

myob | IMS PAYROLL

New Release (V6.52) Webinar



Disclaimer: This document provides guidance on how to manage leave entitlements within our product. We recommend that you read the MBIE document "*Holidays Act 2003: Guidance on annual holidays, domestic violence, leave, bereavement leave, alternative holidays, public holidays and sick leave*" to understand how to meet your obligations as an employer under the Holidays Act 2003. If you have further questions or are in doubt, it is best to seek legal advice to ensure you are meeting your obligations.

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1.0 What's new in this release?

The V6.52 release updates MYOB IMS Payroll to calculate Annual Leave in weeks. Annual Leave balances are displayed in weeks as well as hours/days, and a new *Agreed Definition of a Week* can be specified for each employee. This simplifies leave management, and means that daily/hourly balances can be automatically adjusted when an employee's work schedule changes, to hold a consistent weekly balance.

For background information on these changes, and considerations when upgrading the system, see the document "Managing Annual Leave in Weeks" on the [MYOB IMS Payroll Education Centre](#).

2.0 Annual Leave Enhancements

MYOB IMS Payroll now calculates and reports Annual Leave in weeks. A number of changes have been made to options, record entry screens and reports to support these enhancements.

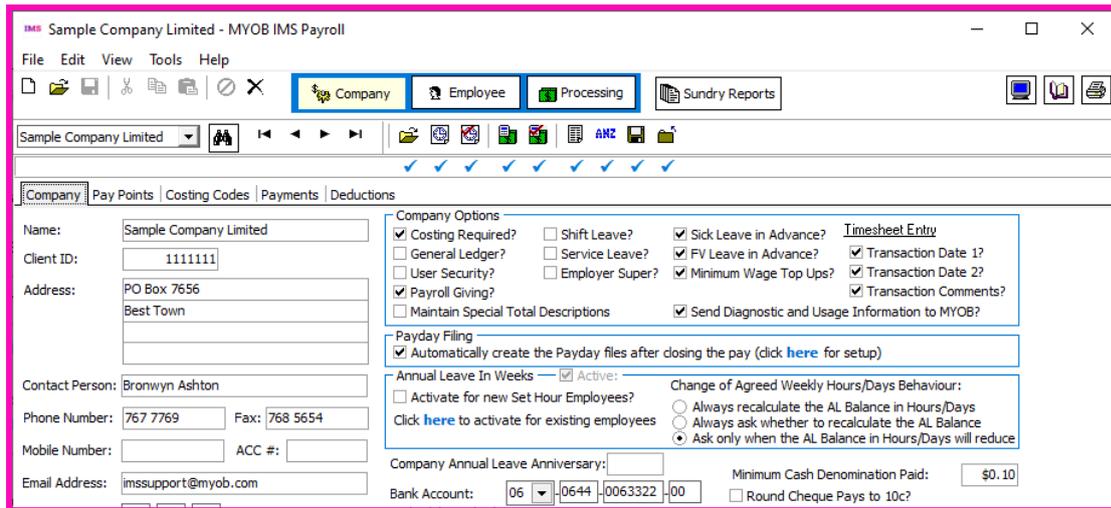
2.1 Enabling Weekly Annual Leave

We recommend taking a backup for each payroll company (through the Tools, Backup menu), and printing an annual leave report (through the Processing, 6-Reports tab), before performing the below steps.

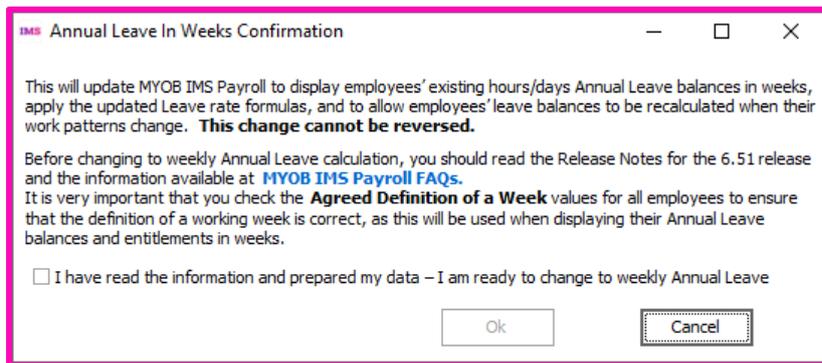
Please Note: You may need to print your annual leave report twice, once ticked on hours and once ticked on days, based on the employee's units selected. We would recommend using the accumulators report option as this will also show you weeks, once the functionality has been turned on. To change to the accumulators report type, highlight the annual leave report and click into the options button. Change the report type to accumulators and then close the options window.

