

# MYOB Advanced

## Upgrade Notes

2018.1



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# Introduction

Welcome to the 2018.1 release of MYOB Advanced. The purpose of this document is to provide essential information for sites that are upgrading to MYOB Advanced 2018.1 from an earlier version.

## Upgrade Notes

### Installation and Upgrade

For a detailed description of the general procedure of updating MYOB Advanced, see “Updating MYOB Advanced” in the MYOB Advanced Installation Guide.

We strongly recommend that before you update Acumatica ERP to a newer product version, you back up all configuration files and databases used by the application instances. An upgrade to MYOB Advanced 2018.1 from previous major versions may cause issues with customisations and dashboards.

Multiple changes have been made in MYOB Advanced 2018.1 that may affect customisations and integrations. For details, see “Customisations” on page 2.

If your MYOB Advanced instance was integrated with software provided by an independent software vendor (ISV) partner, we recommend that you consult with your partner about the compatibility of their products with MYOB Advanced 2018.1.

### Upgrade Policy

On the Apply Updates form (SM203510), only minor updates for your current version of MYOB Advanced are available. You should upgrade your MYOB Advanced instance from previous major versions of the system to version 2018.1 manually on the server. (An upgrade through the web interface is not supported because the customisation of your MYOB Advanced instance may be incompatible with version 2018.1 due to changes in version 2018.1.)

### Prerequisite Steps

Before users install or upgrade MYOB Advanced 2018.1 locally, they need to do the following:

1. Switch the Internet Information Services application pool where your Acumatica ERP 2018 R1 instance will be installed to Integrated mode. (Classic mode is not supported.)
2. Install Microsoft .NET Frameworks 4.7.1 on the server where your Acumatica ERP 2018 R1 instance will be installed.

# Customisations

Multiple changes have been made in this release, which may affect reports, customisations, and integrations that were implemented by the developers for the prior versions.

To prevent breaking changes in the customisations, developers should do the following:

1. Analyse any customisation projects.
2. Carefully read the list of breaking changes in the “Breaking Changes” section.
3. Replace the changed objects with their alternatives. See additional recommendations in the sections below.
4. If the objects used in the customisation projects were removed and no alternatives were provided, consider creating new customisation projects.

After an upgrade to MYOB Advanced 2018.1, to detect the changes that break existing customisation projects, developers can check the compatibility of the code included in all published customisation projects with the original code. For details, see “To Validate the Compatibility of the Published Customisation with a New Version Before an Upgrade” in the MYOB Advanced Customisation Guide.

**Note:** The validation that detects breaking changes is turned on by default in Acumatica ERP 2017 R2. If any errors occur during the validation, see “To Resolve an Issue Discovered During the Validation” topic in the Customisation Guide.

For the complete list of the changes with the suggested alternatives, see the MYOB Advanced 2018.1 Technical Release Notes document.

If a customised mobile site map was published on the MYOB Advanced instance, follow the instructions provided in the Upgrade Procedure: Customisations of Mobile Site Maps section to upgrade the instance.

## Changes in the INItemClass Table and the Item Classes (IN201000) form

The INItemClass table had only a natural key (ItemClassID, nvarchar) before. Now it has a surrogate key (ItemClassID, int with identity) and a natural key (ItemClassCD, nvarchar).

All references to INItemClass in the standard tables (such as INItemClassRep, INItemClassSubItemSegment, INUnit, InventoryItem) are updated with the surrogate key. Because the data type of the field has been changed, many methods have changed their signature (such as set\_ItemClassID(String)).

If the customisation includes custom tables with a reference to INItemClass or a table extension of INItemClass, a special script should be added to the customisation project to update the references to the new surrogate key. The following code shows an example of the script for Microsoft SQL.

```
IF EXISTS (
SELECT * FROM INFORMATION_SCHEMA.COLUMNS
WHERE TABLE_NAME = 'CustomInventory' -- custom table
AND COLUMN_NAME = 'ItemClassID' AND DATA_TYPE = 'nvarchar')
BEGIN
exec sp_rename 'CustomInventory.ItemClassID', 'ItemClassCD', 'COLUMN';
exec ('ALTER TABLE CustomInventory ADD ItemClassID INT NULL');
exec ('update CustomInventory
set ItemClassID = c.ItemClassID
from CustomInventory ci
inner join INItemClass c on c.CompanyID = ci.CompanyID
and c.ItemClassCD = ci.ItemClassCD');
exec ('ALTER TABLE CustomInventory DROP COLUMN ItemClassCD');
END
```

If the customisation includes custom import or export scenarios, or custom endpoints for the contract-based SOAP or REST API working with the Item Classes form (IN.20.10.00), these scenarios or endpoints should be updated to work with the new natural key (ItemClassCD) instead of the old one (ItemClassID).

