

MYOB Advanced

Release Notes

2023.1

Contents

Contents	2
Introduction	1
Installation and Upgrade Notes.....	2
Actions Before the Upgrade.....	3
New Features	4
Commerce	4
Predefined Import Scenarios for Importing Template Items and Matrix Items	4
Import of Refunds for Partially Shipped Orders from Shopify.....	6
Mapping of Shopify Locations to MYOB Advanced Warehouses	7
New Feature for B2B Scenarios	8
Support of BigCommerce Metafields in Order Import	10
Other Improvements	11
Improvements to Payment Method Mapping Settings.....	13
CRM	17
Address Settings for Duplicate Validation.....	17
Delegation and Reassignment of Approvals.....	19
Enhancements to CRM Tasks.....	26
Ability to Extend a Business Account as a Customer During Sales Order Creation	34
Predefined Email Notifications.....	38
Opportunity Metrics.....	41
Selection of Related Entities in Emails, Activities, Tasks, and Events	45
Other Improvements	47
Documentation.....	48
Improvements in User Guides	48
Field Services	49

Performance Improvements.....	49
Finance.....	50
AR Aging by Project Reports.....	50
Changes in Copying Default Subaccounts for GL Transactions.....	55
Generation of Batches on the Prepare Payments Form.....	58
Generation of Financial Periods on Company Activation	61
GL Consolidation by Company	65
Migrated AR and AP Documents with Unreleased Retainage.....	67
Renamed Document Types in AP and AR.....	70
Synchronisation of Fixed Asset Periods with GL Periods	73
Tax Bills with Direct-Entry Taxes and Taxable Lines	76
Other Improvements	83
Inventory and Order Management	87
Ability to Disable Automatic Calculation of Taxes in Sales Orders and Invoices	87
Improvements in Blanket Purchase Orders.....	91
Improvements in Templates for Matrix Items.....	92
Negative Quantity in Orders Whose Type Has Active Receipt and Issue Operations	94
Predefined User Roles.....	97
Sales Orders Based on the Mixed Order Automation Behaviour	103
Support of Multiple Totes for a Pick List	107
Other Improvements	109
Manufacturing	110
Deallocation of Unused Materials for Production Orders.....	110
Enhanced Review of MRP History.....	116
New Workflow Support on the Production Order Maintenance and Production Order Details Forms.....	119
Side Panel Support for Specific Forms	123
Other Enhancements	127
Platform	130
Archiving Old Documents	130

Platform: Deprecation of Automation Steps	134
Resetting Access Rights for Roles	135
Specifying the User Inactivity Timeout from the UI.....	140
Projects and Construction	141
Improvements in Tracking Project-Specific Inventory	141
Improved Lien Waiver Functionality	144
Migration Mode for Pro Forma Invoices.....	147
Mobile App Enhancements.....	152
Enhanced Joint Payment Functionality.....	157
New Productivity Report for Progress Worksheets	162
Improved Design for Project and Construction Reports and Inquiries	164
Other Improvements	175
System Administration.....	179
Deletion of Snapshots and Tenants in Batches	179
Enhancements to Business Events Triggered by Action	181
New Subscriber for Business Events	183
Improvements to the Trace Page.....	186
Using Past Data From Entities with Configured Business Events in Notification Templates	190
Usability.....	192
Improved Delivery of Built-In Infotips.....	192
Application Code	195
Performance Improvements	195
Update of RecordComesFirst Property of PXDBTimeStamp Attribute	202
Commerce Connector.....	203
API Changes.....	203
Commerce Connector.....	204
Availability of Custom Connectors in the Licence	204
Customisation.....	205
Retrieval of a Customisation Package Through the Web API	205
Support of Events Triggered by Field Changes in the UI.....	207

Developer Documentation	209
New Topics	209
Integration Development	211
New API for Webhooks	211
Platform API	213
Fluent BQL in Formulas	213
Web Services	215
Operation with Archived Records.....	215
Retrieval of Values of Multilingual Fields in Available Languages	216
Specification of Values of Multilingual Fields in Particular Languages.....	217

Introduction

This document provides important information about fixes, enhancements, and key features that are available in MYOB Advanced 2023.1. The document is designed particularly for those who install MYOB Advanced. All users can benefit from reviewing this content to determine how they may benefit from the changes in this release.

Information fixes, enhancements, and key features for those who customise MYOB Advanced or develop applications for it can be found in the separate Release Notes for Developers document.

To try new features and improvements, you can use the demo company, which you can easily deploy by selecting the *SalesDemo* item in the MYOB Advanced Configuration Wizard. For detailed information on deploying the demo company and working with the demo data, see Demo Materials on the MYOB Advanced Portal.

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 2023.1, in comparison to Version 2022 R2, 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 2023.1.

Supported Web Browsers for MYOB Advanced Workstations

Supported web browsers that can be used to work with MYOB Advanced 2023.1 workstations are listed in the following table.

Note: Web browsers on mobile devices are not supported. We recommend that MYOB Advanced mobile app is used.

Table: Supported web browsers

Web Browser	Version
<i>Microsoft Edge</i>	108 or later
<i>Mozilla Firefox</i>	108 or later
<i>Apple Safari</i>	15 or later
<i>Google Chrome</i>	109 or later

Actions Before the Upgrade

Before performing the upgrade to MYOB Advanced 2023.1, an administrator should perform the actions described in the following sections.

Finance

If the *General Ledger Consolidation* feature is enabled and in use in the system, an administrator must make sure that an upgrade to 2023.1 is planned for both the tenant with the parent company and each tenant with a subsidiary company.

If only the parent company or only the subsidiary company is upgraded to MYOB Advanced 2023.1, users will not be able to perform consolidation. This is because in the previous versions of MYOB Advanced, the consolidation process used the SOAP protocol, and in 2023.1, the consolidation process has been reimplemented by using the REST technology. For details, see [Finance: GL Consolidation by Company](#).

Inventory and Order Management

On the **Template** tab of the Order Types (SO201000) form, changes have been made to orders whose type has active *Receipt* and *Issue* operations and *RMA Order* or *Invoice* automation behaviour.

For such orders, the administrator should do the following:

- Make sure that any sales orders that had been previously exported to an Excel file have been imported to the Sales Orders (SO301000) form before the upgrade.
- On the Import by Scenario (SM206036) form, make sure that any needed sales orders have been imported.

Note: We highly recommend that these orders be imported before the upgrade to MYOB Advanced 2023.1. Before the system upgrade, all stock and non-stock quantities (the **Require Receipt** and **Require Shipment** checkboxes selected on the Non-Stock Items (IN202000) form) in orders on the Sales Orders form could be only positive. If such an order is imported after the system upgrade, the order balance may be changed because all the lines will be imported with positive quantities. The default order type operation will be selected for all sales order lines automatically, despite some lines could have another operation type.

For details, see [Inventory and Order Management: Negative Quantity in Orders Whose Type Has Active Receipt and Issue Operations](#).

New Features

Commerce

Predefined Import Scenarios for Importing Template Items and Matrix Items

In MYOB Advanced 2023.1, new predefined import scenarios have been implemented to simplify the migration of template items and matrix items (that is, products with variants) from third-party software to MYOB Advanced.

Overview of the New Import Scenarios

The following predefined import scenarios have been added to the Import Scenarios (SM206025) and Import by Scenario (SM206036) forms:

- *Import Template Items*: To import template items to the Template Items (IN203000) form
- *Import Matrix Items*: To import matrix items to the Stock Items (IN202500) form

For each of these scenarios, a corresponding data provider with the same name has been added on the Data Providers (SM206015) form.

Data Templates

For each of the predefined import scenarios, a data template is provided. The user performing the import can download the template, populate it with the data to be migrated to MYOB Advanced, and then use the prepared file on the Import by Scenario (SM206036) form with the corresponding import scenario.

To download the data template, the user does the following:

1. Opens the Import Scenarios (SM206025) or Import by Scenario form.
2. In the **Name** field of the Summary area, selects the import scenario for which the user wants to download the template.
3. In the title bar, clicks **Files**.
4. In the **Files** dialog field, clicks the template file. In the **Save As** dialog field, which opens, the user selects the folder where the template should be saved.

In the data template file, the columns that are required for successful data import are highlighted in red, and the optional columns are blue. (See the following screenshot.)

Inventory ID	Description	Item Class	Attribute 1 Name	Attribute 1 Value	Template ID
TE1-B		ALLOTHER	COLORPANT	B	AATEMPLATE
TE1-R		ALLOTHER	COLORPANT	R	AATEMPLATE
TE1-Y		ALLOTHER	COLORPANT	Y	AATEMPLATE

RED - required fields
BLUE - optional fields

Figure: The data template file for the import of matrix items

Import of Refunds for Partially Shipped Orders from Shopify

In previous versions of MYOB Advanced, it was not possible to import a refund from an external system for a sales order that had any status other than *Completed*, *Open*, or *On Hold*. As a result, users had to manually process refunds and returns for partially shipped orders. This included manually creating a return order, a refund, or both documents in MYOB Advanced and excluding the refund record from synchronisation to prevent the system from importing the same refund from Shopify. The process was complicated and could result in duplicate refunds being created in MYOB Advanced.

In MYOB Advanced 2023.1, the import of refunds for partially shipped orders from Shopify is supported. Now when such a refund is imported to MYOB Advanced, the retail-commerce connector processes it as follows:

- For shipped items: Creates a return order on the Sales Orders (SO301000) form and a refund on the Payments and Applications (AR302000) form, and applies the refund to the return order.
- For not-yet-shipped items: Adjusts the item quantity in the original sales order on the Sales Orders form, creates a refund on the Payments and Applications form, and applies the refund to the original payment.

Note: To avoid issues with the import of refunds, when users issue returns for a partially shipped order in a Shopify store, they should make sure that the **Restock item** checkbox (shown in the following screenshot) is selected.

The screenshot shows the 'Restock' page in MYOB Advanced. At the top, there is a navigation bar with a back arrow and the title 'Restock'. Below this is a light blue information box with a close button (X) and the text: 'Return items before issuing refunds. If you want to track shipping and automatically restock returned items, return items before issuing a refund. You can't return an item if it's already been refunded.' Below the information box are two buttons: 'Return items' and 'Learn more'. The main content area is divided into two columns. The left column lists items with their status, name, quantity, and price. The right column shows a 'Summary' of the order, including 'Items subtotal', 'Tax', and 'Refund total'. Below the summary is a section for 'AUTHORIZED AMOUNT' showing 'Shopify Payments' and a 'Restock items' button. The 'Restock item' checkbox is checked for the 'Unfulfilled' item and the 'Fulfilled' item. The 'Restock item' checkbox is also checked for the 'Fulfilled' item. The 'Restock item' checkbox is checked for the 'Fulfilled' item. The 'Restock item' checkbox is checked for the 'Fulfilled' item. The 'Restock item' checkbox is checked for the 'Fulfilled' item.

Status	Item Name	Quantity	Price	Restock item
Unfulfilled	Apple jam 32 oz APJAM32 \$16.60	1 / 2	\$16.60	<input checked="" type="checkbox"/>
Fulfilled	Apple jam 32 oz APJAM32 \$16.60	1 / 3	\$16.60	<input checked="" type="checkbox"/>

Summary:

Items subtotal	\$33.20
2 items	
Tax	\$3.40
Refund total	\$0.00

AUTHORIZED AMOUNT

Shopify Payments
(**** 4242)
\$54.91 not captured yet.

Send a [notification](#) to the customer

Figure: The Restock item checkbox on the Restock page

Mapping of Shopify Locations to MYOB Advanced Warehouses

In previous versions of MYOB Advanced, it was possible to map locations created in Shopify to specific warehouses and warehouse locations in MYOB Advanced only for Shopify POS orders. Starting in MYOB Advanced 2023.1, this functionality has been extended to Shopify web orders (that is, orders placed in a Shopify online store).

An implementation manager can specify the mapping in the **Warehouse Mapping for Order Import** table on the **Order Settings** tab of the Shopify Stores (BC201010) form (shown in the following screenshot).

The screenshot shows the 'Shopify Stores' form for 'Shopify Shopify'. The 'ORDER SETTINGS' tab is active. A sub-section titled 'WAREHOUSE MAPPING FOR ORDER IMPORT' is highlighted with a red box. It contains a table with the following data:

* Shopify Location	* Warehouse	Location ID
> Shop location	MAIN	R01A01B01

Figure: The Warehouse Mapping for Order Import table

When an order is imported, the system assigns the mapped location to each order line on the Sales Orders (SO301000) form. If the warehouses and locations are not specified, the system uses the default warehouse and location specified in the settings of the item on the Stock Items (IN202500) form.

New Feature for B2B Scenarios

In previous versions of MYOB Advanced, the synchronisation of all entities with a BigCommerce store could be set up if the *BigCommerce Connector* feature was enabled on the Enable/Disable Features (CS100000) form. Entities that are typically required only for business-to-business (B2B) companies were visible to business-to-consumer (B2C) businesses, which could cause confusion.

Starting in MYOB Advanced 2023.1, entities that are relevant only for B2B scenarios are available only if the *B2B Entities* feature is enabled on the Enable/Disable Features form. This new feature can be enabled only if the *BigCommerce Connector*, *Shopify Connector*, or *Shopify and Shopify POS Connector* feature is enabled. If none of the prerequisite features is enabled, the system displays an error message (which is shown in the following screenshot).

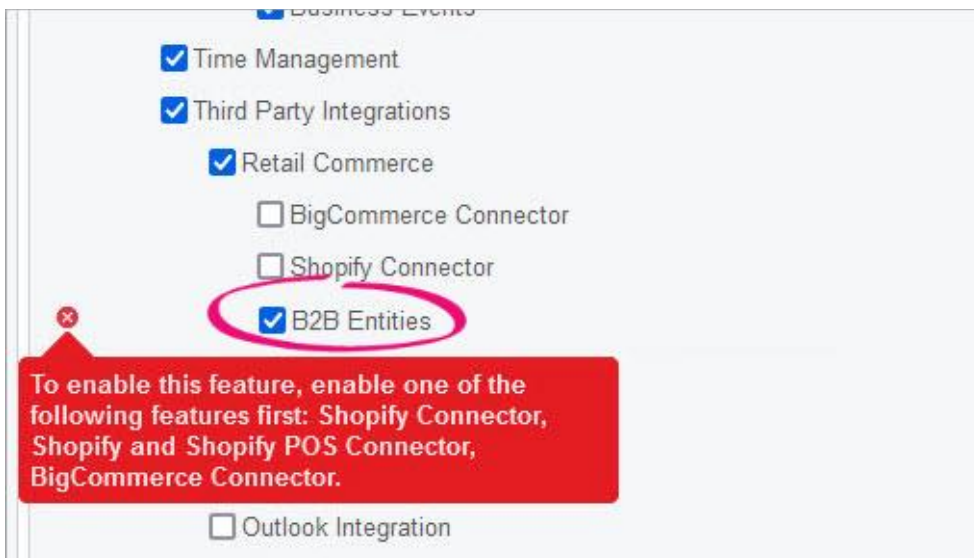


Figure: The B2B Entities feature on the Enable/Disable Features form

BigCommerce Entities

If the *BigCommerce Connector* feature is enabled on the Enable/Disable Features (CS100000) form, the following entities can be activated on the **Entity Settings** tab of the BigCommerce Stores (BC201000) form:

- Customer
- Customer Location
- Sales Category
- Stock Item
- Non-Stock Item
- Template Item
- Base Sales Price
- Product Image
- Product Availability
- Sales Order
- Payment
- Shipment
- Refund

When the *B2B Entities* feature is enabled, the *Customer Price Class* and *Price List* entities also become available.

Shopify Entities

Currently, the synchronisation of all entities with a Shopify store can be set up if the *Shopify Connector* or *Shopify and Shopify POS Connector* feature is enabled on the Enable/Disable Features (CS100000) form. However, in future versions of MYOB Advanced, entities specific to B2B scenarios will be added as part of the *B2B Entities* feature.

Other Changes to Forms

On the Enable/Disable Features (CS100000) form, the *Commerce Integration* group of features has been renamed to *Retail Commerce*. (See the following screenshot.)

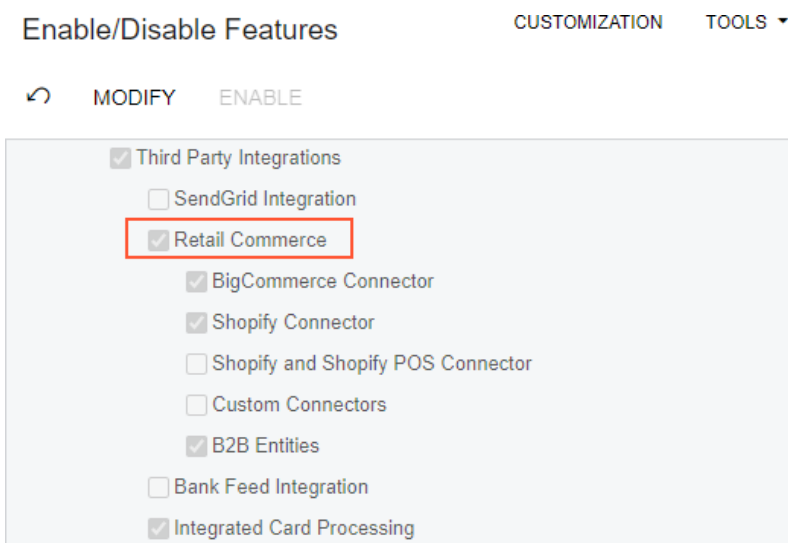


Figure: The renamed Retail Commerce group of features

Support of BigCommerce Metafields in Order Import

BigCommerce customers can create custom fields in their stores to hold additional information, such as extra details about products, sales orders, and customers. Starting in MYOB Advanced 2023.1, users can set up the system to import values stored in metafields of BigCommerce orders into MYOB Advanced.

Using BigCommerce Metafields in Field Mapping

Users of MYOB Advanced Retail Edition can map order metafields created in BigCommerce to sales order fields in MYOB Advanced. This mapping is defined on the Entities (BC202000) form.

Metafields have several properties, including the following:

- **Namespace:** A category or container that groups some metafields and distinguishes them from other metafields
- **Key:** The name of the metafield; it is used to reference the information stored in the metafield
- **Value:** The content of the metafield

When a user is configuring an import mapping for the *Sales Order* entity, to map a BigCommerce metafield with an MYOB Advanced field, they need to select the metafield object in the **External Object** column and type the metafield name in the **External Field / Value** column in the following format: `Namespace.Key`.

The following screenshot illustrates a mapping of a metafield created in BigCommerce that has the *Handling* namespace and *Notes* key to the *Note* field of a sales order in MYOB Advanced. The information that a customer adds to this metafield when placing an order in BigCommerce will be imported along with the sales order and attached to the sales order as a note on the Sales Orders (SO301000) form.

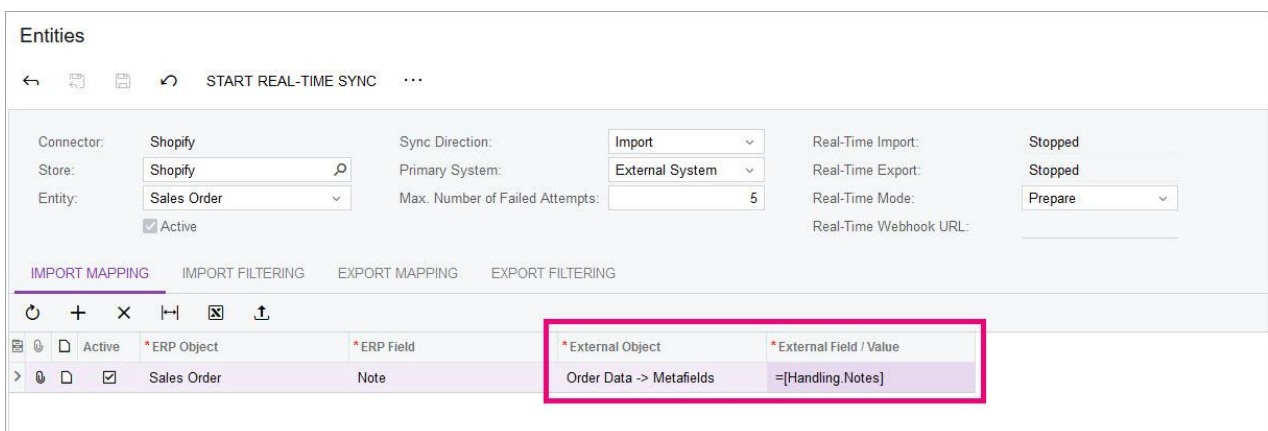


Figure: Use of a BigCommerce order metafield in a mapping

Other Improvements

In MYOB Advanced 2023.1, multiple improvements to commerce-related functionality have been introduced, as described below.

Renamed Columns on the Entities Form

On the Entities (BC202000) form, users could experience difficulty when setting up field mapping between MYOB Advanced and an external system because the columns on the **Export Mapping** and **Import Mapping** tabs had the same names but displayed objects and fields that belong to different systems. To make the purpose of the columns more obvious to users, the column names have been updated as follows:

On the **Export Mapping** tab:

- Target Object to External Object
- Target Field to External Field
- Source Object to ERP Object
- Source Field / Value to ERP Field / Value

On the **Import Mapping** tab:

- Target Object to ERP Object
- Target Field to ERP Field
- Source Object to External Object
- Source Field / Value to External Field / Value

Deletion of Product Images in an External System

In previous versions of MYOB Advanced, if a user exported product images listed in the **Media URLs** table on the **eCommerce** tab of the Stock Items (IN202500), Non-Stock Items (IN202000), or Template Items (IN203000) form to an external system, deleted or replaced the URL of the image in this table, and then synchronised the item, the image in the external system was still available. To work around this issue, the user had to manually delete the image on the product management page in the external system.

In MYOB Advanced 2023.1, this issue has been addressed. During the synchronisation of an item, the retail-commerce connector checks the list of media URLs that were attached to the product in the external system after the previous synchronisation. If it finds an image URL that has been synchronised in the past but no longer exists in the media URL list, it deletes the image in the external system.

Data Preparation on the Sync History Form

In previous versions of MYOB Advanced, the synchronisation process was performed in two stages. The first stage (preparation of entity data for synchronisation) was performed on the Prepare Data (BC501000) form, and the second step (processing of the prepared entity data) could be performed on the Process Data (BC501500) form and on the Sync History (BC301000) form.

Starting in MYOB Advanced 2023.1, a user can start both data preparation and data processing on the Sync History form.

To start the data preparation, a user needs to select the e-commerce store and the entity that needs to be prepared and then invoke the new **Prepare** command, which has been added to the More menu (see the following screenshot).

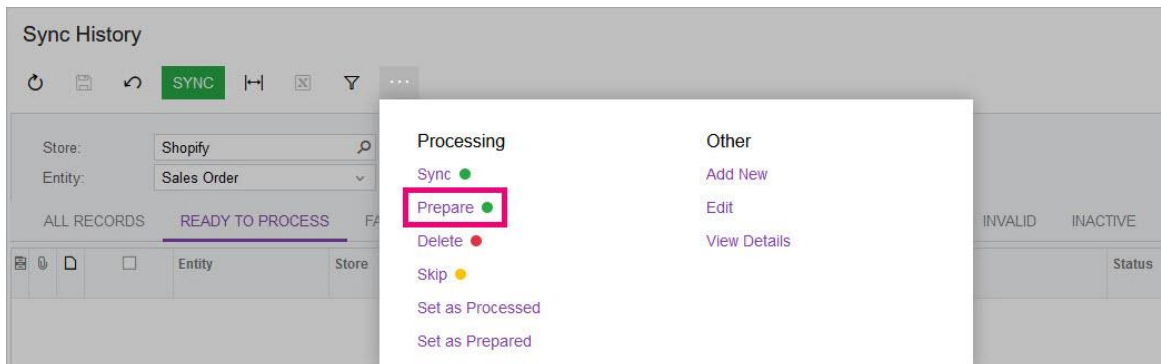


Figure: The new Prepare command on the More menu

Changes to the Connection to a BigCommerce Store

When a user was first establishing a connection to a BigCommerce store on the BigCommerce Stores (BC201000) form, they needed to specify WebDAV credentials so that files could be exported from MYOB Advanced to the BigCommerce store over the WebDAV protocol. However, file transfer over WebDAV is required only for one entity: *Product Image*.

To simplify the process of establishing the store connection, in MYOB Advanced 2023.1, the **WebDAV Path**, **WebDAV Username**, and **WebDAV Password** boxes on the **Connection Settings** tab of the BigCommerce Stores (BC201000) form (which are shown in the following screenshot) are required only if a user activates the *Product Image* entity on the **Entity Settings** tab of this form.

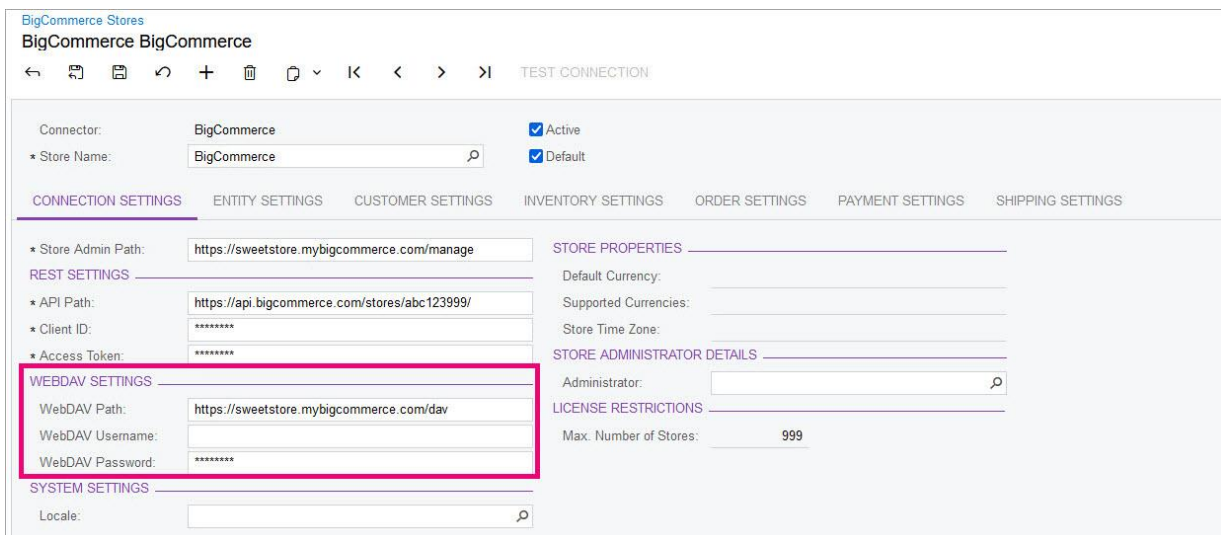


Figure: WebDAV settings

Improvements to Payment Method Mapping Settings

In MYOB Advanced 2023.1, a number of changes have been made on the BigCommerce Stores (BC201000) and Shopify Stores (BC201010) forms to simplify the management of payment method and shipping option mappings.

On the BigCommerce Stores form, the **Shipping Option Mapping** table has been moved from the **Order Settings** tab to the new Shipping Settings tab.

On the **Payment Settings** tab of the BigCommerce Stores and Shopify Stores forms, a user can click the link in any of the following columns (which are shown in the following screenshot) to open the noted record in a pop-up window:

- **ERP Payment Method** to open the payment method on the Payment Methods (CA204000) form
- **Cash Account** to open the cash account on the Cash Accounts (CA202000) form

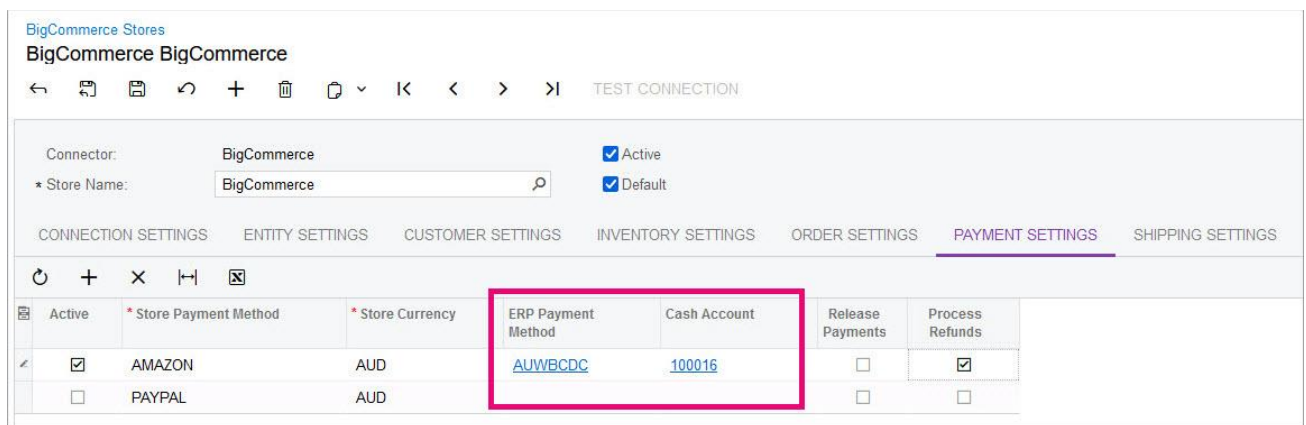


Figure: Links on the Payment Settings tab

Similarly, on the **Shipping Settings** tab of the BigCommerce Stores and Shopify Stores forms, a user can click the link in any of the following columns (which are shown in the following screenshot) to open the noted record in a pop-up window:

- **Ship Via** to open the Ship Via code on the Ship via Codes (CS207500) form
- **Shipping Zone** to open the shipping zone on the Shipping Zones (CS207510) form
- **Shipping Terms** to open the shipping terms on the Shipping Terms (CS208000) form

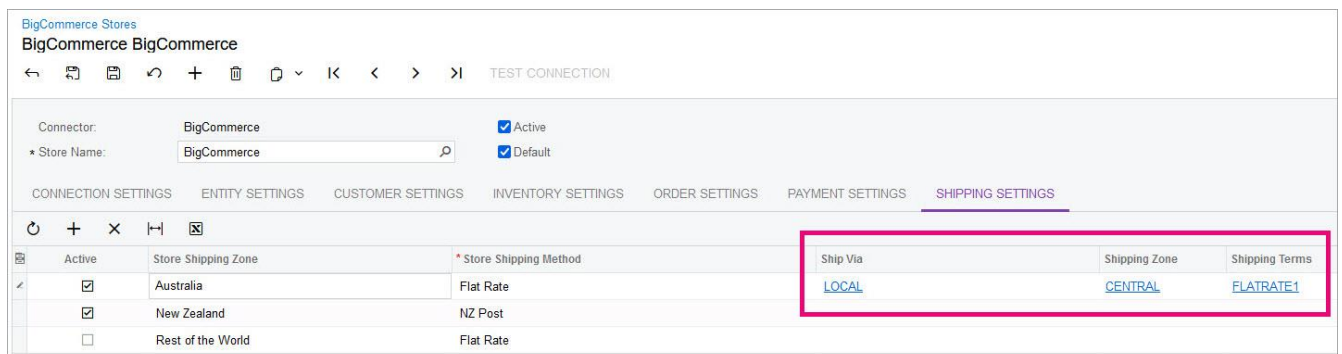


Figure: Links on the Shipping Settings tab

Display of the Currencies Supported by the BigCommerce Store

On the BigCommerce Stores (BC201000) form, a new field, **Supported Currencies**, has been added to the **Store Properties** section of the **Connection Settings** tab. (See the following screenshot.) When a connection to a BigCommerce store is established, the new field is populated with all currencies that have been set up in the control panel of the BigCommerce store.