After upgrading to this release, the option to use weekly Annual Leave rates is disabled—you can enable the option once you and your employees are ready. Make sure to read all of the documentation below before activating weekly Annual Leave. Ticking the **Active** option opens an information window with a message that you must accept before confirming the change:

To activate the weekly Annual Leave method, make sure all pays are closed, then tick **Active** at the top of the new **Annual Leave in Weeks** section on the Company Information screen:



Ticking the **Active** option opens an information window with a message that you must accept before confirming the change:

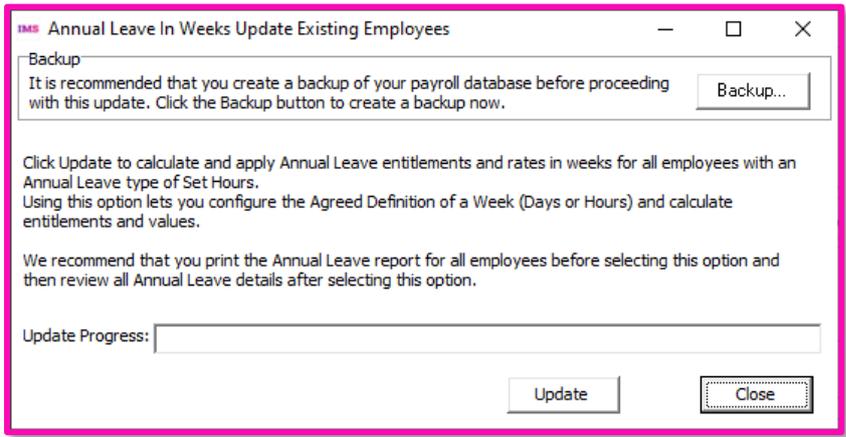


Please note: This change is irreversible. Once you have activated the weekly method, it cannot be deactivated.

The new Annual Leave in Weeks section contains options to set any new Set Hours employees to calculate Annual Leave weekly by default, and to update all existing Set Hours employees to weekly Annual Leave.

You do not have to set all employees to use weekly Annual Leave. The option to calculate Annual Leave in weeks can be set for each employee individually.

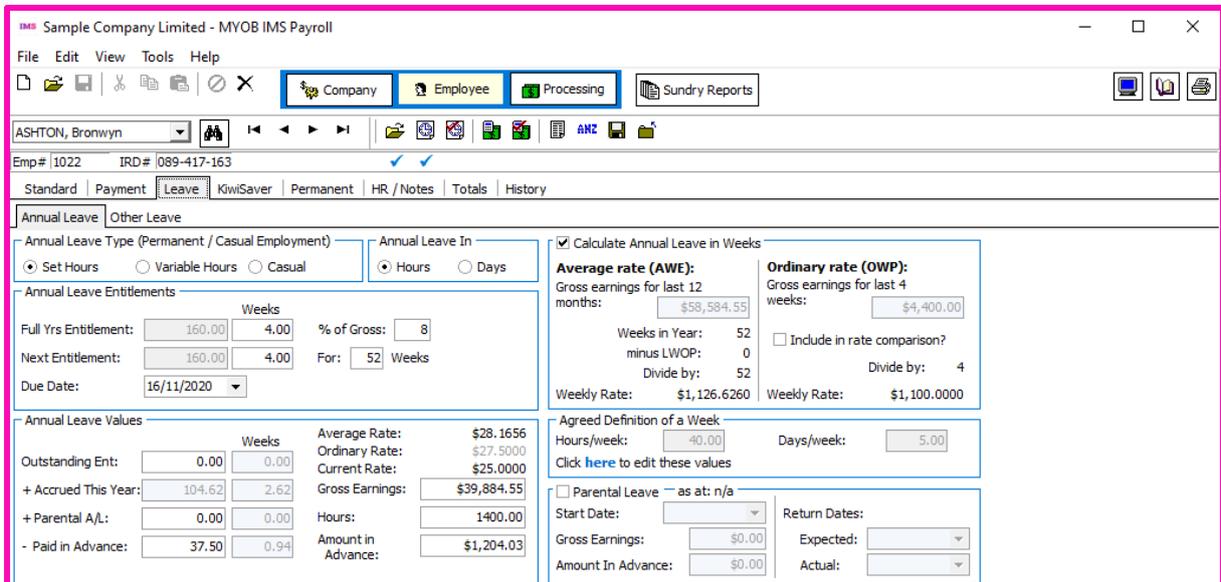
This second option opens a window that lets you confirm the operation and shows its progress:

