Customisation Tool Reference Guide

The Customisation Tool Reference guide contains topics that describe the pages of the Customisation Project Editor and other customisation-related tools, such as the Customisation Menu and the Element Inspector.

Integration Development

Use of MYOB Advanced as an Identity Provider via OIDC

MYOB Advanced 2022.2 can be used as an identity provider via the OpenID Connect (OIDC) protocol. A client application that is registered at MYOB Advanced as having the *OpenID Connect* sign-in method uses the MYOB Advanced Sign-In page for authentication. During the first sign-in, the client application requests access to the user attributes; for the application to be signed in, a user must confirm the granting of access to these attributes.

On the Connected Applications (SM303010) form, support for OIDC has been added for the *Authorisation Code* and *Implicit* flows. Additionally, the *Hybrid* flow has been added, for which support for OIDC has been implemented. To use OIDC, a client application includes the *openid* value in the scope of a request.

The configuration of the OpenID protocol that is used by an MYOB Advanced website can be displayed by a request to the following URL: *[<MYOB Advanced instance URL>]/identity/.well-known/openid-configuration*. In this request, `[<MYOB Advanced instance URL>]` stands for the URL of the MYOB Advanced website.

On the new **Claims** tab of the Connected Applications form, the checkbox should be selected in the **Active** column for the claims that will be included in the token in the response to the client application (when OIDC is used). By default, MYOB Advanced contains a set of claims and a set of scopes; each scope defines the claims that will be included in a response when the scope is specified in a request. These sets of scopes and claims can be redefined in a customisation project (a plug-in). If a plug-in is selected in the Summary area of the Connected Applications form, the claims that are defined in this plug-in are added to the table on the **Claims** tab; in this table, these claims are marked as belonging to the plug-in.

MYOB Advanced contains an active key pair for signing and validating tokens. On the new *OpenID Connection Preferences (SM303030)* form, a user can click the **Generate New Key** button to generate a new key pair. At the generation of a new key pair, the existing signing key is deactivated immediately, while either the existing validation key can be deactivated immediately, or a period for its deactivation can be specified.

Platform API

Dropped Support of Obsolete MYOB Framework Development

In Version 2022.2, the following MYOB Framework development tools are not supported:

- Visual Web Designer for Visual Studio
- Data Access Class Generator in Visual Studio
- Layout Editor in Visual Studio
- A set of page templates in Visual Studio
- The MYOB Framework Configuration Wizard

These tools were a part of MYOB Framework product, which is no longer provided as a separate product and is unavailable for downloading for Version 2022.2.

Instead of the unsupported tools, a developer can use the following tools:

- The Customisation Project Editor
  The developer can use the Customisation Project Editor to create customisation projects and generate and edit data access classes (DACs), graphs, and ASPX pages. To launch the editor, the developer uses the **Customisation** menu of any MYOB Advanced form or the Customisation Projects (SM204505) form.
- A collection of Visual Studio code snippets
  The developer can generate the code of DACs, DAC fields, and graph event handlers with these code snippets. To find related information and download the code snippets, see the CodeSnippets repository on GitHub.
- Acuminator
  With Acuminator, the developer can find common mistakes in MYOB Framework-based code, colourise and format business query language (BQL) statements, and review the structure of code files. To use Acuminator, install the Acuminator extension for Visual Studio. For details about Acuminator, see the Acuminator repository on GitHub.

Optimisation of the PXSetup<Table> Implementation

The `PXSetup<Table>` generic class reads graphs' preferences from the database. In MYOB Advanced 2022.2, the implementation of this generic class has been optimised so that the preferences of graphs can be read more quickly.

Now for each type parameter `Table`, data is read from the database only once and then stored in a database slot (that is, in the cache). In all subsequent uses of the `PXSetup<Table>` generic class with this type parameter, the class reads data from the database slot, not from the database itself.

Signature Capturing on Mobile

In Version 2022.2, MYOB Framework provides a new static method for capturing a user's signature on a mobile device and storing it in a PDF version of the report. The method is defined in the `PX.Data.Api.Mobile.SignManager` namespace.

When a signed report is required, a developer calls the new method in the application business logic code, as shown in the following example. (In this example, `Document` is a data view of a graph.)

```
Document.View.Sign(file.UID, out signedReportUID)
```

When the method is called, the following things happen on the mobile device:

1. The mobile device displays the contents of the report whose file identifier is specified in the input parameter of the method. A user can review the contents by scrolling, panning, or zooming in on the report.
2. The user either declines to sign the report or signs the report by writing a signature on the device screen and providing their name.

Depending on the outcome, the method returns one of the following:

- `SignDialogResult.None`: The signing process was interrupted abnormally.
- `SignDialogResult.Rejected`: The user declined to sign the report.
- `SignDialogResult.Complete`: The user signed the report. The file identifier of the signed PDF is available in the output parameter of the method.

> **Note:** This method has no effect in the web version of MYOB Advanced.

Web Services

Introduction of the Default/22.200.001 Endpoint

In MYOB Advanced 2022.2, a new version of the *Default* endpoint has been introduced, which is *Default/22.200.001*.

E-Commerce-Related Functionality

All the functionality that is exposed in the *eCommerce/20.200.001* endpoint has been made available in the Default/22.200.001 endpoint.