The screenshot shows the 'BigCommerce Stores' configuration form. The 'Connection Settings' tab is active. Under the 'STORE PROPERTIES' section, the 'Supported Currencies' field is highlighted with a pink box and contains the value 'AUD'. Other visible fields include 'Store Admin Path', 'API Path', 'Client ID', 'Access Token', 'WebDAV Path', 'WebDAV Username', 'WebDAV Password', 'System Settings', 'Default Currency', 'Store Time Zone', 'Store Administrator Details', and 'License Restrictions'.

Figure: The list of currencies supported by the BigCommerce store

Changes to the Export of Non-Stock Items to Shopify

In previous versions of MYOB Advanced, when a non-stock item was exported to a Shopify store, it was marked in the admin area of the Shopify store as a nonphysical product. (That is, the **This is a physical product** checkbox was cleared in the **Shipping** section of the product management page.) When an order with this item was created in the Shopify store, it did not contain shipping information. After the order was imported to MYOB Advanced and a shipment was created, the shipment could not be exported to the Shopify store.

Starting in MYOB Advanced 2023.1, if a non-stock item is marked as not requiring shipping, it is exported to the Shopify store as a nonphysical item. Shipping is not required for the non-stock item when the **Require Shipment** checkbox is cleared on the **General** tab of the Non-Stock Items (IN202000) form. If a non-stock item is marked as requiring shipping, it is exported to the Shopify store as a physical item. (In this case, the **Require Shipment** checkbox is selected.)

Limitation on Simultaneous Processing of Records

In previous versions of MYOB Advanced, when a user was synchronizing a large amount of data (for example, if the user's system contained many records or if they were resynchronizing historical data), the process could consume an excessive amount of memory and would sometimes stop before the synchronisation was completed. To address this issue, in MYOB Advanced 2023.1, a new field, **Processing Limit (Rows)**, has been added to the Summary area of the Process Data (BC501500) form.

By using this field, a user can limit the number of rows that the system processes when the user clicks **Process All** on the form toolbar. By default, the system processes all rows—that is, *No Limit* is selected in

the **Processing Limit (Rows)** field. A user can limit the processing to *1,000*, *2,000*, *5,000*, or *10,000* rows by selecting the appropriate value in this field. (See the following screenshot.)

The screenshot shows the 'Process Data' form. At the top, there are several icons and a green 'PROCESS' button. Below that, there are fields for 'Store' (set to 'Shopify') and 'Entity'. The 'Processing Limit (Rows)' dropdown menu is open, showing options: 'No Limit', '1000', '2500', '5000', and '10000'. The 'No Limit' option is currently selected. Below the form, there is a table with columns for 'Store', 'Entity', 'ERP ID', and 'External Description'.

Figure: The processing limits on the Process Data form

Additional Information About Synchronisation Records with the Deleted Status

On the Process Data (BC501500) and Sync History (BC301000) forms, when a synchronisation record is assigned the *Deleted* status, now the **Last Error** column shows the reason for the status assignment, which can be any of the following:

- The record does not exist in the ERP system.
- The record does not exist in the external system.
- The record does not exist in the ERP system or the external system.

For the *Product Availability* entity, the message includes information about the product—that is, if it has not been found, was excluded from synchronisation, or was configured without tracking its available quantity.

Filtering Data During the Merging of Duplicate Records

In previous versions of MYOB Advanced, when customers and sales orders were synchronised between MYOB Advanced and an external system, during the merging of duplicate records, the system did not take into account the filtering conditions that had been set up on the Entities (BC202000) form. These duplicate records include records that have the same key field or fields, such as customers that have the same email address.

Starting in MYOB Advanced 2023.1, filtering conditions are applied before the duplicate records are merged.

Suppose that a filtering condition has been created on the Entities form to exclude customers of a particular customer class from synchronisation, and then a customer with the same email address as one of the customers of that excluded class is created in the external system. During the customer import, the customers with the same email address will not be merged because the system searches for duplicates only among the records within the scope of synchronisation.

Restricted Export of Shipments to BigCommerce for In-Store Pickup Orders

In previous versions of MYOB Advanced, when a customer placed an order in a BigCommerce store and selected the *Pickup In Store* shipping option, the shipment created in MYOB Advanced after order import could be exported to BigCommerce upon synchronisation. This caused BigCommerce to notify the

customer by email about the order shipment, which was confusing because no actual shipping was needed and the customer did not expect a shipment for the order.

Starting in MYOB Advanced 2023.1, users can set up shipments to not be exported to a BigCommerce store for in- store pickup orders. To do this, a user needs to create a Ship Via code with the **Common Carrier** checkbox cleared on the Ship via Codes (CS207500) form and map it to the *Pickup In Store* shipping method on the **Shipping Settings** tab of the BigCommerce Stores (BC201000) form. When the mapping is active, the system shows a warning that the shipments will not be exported to the BigCommerce store (see the following screenshot).

The screenshot shows the 'Shipping Settings' tab for a BigCommerce store named 'SweetStore - BC'. The 'Shipping Settings' section is active, displaying a table of shipping methods and their configurations. A warning message is shown over the 'Pickup in Store' method, stating: 'This ship via code is used for pickup orders. Shipments with this code will not be exported to the external system. For orders that require shipping, use a ship via code for which the Common Carrier check box is selected on the Ship via Codes (CS207500) form.'

Active	Store Shipping Zone	* Store Shipping Method	Ship Via	Shipping Zone	Shipping Terms
<input checked="" type="checkbox"/>	United States	Flat Rate	SWEETSHIP		FLATRATE1
<input checked="" type="checkbox"/>	United States	Pickup in Store	LOCAL		
<input type="checkbox"/>	United States	USPS	USPSFIRST	CENTRAL	
<input type="checkbox"/>	United States	Flat Rate			
<input type="checkbox"/>	United States	Free Shipping			
<input type="checkbox"/>	United States	Pickup in Store			
<input type="checkbox"/>	Rest Of the World	UPS			
<input type="checkbox"/>	Rest Of the World	USPS			
<input type="checkbox"/>	United States	Free Shipping			
<input type="checkbox"/>	United States	None			
<input type="checkbox"/>	United States	Ship by			
<input type="checkbox"/>	United States	UPS			

Figure: The warning message on the Shipping Settings tab

For a shipment that has been exported to a BigCommerce store, if a user clears the **Ship Via** field or selects a Ship Via code with the **Common Carrier** checkbox cleared (in the code's settings) on the **Shipping** tab of the Shipments (SO302000) or Sales Orders (SO301000) form, the shipment will be deleted from the BigCommerce store when it is resynchronised. However, if the **Ship Via** field is empty and the shipment has a tracking number, the shipment will be exported to the BigCommerce store.

If the shipment is assigned the *Confirmed* status and the sales order has a status other than *Back Order* in MYOB Advanced, upon synchronisation, the in-store pickup order is assigned the *Completed* status in the BigCommerce store.

CRM

Address Settings for Duplicate Validation

In MYOB Advanced 2023.1, users can use the address settings of leads, contacts, and business accounts in the duplicate validation process to improve the quality of information and eliminate the creation of duplicate records.

Using the Address Settings for Duplicate Validation

In previous versions of MYOB Advanced, pairs of record types were checked for duplicates by using a set of matching fields that did not include the address settings of the entity. Starting in MYOB Advanced 2023.1, a user can select the following address settings as matching fields for each pair of record types on the Duplicate Validation (CR103000) form (see the following screenshot):

- City
- Postal Code
- State
- Country

The screenshot shows the 'Duplicate Validation' form with the 'Rules of Comparison' section. The 'Validation Score Threshold' is set to 5.00, and the 'Validate on Entry' checkbox is checked. The table below lists the matching fields and their settings:

Matching Field	Score Weight	Transformation Rule	Create on Entry
Email	1.5000	None	Allow
First Name	1.0000	None	Allow
Phone 1	0.5000	None	Allow
Last Name	2.0000	None	Allow
Account Name	1.5000	Split Words	Allow
City	1.0000	None	Allow
Country	1.0000	None	Allow
State	1.0000	None	Allow
Postal Code	1.0000	None	Allow
Web	1.0000	None	Allow

Figure: Address settings for duplicate validation

A score weight defined for any of the matching fields with address settings is also included in the grams calculation. For details about grams calculation, see Duplicate Validation: Calculation of Validation Scores.

For each pair of record types on the Duplicate Validation form, the system compares the address settings that a user entered on the data entry forms, to search for the duplicate values in the matching fields of the records as follows:

- For a **Lead to Lead** pair of record types, the system compares the address settings entered by a user on the **Contact Info** tab of the Leads (CR301000) form for the compared records.
- For a **Lead to Contact** pair of record types, the system compares the address settings entered by a user on the **Contact Info** tab of the Leads form with the same address settings on the **Details** tab of the Contacts (CR302000) form.
- For a **Lead to Account** pair of record types, the system compares the address settings entered by a user on the **Contact Info** tab of the Leads form with the same address settings on the **General** tab of the Business Accounts (CR303000) form.
- For a **Contact to Contact** pair of record types, the system compares the address settings entered by a user on the **Details** tab of the Contacts form for the compared records.
- For a **Contact to Lead** pair of record types, the system compares the address settings entered by a user on the **Details** tab of the Contacts form with the same address settings on the **Contact Info** tab of the Leads form.
- For a **Contact to Account** pair of record types, the system compares the address settings entered by a user on the **Details** tab of the Contacts form with the same address settings on the **General** tab of the Business Accounts form.
- For a **Account to Account** pair of record types, the system compares the address settings entered by a user on the **General** tab of the Business Accounts form for the compared records.

Delegation and Reassignment of Approvals

Starting in MYOB Advanced 2023.1, users can reassign requests for their approval or delegate approval requests to other users. This means that an organisation can keep its approval flow running smoothly even if the original approver assigned through an approval map is temporarily unavailable. Also, users can create additional approval requests as exceptions to the normal approval flow on a temporary basis—that is, without administrators having to update existing approval maps.

The changes that support the ability to reassign or delegate approvals are described in the sections below.

Changes to the Approval Maps Form

On the Approval Maps (EP205015) form, on the **Rule Actions** tab of the right pane, the **Allow Reassignment of Approvals** checkbox has been added, as shown in the following screenshot. If this checkbox is selected for the rule selected in the **Steps** pane, the approver that the system assigned based on this rule can be changed. If this checkbox is cleared (which is its default state), the system will not allow a user to change the approver that has been assigned in accordance with the rule.

The screenshot displays the 'Approval Maps' form for 'Sales Quote Approval - Sales Quotes'. The form is divided into several sections:

- Map:** Sales Quote Approval
- Entity Type:** Sales Quotes
- * Name:** Sales Quote Approval
- Steps:** A tree view showing 'Large Discount' and 'Over \$10K - manager approval'.
- * Description:** Over \$10K - manager approval
- Active:**
- CONDITIONS** and **RULE ACTIONS** tabs are visible, with 'RULE ACTIONS' selected.
- APPROVAL SETTINGS:**
 - Approver:** Employee
 - Employee:** Jason Mendenhall
 - Workgroup:** Sales
 - Allow Reassignment of Approvals:** (highlighted with a red box)
 - * Decision Wait Time:** 000 d 00 h 00 m
 - On Approval:** Complete Step
- REASON SETTINGS:**
 - Reason for Approval:** Is Not Prompted
 - Reason for Rejection:** Is Not Prompted

Figure: The new checkbox on the Rule Actions tab

The form subtitle now consists of the approval map name and the selected entity type. Also, the **Description** field and the **Active** checkbox have been moved from the **Conditions** tab to the area above the tabs, as shown in the following screenshot.

Approval Maps
Sales Quote Approval - Sales Quotes

Map: Sales Quote Approval Entity Type: Sales Quotes
* Name: Sales Quote Approval

Steps
ADD STEP + ↑ ↓ ×

Large Discount
Over \$10K - manager approval

* Description: Over \$10K - manager approval
 Active

CONDITIONS RULE ACTIONS

Active	Bracket	* Entity	* Field Name	* Condition	Value
<input checked="" type="checkbox"/>	-	Sales Quote	Total	Greater Than	10000

Figure: Changes to the Approval Maps form

Changes to the Approvals Form

The following changes have been made to the form toolbar of the Approvals (EP503010) form:

- The **Schedules** menu has been removed.
- The **More** menu has been added.
- The **Reject All** command has been moved under the **Approval** category of the **More** menu.
- A new command, **Reassign**, has been added to the **More** menu. Before clicking this command, a user selects all records to be reassigned in the table by selecting the unlabelled checkboxes for them. If the user then clicks this command, the **Reassign Approval** dialog field, which is shown in the following screenshot, opens.

Approvals

APPROVE APPROVE ALL REJECT

ALL RECORDS MY APPROVALS MY WORKGROUP'S APPROVALS REASSIGNED

Type	Reference Nbr.	Owner	Document Date	Business Account	Account Name
Project Quote	PQ000014	Maxwell Baker	2/2/2023	AACUSTOMER	Alta Ace
Project Quote	PQ000011	Maxwell Baker	1/4/2023	AACUSTOMER	Alta Ace
Sales Quote	Q000013				Chocolate By Design
Purchase O...	PO001319				Tolivers Carpets & Tiles
ECR Item	ECR000011				Maxwell Baker
ECR Item	ECR000012				Maxwell Baker
Purchase O...	PO001321				American Refrigeration
ECO Item	ECO000003		8/12/2020	EP00000004	Joseph Becher
ECO Item	ECO000004		8/12/2020	EP00000002	Maxwell Baker
ECR Item	ECR000008		8/12/2020	EP00000043	Ian Pick

Reassign Approval

* New Approver:

Ignore Approver's Delegations

REASSIGN CANCEL

Figure: Reassign Approval dialog field

By using the **Reassign Approval** dialog field, the user can specify a new approver to reassign the selected records to this approver if the reassignment of approvals is allowed in the related rule of the approval map on the Approval Maps (EP205015) form. If the **Ignore Approver's Delegations** checkbox is selected in the dialog field, the system will assign the selected approval requests to the selected new

approver but not to their delegate, even if the new approver is unavailable and has a delegation set up for the current date. (The next section describes how delegations are configured for an employee or a user.)

If the **Ignore Approver's Delegations** checkbox is cleared and if the new approver is not available and has a delegation set up for the current date, the system will reassign the selected approval requests to the delegate if the delegate is available. If the delegate is unavailable, the system will reassign the requests to the delegate of the delegate. The system will continue the search in this way until it assigns an approver that has no active delegations set up for the current date or it detects a loop in the chain of delegations (in which case an error message will prompt the user to specify a different approver).

Also, the **Reassigned** filter tab has been added to the form. This filter tab displays the records that were originally assigned for approval to the currently signed-in user but are now assigned to a different approver.

Note: To be able to view and approve records on this form, the new approver must have sufficient access rights. With some types of records, such as expense claims, although the new approver may be allowed to approve records, they may not be able to view the details of these records on the corresponding entry forms because of the specifics of the record visibility settings that are effective on these forms.

The Delegates Tab on the Employees and User Profile Forms

On the **Delegates** tab of the Employees (EP203000) form, the delegates of the selected employee are listed. This tab, which is shown in the screenshot below, has been reworked as follows:

- The **Delegation Of** column has been added. The option in this column indicates whether the delegation rule applies to approvals or expense receipts and expense claims. (In previous versions, the tab listed only delegates for expense receipts and expense claims, so the column was not needed.)
- In the new **Delegated To** column, the employee name of the appointed delegate is displayed. In previous versions, the tab had the **Delegate** and **Employee Name** columns, which showed the employee ID and employee name, respectively, of the delegate.
- The new **Active** checkbox indicates whether the delegation rule in the row is active and can be used by the system for determining the appropriate delegate for the employee.
- The new **Starts On** date is the starting date of the delegation period during which approval requests can be reassigned to the specified delegate.
- The new **Expires On** date is the date after which the delegation rule is no longer applicable and previously reassigned approval requests that have not yet been processed are assigned back to the employee.
- The **Starts On** and **Expires On** dates are editable only for the rows that have the *Approvals* option selected in the **Delegation Of** column.

Employees
EP00000001 - Hu Ming, Mrs. NOTES FILES TOOLS ▾

← ↻ 📄 ↶ + 🗑️ ▾ 🗑️ ⏪ < > ⏩ ⋮

* Employee ID: Status:

Employee Name:

GENERAL HISTORY FINANCIAL ATTRIBUTES ACTIVITIES MAILING & PRINTING WORKGROUPS **DELEGATES**

🔄 + × ⏪ ⏩

Delegation Of	*Delegated To	Active	Starts On	Expires On
✓ Approvals	Albarn James, Mr.	<input checked="" type="checkbox"/>	5/07/2023	5/12/2023 ▾
Expense Receipts and Ex...	Andrews Michael, Mr.	<input checked="" type="checkbox"/>		

Figure: The Delegates tab of the Employees form

The **Delegates** tab has also been added to the User Profile (SM203010) form; it has the same columns as the tab on the Employees form does. The data displayed on this tab belongs to the employee associated with the currently signed-in user.

Changes to the Approvals Tab of Multiple Forms

The **Originally Assigned To** column has been added to the table on the **Approvals** tab, which is available on the following document entry forms that support approvals:

- Bills and Adjustments (AP301000)
- Cash Sales (AR304000)
- Cash Transactions (CA304000)
- Change Orders (PM308000)
- Change Requests (PM308500)
- Cheques and Payments (AP302000)
- Cost Projection (PM305000)
- Daily Field Report (PJ304000)
- Employee Time Card (EP305000)
- Engineering Change Order (AM215000)
- Engineering Change Request (AM210000)
- Equipment Time Card (EP308000)
- Expense Claim (EP301000)
- Expense Receipt (EP301020)
- Invoices and Memos (AR301000)
- Journal Transactions (GL301000)
- Payments and Applications (AR302000)
- Pro Forma Invoices (PM307000)
- Progress Worksheets (PM303000)
- Project Quotes (PM304500)
- Projects (PM301000)
- Purchase Orders (PO301000)
- Cash Purchases (AP304000)
- Requests (RQ301000)
- Requisitions (RQ302000)
- Sales Orders (SO301000)

- Sales Quotes (CR304500)
- Subcontracts (SC301000)

The **Originally Assigned To** column is hidden by default, but the Column Configuration dialog field can be used to make it visible.

Also, the **Reassign** command has been added to the More menu of the forms that are listed above, as illustrated in the following screenshot for the Change Orders form. By using this command, an authorised approver of a particular document can reassign this document to a different user for approval.

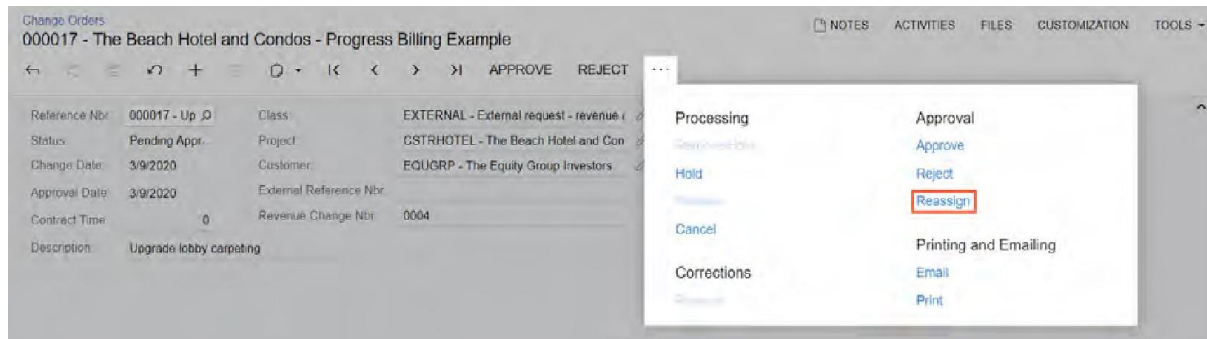


Figure: The More menu of the Change Orders form

Reassign Delegated Activities Form

A new processing form, Reassign Delegated Activities (EP503020), has been added to the system.

This form is available only if the *Approval Workflow* feature is enabled on the Enable/Disable Features (CS100000) form. By using the Reassign Delegated Activities form, which is shown in the following screenshot, an administrative user can reassign existing approval requests to delegates or return them to the original approver if the relevant delegation rules are no longer effective.

Reassign Delegated Activities

PROCESS PROCESS ALL

Delegation Of	Original Assignee	Current Assignee	Delegated To	Active	Starts On	Expires On	Document Type	Reference Nbr.	Requested Time	Description
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	ECR Item	ECR000011	1/12/2021 2:4	Assembled widget - backflush labor
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	ECR Item	ECR000012	1/12/2021 2:4	Stainless Cap Hob
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	ECO Item	ECO000003	1/12/2021 2:4	Build Keung Model 450
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	ECO Item	ECO000004	1/12/2021 2:4	Custom Pipe Cover
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	ECR Item	ECR000009	10/5/2021 9:2	Assembled widget - backflush labor
Approvals	Maxwell Baker	Maxwell Baker	Anna Johnson	<input checked="" type="checkbox"/>	1/17/2023	2/14/2023	Change Order	000017	1/17/2023 8:3	Upgrade lobby carpeting

Figure: Reassign Delegated Activities form

By using the **Process** or **Process All** buttons on the form toolbar, the administrative user can run the reassignment of only selected records or of all listed records, respectively. Each involved record is processed as follows:

- If the current date is within the delegation period determined by the dates in the **Starts On** and **Expires On** columns, the record is reassigned to the employee specified in the **Delegated To** column.
- If the current date is outside the delegation period, the record is reassigned to the employee specified in the **Original Assignee** column.

The reassignment of delegated activities may be automated through the use of automation schedules. A predefined automation schedule, *Reassign delegated activities*, is available for the form; this schedule is set up to run hourly.

In the out-of-the-field system, the link to this form can be found in the **System Management** workspace under the **System Processes** category, as shown in the following screenshot.

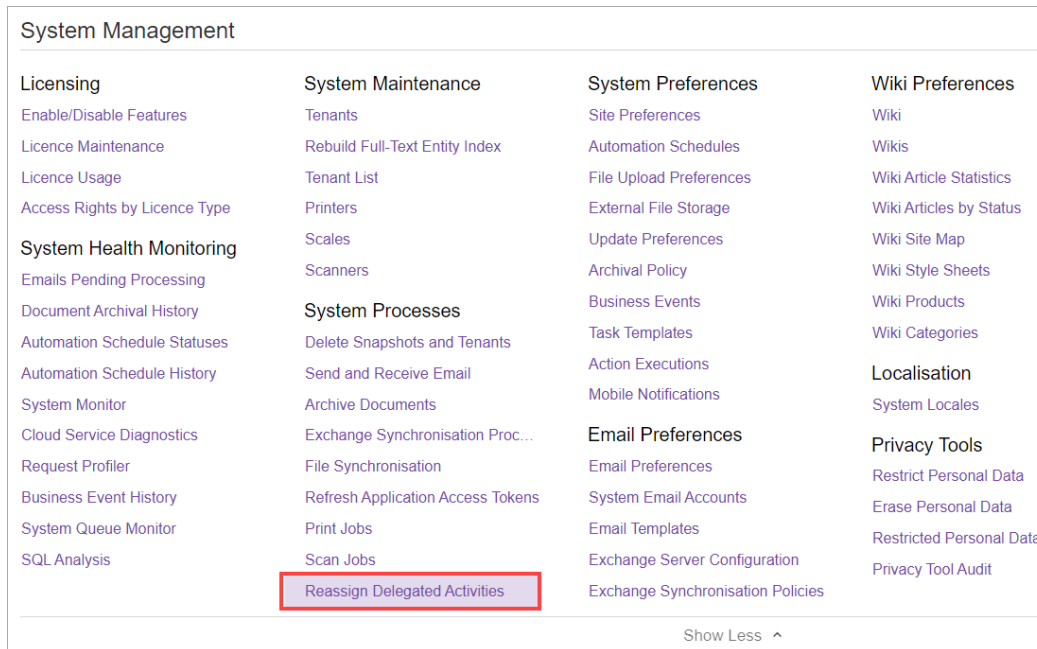


Figure: System Management workspace

Email Notifications

Only original approvers will receive email notifications about records that are pending their approval if such notifications are set up in the system. Email notifications for new approvers can be set up through the use of business events. For details, see Business Events: Email Notifications.

Other Changes

On the Employees (EP203000) form, the tabs have been renamed as follows.

Old Title	New Title
General Info	General
Employment History	History
Financial Settings	Financial
Mailings	Mailing & Printing

Old Title	New Title
Company Tree Info	Workgroups
User Info	User

Enhancements to CRM Tasks

MYOB Advanced 2023.1 introduces a new layout of the Task (CR306020) form to make data entry easier. Also, a new *Tasks (EP4040PL)* list of records has been added, which gives users the ability to view the existing tasks and to navigate between tasks more easily.

New Layout of the Task Form

In MYOB Advanced 2023.1, the Task (CR306020) form has a new layout (see the following screenshot). The form's subtitle (see Item 1 in the following screenshot) contains the description copied from the **Summary** field of the **Details** tab. Also, many UI elements on the **Details** tab have been rearranged or renamed to improve usability. The **Related Activities** and **Related Tasks** tabs have been merged to the **Activities** tab (Item 2). For a detailed description of the **Activities** tab, see the following section.

Figure: Updates to the Task form

The form toolbar has been enhanced as follows:

- The standard **Add New Record** button (see Item 3 in the previous screenshot) has been added.
- The standard **Clipboard** button (Item 4), which a user clicks to open the **Clipboard** menu, has been added.

When a user creates a new task by using the **Clipboard** button, the system copies to the new task the value or state of the following elements of the **Details** tab of the task the user is viewing:

- Summary
- Owner
- Workgroup
- Internal
- Related Entity Type
- Related Entity
- Project
- Project Task
- Cost Code
- Priority
- Category
- Service
- Task description area

Note: If the user role does not have the rights to access the related entity in the selected task, the system displays the following error message next to the **Related Entity** field of a new task: *You have insufficient rights to access the object.*

- The **Complete & Follow-Up** button has been renamed to **Complete & Follow Up** (Item 5). The follow-up task created by using the button has the *Not Started* status and contains the same details as the completed task.
- The **Complete**, **Complete & Follow Up**, and **Cancel** buttons are available on the form toolbar depending on the task's status as follows:
 - The *Open* or *Processing* status: All buttons are enabled.
 - The *Draft* status: Only the **Cancel** button is enabled.
 - The *Completed* or *Canceled* status: None of these buttons are enabled.
- The **Remind at (Date)** field has been renamed to **Remind At** (Item 6). The field is available and required if the **Reminder** checkbox is selected.
- The **Parent** field has been renamed to **Parent Activity**. When a user clicks the **Complete & Follow Up** button, the system inserts the link to the parent task into the field of the follow-up task. When a user clicks this link in the follow-up task, the system opens the parent task on the Task form.

The Related Tasks, Emails, and Activities of the Task

The **Activities** tab of the Task (CR306020) form contains the information about the tasks, emails, and activities related to the current task (as shown in the following screenshot).

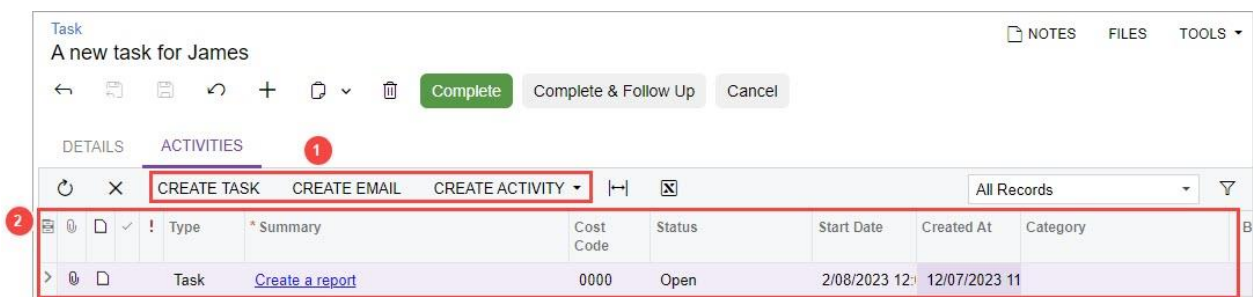


Figure: The Activities tab

The table toolbar of the tab contains the following buttons (see Item 1 in the previous screenshot):

- The **Create Task** button: Opens the current form in a pop-up window so that a user can create a new task related to the current task. The created task will be displayed in the table of the tab.
- The **Create Email** button: Opens the Email Activity (CR306015) form in a pop-up window when a user can create a new email related to the current task. The created email will be displayed in the table of the tab.
- The **Create Activity** button: Opens the Activity (CR306010) form of the selected type in a pop-up window. On this form, the user can create an activity related to the current task. The created activity will be displayed in the table of the tab.

The table of the tab (Item 2) contains the summary settings of the tasks, emails, and activities related to the current task.

New Tasks (EP4040PL) List of Records

Starting in MYOB Advanced 2023.1, the new *Tasks (EP4040PL)* list of records, shown in the following screenshot, has been added.

Summary	Status	Start Date	Due Date	Category	Related Entity	Contact	Phone 1	Email	Completed At	Owner
Create a report	Open	2/08/2023	4/08/2023	Green Category	CUST00...					Albarn James, Mr.
Pivot report of weekly activities	Open	2/08/2023	3/08/2023		CUST00...					Andrews Michael, Mr.
Prepare an offer on juicers	Completed	3/07/2023	4/07/2023		000017, ...				4/07/2023 4:1	Belcher Joseph, Mr.
A new task for James	Open									Albarn James, Mr.