Availability calculation rules have been moved from the INItemClass table to the new INAvailabilityScheme entity, which is set up on a separate form.

If the availability calculation flags (INItemClass.InclQty\*) are used in the customisation, the developer should find an appropriate INAvailabilityScheme record (or join this record in a query) by the INItemClass.INAvailabilitySchemeID value.

### Changes in the INSetup Table and the Inventory Preferences (IN101000) form

The Default Item Class box on the Inventory Preferences form (IN.10.10.00) (INSetup.DfltItemClassID) has been replaced with Default Stock Item Class (INSetup.DfltStkItemClassID) and Default Non-Stock Item Class (INSetup.DfltNonStkItemClassID) boxes. In the customisations, the INSetup.DfltItemClassID field should be replaced with INSetup.DfltStkItemClassID or INSetup.DfltNonStkItemClassID.

### Changes in the INPIClass Table and the Physical Inventory Types (IN208900) form

On the Physical Inventory Types (IN208900) form, multiple item classes can be selected now. Therefore, the INPIClass.ItemClassID field has been replaced with the INPIClassItemClass entity. In the customisations, the fields of the INPIClassItemClass table should be used instead of the INPIClass.ItemClassID field.

# Customisations of Mobile Site Maps

For previous versions of MYOB Advanced, during each update of the application website, the mobile site map (the mobilesitemap.xml file and other predefined files in the \App\_Data\Mobile folder of the website) was overridden with a new version. That is, if a customised mobile site map was published on the MYOB Advanced instance, after each update of the application website, the custom changes to the mobile site map had to be applied once again.

In MYOB Advanced 2018.1, the developer can generate a delta of the original site map and the customised site map, and publish this delta file on the MYOB Advanced instance, along with other customisation changes. The delta file is a MSDL script file that contains the difference of two mobile site maps. Once this file is placed in the **\App\_Data\Mobile** folder of the MYOB Advanced application instance, MYOB Advanced applies the delta automatically when a user starts the mobile application connected to this instance. The custom delta file is not overridden during an update of the website.

The delta file can be generated with the ac.exe command-line utility. The developer can also use the utility to convert an XML mobile site map to MSDL format. For details on the corresponding commands of the ac.exe utility, see “To Generate a Delta from Two Mobile Site Maps” and “To Convert an XML Mobile Site Map to MSDL Format” in the MYOB Advanced Framework Development Guide.

## Upgrade of an MYOB Advanced Instance That Includes a Customised Mobile Site Map to MYOB Advanced 2018.1

To upgrade an MYOB Advanced instance that includes a customised mobile site map to MYOB Advanced 2018.1, do the following:

1. Create a test copy of your production instance of Acumatica ERP.
2. Generate the delta from the original mobile site map of the current version of your test instance of Acumatica ERP and the customised mobile site map.
3. Place this delta file in the **\App\_Data\Mobile** folder of the test instance.
4. Update the test copy of your Acumatica ERP instance to Acumatica ERP 2017 R2.
5. Test the mobile application with the updated test copy of your Acumatica ERP instance.
6. Place the delta file in the **\App\_Data\Mobile** folder of the production instance.
7. Update the production instance of Acumatica ERP to Acumatica ERP 2017 R2.

# Breaking Changes

Multiple changes have been made in this release that may affect reports, customisations, and integrations that were implemented by the developers for the prior versions. The basic changes are listed in this topic. The complete list of the changes with the possible alternatives is provided in the MYOB Advanced 2018.1 Technical Release Notes document.

## Removed Screens

No screens that were present in prior versions have been removed.