Payroll-Related Functionality

The *Default/22.200.001* endpoint makes it possible for users to work with employee payroll settings and payroll batches through the REST API.

By using the *Default/22.200.001* endpoint, users can also do the following:

- Create, update, and delete the preferences and profiles required for setting up employee payroll profiles, and get the results of these operations
- Create, update, and delete the payroll settings for an employee, and get the results of these operations
- Create, update, and delete the preferences and profiles that are required for the creation of payroll batches, and get the results of these operations
- Create, update, and delete payroll batches, and get the results of these operations

Project-Related Functionality: Workflow Actions

In the *Default/22.200.001* endpoint, many workflow actions of entities are mapped. Workflow actions are actions that change the state of an entity.

The following actions are mapped:

- **Hold**, **Activate**, **Complete**, **Suspend**, and **Cancel** (in the `Project` entity)
- **Hold** and **Remove Hold** (in the `ChangeOrder` entity)
- **Hold** and **Remove Hold** (in the `ProFormaInvoice` entity)
- **Hold**, **Activate**, **Complete**, and **Cancel** (in the `ProjectTask` entity)
- **Hold** and **Activate** (in the `ProjectTemplate` entity)

Project-Related Functionality: Added Mapping

In the *Default/22.200.001* endpoint, the Labour Rates (PM209900) screen (form) is mapped to the `LabourCostRate` entity.

Project-Related Functionality: Added Fields

In the *Default/22.200.001* endpoint, for the ProjectGLAccountand ProjectTaskDefaultValues entities, the DefaultExpenseAccountIDand DefaultExpenseSubIDfields are mapped to the DefaultCostAccount and DefaultCostSubaccountfields, respectively.

Also, for the `ChangeOrderCommitment` entity, the `POOrderType` field is mapped to the `POType` field.

Project-Related Functionality: Renamed Fields

In the *Default/22.200.001* endpoint, for the `Event`, `Task`, and `TimeEntry` entities, the date and time fields are mapped to the fields with the same name, without underscores, suffixes, or prefixes.

In the `ProjectTask` entity, the `Attribute` field has been renamed to `Attributes`.

Project-Related Functionality: Removed Fields and Entities

The following fields, which existed in the *Default/20.200.001* endpoint, do not exist in the *Default/22.200.001* endpoint:

- OpenAmount(for the ChangeOrder.Commitmentsentity)
- ActualAmount, ActualQty, Completed, DraftInvoicesAmount, OriginalBudgetedAmount, and OriginalBudgetedQty(for the ChangeOrder.RevenueBudgetentity)

Also, the following entities do not exist in the *Default/22.200.001* endpoint:

- `AllocationRule`
- `CommonTask`
- `ProjectBilling`
- `ProjectBillingRules`

Distribution-Related Functionality: Renamed Fields

The following fields in the *Default/20.200.001* endpoint have been renamed in the *Default/22.200.001* endpoint:

- `FreightAmount` to `FreightPrice` (for the `Shipment` entity)
- `Freight` to `FreightPrice` (for the `SalesOrder.ShippingSettings` entity)

Web Services

Creation of a Shipment with Allocations and Package Contents in One Call

In MYOB Advanced 2022.2, a developer can use one REST API call to create a shipment with allocations and package contents.