Figure: The new *Tasks (EP4040PL)* list of records

In an out-of-the-field instance of MYOB Advanced, a user can open this list of records by clicking the *Task* link in the **Time and Expenses** workspace under the **Tasks** category. To create a new task on the Task (CR306020) form, the user instead clicks the **New** button right of the *Tasks* link.

The *Tasks (EP4040PL)* list of records contains the following tabs (Item 1 in the previous screenshot), each of which displays a list of records with the described tasks:

- **All Records** tab: All tasks created in the system that are available for review, based on the role or roles assigned to the user account of the signed-in user.
- **My Tasks** tab: The tasks to which the user has been assigned as the owner.
- **My Workgroup Tasks** tab: The tasks assigned to the users in the workgroup the signed-in user belongs to and any workgroups in the company tree that are positioned on levels lower than this workgroup but in the same node.
- **Due Today and Overdue Tasks** tab: The tasks for which the due date is the current date or an earlier date (that is, overdue tasks) with the *Open* or *Processing* status.
- **Open Tasks** tab: The active tasks with the *Draft*, *Open*, or *Processing* status.

The table on each tab (Item 2) contains the following columns, which hold summary information about the tasks included in the list of records:

- Summary
- Status
- Start Date

- Due Date
- Category
- Related Entity
- Contact (of the related entity)
- Phone 1 (of the related contact)
- Email (of the related contact)
- Completed At
- Owner

In the *Tasks* list of records, a user can easily see if a task with the *Open* or *Processing* status is overdue. A task is overdue if the **Due Date** of the task is earlier than the current date. The due date of overdue tasks is indicated in red type (Item 3).

Also, in the **Category** column of the *Tasks* form (Item 4), a task with the selected category is highlighted in the colour that has been associated with this category on the Event and Task Categories (EP204040) form.

Also, a side panel has been added to the list of records (Item 5). By clicking a task in the list and opening the side panel, a user can quickly find, view, and modify the information related to the task in the selected row (see the following screenshot).

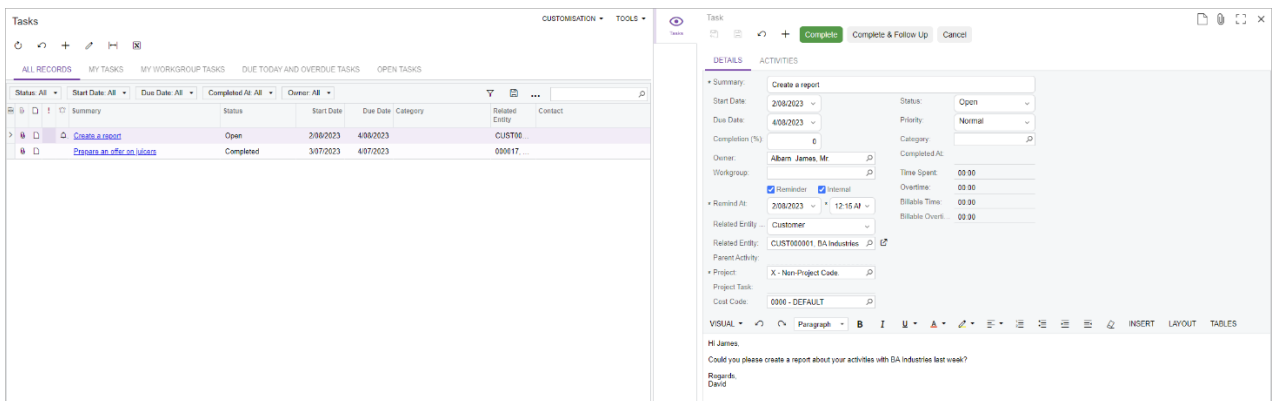


Figure: The side panel for the list of tasks

The obsolete *Tasks* (CR404000) form has been deleted from the system.

Task-Related Enhancements in the Mobile App

In MYOB Advanced 2023.1, the usability of the *Task* screen in the MYOB Advanced mobile app has been improved. On the **Summary** tab of the screen, some fields have been rearranged as follows (see the following screenshot).

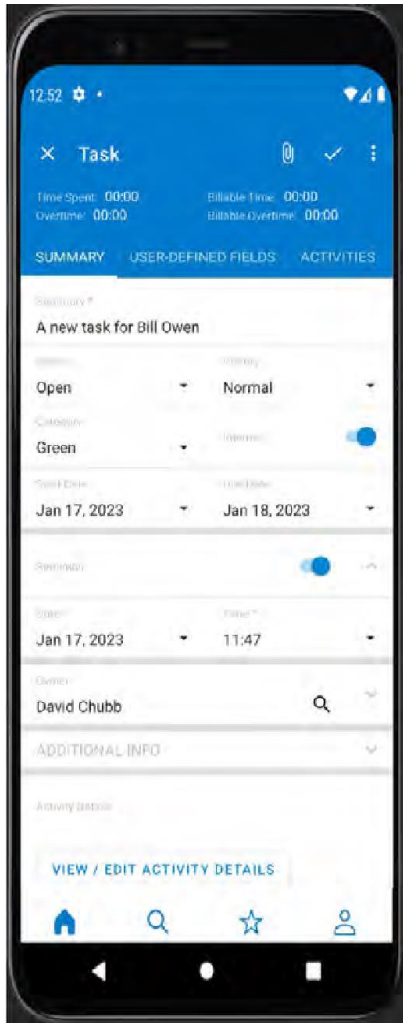


Figure: The Summary tab of the Task screen

On the **Summary** tab, the **Additional Info** group of fields has been added. The group includes the following new and existing fields (see the screenshot below):

- Related Entity Type (read-only)
- Related Entity (read-only)
- Parent Activity
- Service
- Project
- Project Task
- Cost Code
- Completion (%)
- Completed At

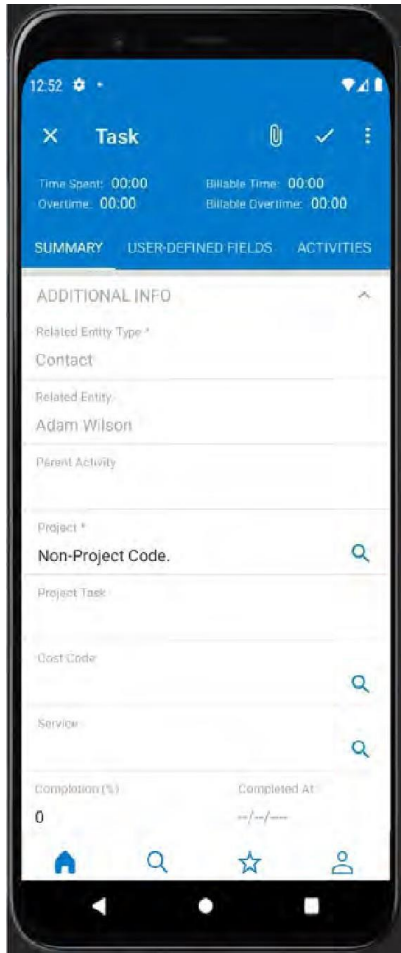


Figure: The Additional Info group of fields on the Task screen

Near the top of the *Task* screen, the following time tracking fields have been added (see the following screenshot):

- Time Spent
- Overtime
- Billable Time
- Billable Overtime

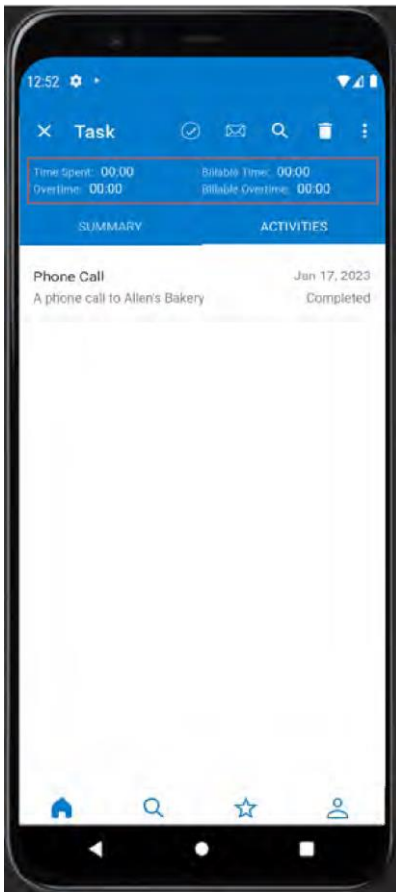


Figure: The time tracking fields on the Task screen

The **Related** tab has been renamed to **Activities**. On the **Activities** tab, the Activities container of the screen toolbar contains commands the user can tap to do the following (see the following screenshot):

- Create a new task
- Create a new email
- Create a new activity

When a user taps this icon, a menu with the commands opens and the user can select the type of activity to be created. The user can use this menu also to add the task to the **Favourites** workspace.

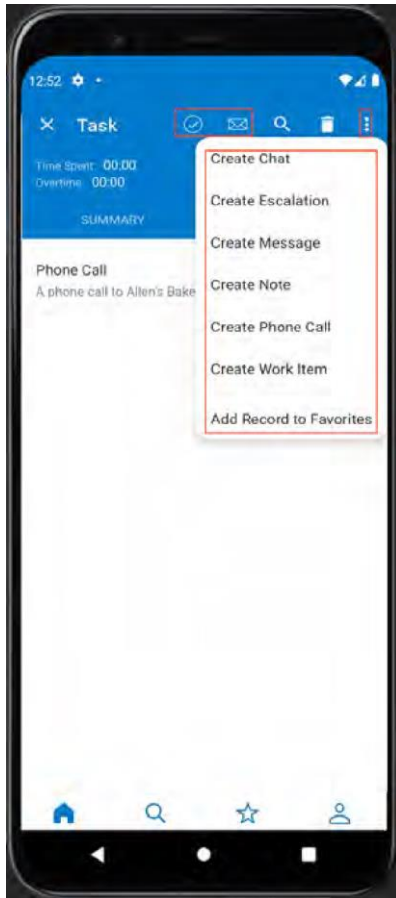


Figure: The specific commands on the screen toolbar of the Activities tab

MYOB Advanced 2023.1 also introduces the new *Tasks* screen, which lists tasks grouped on the following tabs: **All**, **My Tasks**, **My Workgroup Tasks**, **Due Today and Overdue Tasks**, and **Open Tasks**.

Additional Information

For details about the task management, see *Emails and Activities: Tasks and Task Management*.

Ability to Extend a Business Account as a Customer During Sales Order Creation

In MYOB Advanced 2023.1, while creating a sales order from an opportunity or sales quote for a prospect, a user can extend the business account of the prospect to be a customer.

Extension of a Business Account as a Customer

A prospective customer is defined as a business account on the Business Accounts (CR303000) form. That is, the account type (on the **CRM Info** tab) is *Business Account*. If the account is later extended to be a customer, the type is changed to *Customer*.

In previous versions of MYOB Advanced, when an opportunity or a sales quote is ready to be converted to a sales order, for an opportunity or sales order with an account of the *Business Account* type, a user could not complete the creation of a sales order while remaining on the Opportunities (CR304000) or Sales Quotes (CR304500) form. To complete the order creation, the user had to open the account on the Business Accounts form, extend the account as a customer, and then start the process of sales order creation again.

Starting in MYOB Advanced 2023.1, a user can extend a business account to be a customer while creating a sales order on the Opportunities or Sales Quotes form. This functionality is described further in this topic.

Enhancements to the Create Sales Order Dialog Field for Business Accounts

On the Opportunities (CR304000) and Sales Quotes (CR304500) forms, if the business account that is selected in the Summary area of the form has the *Business Account* type, when a user clicks the **Create Sales Order** or **Convert to Order** command on the More menu, the **Create Sales Order** dialog field opens (see the following screenshot).

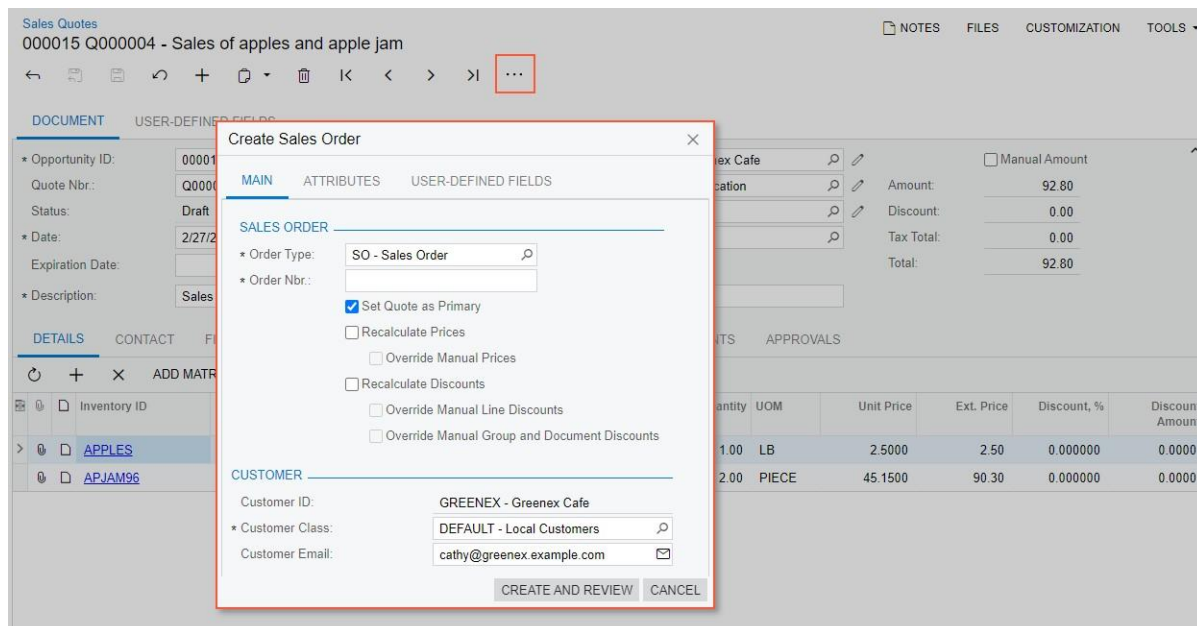


Figure: The Create Sales Order dialog field for a business account

The enhanced dialog field contains the following elements, some of which are new and others are modified:

- The **Main** tab: A tab that holds the settings for the creation of a sales order and the extension of the business account to be a customer. This tab has some new elements, as described below.
- The **Attributes** tab: A tab with all the required attributes defined for the customer on the Customer Classes (AR201000) form. The user has to select the value for the attributes. This tab is new in the dialog field.
- The **User-Defined Fields** tab: A tab with all required user-defined fields that are defined for the customer on the Customers (AR303000) form. The user has to specify the values of all the user-defined fields. This tab is new in the dialog field.
- The **Sales Order** section: A section that contains the settings of the sales order that will be created. The elements of the section have some enhancements.
- The **Order Type** field: The order type of the sales order to be created. In MYOB Advanced 2023.1, the lookup table has been filtered to display only the order types for which one of the following automation behaviours has been selected on the Order Types (SO201000) form:
 - Sales Order
 - Invoice
 - Blanket Order
 - Quote
- The **Set Quote as Primary** checkbox: A checkbox that starting in MYOB Advanced 2023.1 is shown in the dialog field and is selected by default only if the sales order is being created from a non-primary sales quote on the Sales Quotes form.
- The **Customer** section: A section that contains the settings of the customer that will be created when the business account is extended to be a customer. The section and its elements are new.
- The **Customer ID** field: The name of the customer, which is the same as the name of the business account. The field is unavailable for editing.
- The **Customer Class** field: The customer class that the customer will belongs to. The list of classes available in this field is restricted based on the roles assigned to the current user. By default, the system inserts the default customer class that has been specified on the Accounts Receivable Preferences (AR101000) form (if any); otherwise, the field is empty. The customer class is a required setting.
- The **Customer Email** field: The email address of the business account, which is displayed if the settings of the selected customer class require that it be specified. The field is hidden by default.
- The **Create and Review** button: A button that the user can click to cause the system to perform the following actions:
 - Validating that the user has filled in all required boxes in the dialog field
 - Creating a new customer based on the existing business account
 - Creating a new sales order for the customer and opening it on the Sales Orders (SO301000) form

For the extension of the business account to be a customer, the user may need to fill in more information (for example, information that is required for a customer of the selected class). If this is the case, the dialog field displays an error message (see Item 1 in the following screenshot), and the **Customer Class** and **Customer Email** boxes in the **Customer** section become unavailable for editing (Item 2). Also, the **Create Customer** button (Item 3) appears in the dialog field. When the user clicks the button, the created customer is opened on the Customers form in a new browser tab. After filling in the required information and saving the changes, the user needs to return to the Sales Orders form to create a sales order.

The screenshot shows the 'Create Sales Order' dialog box with the following details:

- Tabs:** MAIN (selected), ATTRIBUTES, USER-DEFINED FIELDS
- SALES ORDER Section:**
 - Order Type: SO - Sales Order
 - Order Nbr.: 1
 - Set Quote as Primary
 - Recalculate Prices
 - Override Manual Prices
 - Recalculate Discounts
 - Override Manual Line Discounts
 - Override Manual Group and Document Discounts
- CUSTOMER Section:**
 - Customer ID: GREENEX - Greenex Cafe
 - Customer Class: GOVERNMENT - Construction goverme
 - Customer Email: cathy@greenex.example.com
- Error Message (Item 1):** You need to extend the business account to be a customer. Click Create Customer, and fill in the required settings of the class on the Customers (AR303000) form. Then you can create the sales order.
- Buttons (Item 3):** CREATE CUSTOMER, CREATE AND REVIEW, CANCEL

Figure: The error message and button in the dialog field

Enhancements to the Create Sales Order Dialog Field for Customers

In MYOB Advanced 2023.1, on the Opportunities (CR304000) and Sales Quotes (CR304500) forms, if the selected business account has the *Customer* type, a slightly different version of the **Create Sales Order** dialog field opens when the user clicks **Create Sales Order** or **Convert to Order** on the More menu (see the following screenshot).

The screenshot shows the 'Create Sales Order' dialog box for customers with the following details:

- Tabs:** MAIN (selected)
- SALES ORDER Section (Item 1):**
 - Order Type: SO - Sales Order
 - Order Nbr.: (empty)
 - Set Quote as Primary (Item 3)
 - Recalculate Prices
 - Override Manual Prices
 - Recalculate Discounts
 - Override Manual Line Discounts
 - Override Manual Group and Document Discounts
- Buttons (Item 4):** CREATE AND REVIEW, CANCEL

Figure: The Create Sales Order dialog field for customers

The following improvements have been made to the **Create Sales Order** dialog field:

- The **Sales Order** section (see Item 1 in the previous screenshot) has been added. This section contains the settings of the sales order that will be created.

- In the **Order Type** field (Item 2), the lookup table is now filtered to display only the order types for which one of the following automation behaviours has been selected on the Order Types (SO201000) form:
 - *Sales Order*
 - *Invoice*
 - *Blanket Order*
 - *Quote*
- The **Set Quote as Primary** checkbox (Item 3) starting in MYOB Advanced 2023.1 is shown in the dialog field and is selected by default only if the sales order is being created from a non-primary sales quote on the Sales Quotes form.
- The **OK** button has been renamed to **Create and Review** (Item 4).

Validation of User Rights for Customer Creation

On the Opportunities (CR304000) and Sales Quotes (CR304500) forms, when a user clicks the **Create Sales Order** or **Convert to Order** command on the More menu of the respective form, the system first validates the user rights to create a customer. If the user has no such rights, an error is displayed indicating that the user does not have access rights to create a customer and should contact a system administrator (see the following screenshot).

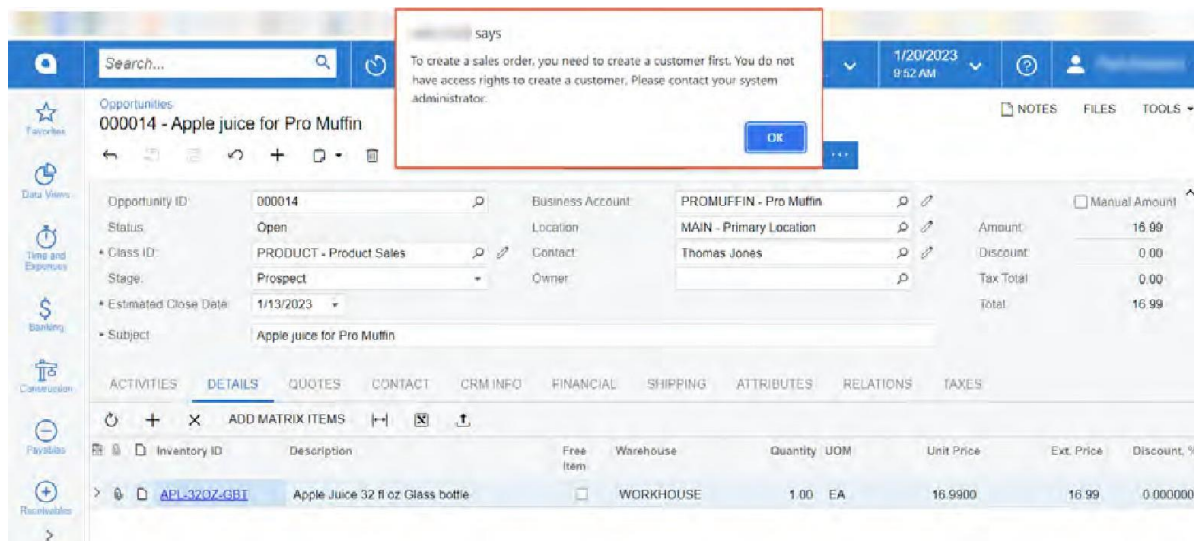


Figure: The error message

Predefined Email Notifications

In MYOB Advanced 2023.1, new predefined CRM business events have been defined on the Business Events (SM302050) form. With the new business events, users can receive email notifications related to tasks and activities being assigned to the owner.

Starting in MYOB Advanced 2023.1, the out-of-the-field system provides a set of business events and the related notification templates. A system administrator can activate any business event the company wants to use by selecting the **Active** checkbox in the Summary area of the Business Events form for the event, and users will receive notifications by email when the business event occurs.

The business events are triggered by the owner being changed on the Task (CR306020) and Activity (CR306010) forms.

Notifications About New Tasks and Activities Being Assigned to Owners

A user can receive email notifications when a new task or activity has been assigned to this user and it was created by another user.

On the Business Events (SM302050) form, the following predefined business events have been configured.

Event ID	Description
<i>CRNewTask</i>	A new task with the <i>Open</i> or <i>Processing</i> status has been assigned to an owner who was not the creator.
<i>CRNewActivity</i>	A new activity has been assigned to an owner who was not the creator.

For these business events, the following email templates for notification have been defined on the Email Templates (SM204003) form.

Event ID	Notification ID
<i>CRNewTask</i>	<i>CRNewTaskNotification</i>
<i>CRNewActivity</i>	<i>CRNewActivityNotification</i>

For example, suppose that the *CRNewActivity* business event has been activated, and an activity has been assigned to a new owner who is not the creator of this activity. The contact selected in the **Owner** field in the Summary area of the Activity form will receive an email based on the *CRNewActivityNotification* notification template. (An example of this email is shown in the following screenshot.) The emails generated based on the notification templates are listed on the All Emails (CO409070) form.

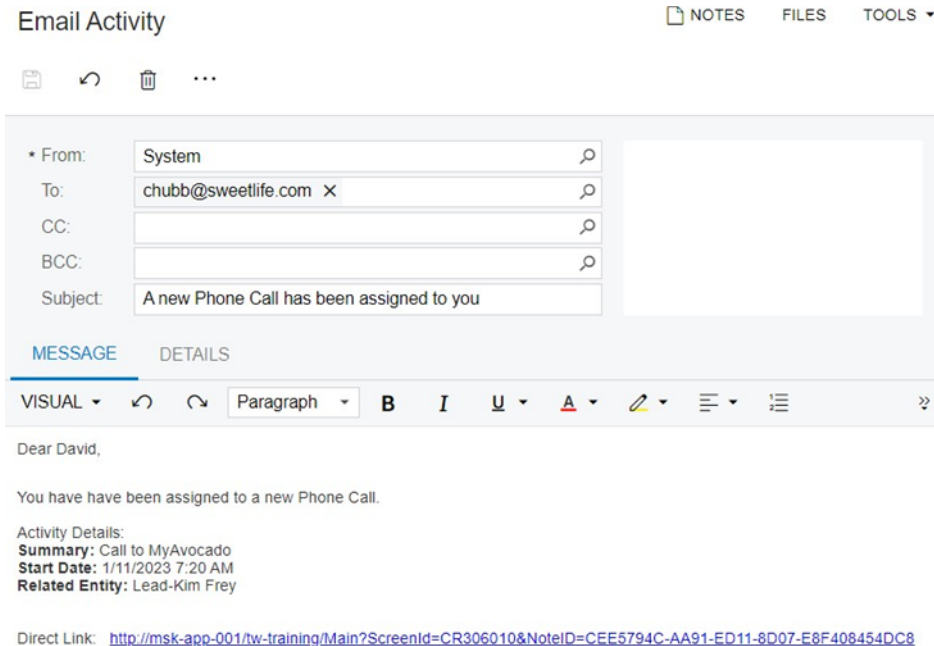


Figure: An email notifying the recipient about a new activity being assigned to them

Notifications of Tasks and Activities Being Assigned to Owners of Related Entities

The owner of an entity (such as a lead, a contact, a business account, an opportunity, or a case) that is related to a task or activity can receive an email notification when the task or activity is assigned in the following scenarios:

- A task or activity has been created for the related entity and assigned to a different user than the owner of the entity.
- An existing task or activity associated with the related entity has been reassigned to a different user than the owner of the entity.
- An existing task or activity has been associated with this related entity and assigned to a different user than the owner of the entity.

On the Business Events form, the following predefined business events have been configured.

Event ID	Description
<i>CRNewThirdPartyTask</i>	A task with the <i>Open</i> or <i>Processing</i> status has been assigned to an owner that differs from the owner of the related entity of the task.
<i>CRNewThirdPartyActivity</i>	An activity has been assigned to an owner that differs from the owner of the related entity of the activity.

For these business events, the following email templates for notification have been configured on the Email Templates (SM204003) form.

Event ID	Notification ID
<i>CRNewThirdPartyTask</i>	<i>CRNewThirdPartyTaskNotification</i>
<i>CRNewThirdPartyActivity</i>	<i>CRNewThirdPartyActivityNotification</i>

For example, suppose the following:

- The *CRNewThirdPartyActivity* business event has been activated
- An activity has a business account specified as its related entity
- The activity has been assigned to a user who is not the owner of the related business account

The owner of the business account will receive an email based on the *CRNewThirdPartyActivityNotification* notification template. (An example of such an email is shown in the following screenshot.)

Email Activity NOTES FILES CUSTOMIZATION TOOLS

SEND ...

* From: System
 To: owen@sweetlife.com
 CC:
 BCC:
 Subject: An activity associated with your Business Account has been

MESSAGE DETAILS

VISUAL Paragraph B I U A

Dear Bill,

The following activity has been associated with the record to which you are assigned as an owner.

Activity Details:

Summary: A marketing call
Related Entity: Business Account-GREENEX, Greenex Cafe
Owner: David Chubb
Phone Number: +1 (777) 896-8954
Email: chubb@sweetlife.com

Direct Link: <http://msk-app-001/tw-training/Main?ScreenId=CR306010&NotelD=FA8D42A4-7492-ED11-8D07-E8F408454DC8>

Figure: An email notifying the owner of the related entity about a new activity being assigned to another user

Additional Information

For details about the activity and task management, see [Emails and Activities: Activities and Emails and Activities: Tasks](#).

Opportunity Metrics

In MYOB Advanced 2023.1, new opportunity-related sales metrics have been added to help the company's sales team work more effectively and easily.

In previous versions of MYOB Advanced, only one form helped sales personnel to analyse the results of the sales team's work with opportunities. Starting in MYOB Advanced 2023.1, a user can use the following forms to analyse opportunity metrics:

- The Opportunity Summary by Close Date (CR3040SM) inquiry form
- The Opportunity Summary by Salesperson (CR3041SM) inquiry form
- The Opportunity List (CR3042SM) inquiry form
- The Opportunity Summary by Class (CR3040PT) pivot table

In an out-of-the-field instance of MYOB Advanced, links to the Opportunity Summary by Close Date and *Opportunity Summary by Class* forms can be found in the **Reports** category of the **Opportunities** workspace of MYOB Advanced.

The user can view the Opportunity Summary by Salesperson form in the side panel of the Opportunity Summary by Close Date form. To access the Opportunity List form, a user can use the Opportunity Summary by Close Date or *Opportunity Summary by Salesperson* form. The inquiry forms and pivot table show existing opportunities grouped by various criteria, as described in detail in the following sections.

Opportunity Summary by Close Date Inquiry Form

By using the Opportunity Summary by Close Date (CR3040SM) form, a user can find information for the specified date range about the amounts of the opportunities in the different stages, with the amounts broken down by the year, quarter, and month of the estimated closing dates of the opportunities. (See the following screenshot.)

	Year	Quarter	Month	Weighted Amount	Prospect Amount	Nurture Amount	Qualification Amount	Development Amount	Solution Amount	Proof Amount	Neg
>	2023	2	April	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	2023	2	May	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	2023	2	June	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	2023	3	July	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	2023	3	August	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
	2023	3	September	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Figure: The Opportunity Summary by Close Date inquiry form

The Selection area of the inquiry form (see Item 1 in the previous screenshot) includes a date range, which must be specified. By default, the date range covers the previous and current quarter, based on the business date.

Optionally, a user can narrow the range of the opportunities whose amounts are shown in the table by specifying additional criteria: the opportunity stage, opportunity class, business account class, contact class, and owner.

The table contains the estimated close dates of opportunities for each year, quarter, and month (Item 2) and the opportunities' amounts in the different stages (Item 4). The estimated amounts of opportunities that may be closed at the current stage are calculated by the system in the **Weighted Amount** column (Item 3).

For any selected row on the Opportunity Summary by Close Date form, the side panel displays the *Opportunity Summary by Salesperson (CR3041SM)* form, which is described in the following section.

In the table, each aggregated amount of the opportunities is also a link. If a user clicks this link, the system opens a new browser tab showing the list of opportunities that meet the specified criteria on the **Drilldown** tab of the *Opportunity List (CR3042SM)* form.

Opportunity Summary by Salesperson Inquiry Form

On the *Opportunity Summary by Salesperson (CR3041SM)* form, a user can find information about the amount and number of the opportunities grouped by owners and stages. (See the following screenshot.)