## Removed Tables

The following tables that were present in prior versions have been removed from the database:

- CABankStatement
- CABankStatementAdjustment
- CABankStatementDetail
- CustomisationPublished
- DynamicAttachment
- EPNotification
- ExportFieldSettings
- ExportScreen
- ExportTableSettings
- ExtraField
- ExtraFieldOnGraph
- ExtraFieldValue
- FSAppointmentInventoryItem
- KBCategory
- KBSetup
- LogRecord
- MetaColumn
- MetaTable
- Obsolete\_EPActivity
- PaymentType
- PaymentTypeDetail
- PaymentTypeInstance

## Breaking Changes

- PaymentTypeInstanceDetail
- PREmployeeJob
- PRJobCode
- PRSetup
- PRShiftCode
- PTInstRecon
- PTInstStatement
- PTInstStmtDetail
- PTInstTranCustomisationDesign
- SMLanguageSearchSettings
- SMLongOperationCommand
- SMPPerformanceValues
- SPDemoAccess
- SystemTask
- SystemTaskInfo
- TaskCryptography
- UploadFileInScreen
- UPPackageFiles

### Removed Fields

The following fields that were present in prior versions have been removed.

Table Name	Field Name
APPayment	PTInstanceID
APSetup	InvoiceRequestApproval
ARInvoice	CuryRUTROTTTotalAmt
ARInvoice	RUTROTOtherCost
ARInvoice	RUTROTMaterialCost
ARInvoice	RUTROTWorkPrice
ARInvoice	RUTROTTTotalAmt
ARInvoice	RUTROTDeductionPct
ARInvoice	RUTDeductionPct
ARInvoice	ROTDeductionPct



## Breaking Changes

Table Name	Field Name
ARInvoice	RUTROTAutoDistribution
ARInvoice	IsRUTROTClaimed
ARInvoice	RUTROTType
ARInvoice	CuryRUTROTPersonalAllowance
ARInvoice	RUTROTPersonalAllowance
ARInvoice	CuryROTPersonalAllowance
ARInvoice	ROTPersonalAllowance
ARInvoice	CuryROTEExtraAllowance
ARInvoice	ROTEExtraAllowance
ARInvoice	CuryRUTPersonalAllowance
ARInvoice	RUTPersonalAllowance
ARInvoice	CuryRUTExtraAllowance
ARInvoice	RUTExtraAllowance
ARInvoice	CuryRUTROTDistributedAmt
ARInvoice	RUTROTDistributedAmt
ARInvoice	ROTEstateAppartment
ARInvoice	ROTEAppartment
ARInvoice	ROTEstate
ARInvoice	ROTEOrganizationNbr
ARInvoice	RUTROTClaimDate
ARInvoice	RUTROTClaimFileName
ARInvoice	RUTROTDistributionLineCntr
ARInvoice	RUTROTEExportRefNbr
ARTran	PMTranID
CABankTran	CuryOrigAmt
CABankTran	PayeeMatched
CABatch	OwnerID
CADeposit	EntryTypeID
CASetup	CuryRateTypeID

## Breaking Changes

Table Name	Field Name
CASetup	PTInstStmtNumbering
CASetup	MatchInSelection
CATransfer	LineCntr
Contract	CampaignID
Contract	VisibleInEP
Country	AllowStateEdit
CRCampaign	DefaultMemberStatus
CRCampaign	ActualCost
CRCampaignMembers	Status
CRMarketingList	IsSelfManaged
CRMarketingListMember	Activated
CRMassMailCampaign	TargetStatus
CRMassMailCampaign	DestinationStatus
CROpportunity	BranchID
CROpportunity	BAccountID
CROpportunity	ProjectID
CROpportunity	OpportunityName
CROpportunity	Description
CROpportunity	Amount
CROpportunity	CuryAmount
CROpportunity	ProductsAmount
CROpportunity	CuryProductsAmount
CROpportunity	CampaignSourceID
CROpportunity	IsTaxValid
CROpportunity	CuryID
CROpportunity	CuryInfolD
CROpportunity	WorkgroupID
CROpportunity	OwnerID
CROpportunity	TaxZoneID