For example, the following request creates a shipment for the *ABARTENDE* customer. The items to be shipped belong to the *SO006778* and *SO006779* sales orders. The items are picked from different locations and are packed into a large box.

```
PUT ?$expand=Details,Details/Allocations,Packages,Packages/PackageContents HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/Shipment

Accept: application/json
Content-Type: application/json


{
    "BaseCurrencyID": { "value": "USD" },
    "ControlQty": { "value": 13 },
    "CreatedDateTime": {

        "value": "2022-06-15T15:45:54.463+03:00"

    },
    "CurrencyRate": { "value": 1 },
    "CurrencyViewState": { "value": false },

        "CustomerID": { "value":
        "ABARTENDE" }, "Details": [

            {

                "Allocations": [

                    {

                        "InventoryID": { "value": "AACOMPUT01" },
                        "LocationID": { "value": "R1S1" },

                        "LotSerialNbr": { "value": "" },
                        "OrderNbr": {},

                        "OrderType": { "value": "SO" },
                        "Qty": { "value": 2 },
                        "UOM": { "value": "EA" }

                    }

                ],
                "Description": { "value": "Acer Laptop Computer" },
                "FreeItem": { "value": false },

                "InventoryID": { "value": "AACOMPUT01" },
                "LocationID": { "value": "R1S1" },

                "LotSerialNbr": { "value": "" },
                "OpenQty": { "value": 0 },
                "OrderedQty": { "value": 2 },
                "OrderLineNbr": { "value": 1 },
                "OrderNbr": { "value": "SO006778" },
```

```
            "OrderType": { "value": "SO" },
            "OriginalQty": { "value": 2 },
            "ShippedQty": { "value": 2 },
            "UOM": { "value": "EA" },
            "WarehouseID": { "value": "WHOLESALE" }
        },
        {
            "Allocations": [
                {
                    "InventoryID": { "value": "AALEGO500" },
                    "LocationID": { "value": "R1S1" },
                    "LotSerialNbr": { "value": "" },
                    "OrderNbr": {},

                    "OrderType": { "value": "SO" },
                    "Qty": { "value": 1 },
                    "UOM": { "value": "EA" }
                },
                {
                    "InventoryID": { "value": "AALEGO500" },
                    "LocationID": { "value": "R2S1" },
                    "LotSerialNbr": { "value": "" },
                    "OrderNbr": {},

                    "OrderType": { "value": "SO" },
                    "Qty": { "value": 2 },
                    "UOM": { "value": "EA" }
                }
            ],
            "Description": { "value": "Lego 500 piece
            set" }, "FreeItem": { "value": false },

            "InventoryID": { "value": "AALEGO500" },
            "LocationID": {},

            "OrderLineNbr": { "value": 3 },
            "OrderNbr": { "value": "SO006778" },
            "OrderType": { "value": "SO" },
            "OriginalQty": { "value": 3 },
            "ShippedQty": { "value": 3 },
            "UOM": { "value": "EA" },
            "WarehouseID": { "value": "WHOLESALE" }
        },
        {
            "Allocations": [
                {
                    "InventoryID": { "value":
                    "AAMACHINE1" }, "LocationID": {
                    "value": "R1S1" }, "LotSerialNbr": {
                    "value": "SRF000011" }, "OrderNbr":
                    {},

                    "OrderType": { "value": "SO" },
                    "Qty": { "value": 1 },
                    "UOM": { "value": "EA" }
                }
            ],
```

```
            "Description":
                   {
             "value": "Injection molding machine - serial numbered"
            },
            "FreeItem": { "value": false },
            "InventoryID": { "value":
            "AAMACHINE1" }, "LocationID": {
            "value": "R1S1" }, "LotSerialNbr":
            {},
            "OpenQty": { "value": 0 },
            "OrderedQty": { "value": 2 },
            "OrderLineNbr": { "value": 3 },
            "OrderNbr": { "value": "SO006779" },
            "OrderType": { "value": "SO" },
            "OriginalQty": { "value": 2 },
            "ShippedQty": { "value": 2 },
            "UOM": { "value": "EA" },
            "WarehouseID": { "value": "WHOLESALE" }
        }
    ],
    "EffectiveDate": { "value": "2013-01-01T00:00:00+04:00" },
    "FreightAmount": { "value": 10 },
    "FreightCost": { "value": 0 },
    "FreightCurrencyID": { "value":
    "USD" }, "GroundCollect": { "value":
    false }, "Hold": { "value": false },
    "LocationID": { "value": "MAIN" },
    "Operation": { "value": "Issue" },
    "PackageCount": { "value": 1 },
    "Packages": [
        {
            "BoxID": { "value": "LARGE" },
            "CODAmount": { "value": 0 },
            "Confirmed": { "value": false },
            "DeclaredValue": { "value": 2050 },
            "PackageContents": [
                {
                    "InventoryID": { "value": "AACOMPUT01" },
                    "LotSerialNbr": { "value": "" },
                "Quantity": { "value": 2 },
                "UOM": { "value": "EA" },
                "OrigOrderType": { "value": "SO" },
                "OrigOrderNbr": { "value": "SO006778" }
            },
            {
                "InventoryID": { "value": "AAMACHINE1" },
                "LotSerialNbr": { "value": "SRF000011" },
                "Quantity": { "value": 1 },
                "UOM": { "value": "EA" },
                "OrigOrderType":  {  "value":  "SO"  },
                "OrigOrderNbr": { "value": "SO006779" }
            },
            {
                "InventoryID": { "value": "AALEGO500" },
```

```
                    "LotSerialNbr": { "value": "" },
                    "Quantity": { "value": 3 },
                    "UOM": { "value": "EA" },
                    "OrigOrderType": { "value": "SO" },
                    "OrigOrderNbr": { "value": "SO006778" }

                }
            ]
        }
    ],
    "ShipmentDate": { "value": "2022-06-15T00:00:00+03:00" },
    "ShippingTerms": { "value": "CFR" },
    "Type": { "value": "Shipment" },
    "UseCustomersAccount": { "value": false },
    "WarehouseID": { "value": "WHOLESALE" }

}
```

Creation and Update of an Inventory Issue

In MYOB Advanced 2022.2, an inventory issue can be created and updated with REST API requests.