Owner	Weighted Amount	Prospect Count	Prospect Amount	Nurture Count	Nurture Amount	Qualification Count	Qualification Amount	Development Count	Development Amount	Solution Count	Solution Amount	Proof Count	Proof Amount	Negotiation Count	Negotiation Amount	Won Amount	Won Amount
Osborn	144.05	0	0.00	1	2,880.90	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00
Thom	0.00	1	3,205.40	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00
Taylor	3,465.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	5,775.00	0	0.00	0	0.00
Li Jan	2,587.20	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	3,234.00	0	0.00
Sum:	6,196.25		3,205.40		2,880.90		0.00		0.00		0.00		5,775.00		3,234.00		0.00

Figure: The Opportunity Summary by Salesperson inquiry form

A user can narrow the information that is shown in the table (see Item 2 in the previous screenshot) by specifying the needed settings in the Selection area (Item 1).

To see the list of the opportunities that are included in any selected row of the table, a user can click the value in the **Owner** column (Item 3), which is also a link. The list of the opportunities with that owner opens on the **Drilldown** tab of the *Opportunity List (CR3042SM)* form.

At the bottom of the *Opportunity Summary by Salesperson* form, the system calculates the total sum of the opportunity amounts for every stage and for the weighted amount of the opportunities (Item 4).

Opportunity List Inquiry Form

On the *Opportunity List (CR3042SM)* inquiry form, a user can find the list of opportunities included in the selected row of the Opportunity Summary by Close Date (CR3040SM) or *Opportunity Summary by*

Salesperson (CR3041SM) forms on the **Drilldown** tab (see Item 3 in the following screenshot). The list of all opportunities is displayed on the **All Records** tab (Item 2).

The screenshot shows the 'Opportunity List' form with the 'ALL RECORDS' tab selected. The 'Drilldown' tab is also visible. The table below shows a list of opportunities with columns for Opportunity ID, Subject, Account Name, Status, Stage, Currency, Total, Estimated Close Date, and Class ID.

Opportunity ID	Subject	Account Name	Status	Stage	Currency	Total	Estimated Close Date	Class ID
000005	Repairs and training for Lake Cafe	Lake Cafe	Open	Prospect	USD	117.50	1/4/2023	SERVICE
000004	A juicer with the installation and training for...	Lake Cafe	New	Prospect	USD	2,337.50	1/4/2023	PROJECT
000003	Assorted teas for Lake Cafe	Lake Cafe	Open	Prospect	USD	4,539.41	1/4/2023	PROJECT
000002	Inquiry for exotic fruits	Russell Brennan Keane	Open	Prospect	USD	0.00	1/4/2023	PROJECT
000001	A juicer for HMT's Bakery & Cafe	HMT's Bakery & Cafe	New	Prospect	USD	3,500.00	1/7/2023	PROJECT

Figure: The Opportunity List form

A user can narrow the opportunities in the table (Item 4) by specifying the needed settings in the Selection area (Item 1).

For any row that a user selects on either tab of the form, the side panel displays the Opportunities (CR304000) form (Item 5). (For more information about side panels, see Side Panels on Forms.)

The screenshot shows the 'Opportunity List' form with the side panel open for Opportunity ID 000122. The side panel displays the 'Opportunities' form with fields for Opportunity ID, Status, Class ID, Stage, Estimated Close Date, Subject, Amount, Discount, Tax Total, and Total. It also shows a table of 'ADD MATRIX ITEMS' with columns for Inventory ID, Description, Free Item, Billing Rate, Warehouse, Quantity, Estimated Duration, UOM, and Unit.

Inventory ID	Description	Free Item	Billing Rate	Warehouse	Quantity	Estimated Duration	UOM	Unit
ITEM00012	KTEC wired optical Mouse	<input type="checkbox"/>	Flat Rate	MAIN	1,000.00	0 h 00 m	EACH	
ITEM00013	Desktop Office Pro Package A	<input type="checkbox"/>	Flat Rate	MAIN	1,500.00	0 h 00 m	EACH	

Figure: The side panel of the Opportunity List form

On the *Opportunity List* form, several columns contain links to other forms, as follows:

- **Opportunity ID** column: Opens the Opportunities form
- **Class ID** column: Opens the Opportunity Classes (CR209000) form
- **Business Account** column (hidden by default): Opens the Business Accounts (CR303000) form

Opportunity Summary by Class Pivot Table

A user can use the *Opportunity Summary by Class (CR3040PT)* pivot table to find the aggregated information of the number and amount of all opportunities. This information is grouped by opportunity class, owner, opportunity status, and opportunity stage (Item 2 in the following screenshot), and contained the automatically calculated total amount and count for each row. The information shown in the table can be narrowed by using the following filter settings (Item 1):

- *Status*

- *Stage*
- *Class*
- *Estimated Close Date*
- *Owner*

Opportunity Summary by Class SAVE AS SAVE CUSTOMIZE TOOLS ▾

🔄 🔍 1
▾ Status ▾ Stage ▾ Class ▾ Estimated C ▾ Owner

			Development		Negotiation		Prospect		Test		Total	
Class	Owner	Status	Count	Amount	Count	Amount	Count	Amount	Count	Amount	Count	Amount
Product Sales	Is Empty	New					6	43.54			6	43.54
		Open			1	405.70	2	4,539.41	1	498.00	4	5,443.11
	Bill Owen	New					1	215.00			1	215.00
		Open					1	8,500.00			1	8,500.00
David Chubb	New											
	Open		1	0.00							1	0.00
Project Sales	Is Empty	New					2	5,837.50			2	5,837.50
Service Sales	Is Empty	Open					1	117.50			1	117.50

Figure: The Opportunity Summary by Class pivot table

For more information, see the Managing Pivot Tables.

Access Rights

A user can have full access to the forms (that is, *Delete* access rights) if one of the following user roles has been assigned to the user account:

- *Administrator*
- *CR Marketing Manager*
- *CR Sales & Marketing Admin*
- *CR Sales Representative*

If the *CR Viewer* user role has been assigned to a user account, the user has view-only access to the forms (that is, the user account has *View Only* access rights).

For users with the *CR Support Admin* or *CR Support Representative* user role assigned to their user account, the access rights to the forms have not been set (that is, the user account has *Not Set* access rights).

Additional Information

For details about the opportunity-related sales metrics, see Managing Opportunity Reports.

Selection of Related Entities in Emails, Activities, Tasks, and Events

In previous versions of MYOB Advanced, a user had to use a dialog field to associate an email or activity with a related entity. Starting in MYOB Advanced 2023.1, a user can quickly associate any email or activity with a related entity on the respective data entry form without opening a dialog field.

Note: In this topic, *activity* is used broadly to describe any sort of activity defined in MYOB Advanced, such as an event on the Event (CR306030) form, a task on the Task (CR306020) form, or another type of activity on the Activity (CR306010) form.

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

Changes to the Data Entry Forms of Emails and Activities

On the Event (CR306030), Task (CR306020), Email Activity (CR306015), and Activity (CR306010) forms, the **Related Entity Type** (see Item 1 in the following screenshot) and **Related Entity** (Item 2) boxes have been added.

The screenshot displays the 'Event' form titled 'Meeting with the manager'. The 'DETAILS' tab is active. The 'Summary' field contains 'Meeting with the manager'. The 'Location' field is empty. The 'Time Zone' is set to '...'. The 'Start Time' is '4/07/2023 5:30 PM' and the 'End Time' is '4/07/2023 6:00 PM'. The 'Status' is 'Open' and the 'Priority' is 'Normal'. The 'Category' field has a red arrow pointing to it. The 'Time Spent', 'Overtime', 'Billable Time', and 'Billable Overtime' fields are all set to '00:00'. The 'Owner' is 'Albarn James, Mr.'. The 'Related Entity Type' field is set to 'Contact' (Item 1) and the 'Related Entity' field is set to 'Baker, John' (Item 2). An 'Open' button (Item 3) is located to the right of the 'Related Entity' field. The form also shows fields for 'Show As' (set to 'Busy'), 'Reminder' (unchecked), and 'Internal' (unchecked).

Figure: An event with a related entity

In the **Related Entity Type** field, a user can select any of the following types of related entities: AP Document, Appointment, AR Invoice/Memo, Business Account, Campaign, Case, Contact, Customer, Employee, Equipment, Expense Receipt, GL Batch, Landed Cost Document, Lead, Marketing List, Mass Email, Opportunity, Payroll Employee, Project Issue, Project Quote, Purchase Order, Purchase Receipt, Request for Information, Route Document, Sales Order, Sales Quote, Service Contract, Service Order, Shipment, SO Shipment Picking Worksheet, Subcontract, Submittal, User, and Supplier.

If the user selects the type of the related entity, the **Related Entity** field becomes available and required. The related entity can be selected from the list of available records, which is narrowed to only records of the selected type of the related entity. To open the selected related entity in a new browser tab, a user can click the Open button (item 3) to the right of the field.

If a user changes the related entity type, the **Related Entity** field is cleared, and the user needs to select a related entity of the newly selected type.

Changes to Mobile App Screens

In the MYOB Advanced mobile app, the **Related Entity Type** and **Related Entity** boxes have been added to the *Event*, *Task*, *Email*, and *Activity* screens of the mobile app, as shown in the following screenshot. The boxes are unavailable for editing.

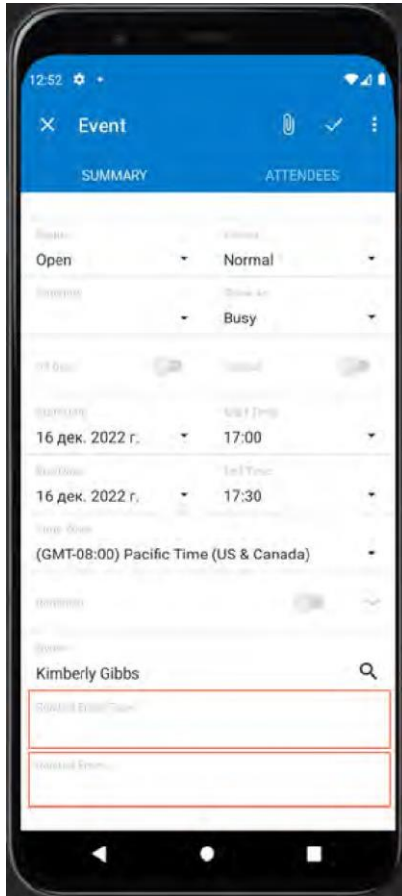


Figure: The Related Entity Type and Related Entity boxes on the Event screen

Other Improvements

MYOB Advanced 2023.1 introduces the improvement to the customer relationship management (CRM) functionality that is 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 some CRM entities without segmented keys had a limit of 10 characters.

Starting in MYOB Advanced2023, 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.

Documentation

Improvements in User Guides

In MYOB Advanced 2023.1, multiple improvements have been made to the content and structure of the guides that make up the documentation, as described in the following sections.

Customer Relationship Management Guide

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

- The Managing Opportunity Reports chapter has been added, in which users will learn about opportunity- related sales metrics.
- The Managing Marketing Reports and Managing the Support Report chapters have been significantly updated.

Getting Started Guide

In the Managing Your Tasks and Events chapter, the Task Management topic has been significantly updated with regard to describing options of creation and tracking tasks.

Contract Management Guide

The Contract Management guide has been reworked and now it has the following structure:

- The Implementing the Contract Functionality chapter. In the General Information topic of this chapter, the diagram of the contract lifecycle has been reworked.
- The Setting Up and Activating Contracts chapter.
- The Managing Contracts chapter, in which a new topic about the related reports and inquiries has been added.
- The Usage of Contracts chapter.
- The Billing Contracts chapter.

Order Management Guide

In the Order Management guide, the Predefined Sales Order Types chapter has been reworked and moved to the Implementation guide. For details about order types, see Sales Order Types: General Information.

Field Services

Performance Improvements

Previously, the performance of MYOB Advanced was significantly affected by the cache extensions used by the field service processes integrated with other MYOB Advanced functional areas. These cache extensions stored data in separate database tables, which caused unnecessary joins that increased the complexity of the queries used in the system and, therefore, slowed the performance of the application.

In MYOB Advanced 2023.1, this issue has been solved. More than 100 database columns of 19 extension tables have been moved from the field service extension tables to their parent tables in other functional areas, which has removed the negative impact on system performance.

The list of the moved columns and the details about the upgrade procedure can be found in the Application Code: Performance Improvements topic of the current document as well as in the Release Notes for Developers 2023.1 document.

Finance

AR Aging by Project Reports

In previous versions of MYOB Advanced, it was not possible to generate a report and print a list of AR aging documents and AR aging customer balances grouped by project.

In MYOB Advanced 2023.1, the following new reports are available in the system if the *Projects* group of features is enabled on the Enable/Disable Features (CS100000) form:

- AR Aging by Project (AR631200) report
- AR Aged Period-Sensitive by Project (AR630600) report

In the out-of-the-field system, links to both of these reports are included in the **Reports** category of the **Receivables** workspace.

The AR Aging by Project report displays outstanding AR documents or customer balances on the specified date. The documents and balances are divided into aging periods. A user can run this report in the following formats:

- *Detailed*: Displays an overview of the outstanding customer documents.
- *Summary*: Displays an overview of the outstanding customer balances.
- *Detailed with Retainage*: Displays an overview of outstanding documents and their unreleased retainage on the **Age as of Date** that the user has specified on the AR Aging by Project report form for the calculation of document balances and aging categories.

The AR Aged Period-Sensitive by Project report displays outstanding AR documents or customer balances at the end date of the particular financial period. The documents and balances are divided into aging periods or financial periods. A user can run this report in the following formats:

- *Detailed*: Displays an overview of the outstanding customer documents.
- *Summary*: Displays an overview of the outstanding customer balances.

The following sections describe each of the formats of these reports in more detail.

AR Aging by Project (Detailed) Report

The following screenshot shows the AR Aging by Project (AR631200) report in the *Detailed* format. Notice that the title ends with (*Detailed*) to indicate the format.

AR Aging by Project (Detailed)											Page:	1 of 1
Company/Branch:		PRODWHOLE		Customer:		INDSACRAME		Date:		1/13/2023 1:44 AM		
Project:		X		Aged On:		11/22/2022		User:		admin admin		
Project ID	Description	Non-Project Code.		Project Manager								
Statement Cycle	Last Statement Date	Description										
EOM	12/31/2013	End of Month										
Customer		Customer Name										
INDSACRAME		Sacramento Industrial Supply										
Doc. Type	Ref. Nbr.	Customer Ref./ Orig. Ref. Nbr.	Branch	Doc. Date	Due Date	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Balance	
Invoice	AR010573	INDSACRAME20	PRODWHOL	1/31/2022	3/2/2022	0.00	0.00	0.00	0.00	108,305.44	108,305.44	
Invoice	AR010665	INDSACRAME20	PRODWHOL	2/2/2022	3/4/2022	0.00	0.00	0.00	0.00	62,999.97	62,999.97	
Invoice	AR010695	INDSACRAME20	PRODWHOL	2/28/2022	3/30/2022	0.00	0.00	0.00	0.00	108,305.44	108,305.44	
Customer Total:						0.00	0.00	0.00	0.00	279,610.85	279,610.85	
Statement Cycle Total:						0.00	0.00	0.00	0.00	279,610.85	279,610.85	
Project Total:											279,610.85	
Company Total:											279,610.85	

Figure: AR Aging by Project (Detailed) report

The detailed AR Aging by Project report provides the user with an overview of the outstanding customer documents. For a particular project, the report shows how open activities are aged. In the detailed report, the documents are grouped by the project specified in AR documents, by the statement cycle, and by the customer. Grouping by the customer provides the user with information about available open AR documents with outstanding customer balances on aging periods.

The AR Aging by Project report contains the following information:

- The total amounts for each aging bucket and for the **Balance** column of each customer of the project (the **Customer Total** field)
- The total amounts for each aging bucket and for the **Balance** column of the current statement cycle (the **Statement Cycle Total** field)
- The sum of the **Balance** totals of all statement cycles in a project (the **Project Total** field)
- The sum of the **Balance** totals of all projects (the **Company Total** field)

AR Aging by Project (Summary) Report

The following screenshot shows the AR Aging by Project (AR631200) report in the *Summary* format. Notice that the title ends with (*Summary*) to indicate the format.

AR Aging by Project (Summary)							Page:	1 of 1		
Company/Branch:		PRODWHOLE		Customer:		INDSACRAME		Date:	1/13/2023 1:50 AM	
Project:		X		Aged On:		11/22/2022		User:	admin admin	
Project ID	Description	Project Manager								
X	Non-Project Code.									
Statement Cycle	Last Statement Date	Description								
EOM	12/31/2013	End of Month								
Customer	Customer Name	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Balance			
INDSACRAME	Sacramento Industrial Supply	0.00	0.00	0.00	0.00	279,610.85	279,610.85			
Statement Cycle Total:		0.00	0.00	0.00	0.00	279,610.85	279,610.85			
Project Total:							279,610.85	279,610.85		
Company Total:							279,610.85	279,610.85		

Figure: AR Aging by Project (Summary) report

The summary AR Aging by Project report provides the user with an overview of the outstanding customer balances. For a particular project, the report shows how open activities are aged. In this format of the report, the customer balances are grouped by the project specified for AR documents and by the statement cycle.

The summary AR Aging by Project report contains the following information:

- The total amounts for each aging bucket and for the **Balance** column of the current statement cycle (the **Statement Cycle Total** field)
- The sum of the **Balance** totals of all statement cycles in a project (the **Project Total** field)
- The sum of the **Balance** totals of all projects (the **Company Total** field)

AR Aging by Project (Detailed with Retainage) Report

The following screenshot illustrates the AR Aging by Project (AR631200) report in the *Detailed with Retainage* format. Notice that the title ends with (*Detailed with Retainage*) to indicate the format.

AR Aging by Project (Detailed with Retainage)

Company/Branch: PRODWHOLE Customer: INDSACRAME Page: 1 of 1
 Aged On: 11/22/2022 Date: 1/13/2023 2:53 AM
 Project: X User: admin admin

Project ID	Description	Project Manager									
X	Non-Project Code.										
Statement Cycle	Last Statement Date	Description									
EOM	12/31/2013	End of Month									
Customer	Customer Name			Balance							
INDSACRAME	Sacramento Industrial Supply			279,610.85							
Doc. Type	Ref. Nbr.	Customer Ref./ Orig. Ref. Nbr.	Branch	Doc. Date	Due Date	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Unreleased Retainage
Invoice	AR010573	INDSACRAME20	PRODWHOL	1/31/2022	3/2/2022	0.00	0.00	0.00	0.00	108,305.44	0.00
Invoice	AR010665	INDSACRAME20	PRODWHOL	2/2/2022	3/4/2022	0.00	0.00	0.00	0.00	62,999.97	0.00
Invoice	AR010695	INDSACRAME20	PRODWHOL	2/28/2022	3/30/2022	0.00	0.00	0.00	0.00	108,305.44	0.00
Customer Total:						0.00	0.00	0.00	0.00	279,610.85	0.00
Statement Cycle Total:						0.00	0.00	0.00	0.00	279,610.85	0.00
Project Total:											0.00
Company Total:											0.00

Figure: AR Aging by Project (Detailed with Retainage) report

In this format, the report provides the user with an overview of outstanding documents and their unreleased retainage on the **Age as of Date** that the user has specified on the AR Aging by Project report form for the calculation of document balances and aging categories. For a particular project, the report shows how open activities are aged. The documents of the report are grouped by the project assigned to AR documents, by the statement cycle, and by the customer.

The report contains the following information:

- The total amounts for each aging bucket and for the **Unreleased Retainage** column of each customer of the project (the **Customer Total** field)
- The total amounts for each aging bucket and for the **Unreleased Retainage** column of the current statement cycle (the **Statement Cycle Total** field)
- The sum of the **Unreleased Retainage** totals of all statement cycles in the project (the **Project Total** field)
- The sum of the **Unreleased Retainage** totals of all projects (the **Company Total** field)
- The sum of aging bucket total amounts in the **Customer Total** section (the **Balance** field in the **Customer** header)
- The sum of customer balances of the current project (the **Balance** field in the **Project** header)

AR Aged Period-Sensitive by Project (Detailed) Report

The following screenshot illustrates the AR Aged Period-Sensitive by Project (AR630600) report in the *Detailed* format. Notice that the title ends with (*Detailed*) to indicate the format.

AR Aged Period-Sensitive by Project (Detailed)											Page	1 of 1
Company/Branch		PRODWHOLE		Customer		ABCSTUDIOS		Date		3/2/2023 7:43 AM		
Project		X		Financial Period		11-2022		User		admin admin		
Aged On		11/30/2022										
Project ID	Description	Project Manager										
X	Non-Project Code											
Statement Cycle	Last Statement Date	Description										
EOM	12/31/2013	End of Month										
Customer	Customer Name											
ABCSTUDIOS	ABC Studios Inc											
Doc. Type	Ref. Nbr.	Customer Ref./ Orig. Ref. Nbr.	Doc. Date	Due Date	Current	1 - 10 Days	Past Due			Balance		
							11 - 30 Days	31 - 60 Days	Over 60 Days			
Invoice	AR010721	ABCSTUDIOS2C	2/17/2022	3/19/2022	0.00	0.00	0.00	0.00	154,750.00	154,750.00		
Customer Total:					0.00	0.00	0.00	0.00	154,750.00	154,750.00		
Statement Cycle Total:					0.00	0.00	0.00	0.00	154,750.00	154,750.00		
Project Total:										154,750.00		
Company Total:					0.00	0.00	0.00	0.00	154,750.00	154,750.00		

Figure: AR Aged Period-Sensitive by Project (Detailed) report

The detailed AR Aged Period-Sensitive by Project report provides the user with an overview of the outstanding customer documents. At the end date of the particular financial period, the report shows how open activities are aged. In the detailed AR Aged Period-Sensitive by Project report, the system groups the documents by the project assigned to AR documents, by the statement cycle, and by the customer. Grouping by customer provides the user with information about available open AR documents with outstanding customer documents on aging or financial periods.

The report contains the following information:

- The total amounts for each aging bucket and for the **Balance** column of each customer of the project (the **Customer Total** field)
- The total amounts for each aging bucket and for the **Balance** column of the current statement cycle (the **Statement Cycle Total** field)
- The sum of the **Balance** totals of all statement cycles in the project (the **Project Total** field)
- The sum of the **Balance** totals of all projects (the **Company Total** field)

AR Aged Period-Sensitive by Project (Summary) Report

The following screenshot illustrates the AR Aged Period-Sensitive by Project (AR630600) report in the *Summary* format. Notice that the title ends with (*Summary*) to indicate the format.

AR Aged Period-Sensitive by Project (Summary)								Page:	1 of 1
Company/Branch	PRODDWHOLE		Customer:	ABCSTUDIOS		Date:	3/2/2023 8:04 AM		
Project:	X		Financial Period:	11-2022		User:	admin admin		
			Aged On:	11/30/2022					
Project ID	Description	Project Manager							
X	Non-Project Code:								
Statement Cycle	Last Statement Date	Description							
EOM	12/31/2013	End of Month							
Customer	Customer Name	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Balance		
ABCSTUDIOS	ABC Studios Inc	0.00	0.00	0.00	0.00	154,750.00	154,750.00		
Statement Cycle Total:		0.00	0.00	0.00	0.00	184,750.00	184,750.00		
Project Total:						154,750.00	154,750.00		
Company Total:		0.00	0.00	0.00	0.00	154,750.00	154,750.00		

Figure: AR Aged Period-Sensitive by Project (Summary) report

The summary AR Aged Period-Sensitive by Project report provides the user with an overview of the outstanding customer balances. At the end date of a particular financial period, the report shows how open activities are aged. In the summary report, the documents are grouped by a project assigned to AR documents and by a statement cycle.

The report contains the following information:

- The total amounts for each aging bucket and for the **Balance** column of the current statement cycle (the **Statement Cycle Total** field)
- The sum of the **Balance** totals of all statement cycles in the project (the **Project Total** field)
- The sum of the **Balance** totals of all projects (the **Company Total** field)

Changes in Copying Default Subaccounts for GL Transactions

Quite often, accountants have a dedicated subaccount to be used with the balance sheet accounts, while for the income and expense accounts, they are using different subaccounts depending on the configuration of subaccounts. In such a case, they usually select the **Use Default Subaccount** checkbox for all their balance accounts on the Chart of Accounts (GL202500) form and specify this subaccount in the **Default Subaccount** field on the General Ledger Preferences (GL102000) form.

In previous versions of MYOB Advanced, when a user was creating a GL transaction on the Journal Transactions (GL301000) form, the system suggested the balance sheet subaccount for all the lines with the Asset or Liability account. The problem was that when the user was entering a transaction on the Journal Transactions form and a line with an Income or Expense account followed a line with a balance sheet account, the system incorrectly inserted the subaccount for the *Income* or *Expense* account: It suggested the default subaccount for the balance sheet account, even though this subaccount was not supposed to be used with this account.

To address this issue, the following changes have been introduced in MYOB Advanced 2023.1:

- For the first line on the **Details** tab of the Journal Transactions form, the system inserts the subaccount specified in the **Default Subaccount** field on the General Ledger Preferences form if the specified account has the **Use Default Subaccount** checkbox selected on the Chart of Accounts form. If the **Use Default Subaccount** checkbox is cleared for the account, the **Subaccount** column on the Journal Transactions form is empty.
- For the second line and all lines after it, the system does either of the following:
 - If the specified account has the **Use Default Subaccount** checkbox selected on the Chart of Accounts form, inserts the subaccount specified in the **Default Subaccount** field on the General Ledger Preferences form.
 - If the specified account has the **Use Default Subaccount** checkbox cleared, copies the value from the previous line if the accounts in the current and in the previous line are both temporary accounts (*Income* or *Expense*) or are both permanent accounts (*Asset* or *Liability*).

The following example explains in detail how these changes are processed by the system.

Usage Example

Suppose that in the system, the 10200 account (a balance sheet account) has the Use Default Subaccount checkbox selected on the Chart of Accounts (GL202500) form and the 000-000 subaccount is specified as the default one on the General Ledger Preferences (GL102000) form.

Further suppose that the *000-INC* subaccount has been set up for accounts with the *Income* type.

When a user enters a GL transaction on the Journal Transactions (GL301000) form, the system inserts subaccounts as follows:

1. On the **Details** tab, the user adds a new line and selects the 10200 account. The system inserts the 000-000 subaccount in the **Subaccount** field, because this subaccount is the default one and the **Use Default Subaccount** checkbox is selected for the 10200 account. These settings are illustrated in the following screenshot.

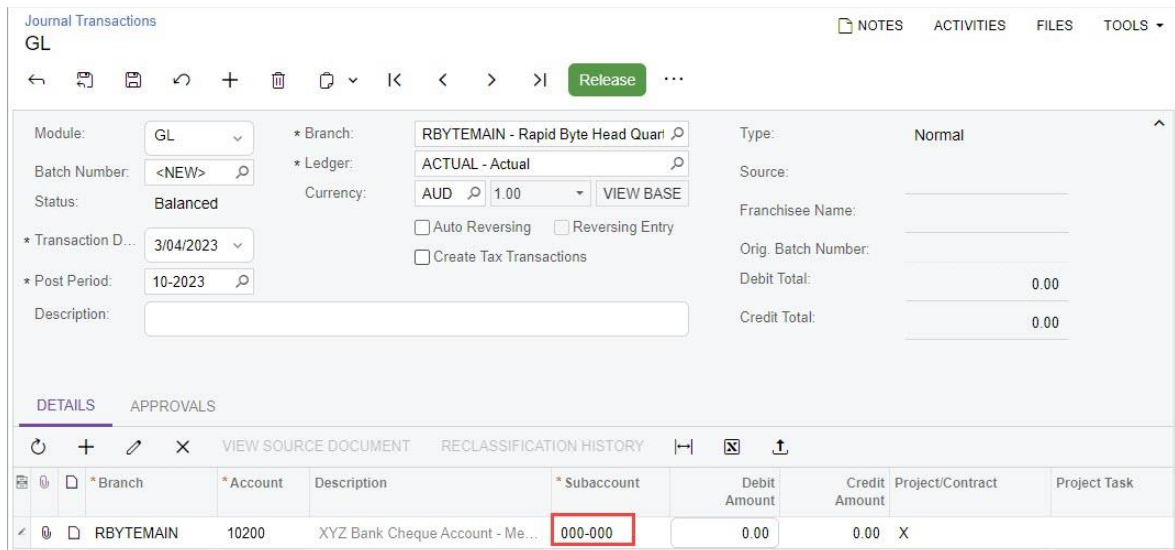


Figure: The default subaccount inserted into the first line

2. The user adds the second line to the transaction and selects the 40000 account. This account has the **Use Default Subaccount** checkbox cleared and the system leaves the **Subaccount** column empty, as shown in the following screenshot.

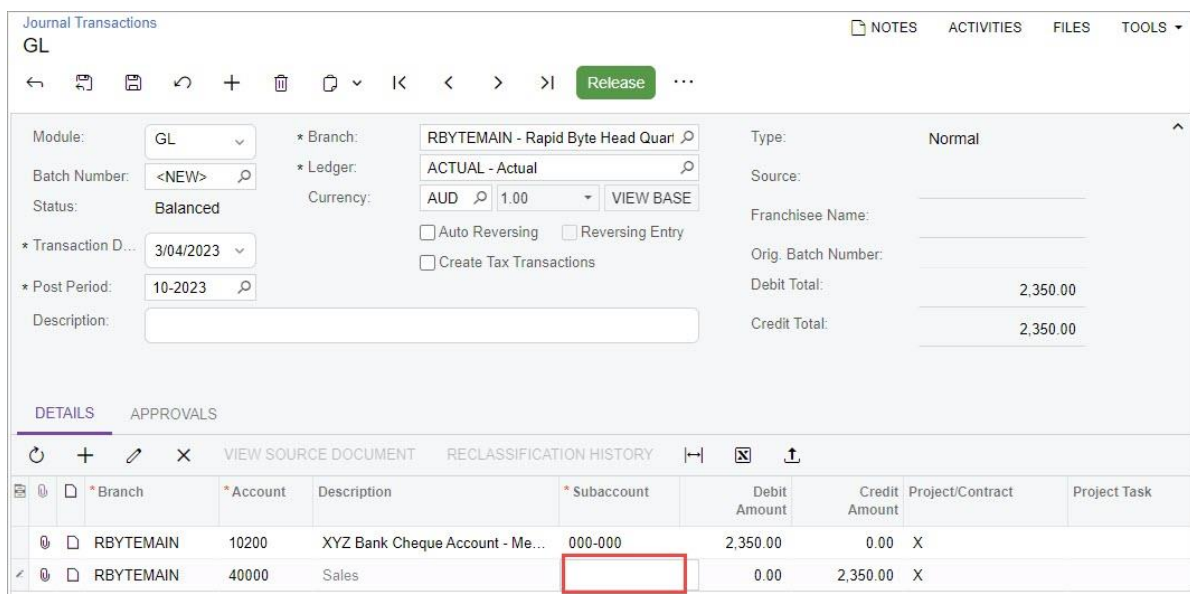


Figure: The Subaccount column left empty for the second line

Because the 40000 account has the *Income* type, the user should manually select the 000-INC subaccount for it.