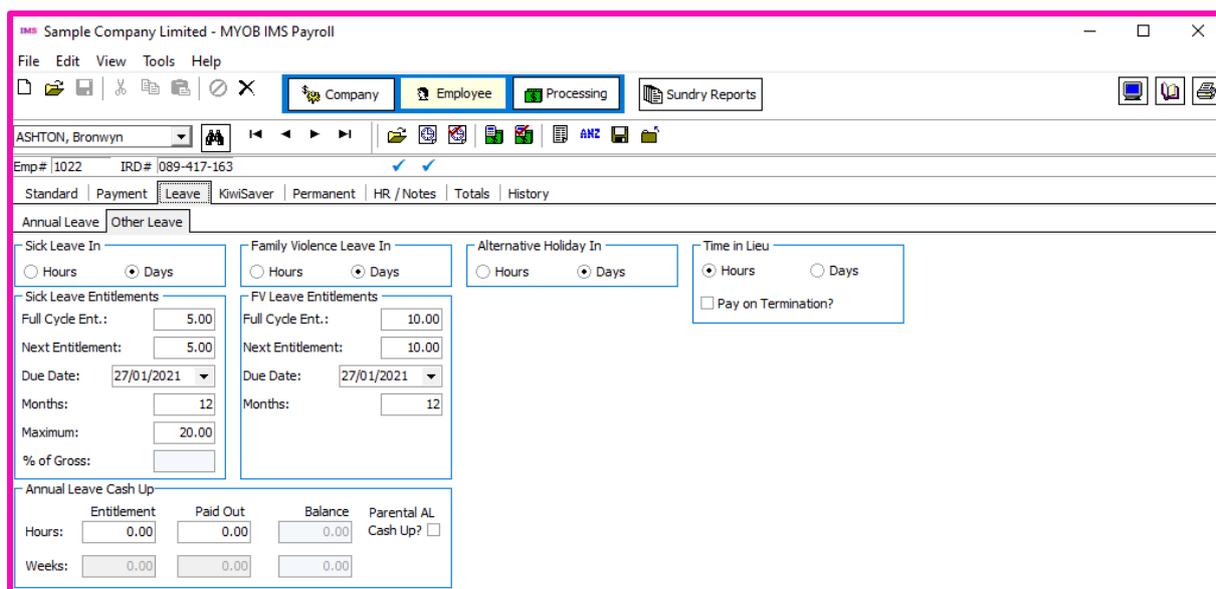


The new section also contains options that affect the system’s behaviour when an employee’s Agreed Definition of a Week changes—see example on page 7.

3.0 Employee Settings

New settings are available on the Employee Information > Leave tab. To make room for these settings, the Leave tab has been separated into two sub-tabs: Annual Leave and Other Leave. The Other tab contains all existing settings related to Sick Leave, Family Violence Leave, Alternative Holidays, Time in Lieu and Annual Leave cash-ups; the Annual Leave tab contains the existing Annual Leave settings, as well as new settings for calculating Annual Leave in weeks:





Ticking the **Calculate Annual Leave in Weeks** option has the following effects:

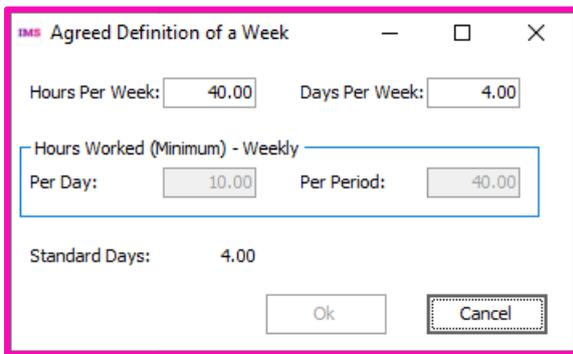
- The settings in the Calculate Annual Leave in Weeks and Agreed Definition of a Week sections become active.
- A **Weeks** column appears next to the Annual Leave entitlement and balance units on this tab, showing the units in weeks as well as hours/days.
- The Average Weekly Earnings (AWE) and Ordinary Weekly Pay (OWP) rates for the employee use the new Agreed Definition of a Week values to calculate a daily or hourly rate.
- A new **Current Rate** field has also been added to the Annual Leave Values section.
- A new **Include in rate comparison?** option is available for the OWP 4 week average rate. For monthly employees, the OWP 4 week divisor is always 4. There are on average 4.33 weeks in a month so this will need to be considered if you use this option. If this option is unticked (the default), the Ordinary Rate (OWP4) will be excluded from rate comparisons, i.e. the system will ignore the Ordinary Rate (OWP4) and use the higher of the Average Rate (AWE) or Current Rate (OWP). If this option is ticked, the system will use the higher of the Average Rate (AWE), Ordinary Rate (OWP4) or Current Rate (OWP).

4.0 Agreed Definition of a Week

The fields in the **Agreed Definition of a Week** section are used to calculate the employee’s hourly or daily balances and entitlements. They represent what is agreed as constituting a working week for the employee — these values will be used when converting between weeks and days/hours. The default values are based on employees’ usual days/hours, but they should be reviewed for all employees.

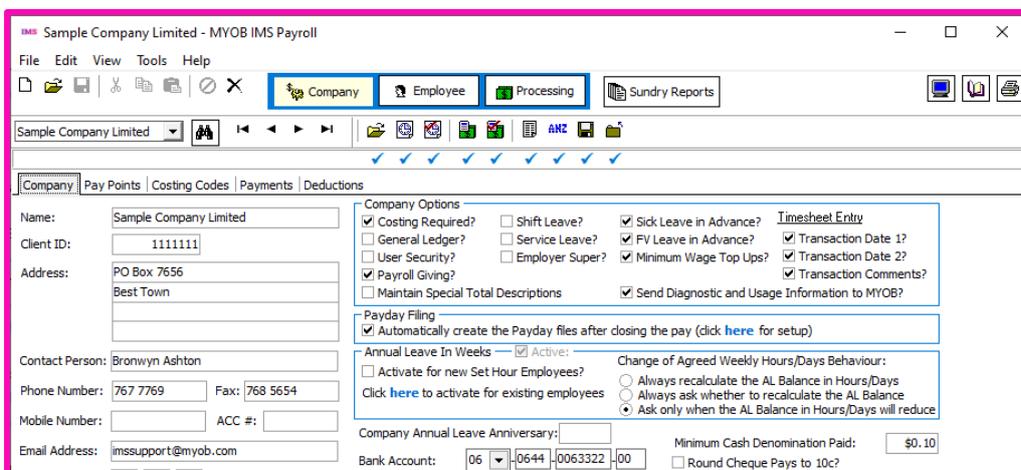
Please note: For employees with variable hours that change from week to week, if you are unable to identify a pattern of work, we recommend talking to an expert for advice on how to enter their Agreed Definition of a Week. Remember that the definition must be agreed on by the employer and employee.