## Breaking Changes

Table Name	Field Name
CROpportunity	ARRefNbr
CROpportunity	CuryTaxTotal
CROpportunity	TaxTotal
CROpportunity	CuryLineTotal
CROpportunity	LineTotal
CROpportunity	ManualTotalEntry
CROpportunity	ContactID
CROpportunity	LocationID
CROpportunity	CROpportunityClassID
CROpportunity	OpportunityNumber
CROpportunity	OrderType
CROpportunity	OrderNbr
CROpportunity	DiscTot
CROpportunity	CuryDiscTot
CROpportunity	CuryOrigDiscAmt
CROpportunity	OrigDiscAmt
CROpportunity	CuryDiscTaken
CROpportunity	DiscTaken
CROpportunity	CuryDiscBal
CROpportunity	DiscBal
CROpportunity	VatTaxableTotal
CROpportunity	CuryVatTaxableTotal
CROpportunity	VatExemptTotal
CROpportunity	CuryVatExemptTotal
CROpportunity	AllowOverrideContactAddress
CROpportunity	OpportunityAddressID
CROpportunity	OpportunityContactID
CROpportunity	ProductCntr
CROpportunityProducts	CROpportunityProductID

## Breaking Changes

Table Name	Field Name
CROpportunityProducts	CROpportunityID
CROpportunityProducts	TransactionDescription
CROpportunityTax	OpportunityProductID
CSCalendar	SunUnpaidTime
CSCalendar	MonUnpaidTime
CSCalendar	TueUnpaidTime
CSCalendar	WedUnpaidTime
CSCalendar	ThuUnpaidTime
CSCalendar	FriUnpaidTime
CSCalendar	SatUnpaidTime
EPExpenseClaimDetails	Submitted
FeaturesSet	Payroll
FeaturesSet	MultipleWorkShifts
FinPeriod	PRClosed
FSAppointmentDet	BillableTime
FSAppointmentDet	ServiceID
FSSchedule	CustomStartDate
FSSchedule	EnableCustomStartDate
FSServiceContract	EnableExpirationDate
FSSODet	BillableTime
FSSODet	ServiceID
GIDesign	PagerStyle
INItemClass	InclQtySOBackOrdered
INItemClass	InclQtySOPrepared
INItemClass	InclQtySOBooked
INItemClass	InclQtySOShipped
INItemClass	InclQtySOShipping
INItemClass	InclQtyInTransit
INItemClass	InclQtyPOReceipts

## Breaking Changes

Table Name	Field Name
INItemClass	InclQtyPOPrepared
INItemClass	InclQtyPOOrders
INItemClass	InclQtyINIssues
INItemClass	InclQtyINReceipts
INItemClass	InclQtyINAssemblyDemand
INItemClass	InclQtyINAssemblySupply
INItemClass	InclQtySORReverse
INItemSite	LastPurchaseDate
INItemSite	LastPurchasePrice
INItemSite	LastVendorID
INItemStats	LastPurchasePrice
INItemStats	LastPurchaseDate
INItemStats	LastVendorID
INPIClass	ItemClassID
INSetup	DfltItemClassID
OAuthClient	CompanyMask
OAuthClient	RequireConsent
OAuthClient	AllowRememberConsent
OAuthClient	AllowClientCredentialsOnly
OAuthClientSecret	CompanyMask
PivotField	DateRounding
PivotFieldPreferences	Type
PivotFieldPreferences	Expression
PMBillingRule	WipAccountGroupID
PMBillingRule	InvoiceDescription
PMBillingRule	LimitQty
PMBillingRule	LimitAmt
PMBillingRule	CapsAccountGroupID
PMBillingRule	OverflowAccountGroupID

## Breaking Changes

Table Name	Field Name
PMCommitment	PeriodID
PMHistory	BudgetQty
PMHistory	BudgetAmount
PMHistory	RevisedQty
PMHistory	RevisedAmount
PMHistory	CommittedQty
PMHistory	CommittedAmount
PMHistory	CommittedOpenQty
PMHistory	CommittedOpenAmount
PMHistory	CommittedReceivedQty
PMHistory	CommittedInvoicedQty
PMHistory	CommittedInvoicedAmount
PMHistory	PTDBudgetAmount
PMHistory	PTDBudgetQty
PMHistory	PTDRevisedAmount
PMHistory	PTDRevisedQty
PMProforma	DetailTotal
PMProforma	CuryDetailTotal
PMSetup	CommitmentTracking
PMSetup	VisibleInEP
PMTask	RetainagePct
PMTax	CuryOrigTaxableAmt
PMTax	OrigTaxableAmt
PMTask	CompletedPct
PMTask	VisibleInEP
POSetup	VendorPriceUpdate
UserPreferences	HeaderFont
UserPreferences	HeaderFontSize
UserPreferences	HeaderFontColor