3. The user adds the third line to the transaction and selects the 40010 account. This account also has the **Use Default Subaccount** checkbox selected, but it has the same type as the account in the second line (*Income*). This is why the system inserts the subaccount from the previous line (000-INC) into the **Subaccount** column for this line, as shown in the following screenshot.

Journal Transactions
GL

NOTES ACTIVITIES FILES TOOLS

Release

Module: GL * Branch: RBYTEMAIN - Rapid Byte Head Quari Type: Normal
 Batch Number: <NEW> * Ledger: ACTUAL - Actual Source:
 Status: Balanced Currency: AUD 1.00 VIEW BASE Franchisee Name:
 * Transaction D...: 3/04/2020 Auto Reversing Reversing Entry Orig. Batch Number:
 * Post Period: 10-2020 Create Tax Transactions Debit Total: 2,350.00
 Description: Credit Total: 2,350.00

DETAILS APPROVALS

VIEW SOURCE DOCUMENT RECLASSIFICATION HISTORY

	* Branch	* Account	Description	* Subaccount	Debit Amount	Credit Amount	Project/Contract	Project Task
	RBYTEMAIN	10200	XYZ Bank Cheque Account - Me...	000-000	2,350.00	0.00	X	
	RBYTEMAIN	40000	Sales Revenue	000-INC	0.00	2,350.00	X	
	RBYTEMAIN	40010	Sales - Freight	000-INC	0.00	130.00	X	

Figure: The subaccount from the previous line inserted by default

Generation of Batches on the Prepare Payments Form

In previous versions of MYOB Advanced, if a user was creating payments on the Prepare Payments (AP503000) form and selected a payment method for which the **Create Batch Payment** checkbox was selected on the Payment Methods (CA204000) form, the user was redirected to the Process Payments / Print Cheques (AP505000) form. On this form, the user had to enter or confirm the **Next Cheque Number** setting for the payments before they were added to the batch. This redirection took additional time to load and process the data.

In MYOB Advanced 2023.1, a shorter workflow is provided as an additional way for supplier payments to be mass processed. Now users can quickly generate a batch of payments from the Prepare Payments (AP503000) form. On this form, the system generates payments, combines them into a payment batch, and opens the batch on the Batch Payments (AP305000) form for further processing.

To support this functionality, the UI changes described in the sections below have been introduced.

Changes to the Payment Methods Form

On the Payment Methods (CA204000) form, the **Quick Batch Generation** column has been added to the **Allowed Cash Accounts** tab, as shown in the following screenshot.

The screenshot shows the 'Payment Methods' form for 'ACH'. The 'Allowed Cash Accounts' tab is active, displaying a table with columns: Cash Account, Description, Branch, Use in AP, AP/Payrol Default, AP - Suggest Next Number, AP Last Reference Number, Batch Last Reference Number, and Quick Batch Generation. The 'Quick Batch Generation' column is highlighted with a red box, and the checkbox for the first row is checked.

Cash Account	Description	Branch	Use in AP	AP/Payrol Default	AP - Suggest Next Number	AP Last Reference Number	Batch Last Reference Number	Quick Batch Generation
100016	AU WBC Bank Corp Account H...	RBYTEMAIN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	21		<input checked="" type="checkbox"/>

Figure: The Quick Batch Generation column on the Payment Methods form

This column appears on the tab if the **Create Batch Payments** option button is selected on the **Settings for Use in AP** tab on the same form. If a user adds a new cash account to a payment method for which the **Create Batch Payments** option button is selected, the **Quick Batch Generation** checkbox will be selected by default for the added cash account.

If the user selects this checkbox for a cash account, the **Quick Batch Generation** option button will be available and selected by default on the Prepare Payments (AP503000) form.

If the **Quick Batch Generation** checkbox is selected for a cash account, the system verifies that the **AP/PR - Suggest Next Number** checkbox is selected and a number is specified in the **AP/PR Last Reference Number** column.

Changes to the Cash Accounts Form

On the Cash Accounts (CA202000) form, the **Quick Batch Generation** column has been added to the **Payment Methods** tab, as shown in the following screenshot.

The screenshot shows the 'Cash Accounts' form for '100016 - AU WBC Bank Corp Account HQ (Payroll)'. The 'PAYMENT METHODS' tab is active, displaying a table of payment methods. The 'Quick Batch Generation' column is highlighted with a red box.

* Payment Method	Use in AP	AP/Payroll Default	AP - Suggest Next Number	AP Last Reference Number	Batch Last Reference Number	Quick Batch Generation	Use in AR	AR Default	AR Default For Refund	AR - Suggest Next Number
> AUWBDCDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AUWBDCAPML	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	123		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CASH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHEQUE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	000446		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure: The Quick Batch Generation column on the Cash Accounts form

If a new payment method that has the **Create Batch Payments** option button selected is linked to a cash account, the checkbox in the **Quick Batch Generation** column will be selected by default for the added payment method. If the user selects this checkbox for a payment method, the **Quick Batch Generation** checkbox will be available and selected by default on the Prepare Payments (AP503000) form.

If this checkbox is selected for a payment method, the system verifies that the **AP/PR - Suggest Next Number** checkbox is selected and a number is specified in the **AP/PR Last Reference Number** column.

Changes to the Prepare Payments Form

On the Prepare Payments (AP503000) form, the **Quick Batch Generation** checkbox has been added to the Selection area, as shown in the following screenshot.

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

- Branch:** RBYTEMAIN - Rapid Byte Head Quari
- Payment Meth...:** ACH
- Cash Account:** 100016 - AU WBC Bank Corp Account
- Payment Date:** 6/03/2020
- Post Period:** 09-2020
- Currency:** AUD 1.00 VIEW BASE
- Supplier Class:** (empty)
- Supplier:** (empty)
- Project:** (empty)
- Pay Date Within:** 3 Days
- Due Date Within:** 3 Days
- Prompt Payment Disc. Expires ...:** 3 Days
- Always Take Prompt Payment ...:**
- Quick Batch Generation:** (highlighted with a red box)
- Summary Statistics:**
 - GL Balance: 0.00
 - Available Bala...: 7,338,005.86
 - Selection Total: 0.00
 - Number of Ro...: 0

Figure: The Quick Batch Generation checkbox on the Prepare Payments form

This checkbox appears on the form and is available if both of the following conditions are met:

- On the Payment Methods (CA204000) form, the **Create Batch Payments** option button is selected on the **Settings for Use in AP** tab for the payment method.
- On the Payment Methods form, the **Quick Batch Generation** checkbox is selected on the **Allowed Cash Accounts** tab for the corresponding cash account.

On the Prepare Payments form, a new batch payment is created automatically and payments are generated if all of the following conditions are met:

- On the Prepare Payments form, the **Quick Batch Generation** checkbox is selected.
- On the Payment Methods form, a number is specified and can be incremented in the **AP/PR Last Reference Number** column, and the **AP/PR - Suggest Next Number** checkbox is selected for the cash account.
- At least one generated payment has the *Pending Print* status.

All payments generated with the *Pending Print* status are added to the created batch payment that opens on the Batch Payments (AP305000) form. For each payment added to the batch, the system generates a **Payment Ref.** number by incrementing the number specified in the **AP Last Reference Number** column on the Payment Methods form for the payment method.

Upgrade Notes

After an upgrade to MYOB Advanced 2023.1, the **Quick Batch Generation** checkbox will be added to the settings of the payment methods that have the **Create Batch Payments** option button selected on the **Settings for Use in AP** tab of the Payment Methods (CA204000) form. This checkbox will be cleared by default.

Additional Information

For details on how to quickly generate a batch of payments, see [To Quickly Prepare a Batch of Payments](#).

Generation of Financial Periods on Company Activation

In previous versions of MYOB Advanced, if a user generated financial calendars on the Master Financial Calendar (GL201000) form, the system did not generate periods for a new year in inactive companies. If the company was subsequently activated, these financial periods were missing in the company calendar and could not be restored or generated again.

Also, even if the company with missing periods remained inactive, the user could not enable the *Centralised Period Management* feature on the Enable/Disable Features (CS100000) form. This was because the system detected that the number of periods in the company calendar was greater than or equal to the number of periods in the master calendar; this validation is performed for active and inactive companies.

Starting in MYOB Advanced 2023.1, the management of financial periods in the general ledger has been streamlined so that users can perform the following operations:

- Create and post transactions in the financial periods that were generated when the company was inactive, even if the *Multiple Calendar Support* feature is disabled
- Enable the *Centralised Period Management* feature even if there is an inactive company whose calendar contains fewer periods than the master calendar
- Disable the *Multiple Calendar Support* feature even if there is an inactive company whose calendar contains fewer periods than the master calendar

In the fixed asset subledger, if the *Multiple Calendar Support* feature is disabled, the periods and years generated on the Generate Book Calendars (FA501000) form are not generated for inactive companies.

Changes to the Companies Form

On the Companies (CS101500) form, the **Active** checkbox has been removed. Instead, the **Status** field has been added, as shown in the following screenshot.

The screenshot shows the 'Companies' form for 'FRANCHISE - Franchise'. The 'Status' field is highlighted with a red box and displays 'Active'. Other visible fields include 'Company ID' (FRANCHISE), 'Company Name' (Franchise), 'Company Type' (Without Branches), 'Jurisdiction' (AU), and 'CDFid'. The form has a navigation bar at the bottom with tabs for 'COMPANY DETAILS', 'DELIVERY SETTINGS', 'EMPLOYEES', 'LEDGERS', 'GLACCOUNTS', 'VISUAL APPEARANCE', and 'COMPANY GROUPS'.

Figure: The Status field on the Companies form

The **Status** field is read-only and displays the status of the company—*Active* (default) or *Inactive*.

On the More menu of the Companies form, the following commands, which are shown in the following screenshot, have been added:

- **Activate** (Item 1): Activates the selected company. This command is available if the company's status is *Inactive*. When the user clicks this command, the system starts the process of activating the company. If the *Multiple Calendar Support* feature is disabled on the Enable/Disable Features (CS100000) form, the system compares the set of financial periods in the master calendar and the

set of financial periods of the current company. If these sets are different, the system generates the missing periods in the company that is being activated.

- **Deactivate** (Item 2): Deactivates the selected company. This command is available if the company's status is *Active*.

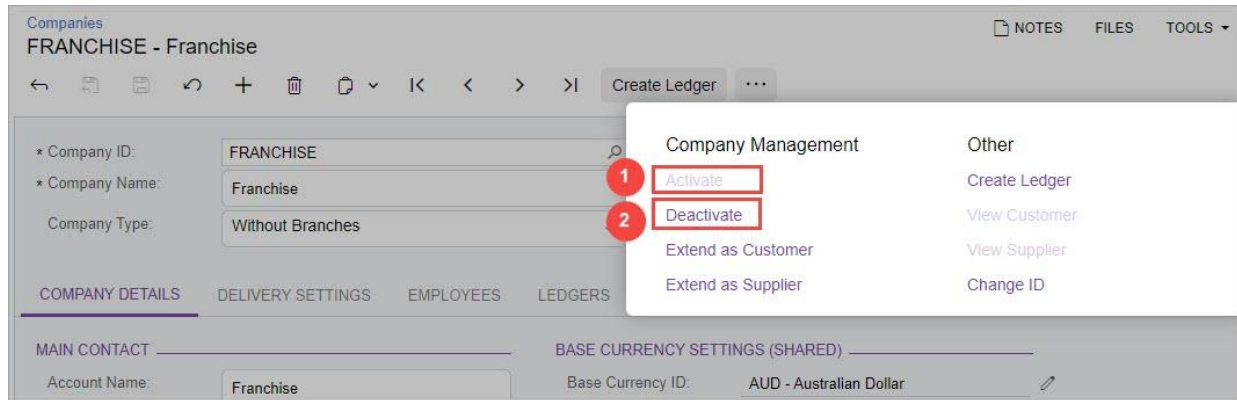


Figure: The updated More menu on the Companies form

Changes in General Ledger

In MYOB Advanced 2023.1, changes have been made to the generation of financial periods in the general ledger. If the *Multiple Calendar Support* feature is disabled on the Enable/Disable Features (CS100000) form and a user activates a company with the Inactive status by clicking **Activate** on the More menu of the Companies (CS101500) form, the system performs the following actions:

1. Compares the set of financial periods in the master calendar with the set of financial periods of the current company. Only the IDs of the periods are compared (the starting and ending dates of each of the included periods are not compared). If these sets are different, the system generates the missing periods for the company.
2. For each newly generated period in the company calendar, sets the period's status and the state of the **Closed in AP**, **Closed in AR**, **Closed in IN**, **Closed in CA**, and **Closed in FA** checkboxes depending on whether the *Centralised Period Management* feature is enabled:
 - If the feature is enabled, the period's status and the state of the **Closed in <Subledger>** checkboxes are copied from the corresponding settings of the master calendar.
 - If the feature is disabled, the system does one of the following, based on the newly generated period:
 - If it is the first added period, the period's status and the state of the **Closed in <Subledger>** checkboxes are copied from earliest period of the company calendar.
 - If it the period has been added to the middle of the company calendar (that is, there are periods before and after the added period), the period's status and the state of the **Closed in <Subledger>** checkboxes are copied from the period just before the added period.
 - If the period is the last period in the company calendar, the added period is assigned the Inactive status and the **Closed in <Subledger>** checkboxes are cleared.

The following additional changes have been implemented in the general ledger:

- Changed validation of periods in the company calendar if the *Centralised Period Management* feature is enabled.

Now the system does not validate that each company has a period in the company calendar that corresponds to the same period in the master calendar. Also, the system does not validate that if a period exists in one company, the period with the same **Period ID** exists in all other companies.

The system now makes sure that if a period exists in a company calendar and the same period exists in another company's calendar, these periods have the same status and the same states of the **Closed in <Subledger>** checkboxes.

- Exclusion of inactive companies from validation if the *Multiple Calendar Support* feature is disabled.

If a user disables the *Multiple Calendar Support* feature on the Enable/Disable Features form, the system makes sure that each period in the master calendar has a matching period in a company calendar for all companies. This validation is no longer performed for companies that have the *Inactive* status.

Changes in Fixed Assets

The following changes have been implemented in fixed assets:

- Periods are not generated in the posting book for inactive companies. If the *Multiple Calendar Support* feature is disabled on the Enable/Disable Features (CS100000) form and a user generates new periods on the Generate Book Calendars (FA501000) form, periods are not generated for companies with the *Inactive* status.

Note: If the *Multiple Calendar Support* feature is enabled, on the Generate Book Calendars form, calendars can be generated separately for each company, and the user can decide for which company new periods will be generated.

- When a company is activated, the calendar of the company's posting book is synchronised with the general ledger calendar. If the *Multiple Calendar Support* feature is disabled on the Enable/Disable Features form and a user activates a company by clicking **Activate** on the More menu on the Companies (CS101500) form, the system performs the following actions:
 - Checks whether each period in the general ledger calendar has a matching period in the calendar of the company's posting book. Only the IDs of the periods are compared.
 - Generates the missing periods in the company's posting book.
- If the *Multiple Calendar Support* feature is disabled, the calendar of the company's posting book is validated against the general ledger calendar. If a user disables the *Multiple Calendar Support* feature on the Enable/Disable Features form, the system checks whether each period of an active company in the company's posting book has a matching period in the general ledger. Only the IDs of the periods are compared. If this condition is not met, the system displays an error message.

Changes in Import Scenarios

To prevent activation of a company without the generation of missing periods, an administrative user is prohibited from changing the *IsActive* field for an import scenario that uses the *Companies* screen on the Import Scenarios (SM206025) form or on the UI. As a result, import scenarios that modify the state of the **Active** checkbox on the Companies (CS101500) form will no longer work in MYOB Advanced 2023.1.

For such import scenarios, the administrative user should use *<Action: Activate>* or *<Action: Deactivate>* in the **Field/ Action Name** column on the **Mapping** tab of the Import Scenarios form.

GL Consolidation by Company

In previous versions of MYOB Advanced, a company could be selected as a consolidation source only if it had the *Without Branches* type. If the company had the *With Branches Requiring Balancing* or *With Branches Not Requiring Balancing* type, its branches could be specified as sources of consolidation but the company itself could not.

Starting in MYOB Advanced 2023.1, companies of the *With Branches Requiring Balancing* and *With Branches Not Requiring Balancing* types can also be selected as consolidation sources on the Consolidation (GL103000) form.

Changes to the Consolidation Form

On the Consolidation (GL103000) form, the following UI changes have been introduced:

- The **Source Branch** column has been replaced with the **Source Company/Branch** column (Item 1 in the screenshot below). If the user clicks the magnifier button in this column, a lookup table is opened.
- The new lookup table that opens from the **Source Company/Branch** column (Item 2) displays a list of companies and branches according to the following rules:
 - Both active and inactive companies are displayed.
 - Companies of all types are displayed: *Without Branches*, *With Branches Not Requiring Balancing*, and *With Branches Requiring Balancing*.
 - Branches of companies with the *With Branches Requiring Balancing* type are displayed (as is the case for the branches in the screenshot below).

Note: Branches of companies with the *With Branches Not Requiring Balancing* type are NOT shown in the lookup field.

The lookup field has the following columns:

- **Company/Branch:** For a company, the company ID is shown; for a branch, the company ID followed by the branch ID is shown. By default, the list is sorted by this column in ascending order.
- **Name:** The name of the company or branch. The following screenshot illustrates these UI changes.



Figure: UI changes on the Consolidation form

Note: Before performing consolidation, on the Access Rights by Screen (SM201020) form, the administrative user should make sure that the user that will sign in to the source tenant—that is, the user specified in the **Username** column in the table of the Consolidation form—has the *Delete* access rights to the following forms in the **Hidden** node:

- Consolidation Accounts (GL103001)
- Consolidation Branches (GL103002)
- Consolidation Ledgers (GL103003)
- Consolidation Companies (GL103004)
- Consolidation Data (GL509001)

Note: Each of these forms is used for data storage during consolidation. The forms are not accessible on the UI, but a user can open them by entering the form ID in the browser address line. For example, the user could enter the following:
`http://localhost/[MYOBAdvancedInstance]/Main?CompanyID=[Tenant]&ScreenId=GL103001`. By default, these forms are not associated with any access roles. That is, any user has full access to them.

Changes to the Import Consolidation Data Form

On the Import Consolidation Data (GL509000) form, the **Source Branch** column has been replaced with the **Source Company/Branch** column, as shown in the following screenshot.

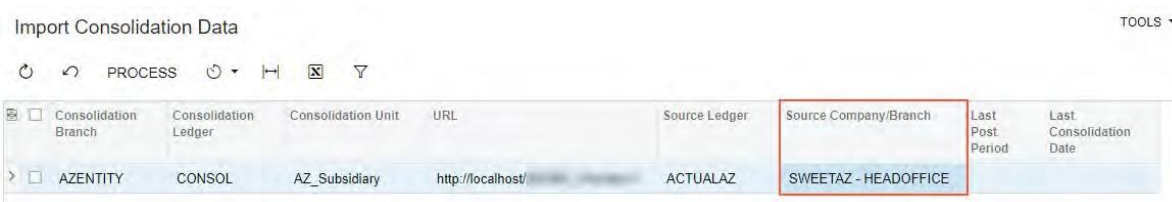


Figure: UI change on the Import Consolidation Data form

The column displays the company or branch selected on the Consolidation (GL103000) form—the company ID if a company is selected or the company ID followed by a branch ID if a branch is selected.

If a company of any type is specified in the **Source Company/Branch** column on the Consolidation form, the consolidation process that is run on the Import Consolidation Data form will consolidate the balances of all the branches, of this company.

Upgrade Notes

After an upgrade to MYOB Advanced 2023.1, on the Access Rights by Screen (SM201020) form, all users will have the *Not Set* access rights to the following forms in the **Hidden** node:

- Consolidation Accounts (GL103001)
- Consolidation Branches (GL103002)
- Consolidation Ledgers (GL103003)
- Consolidation Companies (GL103004)
- Consolidation Data (GL509001)

Migrated AR and AP Documents with Unreleased Retainage

In previous versions of MYOB Advanced, users could create migrated AR invoices and AP bills with unreleased retainage only by using import scenarios. This process could significantly complicate the migration process.

Starting in MYOB Advanced 2023.1, migrated AR invoices and AP bills with unreleased retainage can be created directly on the Invoices and Memos (AR301000) and Bills and Adjustments (AP301000) forms, respectively.

Changes to the Invoices and Memos Form

On the Invoices and Memos (AR301000) form, the **Apply Retention** checkbox in the Summary area is now available for documents created in migration mode, as shown in the following screenshot.

The screenshot shows the 'Invoices and Memos' form for 'Euro Hair Fashion'. The 'Apply Retention' checkbox is checked and highlighted with a red box. The form includes fields for Type (Invoice), Reference Nbr (<NEW>), Status (Balanced), Date (13/05/2021), Post Period (11-2021), Customer (CUST000012 - Euro Hair Fashion), Location (MAIN - Primary Location), Currency (AUD 1.00), Terms (30THMONTH - 30th of Month), Due Date (30/06/2021), Prompt Paym... (30/06/2021), and Project/Contract (X - Non-Project Code). The summary table shows zero values for Detail Total, Discount Total, GST Taxable T..., GST Exempt T..., Tax Total, Balance, Rounding Diff., and Prompt Paym... The table below the form shows a single line item with Branch RBYTEMAIN, Quantity 1.00, Unit Price 0.00, Ext. Price 500.00, and Disco Perc 0.0000.

Figure: A migrated invoice with applied retainage

A user can change the status of the **Apply Retainage** checkbox for an unreleased AR invoice.

Note: To turn on migration mode in accounts receivable, an administrative user should select the **Activate Migration Mode** checkbox on the **General** tab (**Posting Settings** section) of the Accounts Receivable Preferences (AR101000) form.

The following screenshot illustrates a released migrated AR invoice with unreleased retainage.

Invoices and Memos
Invoice 001913 - Euro Hair Fashion

Customer: CUST000012 - Euro Hair Fashion
Location: MAIN - Primary Location
Currency: AUD 1.00
Terms: 30THMONTH - 30th of Month
Date: 13/05/2021
Post Period: 11-2021
Customer Ord...
Project/Contract: X - Non-Project Code.

Detail Total: 350.00
Discount Total: 0.00
GST Taxable T...: 500.00
GST Exempt T...: 0.00
Tax Total: 50.00
Balance: 400.00
Rounding Diff.: 0.00
Amount: 400.00
Prompt Payme...: 0.00

Default Retention Percent: 0.000000
Total Amount: 550.00
Original Retention: 150.00
Unreleased Retention: 150.00
Released Retention: 0.00
Unpaid Retention: 150.00
Paid Retention: 0.00
Tax on Retention: 0.00
Discount on Retention: 0.00

Figure: A released migrated invoice with unreleased retainage

Changes to the Bills and Adjustments Form

On the Bills and Adjustments (AP301000) form, the **Apply Retainage** checkbox in the Summary area is now available for documents created in migration mode, as shown in the following screenshot.

Bills and Adjustments
Bill 000466 - ABC Studios Inc.

Supplier: V00000001 - ABC Studios Inc.
Location: MAIN - Primary Location
Currency: AUD 1.00
Terms: NET30DAYS - Net 30 Days
Date: 3/06/2023
Post Period: 12-2023
Supplier Ref.: ref0001
Due Date: 3/07/2023
Prompt Payme...: 3/06/2023

Detail Total: 1,162.50
Discount Total: 0.00
GST Taxable Total: 1,250.00
GST Exempt Total: 0.00
Tax Total: 125.00
With Tax: 0.00
Balance: 1,287.50
Rounding Diff.: 0.00
Prompt Payment ...: 0.00

Unreleased Retention: 87.50

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Cost	Ext. Cost	Discount Amount	Retention Percent	Retention Amount	Amount	*Account	Description
RBYTEMAIN			1.00		0.00	1,250.00	0.00	7.000000	87.50	1,162.50	500100	Cost of Goods Sold

Figure: A migrated bill with applied retainage

A user can change the status of the **Apply Retainage** checkbox for an unreleased AP bill.

Note: To turn on migration mode in accounts payable, an administrative user should select the **Activate Migration Mode** checkbox on the **General** tab (**Posting Settings** section) of the **Accounts Payable Preferences (AP101000)** form.

The following screenshot illustrates a released migrated AP bill with unreleased retainage.

Bills and Adjustments
Bill 000466 - ABC Studios Inc.

NOTES ACTIVITIES FILES TOOLS

← ↻ + 🗑️ ⏏️ < > >> Pay ...

Type: Bill	Supplier: V000000001 - ABC Studios Inc.	Detail Total: 1,162.50
Reference Nbr.: 000466	Location: MAIN - Primary Location	Discount Total: 0.00
Status: Open	Currency: AUD 1.00 VIEW BASE	GST Taxable Total: 1,250.00
Date: 3/06/2023	Terms: NET30DAYS - Net 30 Days	GST Exempt Total: 0.00
Post Period: 12-2023	* Due Date: 3/07/2023 <input checked="" type="checkbox"/> Apply Retention	Tax Total: 125.00
Supplier Ref.: ref0001	* Prompt Payme...: 3/06/2023 <input type="checkbox"/> Pay by Line <input type="checkbox"/> Track for TPAR	With. Tax: 0.00
Description:	<input type="checkbox"/> Joint Payees	Balance: 1,287.50
		Rounding Diff.: 0.00
		Amount: 1,287.50
		Prompt Payment ...: 0.00

DETAILS FINANCIAL TAXES APPROVALS **RETENTION** APPLICATIONS COMPLIANCE

Default Retention Perc...: 0.000000	Unreleased Retention: 87.50	Tax on Retention: 0.00
Total Amount: 1,375.00	Released Retention: 0.00	
Original Retention: 87.50	Unpaid Retention: 87.50	
	Paid Retention: 0.00	

Figure: A released migrated bill with unreleased retention

Additional Information

For details on creating document with unreleased retainage in migration mode, see Processing Documents in Migration Mode.

Renamed Document Types in AP and AR

In previous versions of MYOB Advanced, some AP and AR document types were confusing. Also, some document types, such as *Customer Refund*, were too long to fit into the **Type** field.

To align the document types with business standards and make their appearance on the UI more user-friendly, multiple document types on AP and AR forms and reports have been renamed in MYOB Advanced 2023.1.

Changes in Accounts Payable

In the accounts payable forms and reports, UI changes to the names of document types have been introduced. The document types on the AP data entry forms have been renamed as follows.

Document Type in Previous Versions	New Document Type in 2023.1
<i>Supplier Refund</i>	<i>Refund</i>
<i>Voided Supplier Refund</i>	<i>Voided Refund</i>

The document types shown in the **Doc. Type** field in the generated AP reports have been renamed as follows.

Document Type in Previous Versions	New Document Type in 2023.1
<i>BILL</i>	<i>Bill</i>
<i>CRADJ</i>	<i>Credit Adj.</i>
<i>DRADJ</i>	<i>Debit Adj.</i>
<i>CHECK</i>	<i>Payment</i>
<i>PREPAY</i>	<i>Prepayment</i>
<i>REF</i>	<i>Refund</i>
<i>VOIDREF</i>	<i>Voided Refund</i>
<i>VOIDCK</i>	<i>Voided Payment</i>
<i>QCHECK</i>	<i>Cash Purchase</i>
<i>VOIDQCK</i>	<i>Voided Cash Purchase</i>

The Quick Cheques (AP304000) form has been renamed to Cash Purchases (AP304000).

Changes in Accounts Receivable

In the accounts receivable forms and reports, the UI changes listed below have been introduced. The document types on the AR data entry forms have been renamed as follows.

Document Type in Previous Versions	New Document Type in 2023.1
<i>Customer Refund</i>	<i>Refund</i>
<i>Voided Customer Refund</i>	<i>Voided Refund</i>

The document types shown in the **Doc. Type** field in the generated AR reports have been renamed as follows.

Document Type in Previous Versions	New Document Type in 2023.1
<i>INVOICE</i>	<i>Invoice</i>
<i>DEBIT MEMO</i>	<i>Debit Memo</i>
<i>CREDIT MEMO</i>	<i>Credit Memo</i>
<i>PAYMENT</i>	<i>Payment</i>
<i>PREPAYMENT</i>	<i>Prepayment</i>
<i>REFUND</i>	<i>Refund</i>
<i>VOIDREFUND</i>	<i>Voided Refund</i>
<i>VOIDPAY</i>	<i>Voided Payment</i>
<i>OVERDUE CHARGES</i>	<i>Overdue Charge</i>
<i>BALANCE WO</i>	<i>Balance WO</i>
<i>CREDIT WO</i>	<i>Credit WO</i>
<i>CASH SALE</i>	<i>Cash Sale</i>
<i>CASH RET</i>	<i>Cash Return</i>

Related Changes in Import Scenarios

Based on the broader name changes in accounts payable, changes have been made to the names of a predefined import scenario and data provider.

On the Import Scenarios (SM206000) form, the *ACU Import AP Quick Cheques* import scenario has been renamed to *ACU Import AP Cash Purchases*.

On the Data Providers (SM206015) form, the *ACU Import AP Quick Cheques* data provider has been renamed to *ACU Import AP Cash Purchases*.

Synchronisation of Fixed Asset Periods with GL Periods

In the general ledger, each company has a set of financial periods that the system uses for posting GL transactions and transactions created by subledgers. Additionally, each company that uses fixed assets has a set of periods in the posting book, which are generated based on the same template as is used for the GL periods. Normally, the fixed asset subledger contains more periods than the general ledger does, because the system must have future periods that correspond to the dates on which the existing fixed assets will be depreciated. When the fixed assets subledger posts transactions to the GL, it uses the GL periods with the same IDs as in the posting book of the fixed asset subledger.

In previous versions of MYOB Advanced, if an administrative user changed user-defined periods in the financial calendar on the Master Financial Calendar (GL201000) form after the periods for the posting book were generated in fixed assets, the periods in the posting book might not match the company's financial periods in the general ledger. This led to the inability to post fixed asset transactions because the release process in fixed assets compares the start and end dates of the periods in the posting book with these dates for the GL periods and fails with an error if they do not match.

In MYOB Advanced 2023.1, users can adjust fixed asset periods so that they match the updated GL periods. The system will recalculate and post depreciation transactions and other types of fixed asset transactions based on the amended periods.

Changes to the Book Calendars Form

On the Book Calendars (FA304000) form, the More menu with the Synchronise FA Calendar with GL command has been added, as shown in the following screenshot.