Click the **here** link below these fields to open a window that lets you edit the Agreed Definition of a Week values:



If an employee’s **Agreed Definition of a Week** values change at any time, this will cause their hourly or daily Annual Leave balance and entitlement to be recalculated to match the new Agreed Definition of a Week.

Options for how employees’ balances will be affected are available under **Change of Agreed Weekly Hours/Days Behaviour** on the Company Information tab:



Selecting **Always recalculate the AL Balance in Hours/Days** means that when an employee’s Agreed Definition of a Week changes, their hourly/daily Annual Leave balance will be recalculated automatically. This option ensures that balances are always adjusted whenever the Agreed Definition of a Week is edited.

An information window appears, showing the new balances and entitlements in weeks as well as in days/hours:

The dialog box contains the following text:

You've updated this employee's Agreed Definition of a Week.

The system will recalculate the Annual Leave Hours balance from 31.96 hour(s) to 25.57 hours. This new balance is calculated as 0.8 week(s) multiplied by the new Agreed Hours Per Week value of 32 hour(s).

Refer to the table below for details of the calculation.

	Agreed Hours Per Week	Balance (Weeks)	Balance (Hours)	Entitlement (Weeks)	Entitlement (Hours)	Leave Rate	Termination Value \$
Before Change	40.00	0.80	31.96	4.00	160.00	\$28.7009	\$783.54
After Change	32.00	0.80	25.57	4.00	128.00	\$35.8762	\$783.54
Difference	8.00	0.00	6.39	0.00	32.00	\$7.1753	\$0.00

Click OK to continue updating the Hours balance, otherwise click Cancel

(The user has the option of clicking **Cancel** at this point if they do not want to make the changes to the Agreed Definition of a Week—the new balance and entitlement values are not applied until the user clicks **OK**.)

Selecting **Always ask whether to recalculate the AL Balance** means that users can choose to recalculate or not on a case by case basis. The following message window appears when an employee’s Agreed Definition of a Week changes:

The dialog box contains the following text:

You've updated this employee's Agreed Definition of a Week.

The system will recalculate the Annual Leave Hours balance from 31.96 hour(s) to 25.57 hours. This new balance is calculated as 0.8 week(s) multiplied by the new Agreed Hours Per Week value of 32 hour(s).

Refer to the table below for details of the calculation.

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After Change	32.00	0.80	25.57	4.00	128.00	\$35.1862	\$973.63
Difference	8.00	0.00	6.39	0.00	32.00	\$7.0372	\$0.00

Click Yes to continue updating the Hours balance, No to keep the existing Hours balance - this will adjust the Weeks balance instead (not recommended), otherwise click Cancel.

This window has the following options:

- **Yes** – The employee’s hourly/daily balance and entitlement will be recalculated as displayed on the window.
- **No** – The hourly/daily balance will remain the same and the employee’s weekly balance and entitlement will be recalculated. (This is not recommended.)
- **Cancel** – The change to the employee’s Agreed Definition of a Week is not saved.

Selecting **Ask only when the AL Balance on Hours/Days will reduce** means that the user is only asked if they want to update or keep the hours/days values if the change to the Agreed Definition of a Week would result in a reduction of the employee’s hour/daily balance and entitlement. If the change means the employee’s hourly/daily values would stay the same or increase, the system will behave the same as when the **Always recalculate the AL Balance in Hours/Days** option is selected. (This is the default.)

Please note: If you choose not to recalculate the Annual Leave balance when an employee’s Agreed Definition of a Week changes, it should be because you have agreed this with your employee or there is another reason the balance shouldn’t change. Not recalculating could affect the employee’s Annual Leave entitlement and payment and may not meet your obligations. If you are unsure you should seek advice from your business advisor.

4.1 Employee Leave Earnings History

New columns have been added to the Employee Information > History > Leave Earnings tab to display historical information about the employee’s Agreed Definition of a Week, as well as any weeks of Leave Without Pay they have taken (see below).

Period Ending	Average Gross	Ordinary Gross	Hours/Week	Days/Week	H/Rate Hrs	ADP Hrs	H/Rate Days	ADP Days	Hours Per Day	LWOP Weeks
08/12/2019	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
15/12/2019	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
22/12/2019	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
29/12/2019	\$1,252.27	\$1,252.27	0	0	40	40	5	5	8	0
05/01/2020	\$1,247.11	\$1,247.11	0	0	40	40	5	5	8	0
12/01/2020	\$1,454.76	\$1,454.76	0	0	40	40	5	5	8	0
19/01/2020	\$1,445.76	\$1,445.76	0	0	40	40	5	5	8	0
26/01/2020	\$1,449.98	\$1,449.98	0	0	40	40	5	5	8	0
02/02/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
09/02/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
16/02/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
23/02/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
01/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
08/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
15/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
22/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
29/03/2020	\$1,100.00	\$1,100.00	40	5	41	40	5.12	5	8	1

5.0 Processing Leave Without Pay

Leave Without Pay (LWOP) of more than one continuous week affects how you manage Annual holidays. In this case, you must either:

- move the employee's Holiday Pay anniversary date forward one week for each whole or partial week of LWOP taken beyond the first (e.g. two weeks of LWOP means that the anniversary date should be moved forward by one week),

or you can agree with your employee to

- leave the anniversary date as it is and reduce the AWE divisor by one for each whole or partial week of LWOP taken beyond the first (e.g. three weeks of LWOP means the divisor should be reduced by two weeks, so gross earnings are divided by 50 weeks instead of the usual 52 to calculate AWE).