For example, the following request creates an inventory issue for the *AAMACHINE1* and *AACOMPUT01* items.

```
PUT ?$expand=Details,Details/Allocations HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/InventoryIssue
Accept: application/json

Content-Type: application/json


{
    "ControlAmount": { "value": 60800 },
    "ControlQty": { "value": 3 },

    "Date": { "value": "2022-05-26T00:00:00+03:00" },
    "Description": { "value": "Descr" },
    "Details": [

        {
            "Allocations": [

                {
                    "InventoryID": { "value": "AAMACHINE1" },
                    "Location": { "value": "R1S1" },
                    "LotSerialNbr": { "value": "SRF000009" },
                    "Qty": { "value": 1 },

                        "UOM": { "value": "EA" }
                 },
                 {
                        "InventoryID": { "value":
                        "AAMACHINE1" }, "Location": {
                        "value": "R1S1" }, "LotSerialNbr": {
                        "value": "SRF000010" }, "Qty": {
                        "value": 1 },

                        "SplitLineNumber": {
                        "value": 6 }, "UOM": {
                        "value": "EA" }

                }
            ],
            "Branch": { "value": "PRODWHOLE" },
            "Description": {

                "value": "Injection molding machine - serial numbered"
            },
            "ExtCost": { "value": 40000 },
            "ExtPrice": { "value": 60000 },
            "InventoryID": { "value":
            "AAMACHINE1" }, "LineNumber": {
            "value": 1 },

            "Location": { "value": "R1S1" },
            "LotSerialNbr": {},

            "Project": { "value": "X" },
            "Qty": { "value": 2 },
```

```
                "ReasonCode": { "value": "INISSUE" },
                "TranType": { "value": "Issue" },
                "UnitCost": { "value": 20000 },
                "UnitPrice": { "value": 30000 },
                "UOM": { "value": "EA" },
                "Warehouse": { "value": "WHOLESALE" }
            },
            {
                "Allocations": [
                    {
                        "InventoryID": { "value":
                        "AACOMPUT01" }, "Location": {
                        "value": "R1S1" },
                        "LotSerialNbr": { "value": "" },
                        "Qty": { "value": 1 },
                        "UOM": { "value": "EA" }
                    },
                    {
                        "InventoryID": { "value":
                        "AACOMPUT01" }, "Location": {
                        "value": "R2S3" },
                        "LotSerialNbr": { "value": "" },
                        "Qty": { "value": 1 },
                        "UOM": { "value": "EA" }
                    }
                ],
                "Branch": { "value": "PRODWHOLE" },
                "Description": {
                    "value": "Acer Laptop Computer"
                },
                "ExtCost": { "value": 250 },
                "ExtPrice": { "value": 800 },
                "InventoryID": { "value":
                "AACOMPUT01" }, "LineNumber": {
                "value": 3 },
                "Project": { "value": "X" },
                "Qty": { "value": 2 },
            "ReasonCode": { "value": "INISSUE" },
            "TranType": { "value": "Issue" },
            "UnitCost": { "value": 250 },
            "UnitPrice": { "value": 800 },
            "UOM": { "value": "EA" },
            "Warehouse": { "value": "WHOLESALE" }
        }
    ],
    "ExternalRef": { "value": "Ext2" },
    "PostPeriod": { "value": "052022" },
    "TotalAmount": { "value": 61600 },
    "TotalCost": { "value": 40250 },

    "TotalQty": { "value": 4 }
}
```

The following request releases the created inventory issue.

```
POST / HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/InventoryIssue/
ReleaseInventoryIssue

Accept: application/json
Content-Type: application/json


{
  "entity": {
    "ReferenceNbr": {

      "value": "<Inventory_issue_ID>"

    }

  }
}
```

Creation of a Return Order

In MYOB Advanced 2022.2, a return order (that is, a return for credit) can be created with a REST API request. For example, the following request creates a return for credit to return 10 units of the item listed in line *2* of the *AR010707* invoice, 11 units of the item listed in line *4* of the *AR010707* invoice, and all units of all items listed in the AR010693 invoice.

```
PUT / HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/SalesOrder
Accept: application/json

Content-Type: application/json


{
    "BaseCurrencyID": { "value": "USD" },
    "CustomerID": { "value": "AACUSTOMER" },
    "Description": { "value": "API" },
    "Details": [
        {
            "InvoiceType": { "value": "Invoice" },
            "InvoiceNbr": { "value": "AR010707" },
            "InvoiceLineNbr": { "value": "2" },
            "OrderQty": { "value": "10" }
        },
        {
            "InvoiceType": { "value": "Invoice" },
            "InvoiceNbr": { "value": "AR010707" },
            "InvoiceLineNbr": { "value": "4" },
            "OrderQty": { "value": "11" }
        },
        {
            "InvoiceType": { "value": "Invoice" },
            "InvoiceNbr": { "value": "AR010693" }
        }
    ],
    "LocationID": { "value": "MAIN" },
    "OrderType": { "value": "RC" }
}
```

Creation of a Credit Memo

In MYOB Advanced 2022.2, a credit memo can be created with a REST API request.

For example, the following request creates a credit memo to return 10 units of the item listed in line *7* of the *AR008287* invoice, all units of the item listed in line *1* of the *AR008281* invoice, and all units of the item listed in the *AR008285* invoice.

```
PUT / HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/SalesInvoice
Accept: application/json

Content-Type: application/json


{
    "CreditHold": { "value": false },
    "Currency": { "value": "USD" },
    "CustomerID": { "value": "AACUSTOMER" },
    "Details": [
        {
            "OrigInvLineNbr": { "value": 7 },
            "OrigInvNbr": { "value": "AR008287" },
            "OrigInvType": { "value": "Invoice" },
            "Qty": { "value": 10 }
        },
        {
            "OrigInvLineNbr": { "value": 1 },
            "OrigInvNbr": { "value": "AR008281" },
            "OrigInvType": { "value": "Invoice" }
        },
        {
            "OrigInvNbr": { "value": "AR008285" },
            "OrigInvType": { "value": "Invoice" }
        }
    ],
    "Project": { "value": "X" },
    "Type": { "value": "Credit Memo" }
}
```

Specification of Tax Details in Purchase Orders

In MYOB Advanced 2022.2, during the creation or update of a purchase order with a REST API request, the value of the `IsTaxValid` field of the `PurchaseOrder` entity is used to determine how the tax details are calculated.