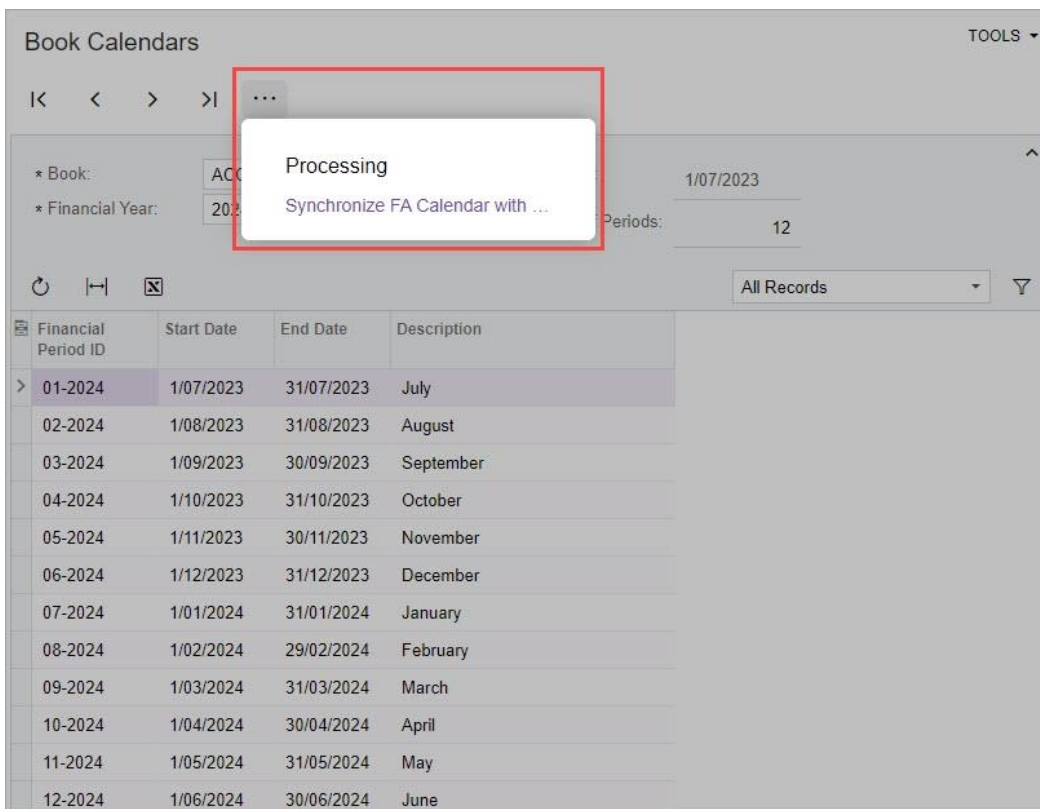


Figure: The More menu on the Book Calendars form

For all companies, if a user clicks this command, the system checks if periods in the posting book are synchronised with the GL periods by comparing the start and end dates of the periods with the same ID, regardless of the status of the periods. If the periods are synchronised, the system returns an error message.

If the periods in the posting book and in the general ledger are not synchronised, the system checks if there are any released and unreleased transactions in the posting book and returns an error message if such transactions are found.

When synchronizing the periods, the system performs the following actions:

- Deletes years and periods in the fixed asset book starting from the period following the most recent period that was synchronised.
- Deletes the `FABookHistory` table for depreciable assets in the posting book starting from the period following the most recent period that was synchronised.
- In the fixed asset book, creates the years and periods that are missing in the posting book calendar, by copying the years and periods from the general ledger.
- Generates new fixed asset years based on the template until the last calendar year that used to be in the posting book before synchronisation plus 1. If there is a gap between the start date of the first generated period and the end date of the last period copied from GL, the system sets the start date of this period to the end date of the previous period to ensure that there are no gaps in the calendar. The same action is performed for the years.
- Recalculates the `FABookBalance.DeprToPeriod` field for active and suspended depreciable assets for which the **Depr. to Period** setting on the **Balance** tab of the Fixed Assets (FA303000) form is later than or equal to the first out-of-sync period.
- Updates the asset's current period with the period that follows the most recent depreciation period (to handle the case when this period has been deleted).
- For active and suspended depreciable assets, calculates depreciation up to the current period if this period was not synchronised.

Changes to the Master Financial Calendar Form

The system displays the warning message shown in the following screenshot if both of the following conditions are met:

- The *Multiple Calendar Support* feature is enabled on the Enable/Disable Features (CS100000) form
- A user changes periods on the Master Financial Calendar (GL201000) form by selecting the **User-Defined Periods** checkbox, updating the periods in the table, and saving the changes

Master Financial Calendar

NOTES ACTIVITIES FILES TOOLS

* Financial Year: 2024 User-Defined Periods

Start Date: 1/07/2023

Number of Periods: 12

Financial Period ID	Start Date	End Date	Length (Days)	Description	Adjustme Period
01-2024	1/07/2023	30/07/2023	31	July	<input type="checkbox"/>
02-2024	1/08/2023	31/08/2023	31	August	<input type="checkbox"/>
03-2024	1/09/2023	30/09/2023	30	September	<input type="checkbox"/>
04-2024	1/10/2023	31/10/2023	31		
05-2024	1/11/2023	30/11/2023	30		
06-2024	1/12/2023	31/12/2023	31		
07-2024	1/01/2024	31/01/2024	31		
08-2024	1/02/2024	29/02/2024	29		
09-2024	1/03/2024	31/03/2024	31		
10-2024	1/04/2024	30/04/2024	30		
11-2024	1/05/2024	31/05/2024	31		
12-2024	30/05/2024	30/05/2024	1	June	<input type="checkbox"/>

Modify Financial Periods

Financial periods for the selected year exist in the fixed asset posting book and do not match the periods in the general ledger. To amend the periods in the posting book based on the periods in the general ledger, on the Book Calendars (FA304000) form, click Synchronize FA Calendar with GL.

OK

Figure: A warning message on the Master Financial Calendar form

The user has to click the **Synchronise FA Calendar with GL** command on the More menu of the Book Calendars (FA304000) form to amend the periods.

The following changes in validation have been implemented on the Master Financial Calendar form:

- The system does not allow the deletion of the financial periods and years that have released or unreleased fixed asset transactions in the posting book. This validation is performed only if no GL batches exist for the period or year.
- The system makes the ending date of a financial period unavailable for editing if there are released or unreleased fixed asset transactions in the posting book in this period or in the later periods.
- If a user modifies the end dates of the existing periods or manually adds new periods, the system checks if the start and end dates of the periods match the start and end dates of the periods that exist in the posting book. If these dates do not match, the system displays an error message.
- If a user generates a new financial year, on completion of the operation, the system checks if the start and end dates of the periods of the year match the start and end dates of the periods that exist in the posting book. If these dates do not match, the system displays an error message.
- The validation of the period dates performed for the periods being deleted, which existed in versions before 2023.1, has been removed.

Changes to the Company Financial Calendar Form

If the *Multiple Calendar Support* feature is enabled on the Enable/Disable Features (CS100000) form, on the Company Financial Calendar (GL201100) form, the system does not allow a user to delete a financial year if at least one period of the year has released or unreleased fixed asset transactions in the posting book for the branches of the company. This validation is performed only if no GL batches exist for the year.

Tax Bills with Direct-Entry Taxes and Taxable Lines

In previous versions of MYOB Advanced, a user could not create one document containing a combination of direct-entry tax lines and expense lines if these tax lines were based on a previous zero-GST invoice. Two forms were used to process both types of lines—the Tax Bills and Adjustments (TX303000) form, which contained only a tax amount, and the Bills and Adjustments (AP301000) form, which contained only expense lines.

In MYOB Advanced 2023.1, users can create AP documents (bills and cash purchases) and landed cost documents with both direct-entry tax lines and expense lines. Direct-entry tax lines have taxable amounts of 0. When a user prepares a tax report, a zero-rate tax is applied to the original transaction (the one that includes the expense lines of the direct-entry tax lines) to report the taxable amount under the original bill. The tax itself is reported in a tax bill. The functionality described below is used when a user creates a tax bill that includes multiple lines, one of which representing the import tax amount.

Note: The previously existing functionality of entering tax lines separately on the Tax Bills and Adjustments form and of entering expense lines on the Bills and Adjustments form is still available. However, to restrict the auto-application of direct-entry taxes on the Bills and Adjustments form, limitations are applied to direct-entry taxes, as described in the next section.

Changes to the Taxes Form

On the Taxes (TX205000) form, the **Enter from Tax Bill** checkbox on the **Tax Settings** tab has been renamed to **Direct-Entry Tax**.

If this checkbox is selected for a tax, the tax that can be entered directly on the Tax Bills and Adjustments (TX303000) form and other data entry forms, and it represents a tax levied on imported goods (import tax). The following rules apply to a direct-entry tax:

- A direct-entry tax cannot be included in the same tax category with non-direct-entry taxes if the **Exclude Listed Taxes** checkbox is cleared on the Tax Categories (TX205500) form) for this tax category.
- Multiple direct-entry taxes that are included in the same tax zone on the Tax Zones (TX206000) form cannot be included in the same tax category.

If a user selects the **Direct-Entry Tax** checkbox for a tax, the system applies the following settings, which cannot be edited:

- **Calculation Rule:** Inclusive Line-Level
- **Cash Discount:** Does Not Affect Taxable Amount
- **Exclude from Tax-on-Tax Calculation:** Selected

With the **Direct-Entry Tax** checkbox selected, the state and behaviour of the following checkboxes are changed:

- **Partially Deductible GST:** Cleared by default and cannot be selected
- **Reverse GST:** Cleared by default and cannot be selected
- **Pending GST:** Cleared by default and can be selected

Note: Direct-entry taxes that have the **Pending GST** checkbox selected are further processed on the Bills and Adjustments (AP301000), Cheques and Payments (AP302000), Recognise Input GST (TX503500), and Recognise Output GST (TX503000) forms as regular pending GSTs.

Direct-entry taxes can be automatically applied by the system on the following forms:

- Bills and Adjustments (AP301000)
- Cash Purchases (AP304000)
- Landed Costs (PO303000)
- Tax Bills and Adjustments (TX303000)

Direct-entry taxes are not applied on other forms where taxes are available, such as Purchase Orders (PO301000) or Sales Orders (SO301000).

Note: If a tax category containing a direct-entry tax is selected for a purchase order on the Purchase Orders form or if a stock item is assigned to a tax category containing a direct-entry tax and the user adds this stock item to a purchase order, the import tax will be ignored by the system.

Changes to the Tax Categories Form

On the Tax Categories (TX205500) form, the **Direct-Entry Tax** read-only column has been added to the table, as shown in the following screenshot.

The screenshot shows the 'Tax Categories' form for 'CAPPURCH - G10 Cap Purch - GST'. The form includes fields for Tax Category ID, Description, and checkboxes for 'Active' and 'Exclude Listed Taxes'. Below the form is a table with the following columns: Tax ID, Description, Tax Type, Calculation Rule, Prompt Payment Disc., and Direct-Entry Tax. The 'Direct-Entry Tax' column is circled in red in the original image.

Tax ID	Description	Tax Type	Calculation Rule	Prompt Payment Disc.	Direct-Entry Tax
> G10CAP GST	GST 10% Capital Purchases Cre...	GST	Inclusive Line-Level	Does Not Affect Taxable A...	<input checked="" type="checkbox"/>

Figure: The Direct-Entry Tax column on the Tax Categories form

Changes to the Tax Zones Form

On the Tax Zones (TX206000) form, the **Direct-Entry Tax** read-only column has been added to the table, as shown in the following screenshot.

Tax Zones
DOMESTIC - Domestic NOTES ACTIVITIES

← ↻ 📄 ↺ + 🗑️ 📄 ▾ ⏪ < > ⏩

* Tax Zone ID: 🔍
 Description:
 Default Tax Category: 🔍 ✎

APPLICABLE TAXES SHIP-TO ADDRESSES

↻ + × ⏪ ⏩

* Tax ID	Description	Tax Type	Calculation Rule	Prompt Payment Disc.	Direct-Entry Tax
> G10CAP_GST	GST 10% Capital Purchases Cre...	GST	Inclusive Line-Level	Does Not Affect Taxable A...	<input checked="" type="checkbox"/>
G11NONCAP_GST	GST 10% Non-capital Purchase...	GST	Exclusive Docume...	Does Not Affect Taxable A...	<input type="checkbox"/>

Figure: The Direct-Entry Tax column on the Tax Zones form

Changes to the Bills and Adjustments Form

The Bills and Adjustments (AP301000) form has been modified to support the entry of tax bills containing taxable lines and 100% tax lines, as well as the entry of tax bills containing only 100% tax lines.

A direct-entry tax is applied on the Bills and Adjustments form if the following conditions are met:

- The supplier's tax zone is the tax zone in which the direct-entry tax is included.
- The tax category selected in the document line contains the direct-entry tax and has the **Exclude Listed Taxes** checkbox cleared on the Tax Categories (TX205500) form.

The following screenshot illustrates a direct-entry tax entered on the Bills and Adjustments form.

Bills and Adjustments
Bill 000459 - ABC Studios Inc. NOTES ACTIVITIES FILES TOOLS ▾

← ↻ 📄 ↺ + 🗑️ 📄 ▾ ⏪ < > ⏩ Pay ...

Type: <input type="text" value="Bill"/> ▾ Reference Nbr.: <input type="text" value="000459"/> 🔍 Status: <input type="text" value="Open"/> Date: <input type="text" value="27/10/2023"/> Post Period: <input type="text" value="04-2024"/> Supplier Ref.: <input type="text" value="OCT1236"/> Description: <input type="text"/>	Supplier: <input type="text" value="V000000001 - ABC Studios Inc."/> ✎ Location: <input type="text" value="MAIN - Primary Location"/> Currency: <input type="text" value="AUD"/> <input type="text" value="1.00"/> ▾ <input type="button" value="VIEW BASE"/> Terms: <input type="text" value="NET30DAYS - Net 30 Days"/> * Due Date: <input type="text" value="26/11/2023"/> ▾ * Prompt Payme...: <input type="text" value="27/10/2023"/> ▾ <input type="checkbox"/> Pay by Line <input type="checkbox"/> Track for TPAR <input type="checkbox"/> Joint Payees	Detail Total: <input type="text" value="442,520.00"/> Discount Total: <input type="text" value="0.00"/> GST Taxable Total: <input type="text" value="442,520.00"/> GST Exempt Total: <input type="text" value="0.00"/> Tax Total: <input type="text" value="44,352.00"/> With. Tax: <input type="text" value="0.00"/> Balance: <input type="text" value="486,772.00"/> Rounding Diff.: <input type="text" value="0.00"/> Amount: <input type="text" value="486,772.00"/> Prompt Payment ...: <input type="text" value="0.00"/>
---	---	---

DETAILS FINANCIAL **TAXES** APPROVALS APPLICATIONS COMPLIANCE

↻ + × ⏪ ⏩

* Tax ID	Tax Rate	Taxable Amount	Tax Amount	Deductible Tax Rate	Expense Amount
> G11NONCAP_GST	10.000000	442,520.00	44,252.00	100.000000	0.00
IMPORT	100.000000	0.00	100.00	100.000000	0.00

Figure: A direct-entry tax on the Bills and Adjustments form

For a document line to which a direct-entry tax is applied, the full line amount is the **Tax Amount** (shown on the **Taxes** tab), and the **Taxable Amount** is always 0.

For a direct-entry tax, the following boxes cannot be edited on the **Taxes** tab of the Bills and Adjustments form: **Taxable Amount**, **Tax Amount**, **Tax Rate**, **Expense Amount** as well as **Retained Taxable Amount** and **Retained Tax** for documents with retainage, and the **Deferral Code** column on the **Details** tab. A user cannot manually delete a direct-entry tax from the **Taxes** tab by clicking **Delete Row** on the table toolbar. To delete a direct-entry tax, the user should change the tax category for the document line or delete the document line with the tax on the **Details** tab.

If the *Net/Gross Entry Mode* feature is enabled on the Enable/Disable Features (CS100000) form, the tax calculation mode selected for the bill on the **Financial** tab (**Tax** section) of the Bills and Adjustments form does not affect the tax calculated for the line with a direct-entry tax.

Note: Direct-entry taxes cannot be applied to lines linked to a purchase order, subcontract, or purchase receipt. A direct-entry tax can be applied only to a landed cost line with the *None* allocation method specified on the **Landed Costs** tab of the Landed Costs (PO303000) form.

Processing of Discounts

No discounts are applied to lines with direct-entry taxes.

If automatic line discounts are set up, for a line with a direct-entry tax, the system will insert 0 in the **Discount Amount** and **Discount Percent** boxes and select the **Manual Discount** checkbox.

Lines with direct-entry taxes are excluded from the calculation of group discounts and document discounts on the Bills and Adjustments form.

Processing of Retainage

If the **Apply Retainage** checkbox is selected for a document on the Bills and Adjustments form, the **Retainage Amount** and **Retainage Percent** columns on the **Details** tab will always be 0 and unavailable for lines with direct-entry taxes.

If a retainage amount and percent have been specified for a regular line and this line is changed to a line with a direct-entry tax, the system resets the **Retainage Amount** and **Retainage Percent** columns to 0 and makes them unavailable.

If a line with a direct-entry tax has been changed to an expense line, the **Retainage Amount** and **Retainage Percent** columns become available.

Changes to the Landed Cost Codes Form

The Landed Cost Codes (PO202000) form has been modified to support direct-entry taxes in landed cost documents as follows:

- If *None* is selected in the **Allocation Method** field, the **Tax Category** lookup field displays tax categories with regular taxes that have the **Exclude Listed Taxes** checkbox cleared on the Tax Categories (TX205500) form and that contain direct-entry taxes.
- If any other allocation method is selected, the **Tax Category** lookup field displays only tax categories containing regular taxes and tax categories that have the **Exclude Listed Taxes** checkbox selected.

Changes to the Stock Items Form

On the Stock Items (IN202500) form, the **Tax Category** lookup field on the **General** tab displays only the tax categories that meet either of the following criteria:

- The tax category contains regular taxes—those for which the **Direct-Entry Tax** checkbox is cleared on the Taxes (TX205000) form—and the **Exclude Listed Taxes** checkbox is selected or cleared on the Tax Categories (TX205500) form.
- The tax category has the **Exclude Listed Taxes** checkbox selected on the Tax Categories form.

Changes to the Landed Costs Form

A direct-entry tax is applied on the Landed Costs (PO303000) form if all of the following conditions are met:

- The landed cost document belongs to the tax zone in which the direct-entry tax is included.
- The line of the landed cost document has the *None* allocation method specified on the **Landed Costs** tab.
- The tax category selected in the document line contains the direct-entry tax and has the **Exclude Listed Taxes** checkbox cleared on the Tax Categories (TX205500) form.

The following screenshot illustrates a direct-entry tax applied to a landed cost document.

The screenshot shows the 'Landed Costs' form for document LC000023 - AU Customs. The 'TAXES' tab is selected. The document details include: Reference Nbr.: LC000023, Supplier: V000000057 - AU Customs, Location: MAIN - Primary Location, Date: 31/07/2020, Post Period: 01-2021, Currency: AUD 1.00, and Supplier Ref.: 0012121. Summary statistics on the right show: Total Allocated Am...: 15,000.00, Amount Total: 15,000.00, GST Taxable Total: 15,000.00, GST Exempt Total: 0.00, Tax Total: 1,500.00, and Document Total: 16,500.00. Below the summary, a table lists taxes:

*Tax ID	Tax Rate	Taxable Amount	Tax Amount
> IMPORT	100.000000	0.00	78.00

Figure: A direct-entry tax on the Landed Costs form

For a direct-entry tax, the following boxes cannot be edited on the **Taxes** tab: **Taxable Amount**, **Tax Amount**, and **Tax Rate**. A user cannot manually delete a direct-entry tax from the **Taxes** tab by clicking **Delete Row** on the table toolbar. To delete the direct-entry tax, the user should change the tax category for the document line or delete the document line with the tax on the **Details** tab.

Changes to the Cash Purchases Form

On the Cash Purchases (AP304000) form, a direct-entry tax is applied if both of the following conditions are met:

- The supplier's tax zone is the tax zone in which the direct-entry tax is included.
- The tax category selected in the document line contains the direct-entry tax and has the **Exclude Listed Taxes** checkbox cleared on the Tax Categories (TX205500) form.

The following screenshot illustrates a direct-entry tax applied to a cash purchase.

Figure: A direct-entry tax on the Cash Purchases form

For a direct-entry tax, the following boxes cannot be edited on the **Taxes** tab of the Cash Purchases form: **Taxable Amount**, **Tax Amount**, **Tax Rate**, **Expense Amount**, and the **Deferral Code** column on the **Details** tab. A user cannot manually delete a direct-entry tax from the **Taxes** tab by clicking **Delete Row** on the table toolbar. To delete the direct-entry tax, the user should change the tax category for the document line or delete the document line with the tax on the **Details** tab.

If the *Net/Gross Entry Mode* feature is enabled on the Enable/Disable Features (CS100000) form, the tax calculation mode selected for the cash purchase on the **Financial** tab (**Tax and Terms** section) of the Cash Purchases form does not affect the tax calculated for the line with a direct-entry tax.

Upgrade Notes

During an upgrade to MYOB Advanced 2023.1, the upgrade script will update the settings of existing direct-entry taxes on the Taxes (TX205000) form to the following:

- Calculation Rule: Inclusive Line-Level
- Cash Discount: Does Not Affect Taxable Amount
- Exclude from Tax-on-Tax Calculation: Selected
- Partially Deductible GST: Cleared
- Reverse GST: Cleared
- Deductible Tax Rate: 100

Additionally, the script will remove a direct-entry tax from a tax category if this was the only direct-entry tax available for the combination of a tax zone and a tax category with the **Exclude Listed Taxes** checkbox cleared. This change prevents unexpected automatic application of the direct-entry tax on the Bills and Adjustments (AP301000), Cash Purchases (AP304000), and Landed Costs (PO303000) forms.

After the upgrade, if a document line has an invalid tax configuration, the system will apply only the regular taxes if the tax category selected for the line contains both regular and direct-entry taxes, and will apply no direct-entry taxes if the tax category contains multiple direct-entry taxes. If a taxable document is created after the upgrade or if a document was created before the upgrade and edited after the upgrade, the system will display warning messages as follows:

- If the tax category contains regular and direct-entry taxes, the system will display a warning indicating that the regular and direct-entry taxes cannot be applied to the same document line.
- If the tax category contains multiple direct-entry taxes, the system will display a warning indicating that multiple direct-entry taxes cannot be applied to the same document line.

Additional Information

For details on direct-entry taxes, see [Direct Tax Payment: General Information](#).

For details on how to add a direct-entry tax to an AP bill, see [Direct Tax Payment: To Create an AP Bill with a Direct- Entry Tax](#).

Other Improvements

In MYOB Advanced 2023.1, multiple improvements to financial management processes have been introduced, as described below.

Ability to Change the Type of Account with Posted Transactions

On the Chart of Accounts (GL202500) form, users can now change the type of accounts to which transactions have been posted by updating the setting in the **Type** column. On this form, a user can substitute the *Income* and *Expense* types for each other, and can substitute the *Asset* and *Liability* types for each other.

Note: By default, the ability to change the account type is granted to only users that are assigned to the *Financial Supervisor* role on the User Roles (SM201005) form.

If a user changes the account type (see Item 1 in the following screenshot, where *Income* has been changed to *Expense*) and clicks **Save**, the system displays a Warning dialog field (Item 2).

The screenshot shows the 'Chart of Accounts' form with a table of accounts. The table has columns for Account, Account Class, Type, Active, Description, Control Account Module, Allow Manual Entry, Post Option, Cash Account, Currency, and Revaluation Rate Type. The account with ID 100030 is highlighted, and its 'Type' is changed from 'Asset' to 'Liability'. A red circle labeled '1' points to this change. A dialog box titled 'Update Account Type' is overlaid on the table, with a red circle labeled '2' pointing to the 'UPDATE' button. The dialog box contains the following text: 'Changing the type of accounts may affect financial statements because general ledger transactions were posted to these accounts: 100030.' Below the text are 'UPDATE' and 'CANCEL' buttons.

Account	Account Class	Type	Active	Description	Control Account Module	Allow Manual Entry	Post Option	Cash Account	Currency	Revaluation Rate Type
100015	CASHASSET	Asset	✓	XYZ Bank Cheque Account - Me...		<input type="checkbox"/>	Detail	<input checked="" type="checkbox"/>	AUD	
100016	CASHASSET	Asset	✓	AU Wespac Banking Cop- HQ		<input type="checkbox"/>	Detail	<input checked="" type="checkbox"/>	AUD	
100020	CASHASSET	Asset	✓	Savings Account - AUD		<input type="checkbox"/>	Detail	<input checked="" type="checkbox"/>	AUD	
100030	CASHASSET	Liability	✓	Trading and Investment Account - AUD		<input type="checkbox"/>	Detail	<input type="checkbox"/>	AUD	
100035	CASHASSET	Asset	✓	Payroll Cheque		<input type="checkbox"/>		<input type="checkbox"/>		
100040	CASHASSET	Asset	✓	Cheque Account		<input type="checkbox"/>		<input checked="" type="checkbox"/>	NZD	SPOT
100050	CASHASSET	Asset	✓	Cheque Account		<input type="checkbox"/>		<input checked="" type="checkbox"/>	USD	SPOT
100060	CASHASSET	Asset	✓	Cheque Account		<input type="checkbox"/>		<input checked="" type="checkbox"/>	EUR	SPOT
100070	CASHASSET	Asset	✓	Cheque Account		<input type="checkbox"/>		<input type="checkbox"/>	GBP	SPOT
100072	CASHASSET	Asset	✓	AU Wespac Banking Cop- Sydney		<input type="checkbox"/>	Detail	<input checked="" type="checkbox"/>	AUD	

Figure: Change of account type on the Chart of Accounts form

To confirm the change of the account type, the user clicks **Update** in the dialog field. If this account has corresponding project transactions, the system also runs the process of recalculating project balances for the related projects.

Changes in types of account do not affect the calculation of amounts posted to the *Retained Earnings* and *YTD Net Income* accounts.

Tax Zone Validation

In MYOB Advanced 2022 R2, automatic assignment of the tax zone to sales orders and invoices was implemented. However, records entered on the **Ship-To Address** tab of the Tax Zones (TX206000) form were not validated, so a user could enter more than one tax zone that corresponded to the same country, state, and postal code.

To address this ambiguity, validation of tax zones has been implemented in MYOB Advanced 2023.1 as an enhancement to this functionality. The system now ensures that the user cannot create two or more tax zones linked to the same combination of country, state, and postal code. If a combination of the tax zone and the country, state, and postal code already exists, the system displays an error message.

When a user enters a new record on the **Ship-To Addresses** tab of the Tax Zones (TX206000) form, depending on the **Tax Zone Is Based On** setting, the system validates the new entry as follows:

- If *Countries* is selected, when the user adds a country to the list of the tax zone's countries, the system verifies that there is no tax zone with *Countries* selected in the **Tax Zone Is Based On** field that has the same country in the list of the tax zone's countries.
- If *States* is selected, when the user adds a state to the list of the tax zone's states, the system verifies that there is no tax zone with *States* selected in the **Tax Zone Is Based On** field that has the same state in the list of the tax zone's states.
- If *Postal Codes* is selected, when the user adds a postal code range to the list on the **Ship-To Addresses** tab, the system verifies that there is no tax zone with *Postal Codes* selected in the **Tax Zone Is Based On** field with the same country that has a postal code range that overlaps with the newly added postal code range.

If the user modifies a record on the **Ship-To Addresses** tab, the system performs the same validation, but without taking into account the record that is being modified.

Availability of Payments by Line for Tax Agencies

On the Suppliers (AP303000) form, the **Pay by Line** checkbox on the **Payment** tab (**Default Payment Settings** section) is now available for suppliers configured as tax agencies (those that have the **Supplier Is a Tax Agency** checkbox selected on the **General** tab), as shown in the following screenshot.

The screenshot shows the Suppliers form for 'DHS - Department of Human Services'. The 'Supplier Class' is 'TAXAGENCY - Tax Agency'. The 'Payment' tab is active, showing 'REMIT-TO ADDRESS' and 'DEFAULT PAYMENT SETTINGS'. In the 'DEFAULT PAYMENT SETTINGS' section, the 'Pay by Line' checkbox is checked and circled in red. Other settings include 'Payment Method: ACHBA - ACH Balanced', 'Cash Account', 'Payment By: Due Date', 'Payment Lead Time (D...): 0', 'Pay-to Supplier', 'Prepayment Percent: 0.000000', and 'Pay Separately' (unchecked).

Figure: The *Pay by Line* checkbox selected for a tax agency

Due to this change, the tax bills that are generated for such a tax agency and that have multiple lines can be paid in full or by line.

Availability of the Reverse Command for GL Revaluation Batches

In previous versions of MYOB Advanced, users were not able to correct GL transactions that were generated on the Revalue GL Accounts (CM506000) form.

In MYOB Advanced 2023.1, on the Journal Transactions (GL301000) form, the **Reverse** command is available on the More menu for batches posted during processing on the Revalue GL Accounts form. If the user clicks **Reverse** on the More menu, the system creates a reversing batch, which is a copy of the original

batch where the debit and credit amounts change places to offset the original debit and credit amounts. The user can edit the **Description** field for this batch; all the other boxes are read-only.

Note: For the batches created on the Revalue AP Accounts (CM504000) and Revalue AR Accounts (CM505000) form, the **Reverse** command remains unavailable.

The following screenshot shows a batch that was posted as a result of the GL revaluation process on the Revalue GL Accounts form and the availability of the **Reverse** command for the batch.