## Breaking Changes

Table Name	Field Name
UserPreferences	HeaderFillColor
UserPreferences	HeaderFontType
UserPreferences	BodyFont
UserPreferences	BodyFontSize
UserPreferences	BodyFontColor
UserPreferences	BodyFillColor
UserPreferences	BodyFontType
UserPreferences	Border
UserPreferences	BorderColor
UserPreferences	HiddenSkip
Vendor	EnableTaxStartDate
Vendor	TaxYearStartDate

## Modified Field Types

The following table lists the fields whose types have been modified.

Table Name	Field Name	Old Type	New Type	Old Max. Length	New Max. Length
CRCampaignType	Description	NVarChar	NVarChar	30	250
CRCampaignType	TypeID	NVarChar	NVarChar	10	30
CROpportunity	StageID	Char	VarChar	1	2
CROpportunityProbability	StageCode	Char	VarChar	1	2
INItemClass	ItemClassID	NVarChar	Int	10	0
INItemClassRep	ItemClassID	NVarChar	Int	10	0
INItemClassSubItemSegment	ItemClassID	NVarChar	Int	10	0
INLocation	PrimaryItemClassID	NVarChar	Int	10	0
INReplenishmentLine	PONbr	VarChar	NVarChar	15	15
INUnit	ItemClassID	NVarChar	Int	10	0
InventoryItem	ItemClassID	NVarChar	Int	10	0

## Breaking Changes

PMSetup	NonProjectCode	NVarChar	NVarChar	10	30
PMTran	ARTranType	NVarChar	Char	3	3
POOrder	soordernbr	VarChar	NVarChar	15	15
SOOrderSite	OrderNbr	VarChar	NVarChar	15	15
FSAppointment	EstimatedLineTotal	6	4	0	0
FSAppointmentDet	EstimatedTranAmt	6	4	0	0
FSAppointmentDet	TranAmt	6	4	0	0
FSSODet	ApptTranAmt	6	4	0	0
FSSODet	EstimatedTranAmt	6	4	0	0
PMBillingRecord	BillingTag			20	30
SFSyncRecord	LocalID			30	36

## Removed Data Access Classes

The following data access classes that were present in prior versions have been removed.

Namespace	Class Name
PX.SM	SMPerformanceValues
PX.SM	AUNotificationProcess+AUNotificationFilter
PX.SM	KBSetup
PX.SM	UploadFileInScreen
PX.SM	WikiPageWithDefaultLanguage
PX.Data	LogRecord
PX.Data	ExtraFieldValue
PX.Data	ExtraField
PX.Data	ExtraFieldOnGraph
PX.Data.EP	DynamicAttachment
PX.SM	SMLanguageSearchSettings
PX.Objects.PM	ProjectBalanceValidationProcess+PMProjectStatusEx
PX.Objects.PM	ProjectBalanceByPeriodEntry+ProjectBalanceFilter
PX.Objects.PM	PMHistory2Accum
PX.Objects.PM	PMProjectStatus
PX.Objects.PM	PMProjectStatusAccum



## Breaking Changes

Namespace	Class Name
PX.Objects.PM	PMProjectStatusEx
PX.Objects.PM	PMInventorySelectorAttribute+Cogs
PX.Objects.PM	PMInventorySelectorAttribute+Exp
PX.Objects.PM	PMInventorySelectorAttribute+Sale
PX.Objects.PM	ProjectBalanceEntry+ProjectBalanceFilter
PX.Objects.PM	TransactionInquiry+PMTranEx
PX.Objects.CR	CampaignMemberMassProcess+CampaignOperationPa ram
PX.Objects.CR	SelCampaignMembers
PX.Objects.CR	CRMarketingListMaint+MailSubscriptionInfo
PX.Objects.CR	CRMarketingListMaint+MailUnsubscriptionInfo
PX.Objects.CR	CRMarketingListMaint+MarketingListInfo
PX.Objects.CR	ARDunningLetterProcess+ARDunningLetterDetail2
PX.Objects.CR	CampaignDocuments+SOOrderAlias
PX.Objects.CR	CampaignDocuments+ARInvoiceAlias
PX.Objects.CR	CampaignDocuments+Filter
PX.Objects.CR	OpportunityMaint+ConvertedFilter
PX.Objects.PR	PREmployeeJob
PX.Objects.PR	PRShiftCode
PX.Objects.PR	PRJobCode
PX.Objects.PR	PRSetup