If the `IsTaxValid` field is specified in the request body, its value is set to *true*, and an external tax zone is specified, then the tax details from the request body are used without modification and no other taxes are applied.

If the `IsTaxValid` field is specified in the request body, its value is set to *true*, and an internal tax zone is specified, then the tax details from the request body are compared to those calculated by the system. If the taxes specified in the request body are present among those calculated by the system, then the tax details from the request body are used without modification and no other taxes are applied. If there is a tax in the request body that is not present among those calculated by the system, the request execution fails.

If the `IsTaxValid` field is not specified in the request body or its value is not set to *true*, tax calculation is performed by the system.

For example, the following request can be used to create a purchase order. In this sample code, an external tax zone and two new tax codes are used; the tax amount is then calculated based on these tax codes.

```
PUT ?$expand=Details,TaxDetails HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/PurchaseOrder
Accept: application/json

Content-Type: application/json


{
    "BaseCurrencyID": { "value": "USD" },
    "Branch": { "value": "PRODWHOLE" },
    "ControlTotal": { "value": 1102.50 },
    "CurrencyEffectiveDate": { "value": "2013-01-01T00:00:00+04:00" },
    "CurrencyID": { "value": "USD" },
        "CurrencyRate": { "value": 1 },
        "CurrencyReciprocalRate": { "value": 1 },

        "Date": { "value": "2022-06-03T00:00:00+03:00" },
        "Details": [
            {
                "BranchID": { "value": "PRODWHOLE" },
                "Cancelled": { "value": false },
                "Completed": { "value": false },
                "CompleteOn": { "value": 100 },
                "ExtendedCost": { "value": 1000 },
                "InventoryID": { "value":
                "AACOMPUT01" },

                "LineDescription": { "value": "Acer Laptop Computer" },
                "LineNbr": { "value": 1 },

                "LineType": { "value": "Goods for
                IN" }, "MaxReceiptPercent": {
                "value": 100 }, "MinReceiptPercent":
```

```
                    { "value": 0 }, "OrderQty": {
                    "value": 1 },

                    "OrderType": { "value": "RO" },
                    "Promised": { "value": "2022-06-08T00:00:00+03:00" },
                    "QtyOnReceipts": { "value": 0 },
                    "ReceiptAction": { "value": "Accept but
                    Warn" },

                    "Requested": { "value": "2022-06-03T00:00:00+03:00" },
                    "TaxCategory": { "value": "EXEMPT" },
                    "UnitCost": { "value": 1000 },
                    "UOM": { "value": "EA" },
                    "WarehouseID": { "value": "WHOLESALE" }
                }
        ],
        "Hold": { "value": true },
        "IsTaxValid":  { "value": true },
        "Location": { "value": "MAIN" },
        "TaxDetails": [
            {
                "TaxableAmount": { "value": 1000 },
                "TaxAmount": { "value": 37.50 },

                "TaxID": { "value": "NEWTAX1" },
                "TaxRate": { "value": 4 }
            },
            {
                "TaxableAmount": { "value": 1000 },
                "TaxAmount": { "value": 0 },

                "TaxID": { "value": "WA COUNTY TAX" },
                "TaxRate": { "value": 0 }
            },
            {
                "TaxableAmount": { "value": 900 },
                "TaxAmount": { "value": 70 },

                "TaxID": { "value": "NEWTAX2" },
                "TaxRate": { "value": 6.50 }
            }
        ],
        "TaxTotal": { "value": 102.50 },
        "Terms": { "value": "30D" },
        "Type": { "value": "Normal" },
        "VendorID": { "value": "AAVENDOR"
        }, "VendorRef": {},

        "VendorTaxZone": { "value": "EXT" }
}
```

Overriding of Values in the Item Warehouse Details

In MYOB Advanced 2022.2, during the specification of item warehouse details, fields can be marked as overridden and their new values can be set in one REST API call.

For example, in the details for the *AACOMPUT01* inventory item and the *WHOLESALE* warehouse, the following request marks the `InventorySubaccount`, `MaxQty`, `ReorderPoint`, and `SafetyStock` fields as overridden and specifies their new values.

```
PUT / HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/ItemWarehouse
Accept: application/json

Content-Type: application/json


{
    "InventoryID": { "value": "AACOMPUT01" },
    "InventorySubaccount": { "value": "WID000" },
    "MaxQty": { "value": 2222 },

    "MSRP": { "value": 600 },
    "OverrideInventoryAccountSubaccount": { "value": true },
    "OverrideMaxQty": { "value": true },
    "OverridePreferredVendor": { "value": false },
    "OverridePrice": { "value": false },
    "OverrideProductManager": { "value": false },
    "OverrideReorderPoint": { "value": true },
    "OverrideReplenishmentSettings": { "value": false },
    "OverrideSafetyStock": { "value": true },
    "OverrideStandardCost": { "value": false },
    "PreferredLocation": { "value": "MAIN" },
    "PreferredVendor": { "value": "ELEEASTCOM" },
    "ReorderPoint": { "value": 14 },

    "ReplenishmentClass": { "value": "PURCHASE" },
    "ReplenishmentMethod": { "value": "Min./Max." },
    "ReplenishmentSource": { "value": "Purchase" },
    "SafetyStock": { "value": 244 },

    "Seasonality": { "value": "NONE" },
    "ServiceLevel": { "value": 87 },
    "WarehouseID": { "value": "WHOLESALE" }

}
```

Innovations in the Implementation of the REST API

In MYOB Advanced 2022.2, innovations have been introduced in the implementation of the REST API.