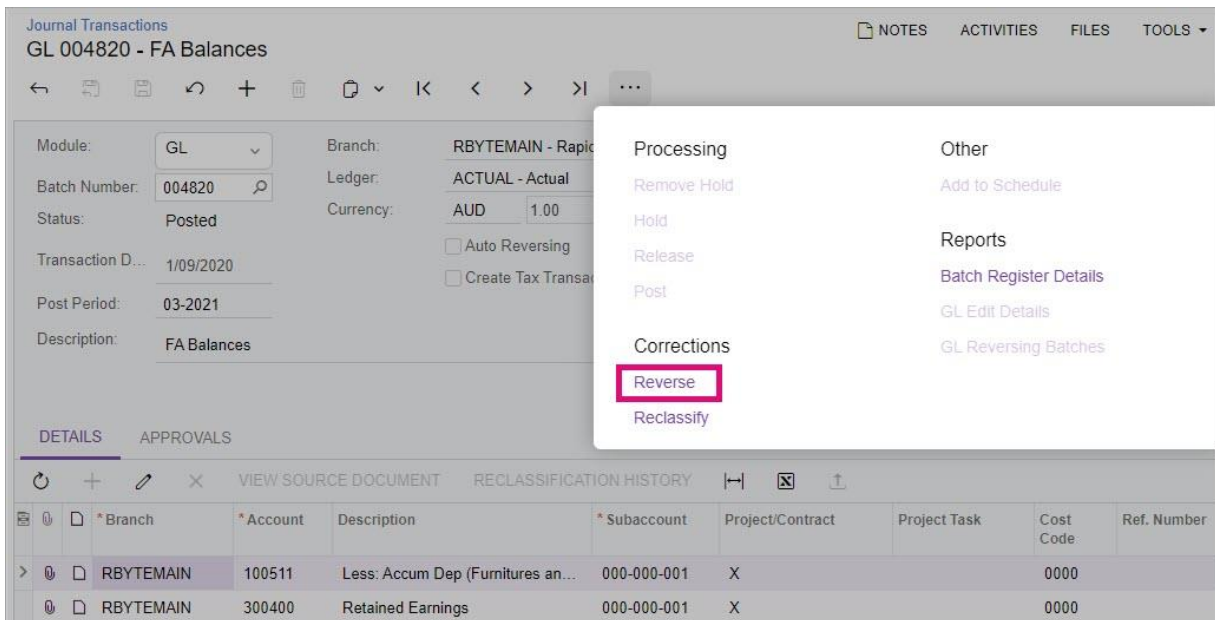


Figure: The available Reverse command for a GL revaluation batch

The following screenshot shows the batch that reverses the GL revaluation batch in the previous screenshot.

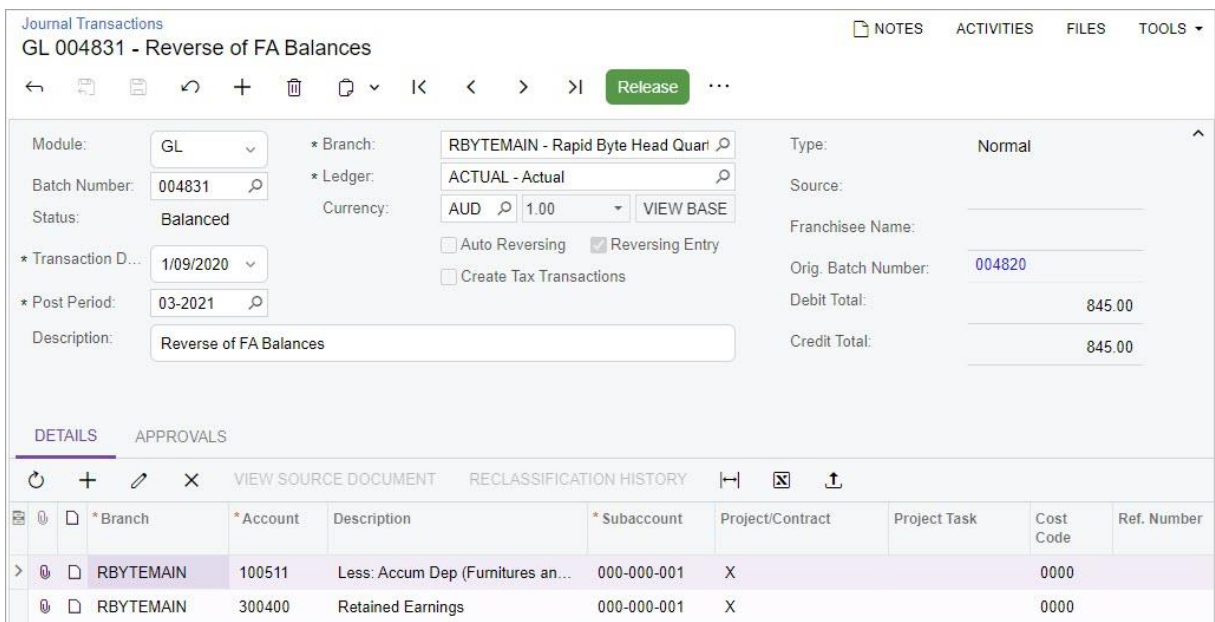


Figure: The reversing batch generated by the system

Copying of GL Accounts from the Default Location to New Locations

In previous versions of MYOB Advanced, when a user added a new customer or supplier location on the **Locations** tab of the Customers (AR303000) or Suppliers (AP303000) form, the system copied only the **Sales Account** and **Expense Account**, respectively, from the default customer or supplier location to the new location.

In MYOB Advanced 2023.1, when a user creates a new location for a customer or supplier, the system copies the following settings from the default location:

- For a new customer location: **Sales Account, Sales Sub., Discount Account, Discount Sub., Freight Account, and Freight Sub.** (Subaccounts are copied if they are used in the system.)
- For a new supplier location: **Expense Account, Expense Sub., Discount Account, and Discount Sub.** (Subaccounts are copied if they are used in the system.)

Renamed Tabs on Cash Management Forms

To align the tab names on multiple cash management forms with the names of similar tabs on forms in other MYOB Advanced areas, the tabs on cash management forms have been renamed as follows.

Form	Tab Name in Previous Versions	New Tab Name in 2023.1
Cash Management Preferences (CA101000)	General Settings	General
	Approval	Approvals
	Bank Statement Settings	Bank Statements
Cash Transactions (CA304000)	Transaction Details	Details
	Tax Details	Taxes
	Financial Details	Financial
	Approval Details	Approvals
Bank Deposits (CA305000)	Financial Details	Financial

Reimplementation of the Australian Prime Cost Depreciation Method

In MYOB Advanced 2023.1, the Australian Prime Cost depreciation method has been reimplemented by using the new depreciation engine. The method can be used for any type of calendar, but the correct depreciation amounts according to the rules used in Australia will be generated for monthly calendars only.

Inventory and Order Management

Ability to Disable Automatic Calculation of Taxes in Sales Orders and Invoices

In previous versions of MYOB Advanced, when an invoice was created for a sales order, the taxes were always recalculated on the Invoices (SO303000) form according to the tax configuration settings in the system. But for most of the e-commerce customers of MYOB Advanced, the taxes are calculated in external e-commerce systems and then imported to MYOB Advanced. Such customers could have tax rates configured inaccurately or not configured at all in MYOB Advanced and thus, the recalculation of taxes in the updated sales orders or prepared invoices could cause incorrect amounts in documents provided to the customer.

In MYOB Advanced 2023.1, the ability to turn off automatic tax calculation in order to preserve imported or manually entered taxes has been introduced.

Changes to Sales-Related Forms

On the Order Types (SO201000) form, the new **Disable Automatic Tax Calculation** checkbox has been added (shown in the screenshot below). This checkbox defines the default state of the **Disable Automatic Tax Calculation** checkbox in new sales orders on the Sales Orders (SO301000) form. The checkbox should be selected for the order types that will be used for orders imported from e-commerce stores, or for orders in which taxes will be specified manually. The checkbox does not appear for order types that have the *Transfer Order* and *Blanket Order* options specified in the **Automation Behaviour** field on the **Template** tab of the Order Types form.

The screenshot displays the 'Order Types' form for 'SO - Sales Order'. The form is divided into several sections: 'GENERAL', 'TEMPLATE', and 'QUICK PROCESSING'. The 'ORDER SETTINGS' section includes fields for 'Order Numbering Sequence' (SOORDER), 'Days To Keep' (0), and various checkboxes for order handling. The 'ACCOUNTS RECEIVABLE SETTINGS' section includes 'Invoice Numbering Sequence' (ARINVOICE) and checkboxes for 'Mark as Printed', 'Mark as Emailed', 'Hold Invoices on Entry', and 'Use Currency Rate from Sales Order'. The 'POSTING SETTINGS' section includes dropdowns for 'Posting Class', 'Combine Sales Sub. From', 'Freight Account', 'Use Freight Account from', 'Ship Via', 'Freight Sub.', 'Combine Freight Sub. from', 'Discount Account', 'Use Discount Account from', and 'Discount Sub.'. The checkbox 'Disable Automatic Tax Calculation' is highlighted with a red box.

Inventory and Order Management

Figure: The Disable Automatic Tax Calculation on the Order Types form

On the Sales Orders (SO301000) form, the **Disable Automatic Tax Calculation** checkbox has been added to the **Financial** tab (shown in the following screenshot). This checkbox indicates (if selected) that the taxes specified on the **Taxes** tab of the Sales Orders form will not be automatically recalculated when the lines of the sales order are updated. The state of this checkbox can be manually changed by the user.

The screenshot displays the 'Sales Orders' form for 'SO - BA Industries'. The 'FINANCIAL' tab is active, showing 'FINANCIAL INFORMATION' and 'PAYMENT INFORMATION'. In the 'FINANCIAL INFORMATION' section, the 'Disable Automatic Tax Calculation' checkbox is checked and highlighted with a red box. Other visible fields include 'Order Type: SO', 'Customer: CUST000001 - BA Industries', 'Location: MAIN - Primary Location', 'Date: 7/07/2023', and 'Currency: AUD 1.00'. The 'PAYMENT INFORMATION' section shows 'Payment Method: CASH - Cash Payment' and 'Cash Account: 100016 - AU WBC Bank Corp Account'. A summary table on the right shows 'Ordered Qty.: 0.00', 'Discount Total: 0.00', 'GST Exempt T...: 0.00', 'GST Taxable T...: 0.00', 'Tax Total: 0.00', and 'Order Total: 0.00'.

Figure: The Disable Automatic Tax Calculation on the Sales Orders form

When an invoice is created for such a sales order on the Invoices (SO303000) form, the system does not recalculate taxes in this invoice. The read-only **Disable Automatic Tax Calculation** checkbox has also been added to the **Financial** tab of the Invoices form to inform the user that the taxes are not recalculated if this checkbox is selected (shown in the following screenshot). In case of partial invoices, the whole tax amount from a sales order is transferred to the first created invoice.

Inventory and Order Management

The screenshot displays the 'Invoices' form for 'Coat Wright and Company'. The form is divided into several sections: 'DETAILS', 'TAXES', 'COMMISSIONS', 'FREIGHT', 'FINANCIAL', 'ADDRESSES', 'DISCOUNTS', and 'APPLICATIONS'. The 'FINANCIAL' tab is currently selected. The form includes fields for 'Type' (Invoice), 'Reference Nbr.' (<NEW>), 'Status' (Balanced), 'Date' (7/07/2023), 'Post Period' (12-2023), 'Customer Ord...', 'Project/Contract' (X - Non-Project Code), 'Description', 'Customer', 'Location' (MAIN - Primary Location), 'Currency' (AUD 1.00), 'Terms' (CASHONLY - Cash Only), 'Due Date' (7/07/2023), 'Prompt Payme...' (7/07/2023), 'Detail Total' (0.00), 'Discount Total' (0.00), 'GST Taxable T...' (0.00), 'GST Exempt T...' (0.00), 'Tax Total' (0.00), 'Write-Off Total' (0.00), 'Balance' (0.00), and 'Prompt Payme...' (0.00). The 'LINK TO GL' section contains 'Batch Nbr.', 'Branch' (RBYTEMAIN - Rapid Byte Head Quar), 'AR Account' (100201 - Account Receivable - Local), and 'AR Subaccount' (000-000-001 - Franchisee 1). The 'PAYMENT INFORMATION' section includes 'Payment Method' (AUWBDCD - AU Westpac Banking Co), 'Card/Account Nbr.', and 'Cash Account'. The 'TAX INFO' section has a checkbox for 'Disable Automatic Tax Calculation' which is highlighted with a red box. The 'OWNERSHIP' section shows 'Customer Tax Zone' (DOMESTIC - Domestic).

Figure: The Disable Automatic Tax Calculation checkbox on the Invoices form

Changes to Commerce-Related Forms

On the BigCommerce Stores (BC201000) or Shopify Stores (BC201010) form (**Order Settings** tab), an administrative user specifies the order type in the **Order Type for Import** field. Orders imported from an e-commerce store are created on the Sales Orders (SO301000) form with this order type. If the user selects the **Tax Synchronisation** checkbox, the system displays a warning message if the **Disable Automatic Tax Calculation** checkbox is cleared for the order type on the Order Types (SO201000) form. The following screenshot shows the warning message on the Shopify Stores form.

Inventory and Order Management

Shopify Stores
SweetStore - SP

CONNECTOR: Shopify Active
* Store Name: SweetStore - SP Default

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

GENERAL

* Branch: RETAIL - SweetLife Store

ORDER

* Order Type for Import: EO - eCommerce Order

Order Types for Export: SA - Sales Order with Alloc...

Return Order Type: ER - eCommerce Return Ord.

* Refund Amount Item: REFUNDAMT - eCommerce I

Refund Reason Code:

Order Time Zone: (GMT-05:00) Eastern Time ...

Show Discounts As: Line Discounts

Import Order Risks

Hold on Risk Status: High Risk

Gift Certificate Item: GIFTCERT - Gift Certificate

WAREHOUSE MAPPING FOR ORDER IMPORT

* Shopify Location	* Warehouse	Location ID
> 2330 Hoffman Aven...	RETAIL	MAIN
WH1	WHOLESALE	L1R1S1

The Disable Automatic Tax Calculation check box is cleared for the EO order type on the Order Types (SO201000) form. Taxes in sales orders imported from the Shopify store will be recalculated on invoice creation.

Tax Synchronization

Default Tax Zone:

Figure: A warning message on the Shopify Stores form

Limitations of the Functionality

The following limitations apply to the new functionality:

- The functionality does not work with taxes that have the *Inclusive Line-Level* or *Inclusive Document-Level* calculation rule selected on the Taxes (TX205000) form.
- The functionality does not work if the *Gross* option is selected in the **Tax Calculation Method** field on the **Financial** tab of the Sales Orders (SO301000) form for the customer in the sales order while the *Net/Gross Entry Mode* feature is enabled on the Enable/Disable Features (CS100000) form.
- The new feature is incompatible with the functionality provided by the *Estimating* feature of MYOB Advanced Manufacturing Edition.

Improvements in Blanket Purchase Orders

In previous versions of MYOB Advanced, users could not track the actual quantity of received items in a purchase order of the *Blanket* type while viewing the order on the Purchase Orders (PO301000) form. In each child order of the blanket purchase order, the **Qty. on Receipts** column on the **Details** tab of the form showed the quantity of the line item that has been received according to all purchase receipts. That is, if a supplier delivered only part of the item's quantity, the shortage was reflected in the **Qty. on Receipts** column for a line of the child order but in the blanket purchase order, the **Qty. on Receipts** value always remained the same.

In MYOB Advanced 2023.1, the tracking of items' receipts has been improved for the blanket purchase orders.

New Columns for Blanket Purchase Orders

On the Purchase Orders (PO301000) form, if the purchase order has the *Blanket* type, the following new columns are displayed in the table on the **Details** tab (as shown in the screenshot below):

- **Qty. on Orders:** The sum of the following quantities of the item in all lines of the related child orders, which are specified for those orders on the **Details** tab of the Purchase Orders form:
 - The sum of the item's quantities in the **Order Qty.** column for all incomplete lines and lines with the *Service* type
 - The sum of the item's quantities in the **Qty. on Receipts** column for all completed lines
- **Blanket Open Qty.:** The quantity of the line of the blanket purchase order in the **Order Qty.** column minus the quantity in the **Qty. on Orders** column.

The screenshot displays the 'Purchase Orders' form for 'Blanket 000001 - ITL Technology'. The 'Type' is set to 'Blanket'. The 'Order Nbr.' is '000001' and the 'Status' is 'On Hold'. The 'Supplier' is 'V000000051 - ITL Technology' and the 'Location' is 'MAIN - Primary Location'. The 'Date' is '12/07/2023' and the 'Currency' is 'AUD 1.00'. The 'Line Total' is '2,224.10' and the 'Order Total' is '2,224.10'. The 'Details' tab is active, showing a table with the following columns: Branch, Inventory ID, Line Type, Warehouse, Line Description, Qty. On Orders, Blanket Open Qty., and UOM. The table contains one line item: RBYTEMAIN, ELEGDD2, Goods for IN, MAIN, Hard drive 1 TB SSD, with Qty. On Orders of 5.00 and Blanket Open Qty. of 10.00.

Figure: New columns for blanket purchase orders

For a line of a blanket purchase order, the quantity in the **Qty. on Receipts** column is now calculated as the sum of the quantities of the item in the same column from the related lines of all child orders that have been created for this blanket purchase order.

Updated Rules of Completion for Lines of the Blanket Purchase Orders

The rules of completion for lines of blanket purchase orders have been updated as follows:

Inventory and Order Management

- If the line has the *Goods for IN*, *Non-Stock*, *Goods for Drop-Ship*, or *Non-Stock for Drop-Ship* type and the non-stock item in the *Non-Stock* or *Non-Stock for Drop-Ship* line has *By Quantity* selected in the **Close PO Line** field of the Non-Stock Items (IN202000) form, completing and closing occur as follows:
 - The line is completed when all related lines in child orders are completed and **Qty. on Receipts** on the **Details** tab of the Purchase Orders (PO301000) form for the blanket order line is greater than or equal to the results of the following calculation for the line: $\text{Order Qty.} * \text{Complete On \%} / 100$.
 - The line is closed when the **Completed** checkbox on the **Details** tab of the Purchase Orders form is selected and all related lines in child orders are closed.
- If the line has the *Service* type and the item in the line has *By Quantity* selected in the **Close PO Line** field of the Non-Stock Items form, the line is completed and closed when both of the following conditions are met:
 - For the blanket order line, the quantity in the **Billed Qty.** column on the **Details** tab of the Purchase Orders form is greater than or equal to the results of the following calculation: $\text{Order Qty.} * \text{Complete On \%} / 100$.
 - All related lines in child orders are completed and closed.
- If the line has the *Non-Stock* and *Service* type and the item in the line has *By Amount* selected in the **Close PO Line** field of the Non-Stock Items form, the line is completed and closed when both of the following conditions are met:
 - For the blanket order line, the amount in the **Billed Amount** column on the **Details** tab of the Purchase Orders form is greater than or equal to the value in the **Amount** column.
 - All related lines in child orders are completed and closed.

Improvements in Templates for Matrix Items

In MYOB Advanced 2023.1, the ability to define the set of attributes for new matrix items has been implemented at the level of template items.

Configuration of Attributes in Template Items

In previous versions of MYOB Advanced, the set of variance attributes for matrix items could be defined only at the item class level on the Item Classes (IN201000) form. If a user needed to create matrix items for goods that shared most of the characteristics but differed in details, they had to create multiple item classes to generate relevant matrix items. For example, suppose that all brands of T-shirts have such characteristics as size, colour, and material, but only some brands of T-shirts have prints. In this case, previously the user would need two item classes to make sure that the T-shirts without prints would not have redundant attributes.

Starting in 2023.1, the user can define a custom set of variance attributes for each template item of an item class. The new unlabelled Active column has been added to the **Attributes** table on the **Configuration** tab of the Template Items (IN203000) form (shown in the following screenshot). By selecting the checkbox next to particular attributes, the user can define which attributes will be used for the matrix items of a particular template item. If the Active checkbox is selected, the attribute will be used to generate the matrix item, and if the Active checkbox is cleared, the attribute will be skipped during generation. Thus, multiple template items can be defined that vary by the list of attributes within a single item class.

Inventory and Order Management

The screenshot shows the 'Template Items' form for 'SUMDRE - Summer Dress'. The 'CONFIGURATION' tab is active. Below the tabs is an 'ATTRIBUTES' table with the following data:

Attribute	Requ	Category	Value	Active
> Colour	<input type="checkbox"/>	Variant		<input checked="" type="checkbox"/>
Fabric Types	<input type="checkbox"/>	Variant		<input checked="" type="checkbox"/>
Size	<input type="checkbox"/>	Variant		<input checked="" type="checkbox"/>

Figure: The Active checkbox on the Template Items form

If at least one matrix item has been created for a template item, the Active checkbox in the **Attributes** table becomes unavailable for editing for all attributes in this template item.

Negative Quantity in Orders Whose Type Has Active Receipt and Issue Operations

In MYOB Advanced 2023.1, on the Sales Orders (SO301000) form, a user can specify a negative quantity in a line of a sales order whose order type has the applicable settings, as described in the next section. Also, the user no longer needs to manually change the operation type in the **Operation** column on the **Details** tab of the Sales Orders form.

Settings of an Applicable Sales Order Type

On the Sales Orders (SO301000) form, a user can now specify negative line quantities in orders with an order type for which the following conditions are met on the **Template** tab of the Order Types (SO201000) form:

- *RMA Order, Invoice, or Mixed Order* is selected as the automation behaviour. This setting determines how the sales order is processed. (For details about an order type with the *Mixed Order* automation behaviour, see Inventory and Order Management: Sales Orders Based on the Mixed Order Automation Behaviour.)
- In the **Operations** table, both the *Issue* operation and the *Receipt* operation are listed and defined as active.

Negative Quantity in a Sales Order Line

In previous versions of MYOB Advanced, if a user created a sales order on the Sales Orders (SO301000) form of an order type with the applicable settings described in the previous section and added a line on the **Details** tab, the user had to manually change the **Operation** value for each line that required this change. This slowed the data entry process.

Starting in MYOB Advanced 2023.1, for a sales order whose order type (see Item 1 in the following screenshot) has the applicable settings, if a user adds a new line on the **Details** tab of the Sales Orders form for the order, the default operation of the order type is inserted in the **Operation** column. The default operation is the operation specified on the **Templates** tab of the Order Types (SO201000) form for the sales order type. Depending on whether the value in the **Quantity** column for the new line is positive or negative, the value in the **Operation** column is affected as follows:

- If a user specifies a positive value, the default operation type remains.
- If the user specifies a negative value (Item 2), the default operation is automatically changed to the opposite operation (Item 3).

The user can no longer manually change the operation in the **Operation** column.

Inventory and Order Management

Sales Orders
RM - AC Equipment

Order Type: RM
Order Nbr.: <NEW>
Status: Open
Date: 7/07/2023
Requested On: 7/07/2023
Customer Ord...
External Refer...

Customer: CUST000011 - AC Equipment
Location: MAIN - Primary Location
Contact:
Currency: AUD 1.00 VIEW BASE
Project: X - Non-Project Code

Ordered Qty.: 1.00
Discount Total: 0.00
GST Exempt T...: 0.00
GST Taxable T...: 79.99
Tax Total: 8.00
Order Total: 87.99

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS

ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS PO LINK ITEM AVAILABILITY

Branch	Invt Nbr	Inventory ID	Operation	Substituti Required	Free Item	Warehouse	Line Description	UOM	Quantity
RBYTEMAIN		ELEHDD1	Receipt	<input type="checkbox"/>	<input type="checkbox"/>	MAIN	Hard drive 2TB 7200rpm	EACH	-5.00

Figure: The changed operation type in a line with a negative quantity

For a sales order whose order type has the applicable settings on the Sales Orders form, if a line quantity is negative, the system changes the values in the **Qty. on Shipments**, **Open Qty.**, **Ext. Price**, **Discount Amount**, **Amount** and **Unbilled Amount** columns to also be negative.

A user can click any line on the **Details** tab and click **Line Details** on the table toolbar to open the **Line Details** dialog field and view the line splits. If a negative quantity has been specified for a sales order line, the line quantity in the dialog field remains positive, as shown in the following screenshot.

Line Details

Active

Ship On	Allocat	Alloc. Warehouse	Comple	*Lot/Serial Nbr.	Quantity	Qty. On Shipment	Qty. Received	UOM	Mark for PO	Relate Docur
> 29/07/2020	<input type="checkbox"/>	MAIN	<input type="checkbox"/>		5.00	0.00	0.00	EACH	<input type="checkbox"/>	

OK

Figure: Quantity in the Line Details dialog field

Negative Quantities in the Sales Order Report

In the Sales Order (SO641010) report, which shows a ready-to-print version of a sales order that has been defined on the Sales Orders (SO301000) form and whose order type has the applicable settings described in the previous sections, a negative sign is shown in the **Qty.** and **Extended Price** columns for an order line with a negative quantity (see the following screenshot).



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

RMA Order

Order No.: SO006768
 Order Date: 11/23/2022
 Delivery Date: 11/23/2022
 Customer ID: ABCSTUDIOS
 Currency: USD
 For: Travis Harper

FOR:	SHIP TO:	BILL TO:
ABC Studios Inc 77 W 66th St # 13 New York NY 10023 United States of America	ABC Studios Inc 77 W 66th St # 13 New York NY 10023 United States of America Attn: Receiving	ABC Studios Inc 77 W 66th St # 13 New York NY 10023 United States of America Attn: Liz Lemon

CUSTOMER P.O. NO.	TERMS	CONTACT
	30 Days	Maxwell Baker, mbaker@revisiontwo.com
FOB POINT	SHIPPING TERMS	SHIP VIA

NO.	ITEM	QTY. UOM	PRICE	DISC.	EXTENDED PRICE
1	AACOMPUT01: Acer Laptop Computer	-5.00 EA	500.00	0%	-2,500.00

Figure: Negative quantities in the Sales Order printed form

Additional Information

For more information about predefined order types, see Sales Order Types: General Information.

Inventory and Order Management

Predefined User Roles

In MYOB Advanced 2023.1, predefined user roles have been added that provide access to the forms needed in the everyday work of employees related to the inventory and order management. Implementation managers can now use these predefined user roles instead of creating and setting up the roles from the ground up. The managers can also modify the role permissions to meet the organisation's access policies. In smaller organisations, the managers can apply multiple roles to the same user who takes over multiple duties.

In the following table, the details of the predefined user roles are provided.

Role name	Description	Access Rights
<i>SO Admin</i>	A person who performs the setup of the sales order functionality and configures the sales processes.	<ul style="list-style-type: none">• Full access to the sales orders functionality related to order fulfilment and sales orders settings• Full access to accounts receivable forms required for processing and review of sales orders such as Sales Prices (AR202000), Sales Price Worksheets (AR202010), and Discounts (AR209500) forms• Full access to the inventory functionality and settings affecting sales orders• Read-only access to purchase orders and receipts to view info related to sales orders that require purchasing• No access to forms related to automated warehouse operations
<i>SO Manager</i>	A person who creates sales orders, manages customer contracts (such as blanket sales orders), views account receivables invoices and payments, negotiates customer terms, manages approvals, and oversees the sales operations staff and their activities.	<ul style="list-style-type: none">• Full access to the forms related to order fulfilment• Read-only access to forms with the sales orders settings• Full access to accounts receivable forms required for processing and review of sales orders such as Sales Prices (AR202000), Sales Price Worksheets (AR202010), and Discounts (AR209500) forms• Full access to inventory functionality affecting sales orders• Read-only access to purchase orders and receipts (to view info related to sales orders that require purchasing)• No access to forms related to automated warehouse operations

Inventory and Order Management

Role name	Description	Access Rights
<i>SO Clerk</i>	A person who enters data of sales orders, creates customer returns, prints and sends order confirmations, and manages customer inquiries.	<ul style="list-style-type: none"> Limited access to sales orders functionality such as data entry and internal reporting No access to the Sales Orders Preferences (SO101000) form Read-only access to Sales Prices (AR202000), Sales Price Worksheets (AR202010), and Discounts (AR209500) forms and to inventory settings, order type settings, shipping-related settings, purchase order inquiries, and reports No access to forms related to automated warehouse operations
<i>SO Viewer</i>	A person who can view the progress of the sales orders processing but cannot change them.	<ul style="list-style-type: none"> Read-only access to the forms related to sales orders fulfilment No access to the Sales Orders Preferences (SO101000) form, financial forms, auto- mated warehouse operations forms
<i>PO Admin</i>	A person who performs the setup of the purchase orders functionality and configures the processes of purchasing.	<ul style="list-style-type: none"> Full access to the purchase orders functionality related to the order fulfilment and purchase order settings Full access to accounts payable forms required for processing and review of purchase orders such as Supplier Prices (AP202000), Supplier Price Worksheets (AP202010), and Supplier Discounts (AP205000) Limited access to inventory settings re- quired for purchase orders and replenishment, inventory inquiries, and reports No access to forms related to automated warehouse operations

Inventory and Order Management

Role name	Description	Access Rights
<i>PO Manager</i>	A person who creates purchase orders and requisitions, views accounts payable bills and payments, negotiates supplier credit terms, manages supplier returns, manages approvals, and oversees the purchasing staff and their activities.	<ul style="list-style-type: none"> • Full access to the forms related to purchase order fulfilment and replenishment planning • Read-only access to the forms with the purchase orders settings • Full access to accounts payable forms required for processing and review of purchase orders such as Supplier Prices (AP202000), Supplier Price Worksheets (AP202010), and Supplier Discounts (AP205000) • Limited access to inventory settings required for all procurement processes, sales order inquiries, inventory inquiries and reports • No access to forms related to automated warehouse operations
<i>PO Buyer</i>	A person who procures inventory to replenish the warehouse stock levels or to fulfill orders (planning of purchases, creation of purchase orders, linking of purchase orders to fulfill sales orders), reviews seasonality and replenishment settings for optimisation and procurement.	<ul style="list-style-type: none"> • Full access to the forms related to purchase order fulfilment and replenishment planning • Read-only access to the forms with settings related to shipping and transportation of items to the warehouse such as Landed Cost Codes (PO202000), FOB Points (CS208500), Ship via Codes (CS207500), and Carriers (CS207700) • No access to the Purchase Requisitions Preferences (RQ101000) and Purchase Orders Preferences (PO101000) forms • Full access to accounts payable forms required for processing and review of purchase orders such as Supplier Prices (AP202000), Supplier Price Worksheets (AP202010), and Supplier Discounts (AP205000) • Limited access to inventory settings required for replenishment and purchase orders, sales order inquiries, inventory inquiries, and reports • No access to forms related to automated warehouse operations

Inventory and Order Management

Role name	Description	Access Rights
<i>PO Clerk</i>	A person who enters data of purchase orders, creates supplier returns, and views inquiries and reports.	<ul style="list-style-type: none"> • Limited access to the purchase order functionality such as data entry forms and in-ternal reporting • No access to the forms with the purchase orders settings • Read-only access to accounts payable profile settings such as Supplier Prices (AP202000), Supplier Price Worksheets (AP202010), and Supplier Discounts (AP205000) • Limited access to inventory settings re-quired for purchase orders, sales order inquiries, and reports • No access to forms related to automated warehouse operations
<i>PO Viewer</i>	A person who can view the progress of the purchase orders processing but cannot change them.	<ul style="list-style-type: none"> • Read-only access to the forms related to order fulfilment • No access to forms with the purchase orders settings, financial forms, and auto- mated warehouse operations forms
<i>IN Admin</i>	A person who performs the setup of the inventory functionality and configures the inventory processes.	<ul style="list-style-type: none"> • Full access to the inventory management functionality and settings • Full access to automated inventory operations for sales and purchases • Limited access to the purchasing and sales functionality required for the inventory management • Limited access to the purchasing and sales settings required for the inventory management
<i>IN Manager</i>	A person who analyses and manages warehouse activities and performance, takes responsibility for the physical movement of goods to and from the warehouse as well as inventory optimisation and efficiency within the ware- house, and oversees the warehouse staff and their activities.	<ul style="list-style-type: none"> • Full access to the inventory management functionality and settings • Limited access to the purchasing and sales functionality required for the inventory management • Read-only access to the purchasing and sales settings required for the inventory management • Full access to automated inventory operations for sales and purchases

Inventory and Order Management

Role name	Description	Access Rights
<i>IN Receiver</i>	A person who receives purchases, inbound transfers, and customer returns, puts away received goods into designated warehouse locations.	<ul style="list-style-type: none"> Limited access to inventory functionality such as data entry, scanning of receipts, and internal reporting No access to the forms with the inventory settings and settings of purchases and sales Full access to the automated receiving and putting away functionality of the automated warehouse operations No access to the automated picking and packing functionality of the automated warehouse operations No access to financial information including pricing or inventory costs
<i>IN Shipper</i>	A person who picks, packs, and ships customer sales orders, outbound transfers, and supplier returns, and confirms shipments.	<ul style="list-style-type: none"> Limited access to inventory functionality such as data entry, scanning of outbound shipments, and internal reporting No access to the forms with the inventory settings and settings of purchases and sales Full access to the automated picking and packing functionality of the automated warehouse operations No access to the automated receiving and putting away functionality of the automated warehouse operations No access to financial information, including pricing or inventory costs
<i>IN Clerk</i>	A person who performs cycle counts and inventory adjustments and re-stocks the inventory within the same warehouse according to the warehouse manager's plan.	<ul style="list-style-type: none"> Limited access to the inventory functionality: data entry, scanning of physical inventory counts, and movement of goods to re-stock warehouse inventory locations Read-only access to the forms with the inventory settings No access to the inventory, purchasing, and sales settings required for the inventory management No access to the automated warehouse operations and financial information, including pricing or inventory costs

Inventory and Order Management

Role name	Description	Access Rights
<i>IN Viewer</i>	A person who can view the documents related to the warehouse processes and inventory settings but cannot change orders and settings.	<ul style="list-style-type: none">• Read-only access to the forms related to inventory• No access to forms with the forms with settings, financial forms, automated warehouse operations forms
<i>Customer Data Manager</i>	A person who is responsible for entering master data related to customer profiles.	<ul style="list-style-type: none">• Full access to customer's data entry and maintenance forms such as Customers (AR303000) and Customer Classes (AR201000)• Read-only access to accounts receivable preferences• No access to any processing forms, forms with general settings, reports, or inquiries
<i>Supplier Data Manager</i>	A person who is responsible for entering master data related to supplier profiles.	<ul style="list-style-type: none">• Full access to supplier's data entry and maintenance forms such as Suppliers (AP303000) and Supplier Classes (AP201000)• Read-only access to accounts payable preferences• No access to any processing forms, forms with general settings, reports, or inquiries
<i>Inventory Data Manager</i>	A person who is responsible for entering master data related to inventory item profiles.	<ul style="list-style-type: none">• Full access to maintenance forms such as Non-Stock Items (IN202000), Stock Items (IN202500), and Item Classes (IN201000) forms• No access to any processing forms, forms with general settings, reports, or inquiries

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

- Access Rights by Role (SM651500)
- Access Rights by Screen (SM651700)
- Access Rights by User (SM201055)

On the following forms, the user can modify access rights for the user roles:

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

Additional Information

For more information about user roles in the system, see [User Roles: General Information](#).