Please note: This does not apply to all kinds of unpaid leave, e.g. unpaid Sick Leave, unpaid Parental Leave, Voluntary Service or leave on ACC are exempt from this – see [“Leave without pay” on the MBIE website](#) for more information.

This release contains several updates that let you process LWOP in this scenario.

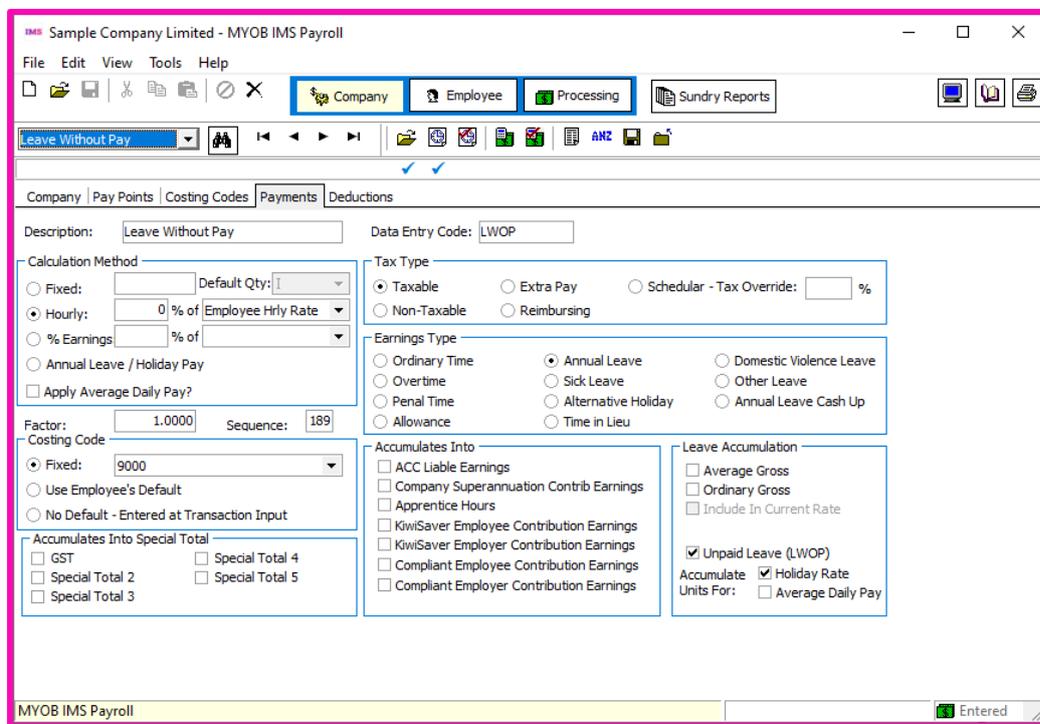
Please note: These updates are only available when the Annual Leave in Weeks function is enabled – see page 3. If you don't have this functionality enabled, if any employee has any LWOP weeks at the time they are moved to weekly Annual Leave, this should be entered into the Employee, History, Leave Earnings tab (select the relevant week(s) and click Modify.

You can then add the number of LWOP weeks to the relevant pay period.

Period Ending	Average Gross	Ordinary Gross	Hours/Week	Days/Week	H/Rate Hrs	ADP Hrs	H/Rate Days	ADP Days	Hours Per Day	LWOP Weeks
22/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
29/03/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
05/04/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
12/04/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
19/04/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
26/04/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
03/05/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
10/05/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
17/05/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
24/05/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
31/05/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
07/06/2020	\$1,125.19	\$1,125.19	0	0	40	40	5	5	8	0
14/06/2020	\$1,109.48	\$1,109.48	0	0	40	40	5	5	8	0
21/06/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
28/06/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
05/07/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	0
12/07/2020	\$1,100.00	\$1,100.00	0	0	40	40	5	5	8	1