New Common Fields in REST Responses

Now every REST response body with payload has additional fields as follows:

- For every returned record that corresponds to a top-level entity, there is a `_links/self` field in the response. The value of this field is part of the URL of a GET request for the retrieval of this top-level entity by its ID. The same URL can be used in a DELETE request for the deletion of this entity.
- For every returned record, there is a `_links/files:put` field in the response. The value of this field is part of the URL template that must be used in a request for attaching a file to this record. This field is returned not only for top-level entities but also for detailed records, and so now files can be attached to detailed records as well.

Following is an example of the new fields in a response that returns a `Bill` entity.

```
"_links": {
    "self": "/SalesDemo/entity/Default/20.200.001/Bill/2b7001ab-7b00-
ed11-9e53-9828a61840c3",

    "files:put": "/SalesDemo/entity/Default/20.200.001/files/PX.Objects.AP.APInvoiceEntry/
Document/2b7001ab-7b00-ed11-9e53-9828a61840c3/{filename}"
```

Multiple Conditions for the Same Field in a Filter

Now a user can specify multiple conditions for the same field in a filter by using the AND and OR operators. For example, a request with the following URL retrieves sales orders that have the *SO003731*, *SO003732*, or *SO003733* order number.

```
http://<MYOB Advanced instance URL>/entity/default/20.200.001/SalesOrder?$filter=
OrderNbr eq 'SO003731' or OrderNbr eq 'SO003732' or OrderNbr eq 'SO003733'
```

Retrieval of All Localised Values of Multi-Language Fields

In MYOB Advanced 2022.2, a new way to retrieve multi-language fields has been introduced. To retrieve all localised values of all requested fields, a developer only needs to add the `$expand=Translations` parameter to the request. For example, the following request can be used to retrieve all stock items that are registered in the system; during the execution of this request, all the field values with all available localisations are requested.

```
GET ?$expand=Translations HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/20.200.001/StockItem
Accept: application/json

Content-Type: application/json
```

In this request, [`<MYOB Advanced instance URL>`] should be replaced with the URL of the MYOB Advanced instance to which the request is made.

Below is an example of the returned data.

```
[
  ...
  {
    "id": "8ecd4ca7-30d1-ec11-839d-085bd61190bc",
    ...
    "Description" : {
      "value": "Description in English",
      "Translations": {

        "en": "Description in English",
        "fr": "Description en français"

      }
    },
  ...
  },
...
]
```

Update of Tax Details During Bill Creation or Update

In MYOB Advanced 2022.2, the following changes have been made to the functionality exposed by the *Default/20.200.001* endpoint: During the creation or update of a bill (through the use of the `Bill` entity) or invoice (through the use of the `Invoice` entity), the value of the `IsTaxValid` field determines how the tax details are calculated. If the `IsTaxValid` field is specified in the request body and its value is set to *true*, the tax details are copied from the request body. Otherwise, tax calculation is performed by the system.

For example, the following request creates or updates a bill and at the same time updates the details of the *CAGST* tax, so that its taxable amount is set to *1000*, its tax amount is set to *150*, and its expense amount is set to *0.*

```
PUT ?$expand=TaxDetails HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/20.200.001/Bill
Accept: application/json

Content-Type: application/json


{
    ...
    "IsTaxValid": { "value": true },
    "TaxDetails": [
        {
            "TaxID": { "value": "CAGST" },
            "TaxableAmount": { "value": 1000.0 },
            "TaxAmount": { "value": 150.0 },
            "ExpenseAmount": { "value": 0.0 }
        }
    ],
    ...
}
```

Workflow

Enhancements of the Workflow Engine

In MYOB Advanced 2022.2, several enhancements to the workflow engine have been implemented. A customiser can now do the following:

- In a workflow state, specify the default values for fields of non-primary DACs.
  For details about how a developer can implement this functionality by using Workflow API, see Specifying Default Values for Fields.
  For details about how a customiser can implement this functionality by using the Customisation Project Editor, see Specifying Default Values for All Fields.
- In a dialog box, obtain the values of a combo-box field from a source state or a target state of a transition where the dialog box is shown.

Important:	Obtaining values of a combo-box field from a target state cannot be used if multiple transitions can be performed for the same initial state depending on a condition, because in that case, the field values cannot be determined in advance.

  For details about how a developer can implement this functionality by using Workflow API, see Obtaining the Value of a Combo Box Field from a Source or Target State.
  For details about how a customiser can implement this functionality by using the Customisation Project Editor, see Obtaining Values for Drop-Down Lists from Target States or Source States of a Transition.
- In a dialog box, hide fields depending on a condition.