## Removed Graphs

Namespace	Name
PX.Objects.PM	ProjectBalanceByPeriodEntry
PX.Objects.PM	ProjectBalanceEntry
PX.Objects.CR	CampaignMemberMassProcess

## Removed Constants

Namespace	Name
PX.Objects.IN	InventoryAttribute+dimensionName
PX.Objects.CR	CROpportunityStagesAttribute+Deploy
PX.Objects.CR	CROpportunityStagesAttribute+Deploy
PX.Objects.CR	CampaignMemberMassProcess+CampaignOperationParam+ActionList+add
PX.Objects.CR	CampaignMemberMassProcess+CampaignOperationParam+ActionList+update
PX.Objects.CR	CampaignMemberMassProcess+CampaignOperationParam+ActionList+remove
PX.Objects.CR	OpportunityStatusAttribute+New
PX.Objects.CR	OpportunityStatusAttribute+Open
PX.Objects.CR	OpportunityStatusAttribute+Won
PX.Objects.CR	OpportunityStatusAttribute+Lost
PX.Objects.GL	BatchModule+modulePR
PX.Objects.EP	PXDBTimeSpan2Attribute+zero
PX.Objects.CA	CABankStatementStatus+hold
PX.Objects.CA	CABankStatementStatus+balanced
PX.Objects.CA	CABankStatementStatus+released
PX.Objects.AP	MISC1099EFileFilter+include+allMarkedBranches

# Projects

Before an instance of MYOB Advanced is upgraded from a previous version to 2018.1, we recommend that system administrators who will perform the upgrade read the information in the following sections, which is related to the changes made to the Projects module.

## The Upgrade Process

During the upgrade process, the system migrates the project budget records to the new data structure, so users can view them on the Projects form (PM.30.10.00) after the upgrade.

While the billing rules are upgraded, for each account group in a billing rule, the system creates a step of the Time and Material type with an empty line amount formula. The billing rules may continue to work with an allocation process that creates transactions for these account groups. The billing rules with no line amount formula use the value of the PMTran.Amount data field, so that the billing result is consistent with the result in the system previously.

## Actions After the Upgrade Process

After the upgrade process is complete, a system administrator needs to perform the

1. On the Validate Project Balances (PM504000) form, select the Recalculate Unbilled Summary check box, and on the form toolbar, click Validate All to cause the system to recalculate the amounts of the project budget records based on the project transactions generated as a result of the upgrade.
2. Optional: To enable the pro forma invoice workflow for an existing project, do the following:
  - a. On the Invoices tab of the Projects (PM301000) form, make sure there are no unreleased Accounts Receivable documents related to the project.
  - b. On the Summary tab, select the Create Pro Forma on Billing check box for the project.

**Note:** To later return to processing direct Accounts Receivable invoices for the project, users should make sure there are no unreleased pro forma invoices or Accounts Receivable documents related to the project, and then clear the Create Pro Forma on Billing check box for the project.

## Migration of Projects with the Billing Limit Amount Controlled

The limit amount, which was specified for a budget line in the Budgeted Amount column on the Project Tasks form (PM.30.20.00) and for the account group specified in the Max. Limits Account Group setting of the billing rule on the Billing Rules form (PM.20.70.00), is now set for the budget line of the project in the Maximum Amount column on the Revenue Budget tab of the Projects form (PM.30.10.00).

During the upgrade process, for each billing rule that uses limits, the system copies the limit amount from the Budgeted Amount column of the budget line of the task for the account group from the Max. Limits Account Group setting on the Billing Rules form to the Maximum Amount column on the Revenue Budget tab of the project on the Projects form for the same account group. (It is supposed that the account group of the limit is the account group of Income type to which the project revenues are recorded.) The Limit Amount check box on the Revenue Budget tab of the Projects form is selected automatically for the migrated revenue budget lines with non-zero Maximum Amount. As soon as at least one revenue budget line with the limit is generated during the upgrade process, the system also selects the Use T&M Revenue Budget Limits check box for this project on the Summary tab of the Projects form to expose the Limit Amount and Maximum Amount columns on the Revenue Budget tab of the Projects form.