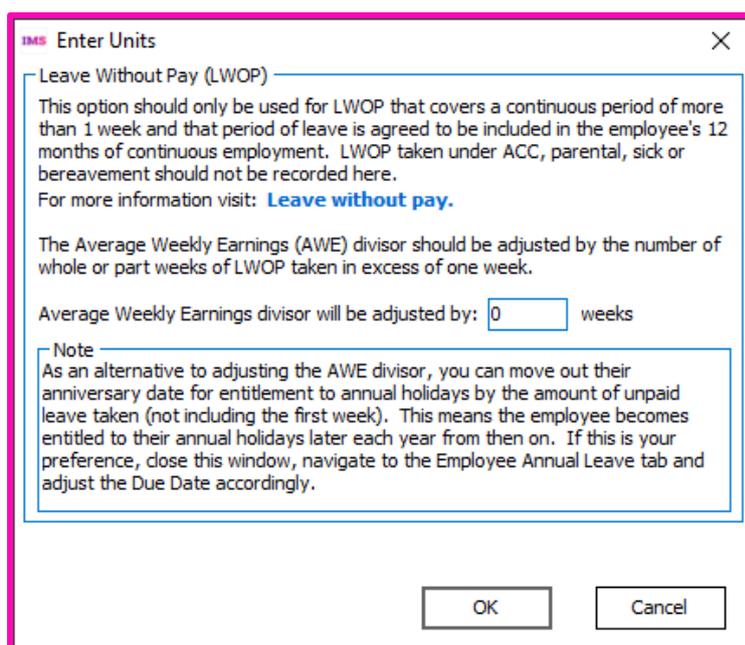
6.0 Updates to Payments

The **Unpaid Leave** setting on the Company Payments tab has been renamed to **Unpaid Leave (LWOP)** to indicate that any payment with this option will be treated as Leave Without Pay:



7.0 Updates to Timesheets

After adding a payment that has been marked as unpaid leave to an employee's timesheet, a new Enter Units window opens:



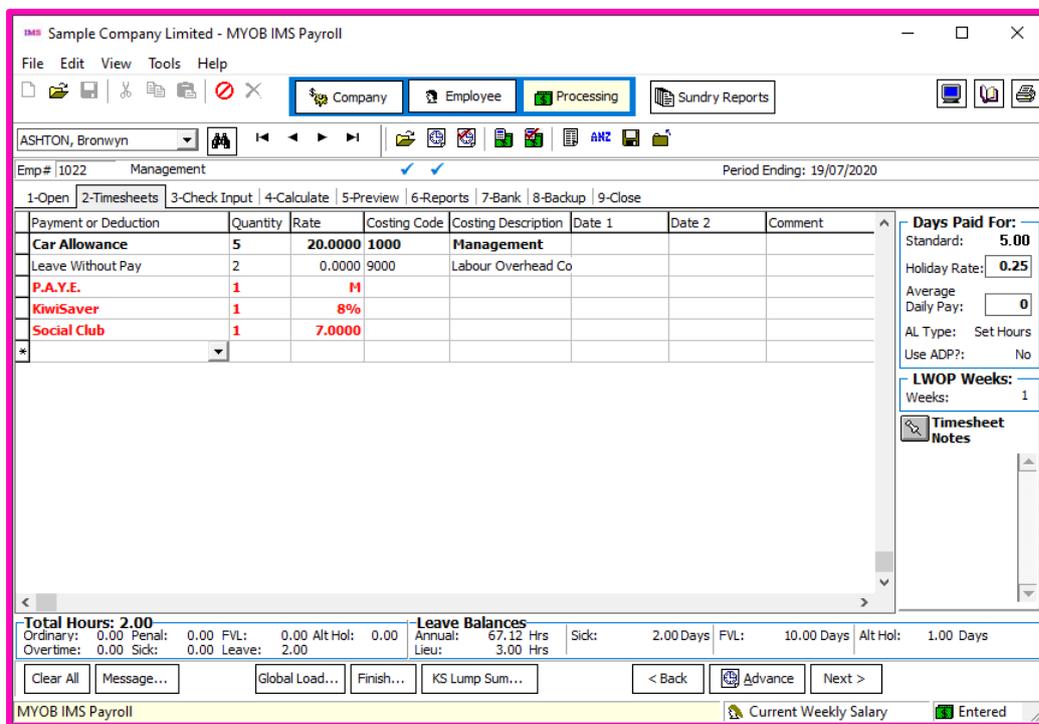
Please note: this window only appears when adding payments that have the Unpaid Leave (LWOP) option ticked, and do not have one of the exempt leave types selected under Earnings Type.

If you want to reduce the employee’s AWE divisor, enter the number of weeks to reduce it by on this window. Remember, the divisor should be reduced by one for each whole or partial week of LWOP taken beyond the first.

For example:

- if the employee takes 1 week of LWOP only, the divisor does not need to be reduced.
- if the employee takes 1.5 continuous weeks of LWOP, the divisor should be reduced by 1 week.
- if the employee takes 2 continuous weeks of LWOP, the divisor should be reduced by 1 week.
- if the employee takes 3 continuous weeks of LWOP, the divisor should be reduced by 2 weeks.

A new **LWOP Weeks** field on the Timesheets tab displays the number of weeks you entered on the Enter Units window:



This number is also displayed in **Average rate (AWE)** section of the Employee Leave tab and on the Leave Earnings History tab (see page 10).