Note:	If all fields of a dialog box should be hidden and the dialog box does not contain fields which value is required and has no default value, the dialog box will not be displayed. In that case, a transition before which the dialog box is shown, is still performed.

  For details about how a developer can implement this functionality by using Workflow API, see Hiding Fields in a Dialog Box.
  For details about how a customiser can implement this functionality by using the Customisation Project Editor, see Hiding Fields in Dialog Boxes.
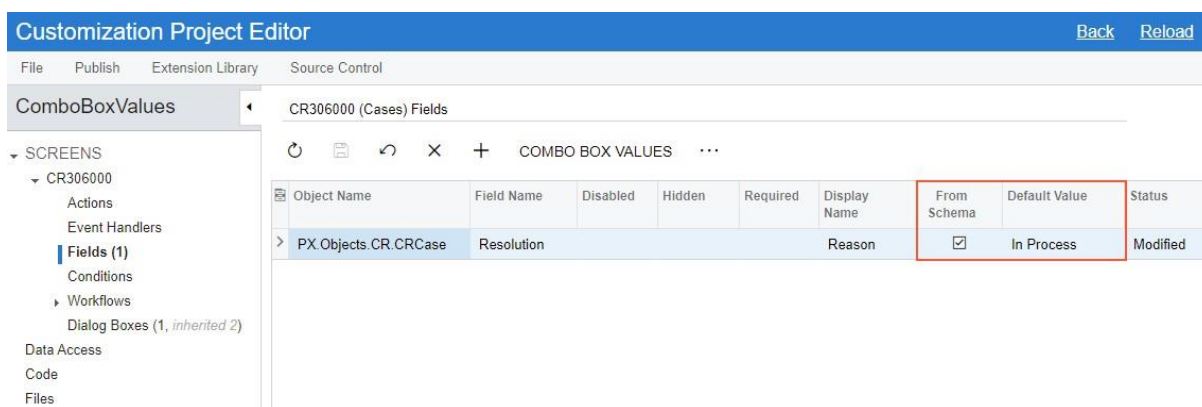
Enhancements to the Customisation Project Editor

This section describes the enhancements to the workflow-related pages of the Customisation Project Editor that have been implemented in MYOB Advanced 2022.2.

Specifying Default Values for All Fields

In the previous versions of MYOB Advanced, a customiser could specify default values for fields in only the initial state of the workflow. In Version 2022.2, the customiser can specify the default values for all fields added to the customisation project.

On the Fields page of the Customisation Project Editor, the **Default Value** and **From Schema** columns have been added to the table (see the following screenshot). The customiser can enter the needed values for fields or select one of the values available in the database. The customiser can also use the Formula Editor to specify values that depend on the values of other fields (for example, *Type* or *Status*).

Obtaining Values for Drop-Down Lists from Target States or Source States of a Transition

A customiser can select the source of values that will be available in dialog boxes that the system displays when a user invokes certain actions on a form. Instead of specifying drop-down values for each dialog box explicitly, the customiser can indicate that these values should be the same as in the target state or source state of the transition. This functionality allows the customiser to use only one dialog box for all actions in a workflow.

In the Customisation Project Editor, the customiser selects the source of values in the **Combo Box Values** dialog box. For a custom or customised workflow, the customiser opens this dialog box by clicking **Combo Box Values** on the table toolbar of the **Dialog Box Fields** table of the Dialog Boxes page.

In the **Source of Values** field of the dialog box, the customiser selects one of the following options (see the screenshot below):

- *Take From Source State*: The values from the source state of the transition are used. This is the default option for a new dialog box.
- *Take From Target State*: The values from the target state of the transition are used.

- *Specify Explicitly*: The values are selected in the table in the dialog box as they were in the previous versions of MYOB Advanced. This is the default option for an existing dialog box.
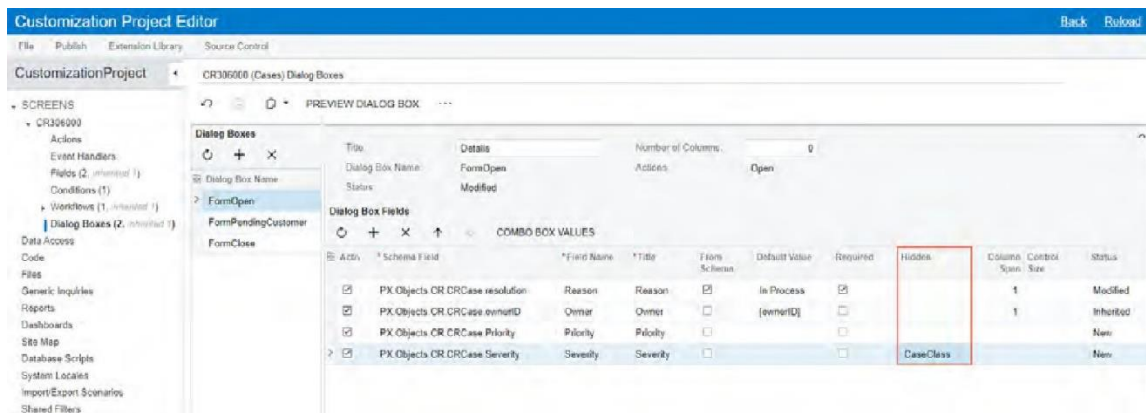
Hiding Fields in Dialog Boxes

A customiser can hide fields in dialog boxes depending on conditions.