For each project created in the previous version of the system that has tasks to which the billing rules with the Limit Amount check box applied, users need to do the following:

- After the upgrade and before the next iteration of the allocation process is run for the project, enable the pro forma invoice workflow for each project for which they want to continue using the limit amount control.
- After these users have enabled the pro forma invoice workflow for the project, resume processing the project—that is, run the allocation process, and then run the billing process, which creates a pro forma invoice where the limits are verified.

**Note:** On the Projects Preferences form (PM.10.10.00), the setting in the **Validate T&M Revenue Budget Limits** box determines whether users should receive a warning or error message on the Pro Forma Invoices form (PM.30.70.00) if an invoice exceeds a limit.

## Functional Changes

The following functional changes have been made to the Projects module:

- The project budget is now defined on the Projects form (PM.30.10.00) instead of the Project Tasks form (PM.30.20.00).
- The following forms have been removed:
  - Project Budget (PM303000): The new Budget Details (PMGI0010) generic inquiry can be used to view the list of records of a project budget in the system, and the Revenue Budget and Cost Budget tabs of the Projects form can be used to import budget records.
  - Project Budget by Period (PM305000): The project budget is no longer broken down by period.

- For project templates, the budget is now defined on the Project Templates form (PM.20.80.00) instead of the Project Template Tasks form (PM.20.80.10), which is consistent with the changes to the Projects form.
- The new TMPROJECT segmented key, which can be viewed and edited on the Segmented Keys form (CS.20.20.00), now defines the format of project template identifiers on the Project Templates form (PM.20.80.00). The auto-numbering that can be specified in the PROJECT segmented key now applies to only the project identifiers. Auto-numbered projects and project templates may still share the same numbering sequence, if needed.
- The ability to postpone a certain amount of an invoice line until the next invoice (that is, the billing option) has been changed as follows:
  - A user can now postpone a certain amount and quantity of a line of a pro forma invoice until the next invoice or write it off. This functionality is now available on the Pro Forma Invoices form (PM.30.70.00).
  - The Billing Option column is no longer available on the Document Details tab of the Invoices and Memos form (AR.30.10.00).
  - The scenario of postponing a partial quantity of an invoice generated by a billing procedure for a project is not supported.
- The validation of the billing limit has been changed as follows:
  - The validation of the billing limit is now performed as part of the billing process instead of the allocation process. In the previous versions of MYOB Advanced, the allocation process did not create a transaction if the allocated amount exceeded the limit. The billing process created the Accounts Receivable invoice in the full unbilled amount. Now the allocation process does not validate limits; it creates all transactions according to the allocation rule. The billing process creates a pro forma invoice with all billable transactions.
  - Now users can review the transactions that violated the limit and take the corrective actions on the Pro Forma Invoices form. The validation level may vary, from a simple warning, which does not block the processing of the pro forma invoice, to an error, which prevents the pro forma invoice from being processed further until the invoice amount is within the limit. The desired validation level is specified on the Projects Preferences form (PM.10.10.00).
  - The validation of the billing limit is no longer performed if the Accounts Receivable invoice is created directly without a pro forma invoice being processed first.
  - The amount of the billing limit is now defined for a revenue budget line (on the Revenue Budget tab of the Projects form) instead of for a billing rule.
  - The Over the Limits Account Group setting that existed on the Billing Rules form (PM.20.70.00) is deprecated. With the new limit validation workflow, a user can preview over-limit amounts in a pro forma invoice and make the necessary decisions without the allocation process temporarily posting these amounts to an account group for further review and adjustment.
  - The ability to specify billing limits by quantity is temporarily not supported