8.0 Reporting and Payslips

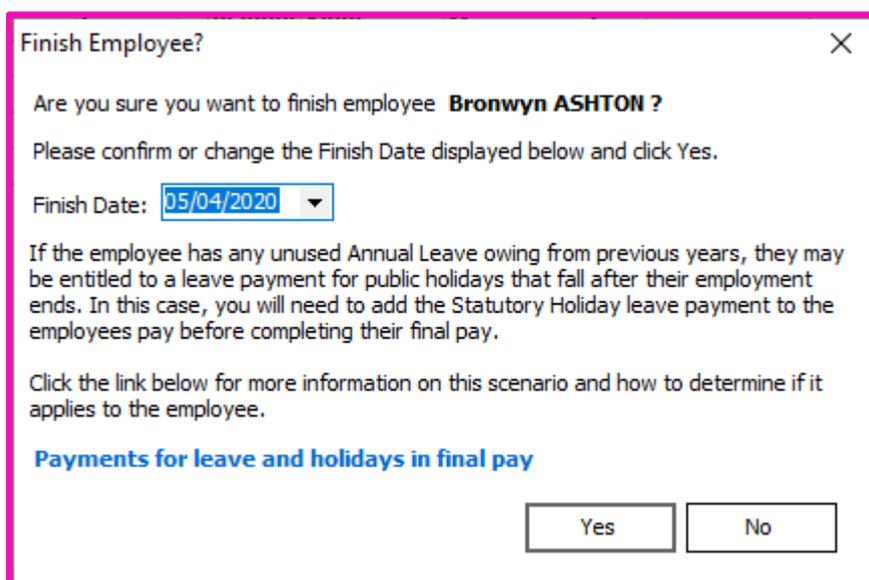
Weekly Annual Leave units are now shown on employee's payslips, if the new **AL in Weeks Balance?** report option is selected.

Weekly units have also been added to the Annual Leave Reports and other places where employees' Annual Leave units are shown, e.g. the Employee Inquiry window.

9.0 Public Holidays and Termination Pay

In some cases, a departing employee with unused Annual Leave may be entitled to Public Holidays that fall after their employment ends—see [“Payment for leave and holidays in final pay” on the Employment New Zealand website](#) for information on this scenario and how to determine if it applies to a departing employee.

When entering a Finish Date for an employee, a new message warns about this scenario and includes a link to the information on the Employment New Zealand website:



Finish Employee? ✕

Are you sure you want to finish employee **Bronwyn ASHTON** ?

Please confirm or change the Finish Date displayed below and click Yes.

Finish Date:

If the employee has any unused Annual Leave owing from previous years, they may be entitled to a leave payment for public holidays that fall after their employment ends. In this case, you will need to add the Statutory Holiday leave payment to the employees pay before completing their final pay.

Click the link below for more information on this scenario and how to determine if it applies to the employee.

[Payments for leave and holidays in final pay](#)

10.0 Changing Employees from Variable Hours to Set Hours

The Holidays Act 2003 provides all employees 4 weeks Annual Holidays after 12 months' continuous employment. Ensuring that your employees receive their full entitlement each year is an important part of your obligations under the Act. To manage Annual Holidays for your employees you need to ensure you have an agreement with them on what a working week means (i.e. how many days or hours), this must genuinely reflect their working pattern at the time of any holidays taken.

Given the need to ensure Annual Holidays entitlement is based on what the working pattern is for your employees you will need to move them from Variable to Set Hours.

If you continue to use Variable Hours you will need to manage the Annual Holiday entitlement manually outside of the product. This is because the Variable Hours method allocates a % of time for your employee for every hour you pay them rather than allocating (or accruing) this time based on their agreed definition of a week.

To convert employees from Variable to Set Hours entitlement method, you will need to:

- ✓ Review work patterns and determine if you can find a pattern of work
- ✓ If they are in fact so variable that you cannot define a week, seek advice from an employment relations specialist on how to define a week for those employees
- ✓ Discuss and agree the process to define a week with the employee

Then:

1. Recalculate correct balances (refer below)
2. Change the employee to Set Hours in the leave tab
3. Adjust their Annual Entitlement and DOW based on agreed Week
4. Adjust their Hours balance based on your recalculated balances
5. Turn on Weeks for this employee

10.1 Recalculating Balances

Where employees have been on a consistent work pattern for their length of employment, (i.e they have never changed their work pattern or vary in working hours or days) a simple calculation can be done to check balances before switching to weeks

1. Number of Years (at least 6 years from last Anniversary)
2. X (Days/Hours per week x 4 weeks)
3. - Days/Hours you have paid Holiday Pay
4. = Balance

If there has been a change in working pattern or variable working hours or days, you will need to agree the definition of a week for future leave entitlement and use another method to determine the current balance.

Data sources for determining work patterns

- ✓ In IMS – go to the employee, history, Timesheet history tab
- ✓ External Sources – Rosters, timesheets, agreements

If you do not have time records to establish a balance of Annual Holidays, you may need to seek advice on how to proceed outside of assistance MYOB is able to offer. Your business advisor or MBIE position statement/advice may be helpful.

[MBIE Website](#)

[Learn more about the Labour Inspectorate's Position Statement here](#)

Once you have an agreed definition of a week and an opening balance of Annual Holidays is agreed, follow the process below.