In the **Dialog Box Fields** table of the Dialog Boxes page of the Customisation Project Editor, the **Hidden** column has been added (see the following screenshot). In this column, the customiser selects the conditions for particular fields; if these conditions are met, the fields are not displayed in the dialog box.

If all fields of a dialog box are hidden, this dialog box is not displayed. If particular fields are hidden but have default values specified for them, these fields are not displayed in the dialog box; however, in the target state of the transition, these default values are assigned to the fields.

The customiser can also permanently hide a particular field in the dialog box by selecting *True* in the **Hidden** column for this field. This functionality can be useful if the field has been added in the predefined workflow but is not required in the customised workflow; also, no additional workflow modifications are required in this case.

Enhancements to Workflow API

This section describes the enhancements that have been implemented to Workflow API in MYOB Advanced 2022.2.

Specifying Default Values for Fields

In a screen configuration, a developer now has the ability to specify a default value for a DAC field. To do this, a developer can call one of the following methods while adding field states to the screen configuration in the `WithFieldStates` method:

- `WithDefaultValue`
  This method allows the developer to specify the exact value.
- `WithDefaultExpression`
  This method allows the developer to provide a BQL expression that selects the proper value.

An example is shown in the following code.

```
context.AddScreenConfigurationFor(screen =>
{
  return screen
    .StateIdentifierIs<CRCase.status>()
    .AddDefaultFlow(DefaultCaseFlow)
    ...
    .WithFieldStates(fields =>
    {
      fields.Add<CRCase.resolution>(field => field
        .SetComboValues(
          (_reasonRejected, "Rejected"),
          (_reasonResolved, "Resolved"),

          ...
          (_reasonUnassigned, "Unassigned"),
          (_reasonAssigned, "Assigned"),
          (_reasonUpdated, "Updated"))
        .WithDefaultValue("Assigned"));
    })
});
```

In the code above, the `CRCase.resolution` field is added to the screen configuration. The default value of the field is specified in the `WithDefaultValue` method.

> **Note:** If a field has combo box values, the default value should be one of the values listed in the `SetComboValues` method.

For more details on specifying default values for fields in a screen configuration, see Field States: General Information in the in-product help.

Obtaining the Value of a Combo Box Field from a Source or Target State

In a workflow state, a developer can use the `WithFieldStates` method to specify the possible values of fields similarly to what is described in the previous section. In a dialog box, a developer can now specify that the set of values for a combo box field should be taken from a source state or a target state.

To specify that the set of combo box values of a dialog box field should be taken from a source or target state, while adding the field to a dialog box, the developer needs to call the `ComboBoxValuesSource` method and in a parameter, specify from where the values should be taken (a source state, a target state, or explicit values specified in the dialog box definition).

For example, suppose that in some state, a set of values for the `CRLead.resolution` field is specified. The workflow includes a transition where this state is a target state, and a dialog box that is shown during this transition. Further suppose that the dialog box includes the `Reason` field, whose configuration is provided by the `CRLead.resolution` field (through the developer's use of the `WithSchemaOf` method). To specify that the values of the `Reason` field should be taken from the target state of a transition where the dialog box is used, a developer should use the following code in the dialog box.

```
.WithForms(forms => {
  forms.Add("FormOpen", form =>

    form.WithFields(fields =>
    {
      fields.Add("Reason", field => field
        .WithSchemaOf<CRLead.resolution>()
        .IsRequired()
        .Prompt("Reason")
        .ComboBoxValuesSource(ComboBoxValuesSource.TargetState));
      }
      )
      )
      ;

    })
```

For more details on configuring combo box values in a dialog box, see Configuring Fields of a Dialog Box in the in-product help.

Hiding Fields in a Dialog Box

In a dialog box, developer now can hide a field depending on a condition. To do this, a developer should call the `IsHiddenWhen` method while adding a field to a dialog box in a screen configuration and specify a condition as a parameter.

> **Note:** The condition specified in the `IsHiddenWhen` method is not checked during mass processing of records.

Also, a developer can always hide a field by calling the `IsHiddenAlways` method. This method may be useful to hide a field in a dialog box of a custom workflow if this field is included in this dialog box in a predefined workflow.

An example is shown in the following code.

```
.WithForms(forms => {
  forms.Update("FormOpen", form =>

    form.WithFields(fields =>
    {
      fields.Add("Reason", field => field.WithSchemaOf<CROpportunity.resolution>()
        .Prompt("Reason")
        .IsHiddenWhen(hideReason));


      fields.Update("Stage", field => field.WithPrompt("Stage ID").IsHiddenAlways());
       }
       )
       )
       ;
})
```

In the code above, the `FormOpen` dialog box is updated in the following ways:

- The `Reason` field of the `FormOpen` dialog box is added and hidden when the `hideReason` condition is *True*.
- The `Stage` field is always hidden.

For more details on configuring field appearance in a dialog box, see Configuring Fields of a Dialog Box in the in-product help