- The ability to edit original budget amounts and quantities now depends on the budget lock status instead of the project and task statuses. For the budget lines of a project on the Projects form, the Budgeted Amount and Budgeted Quantity columns (on both the Revenue Budget and Cost Budget tabs) can now be protected from editing if a user applies the Lock Budget action to the project. The **Unlock Budget** action reverses the Lock Budget action and makes the columns available for editing again.
- The auto-calculation of the percentage of task completion by amount or quantity can now be based on the cost budget lines only—that is, the budget lines that can be added to the Cost Budget tab of the Projects form. Also, the Production column of this tab has been renamed to Auto Completed (%).
- The WIP Account Group is now specified at the task level on the Project Tasks form instead of at the billing rule level on the Billing Rules form. During the upgrade, the system copies the WIP account group from the billing rule of a project task to the settings of the project task. The logic for reversing the WIP amount remains the same—that is, on release of an Accounts Receivable invoice, the system reverses the amount on the WIP account group that is specified for the project task that is being billed.
- Budgeting against an off-balance account group is available on the Cost Budget tab of the Projects form only if the account group has the Expense check box selected on the Account Groups form (PM.20.10.00). Off-balance expense budget records are included in the Expense Totals row on the Balances tab of the Projects form. Budget records by non-expense off-balance account groups are included in the Off-Balance Totals row on the Balances tab.
- The ability to budget against asset, liability, and non-expense off-balance account groups is temporarily unavailable. Actual amounts for these account groups are displayed on the Balances tab of the Projects form and in the Budget Details generic inquiry.
- The auto-budget function is temporarily not supported.

## Renamed Elements

In addition to the previously mentioned renamed elements, the following elements have been renamed:

- On the Enable/Disable Features form (CS.10.00.00), the feature that makes the Projects module available for use has been renamed from Project Management to Project Accounting.
- On the Projects form (PM.30.10.00), the table on the Account Task Mapping tab was moved to the Default Task for GL Account section of the GL Accounts tab. The Account Task Mapping tab was removed from the form.

## Changed, New, and Removed Forms

Multiple enhancements have been made to the UI of the following forms:

- Projects (PM.30.10.00)
- Project Tasks (PM.30.20.00)
- Project Transactions (PM.30.40.00)
- Project Transactions (PM.40.10.00)
- Tasks by Employee (PM.40.20.00)
- Reverse Unbilled Transactions (PM.50.50.00)
- Run Project Billing (PM.50.30.00)
- Project Balance (PM.62.10.00)
- Projects Preferences (PM.101.0.00)
- Billing Rules (PM.20.70.00)
- Attributes (PM.20.20.00)
- Project Templates (PM.20.80.00)
- Project Template Tasks (PM.20.80.10)
- Common Tasks (PM.20.80.30)

In addition to the enhanced forms, the following forms have been added:

- Budget Details (PM.GI.00.10): A new generic inquiry under Organization > Projects > Work Area > Explore
- Budget Summary by Account Group (PM.PV.00.10): A new pivot table under Organization > Projects > Work Area > Explore
- Pro Forma Invoices (PM.30.70.00): A new form under Organization > Projects > Work Area > Manage
- Commitments (PM.30.60.00): A new form under Organization > Projects > Work Area > Explore
- Process Pro Forma Invoices (PM.50.60.00): A new form under Organization > Projects > Processes > Recurring
- Pro Forma Invoice (PM.64.20.00): A new report under Organization > Projects > Reports > Forms

Also, the following forms have been removed:

- Project Budget (PM.30.30.00)
- Project Budget by Period (PM.30.50.00)

**Note:** Custom objects, such as customisations, import/export scenarios, and screen-based API that refer to fields on the changed and removed forms may need to be updated.

## Custom Reports and Generic Inquiries

The project budget is now stored in the new PMBudget database table. Therefore, custom generic inquiries and reports should be updated so that the system can use this table to retrieve the project budget data instead of the PMProjectStatus or PMHistory tables. The PMProjectStatus table will no longer be updated. This table is deprecated and will soon be removed from the database schema.

Because the project budget is no longer kept by period, the columns that are listed below have been removed from the PMHistory table:

- Budget PTD Amount
- Budget PTD Quantity
- Revised PTD Amount
- Revised PTD Quantity

**Note:** In analytical reports, the respective options of the **Amount Type** setting of the data source of PM type are no longer available on the Row Sets (CS.20.60.10), Column Sets (CS.20.60.20), and Unit Sets (CS.20.60.30) forms.

## Changes to the Acumatica Mobile App

The following mobile screens have been updated to reflect the changes made to the respective forms:

- **Projects:** Multiple enhancements have been made to this screen.
- **Project Tasks:** This screen is hidden in the site map of the mobile app and opens only if the user selects the View Task action in the detailed view of a project task on the Projects mobile screen.