When changing an employee from Variable Hours to Set Hours for annual leave you will need to update the following fields:

1. Employee, payment tab. Agreed definition of a week.

The screenshot shows the 'Payment' tab for employee 'BLUE, Wendy'. The form includes the following sections:

- Pay Frequency:** Weekly (selected), Fortnightly, Monthly, Half Monthly, Four Weekly.
- Employee Type:** Wage (per Hour) (selected), Salary (per Pay).
- Tax Details:** IRD No: 567 890 120, Tax Code: M, Expires: [dropdown], PAYE override %, Extra Pays override %.
- Student Loans:** Student Loan override %, Income Type: [dropdown], Certificate: none, Expiry Tax Code: [dropdown], Contractor?, GST Registered?
- Pay Rates:** Hourly: \$18.9000, Per Pay: [input], Rate 2: [input], Rate 3: [input], Rate 4: [input], Rate 5: [input]. Includes 'Use Average Daily Pay?' section with Hourly Rate: \$18.0542, Daily Rate: \$142.5058, Standard Days: 4.00.
- Hours Worked (Minimum):** Per Day: 8.00, Per Period: 32.00.
- Cash Rounding Balance:** \$0.08.
- Payslips:** No Payslip, No IMS Online Payslip, Printed (checked), Emailed.

2. Employee, leave tab. Change from Variable Hours to Set Hours. Annual leave can either be in hours or in days. You will need to update the full years entitlement and next entitlement fields. This will need to be the number of hours or days holiday pay that the employee would be entitled to on their next anniversary date.

BLUE, Wendy | Emp# 1051 | IRD# 567-890-120

Standard | Payment | **Leave** | KiwiSaver | Permanent | HR / Notes | Totals | History

Annual Leave | Other Leave

Annual Leave Type (Permanent / Casual Employment) | Annual Leave In

Set Hours | Variable Hours | Casual | Hours | Days

Annual Leave Entitlements

Full Yrs Entitlement: 130.08 | % of Gross: 8
 Next Entitlement: 130.08 | For: 52 Weeks
 Due Date: 04/06/2021

Annual Leave Values

Outstanding Ent:	37.08	Average Rate:	\$18.0542
+ Accrued This Year:	17.92	Ordinary Rate:	\$18.9000
+ Parental A/L:	0.00	Current Rate:	\$18.9000
- Paid in Advance:	0.00	Gross Earnings:	\$4,233.60
		Hours:	224.00
		Amount in Advance:	\$0.00

Calculate Annual Leave in Weeks

Average rate (AWE):
 Gross earnings for last 12 months: N/A
 Weeks in Year: N/A
 minus LWOP: N/A
 Divide by: N/A
 Weekly Rate: N/A

Ordinary rate (OWP):
 Gross earnings for last 4 weeks: N/A
 Include in rate comparison?
 Divide by: N/A
 Weekly Rate: N/A

Agreed Definition of a Week

Hours/week: 0.00 | Days/week: 0.00
 Click here to edit these values

Parental Leave as at: n/a

Start Date: | Return Dates: | Expected: | Actual: |

Gross Earnings: \$0.00 | Amount In Advance: \$0.00

Balances Accrued To 19/07/2020

Annual Leave: 55.00 | Sick: -1.00 | FVL: 5.00 | Alternative Holiday: | TIL: |

- Update any Outstanding Entitlement or Paid In Advance figures. If you selected days for the units, then the Outstanding Entitlement or Paid in Advance figures will need to be converted to days.

BLUE, Wendy | Emp# 1051 | IRD# 567-890-120

Standard | Payment | **Leave** | KiwiSaver | Permanent | HR / Notes | Totals | History

Annual Leave | Other Leave

Annual Leave Type (Permanent / Casual Employment) | Annual Leave In

Set Hours | Variable Hours | Casual | Hours | Days

Annual Leave Entitlements

Full Yrs Entitlement: 128.00 | % of Gross: 8
 Next Entitlement: 128.00 | For: 52 Weeks
 Due Date: 04/06/2021

Annual Leave Values

Outstanding Ent:	37.08	Average Rate:	\$18.0542
+ Accrued This Year:	12.31	Ordinary Rate:	\$18.9000
+ Parental A/L:	0.00	Current Rate:	\$18.9000
- Paid in Advance:	0.00	Gross Earnings:	\$3,628.80
		Hours:	192.00
		Amount in Advance:	\$0.00

Calculate Annual Leave in Weeks

Average rate (AWE):
 Gross earnings for last 12 months: N/A
 Weeks in Year: N/A
 minus LWOP: N/A
 Divide by: N/A
 Weekly Rate: N/A

Ordinary rate (OWP):
 Gross earnings for last 4 weeks: N/A
 Include in rate comparison?
 Divide by: N/A
 Weekly Rate: N/A

Agreed Definition of a Week

Hours/week: 0.00 | Days/week: 0.00
 Click here to edit these values

Parental Leave as at: n/a

Start Date: | Return Dates: | Expected: | Actual: |

Gross Earnings: \$0.00 | Amount In Advance: \$0.00

Balances Accrued To 12/07/2020

Annual Leave: 49.39 | Sick: -1.00 | FVL: 5.00 | Alternative Holiday: | TIL: |

Further Information

Further information on Annual Leave can be found on the following web site:

www.employment.govt.nz/leave-and-holidays/

IMS Payroll

The IMS team have various options for MYOB IMS Payroll Training.

All our sessions are totally driven by you the user and you can have as many people attend the training sessions as you wish. Our goal is to maximize the benefits of using MYOB IMS Payroll. To book a session please email us imsprofessionalservices@myob.com.

- Onsite Training
- Online Training

For further details or Online Assistance please contact the Helpdesk on 0800 600 110 or email imssupport@myob.com to discuss your requirements