Sales Orders Based on the Mixed Order Automation Behaviour

In MYOB Advanced 2023.1, the new *Mixed Order* automation behaviour, which determines how a sales order is processed, is introduced. By using a mixed order, a user can process both a sale and a return in the same order on the Sales Orders (SO301000) form as well as customer payments and refunds related to this order. A mixed order may be used if a customer needs to buy and return products or services (or replace the returned products) at the same time at a counter or through a point of sale (POS) system operated by a cashier. The *Mixed Order* automation behaviour does not support shipments because it is designed for counter sales.

Order Type with the Mixed Order Automation Behaviour

In previous versions of MYOB Advanced, if a user needed to process a customer sale and return with customer payments and refunds, the user had to create multiple documents of separate order types.

Starting in MYOB Advanced 2023.1, a user can process an order with a positive or negative balance on the Sales Orders (SO301000) form. A user can now add lines with a positive quantity and lines with a negative quantity to an order and process either a customer payment or a customer refund based on the order's positive or negative balance. The *Mixed Order* automation behaviour has been implemented to provide this simpler processing. The new *MO* predefined order type has been created on the Order Types (SO201000) form (see Item 1 in the following screenshot).

The screenshot shows the 'Order Types' form for 'MO - Mixed Order'. The form is divided into 'GENERAL' and 'TEMPLATE' tabs. The 'TEMPLATE' tab is active, showing various settings. Red boxes and numbers 1 through 7 highlight specific fields:

- 1: Order Type: MO
- 2: Automation Behavior: Mixed Order
- 3: Default Operation: Issue
- 4: AR Document Type: Invoice/Credit Memo
- 5: Process Shipments
- 6: Allow Quick Process
- 7: Operations table (highlighted row)

Operation	Active	Inventory Transaction Type	*Order Plan Type	*Shipment Plan Type	Require Reason Code
> Issue	<input checked="" type="checkbox"/>	Invoice	SO Shipped		<input type="checkbox"/>
Receipt	<input checked="" type="checkbox"/>	Credit Memo	SO Shipped		<input type="checkbox"/>

Figure: Settings of the new order type

Inventory and Order Management

On the **Template** tab, the *MO* type has both the *Issue* operation and the *Receipt* operation listed and active (see Item 7 in the previous screenshot). The following settings are also specified on the tab:

- **Automation Behaviour:** Mixed Order (Item 2)
- **Default Operation:** Issue (Item 3)
- **AR Document Type:** Invoice/Credit Memo (Item 4)

The **Process Shipment** checkbox is cleared on the tab and unavailable for selection (Item 5). This indicates that for an order of the *MO* type, no shipment can be created during the processing.

Also on the **Template** tab, the **Allow Quick Process** checkbox is available for selection (see Item 6 in the screenshot above).

Note: A system administrator can create a custom order type with the *Mixed Order* automation behaviour and select either of the following options in the **AR Document Type** field:
Invoice/Credit Memo if the company issues invoices for its goods sold or services rendered
Cash Sale/Cash Return if the company receives cash for its goods or services

Preparation of a Mixed Order

In MYOB Advanced 2023.1, a user can prepare an order of the *MO* type, which has both a sale and a return. For this mixed order, each new line that the user adds on the **Details** tab of the Sales Orders (SO301000) form has the *Issue* default operation in the **Operation** column. Depending on whether the value in the **Quantity** column for this line is positive or negative, the value in the **Operation** column is affected as follows:

- If the user specifies a positive quantity for the line (that is, the quantity should be issued for sale), the *Issue* operation remains unchanged. The amount in a line with the *Issue* operation increases the balance of the order.
- If the user specifies a negative quantity for the line (that is, the quantity should be returned by a customer), the operation is automatically changed from *Issue* to *Receipt*. The amount in a line with the *Receipt* operation decreases the balance of the order.

Preparation of Customer Payments and Refunds for a Mixed Order

If a mixed order has the *Open* status, a user can create a payment or refund by using the **Payments** tab of the Sales Orders (SO301000) form as a starting point as follows:

- If the **Order Total** value is positive, the user can click **Create Payment**, and a payment will be created.
- If the **Order Total** value is negative, the user can click **Create Refund**, and a refund will be created.

A user can delete an unreleased payment or unreleased refund from the system. On the table toolbar of the **Payments** tab, the **Delete Payment** (see the following screenshot) and **Delete Refund** (see the second screenshot below) buttons have been added. A user clicks the applicable payment or refund on the tab to select it and then clicks the applicable button, which deletes the payment or the refund, respectively, from the current tab and from the system.

Inventory and Order Management

Sales Orders
MO AR010731 - ABC Holdings Inc

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

PREPARE INVOICE HOLD

Order Type: MO Customer: ABCHOLDING - ABC Holdings Inc Ordered Qty.: 10.00
 Order Nbr.: AR010731 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: VAT Exempt T...: 0.00
 Date: 1/11/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00
 Requested On: 1/11/2023 Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord... Order Total: 190.70
 External Refer... Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

CREATE PAYMENT DELETE PAYMENT VOID CARD PAYMENT CREATE REFUND Active

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method
Payment	003939	190.70	0.00	0.00	Balanced	PMT03608	CHECK

Not Released: 190.70
 Released: 0.00
 Total Paid: 190.70
 Total Transferr...: 0.00
 Unpaid Balance: 0.00
 Unrefunded B...: 0.00
 Unbilled Balan...: 190.70

Figure: The Delete Payment button on the Sales Orders form

Sales Orders
MO AR010732 - USA Bartending School

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

PREPARE INVOICE HOLD

Order Type: MO Customer: ABARTENDE - USA Bartending Schor Ordered Qty.: 2.00
 Order Nbr.: AR010732 Location: MAIN - Primary Location Discount Total: 0.00
 Status: Open Contact: Fadi Kabuk VAT Exempt T...: 0.00
 Date: 1/11/2023 Currency: USD 1.00 VIEW BASE VAT Taxable T...: 0.00
 Requested On: 1/11/2023 Project: X - Non-Project Code Tax Total: 0.00
 Customer Ord... Order Total: -1,375.00
 External Refer... Description:

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

CREATE PAYMENT VOID CARD PAYMENT CREATE REFUND DELETE REFUND Active

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account
Refund	003940	1,375.00	0.00	0.00	Balanced	PMT03609	CHECK	10200

Not Released: 1,375.00
 Released: 0.00
 Total Paid: 1,375.00
 Total Transferr...: 0.00
 Unpaid Balance: 0.00
 Unrefunded B...: 0.00
 Unbilled Balan...: -1,375.00

Figure: The Delete Refund button on the Sales Orders form

Preparation of Invoices and Credit Memos for a Mixed Order

To prepare an invoice for a mixed order, a user can click **Prepare Invoice** on the form toolbar of the Sales Orders (SO301000) form. Depending on the order's balance, the system will create an invoice on the Invoices (SO303000) form as follows:

- An invoice of the *Invoice* or *Cash Sale* type (see the following note) if the **Order Total** value is positive or zero
- An invoice of the *Credit Memo* or *Cash Return* type (see the following note) if the **Order Total** value is negative

Note: The type of document created depends on whether the **AR Document Type** setting on the **Template** tab of the Order Types (SO201000) form contains *Invoice/Credit Memo* or *Cash Sale/Cash Return*.

Limitations for Mixed Orders and the Related Invoices

The following limitations apply to the processing of mixed orders and invoices prepared for these orders:

- One invoice can be created for one mixed order. If invoices are created from the Process Orders (SO501000) form through the *Prepare Invoice* action, a separate invoice will be created for each order.
- An invoice can be created only for a full quantity of items in a mixed order. A user cannot create an invoice for a partial quantity of items in the order or order line.
- A user cannot do the following on the **Details** tab of the Invoices (SO303000) form:
 - Add a mixed order to the invoice by using the **Add Order** dialog field
 - Add an order line of a mixed order by using the **Add SO Line** dialog field

Payment and Refund Limitations for Mixed Orders and Their Invoices

The processing of customer payments and refunds related to mixed orders and their invoices has limitations. On the **Payments** tab of the Sales Orders (SO301000) form and on the **Applications** tab of the Invoices (SO303000) form, a user cannot do the following:

- Add an application for an existing payment or for an existing refund.
- Remove the link to a payment application or refund application from the order or invoice.
- Change the amount of a payment application or refund application. The application amount can be changed only on the Payments and Applications (AR302000) form.

Taxes and Discounts in Mixed Orders

Taxes and discounts in sales orders of a type with the *Mixed Order* automation behaviour are calculated the same way they are calculated in return orders of a type with the *RMA Order* automation behaviour.

Additional Information

For more information about the predefined MO order type, see the Order Type for Processing Both a Sale and a Customer Return section in Sales Order Types: General Information.

Support of Multiple Totes for a Pick List

In previous versions of MYOB Advanced, users could not assign multiple totes to the same pick list when they picked the items on the Pick, Pack, and Ship (SO302020) form. This limitation resulted in numerous workarounds if the quantity of items did not fit in a single tote.

In MYOB Advanced 2023.1, the system can be configured to allow users to add totes to the pick list on the fly on the Pick, Pack, and Ship form.

Adding of Totes on the Fly

The **Add Totes to Shipments on the Fly** checkbox has been added to the **Warehouse Management** tab (**Fulfilment Settings** section) of the Sales Orders Preferences (SO101000) form (shown in the following screenshot). If an implementation manager selects this checkbox, pickers have the ability to assign multiple totes to a shipment or to multiple shipments in a pick list when they pick the items for the pick lists of the Single- Shipment and Wave type on the Pick, Pack, and Ship (SO302020) form.

The screenshot shows the 'Sales Orders Preferences' form with the 'WAREHOUSE MANAGEMENT' tab selected. Under the 'FULFILLMENT SETTINGS' section, the 'Add Totes to Shipments on the Fly' checkbox is checked and highlighted with a red box. Other settings include 'Short Shipment Confirmation' set to 'Forbid', 'Order Shipment Lines by Location' set to 'Pick Priority', and various other checkboxes for fulfillment workflow and settings.

Figure: The Add Totes to Shipments on the Fly checkbox

If the picked goods do not fit the tote that was initially assigned to the pick list, a picker can click the new **Add Tote** button on the form toolbar of the Pick, Pack, and Ship form (as shown in the following screenshot). The button becomes available only if at least one item has been picked to an already-assigned

Inventory and Order Management

tote. After the picker adds a new tote to the pick list, for each newly scanned item, the system prompts the user to scan the barcode of the tote to which they want to pick the item.

The screenshot shows the 'Pick, Pack, and Ship' interface. At the top, there are navigation buttons: RESET, USER SETTINGS, REMOVE, SET QTY, CONFIRM PICK LIST, NEXT LIST, FINISH AND NEXT, ADD TOTE (highlighted with a red box), and CONFIRM LINE QUANTITY. Below these are input fields for Scan, Shipment Nbr (000029), and Current Location (L3R2S1 - Line 3, rack 2, shelf 1). A message states: 'The Paperless Pick mode is in use. The APJAM08 item is selected. Scan the barcode of the tote to which you want to add the items.' Below the message are tabs for PICK and SCAN LOG. A table titled 'PROCESSED PICKING' is shown with the following data:

Matched	Warehouse	Location	Inventory ID	Picked Quantity	Quantity	UCM	Quantity Confirmed	Tote ID
<input checked="" type="checkbox"/>	WHOLESALE	L3R2S1	APJAM08	0.00	10.00	PIECE	<input type="checkbox"/>	T2
<input type="checkbox"/>	WHOLESALE	L2R183	ORJAM32	5.00	5.00	PIECE	<input type="checkbox"/>	T2
<input type="checkbox"/>	WHOLESALE	L2R183	ORJAM32	3.00	3.00	PIECE	<input type="checkbox"/>	T1

Figure: The Add Tote button

Other Improvements

In MYOB Advanced 2023.1, multiple improvements to functionality of the inventory and order management have been introduced, as described below.

Calculation of the Commissionable Amount in Sales Orders

Starting in MYOB Advanced 2023.1, improvements have been made to the calculation of the commissionable amount in sales orders that are created on the Sales Orders (SO301000) form. If a commissionable item is returned by a customer, the item's commissionable amount is appropriately subtracted from the commission, so that commission is not being given for an item that the customer returned.

If a sales order line on the **Details** tab is subject to commission (that is, the **Commissionable** checkbox is selected) and has the *Receipt* operation type, the amount of the line decreases the **Commissionable Amount** value on the **Commissions** tab. For example, for a sales order that has lines with the *Receipt* operation only, the commissionable amount will be negative.

New Alternate Type in Cross-References for Stock and Non-Stock Items

In MYOB Advanced 2023.1, the new *GTIN/EAN/UPC/ISBN* option has been added to the **Alternate Type** column on the **Cross-Reference** tab of the Stock Items (IN202500) and Non-Stock Items (IN202000) forms. (The following screenshot shows the option in the column on the Stock Items form.)

Stock Items NOTES ACTIVITIES

CINNAMON - Cinnamon powder, package of 1 lb

← ↻ 📄 ↶ + 🗑️ 📄 ▾ ⏪ < > ⏩ ...

* Inventory ID: CINNAMON - Cinnamon powder, pack Product Workgroup:

Item Status: Active Product Manager:

Description: Cinnamon powder, package of 1 lb

GENERAL PRICE/COST WAREHOUSES VENDORS ATTRIBUTES PACKAGING **CROSS-REFERENCE** RELATED ITEMS

↻ + × ↔️ ☒

Alternate Type	* Vendor/Customer	* Alternate ID	UOM	Description
GTIN/EAN/UPC/ISBN		CNM1LB	LB	Cinnamon, 1 lb package
Vendor Part Number	TEACOMPANY	C15267	LB	Cinnamon
Barcode		CNMN	LB	

Figure: The GTIN/EAN/UPC/ISBN alternate type of cross-reference

The *GTIN/EAN/UPC/ISBN* alternate type behaves in the same way as the *Barcode* type does. That is, it can be used in the same processes (such as automated warehouse operations and addition of an item by barcode). The new alternate type has been introduced for better visibility of the barcodes of the GTIN, EAN, UPC, and ISBN types assigned to an item and for future integrations and enhancements related to these types.

Manufacturing

Deallocation of Unused Materials for Production Orders

In previous versions of MYOB Advanced Manufacturing Edition, when a user manually set the status of a production order to *Completed*, the materials would still be allocated for the production order—that is, item plans for the material allocation would exist on the Inventory Allocation Details (IN402000) form. This situation could happen if the required quantity of materials for a production order has been overestimated. The only way to remove the material allocation was to close the production order, which was not applicable in some cases. Open item plans for materials from completed production orders would affect material requirements planning in the way that the system would continue to regard these materials as being required for the production orders.

Version 2023.1 introduces the ability to manually deallocate materials for production orders that have the *Completed* status. Also, if a production manager realises that they need to issue more materials after the production order has been completed, the manager now can reopen the order and allocate the needed materials.

Deallocation of Materials

When a production manager needs to deallocate materials for a production order that has the *Completed* status, the manager opens the order on the Production Order Details (AM209000) or Production Order Maintenance (AM201500) form. On the More menu, the manager clicks the new **Set Materials Status to Completed** command under **Materials** (see the following screenshot). As a result, the system does the following:

- Closes any opened item plans for the materials of the production order on the Inventory Allocation Details (IN402000) form
- Changes the status of the materials to *Completed*

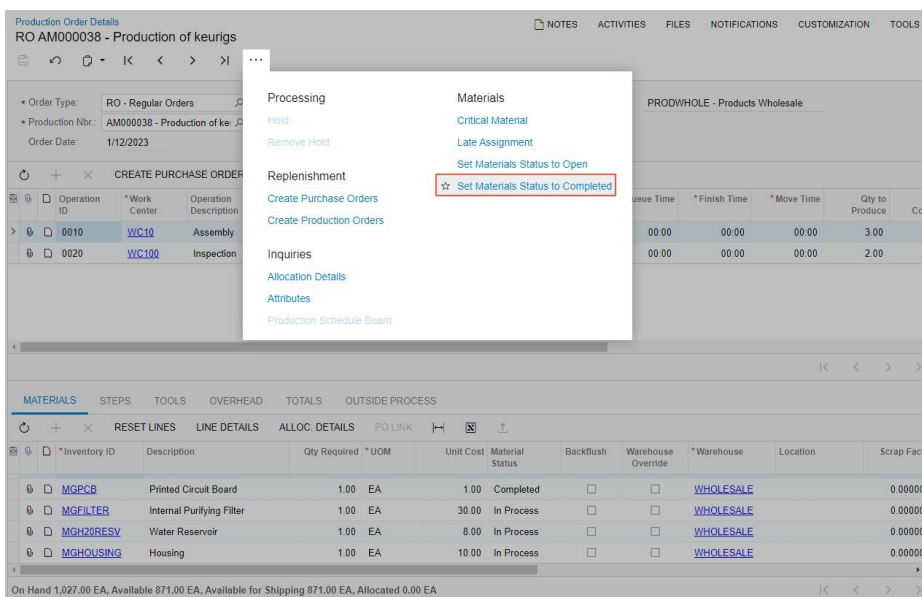


Figure: The new command on the Production Order Details form

Allocation of Materials

If a production manager needs to issue a greater quantity of materials that were not issued in full but were assigned the *Completed* status and the production order containing the materials has already been completed, the manager opens the production order on the Production Order Details (AM209000) or Production Order Maintenance (AM201500) form. Then on the More menu, the manager clicks the new **Set Materials Status to Open** command under **Materials** (see the following screenshot). As a result, the system does the following:

- Creates item plans for the remaining material quantities on the Inventory Allocation Details (IN402000) form.
- Changes the material status from *Completed* to one of the following statuses:
 - If the remaining quantity of the material is zero, the material status remains *Completed*.
 - If the remaining quantity of the material is not zero and the actual quantity is not zero, then the status is changed to *In Process*.
 - If the remaining quantity for the material is not zero and the actual quantity is zero, then the status is changed to *Released*.

Note: The remaining quantity of each material is displayed in the **Qty Remaining** column and the actual quantity is displayed in the **Qty Actual** column of the **Materials** table on the Production Order Details form.

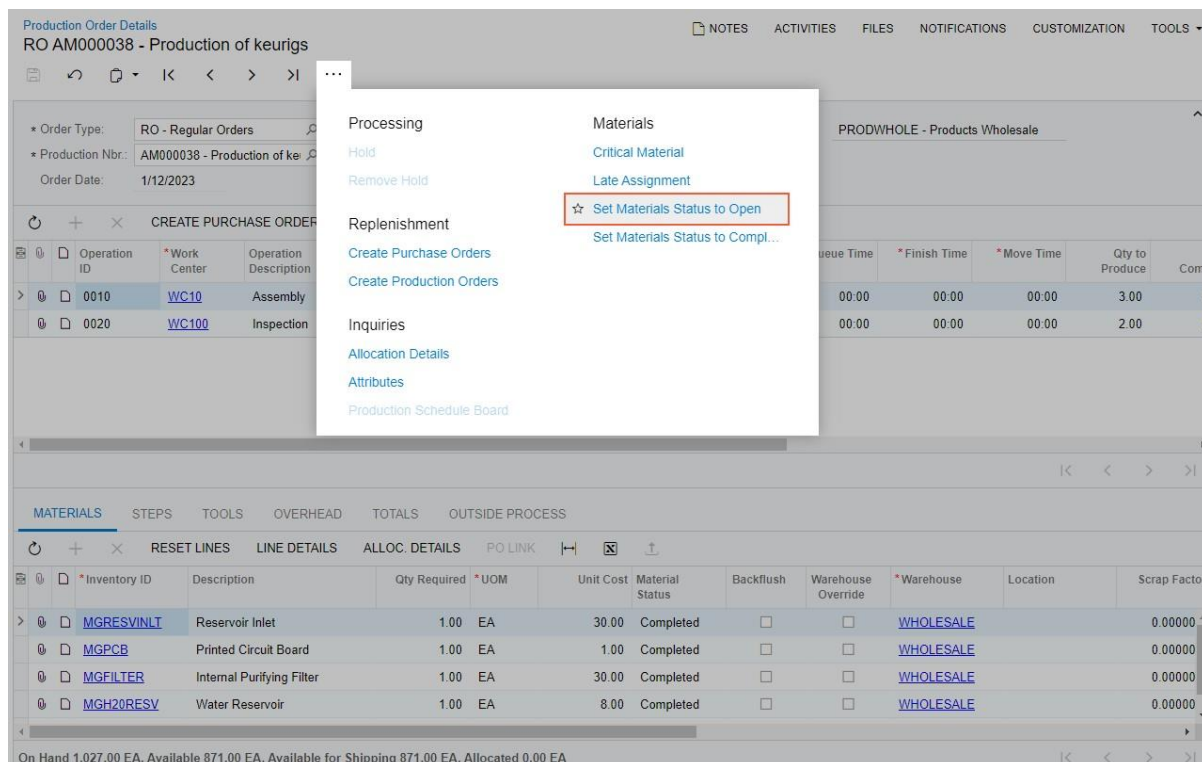


Figure: The new command on the Production Order Details form

Status for Material Allocation in Production Orders

To support the functionality of manual material allocation and deallocation, the status of materials for a particular production operation has been introduced. The status indicates whether the materials have been issued for the operation and whether the materials have been allocated for the production order—that is, item plans for the materials exist on the Inventory Allocation Details (IN402000) form. Also, the material status corresponds to the production order status.

A production manager can view the material status for each operation in the **Material Status** column of the **Materials** tab on the Production Order Details (AM209000) form, shown in the following screenshot.

The screenshot shows the 'Production Order Details' form for 'RO AM000037 - Production of 3 widgets'. The 'MATERIALS' tab is active, displaying a table with the following data:

Inventory ID	Description	Qty Required	UOM	Unit Cost	Material Status	Backflush	Warehouse Override	Warehouse	Location
WIDGET01	Widget 01 - High volume, low...	10.00	EA	0.86	Released	<input type="checkbox"/>	<input type="checkbox"/>	WHOLESALE	
WIDGET03	Widget 03 - Standard cost item	2.00	EA	35.00	Released	<input type="checkbox"/>	<input type="checkbox"/>	WHOLESALE	

Figure: The Material Status column on the Production Order Details form

The material statuses are described in the following table.

Material Status	Description
<i>Planned</i>	The material has not been issued yet, and the production order that contains the material has the <i>Planned</i> status. The item plan for the material has been created.
<i>Released</i>	The material has not been issued yet, and the production order that contains the material has the <i>Released</i> status. The item plan for the material has been created.
<i>In Process</i>	The material has been partially issued. The item plan for the remaining material quantity has been created.

Material Status	Description
<i>Completed</i>	The material has been issued in full. No item plans exist for the material.
<i>Closed</i>	The production order that contains the material has the <i>Closed</i> status. No item plans exist for the material.
<i>Canceled</i>	The production order that contains the material has the <i>Canceled</i> status. No item plans exist for the material.

UI Enhancements

The More menu on the Production Order Details (AM209000) form and Production Order Maintenance (AM201500) form has been redesigned as follows to group commands in a more convenient way (see the following screenshots):

- The **Replenishment** category has been added, with the **Create Purchase Orders** and **Create Production Orders** commands within it.
- The **Materials** category has been added, with the **Critical Material**, **Late Assignment**, **Set Materials Status to Open**, and **Set Materials Status to Completed** commands within it.

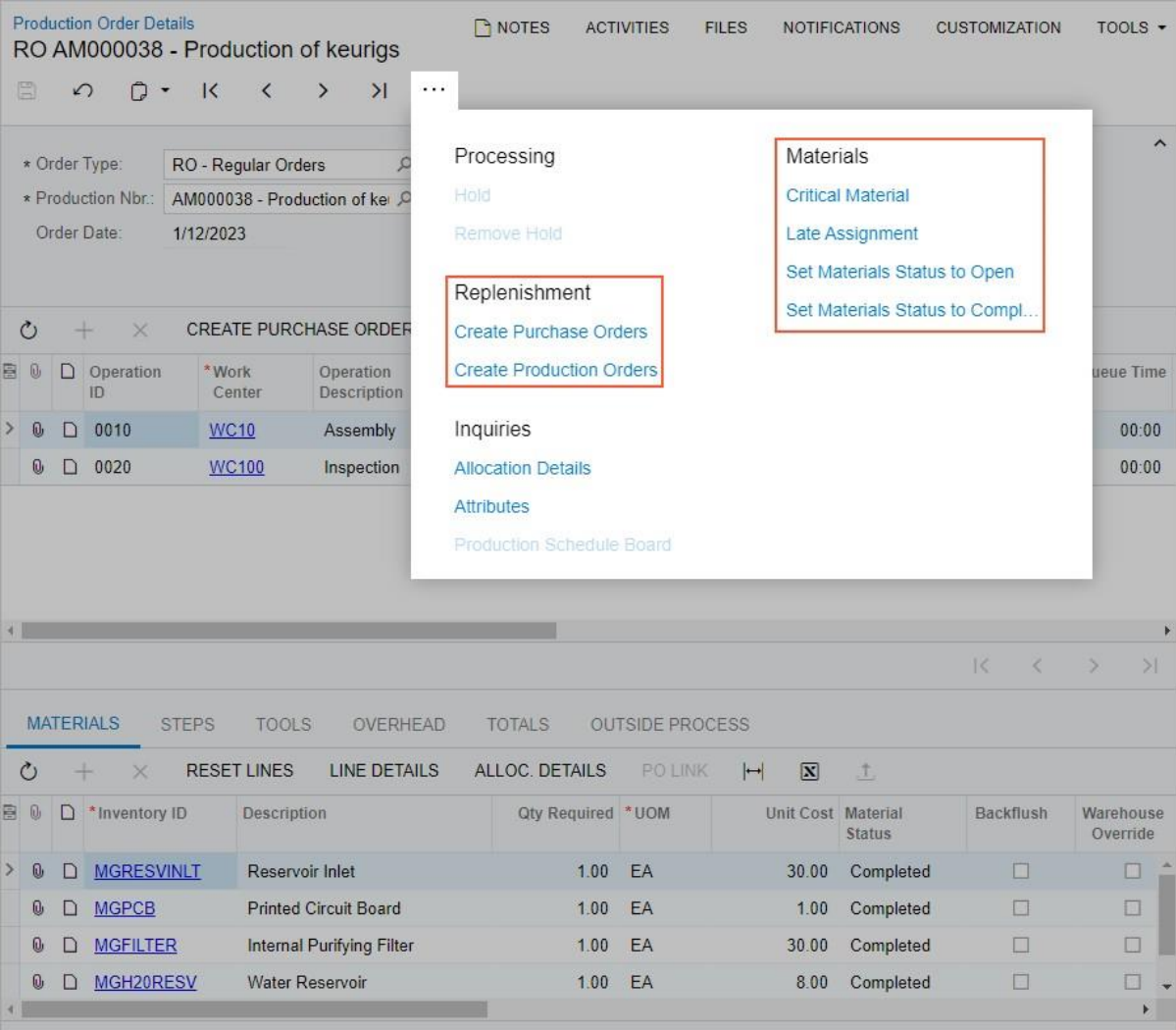


Figure: The More menu on the Production Order Details form

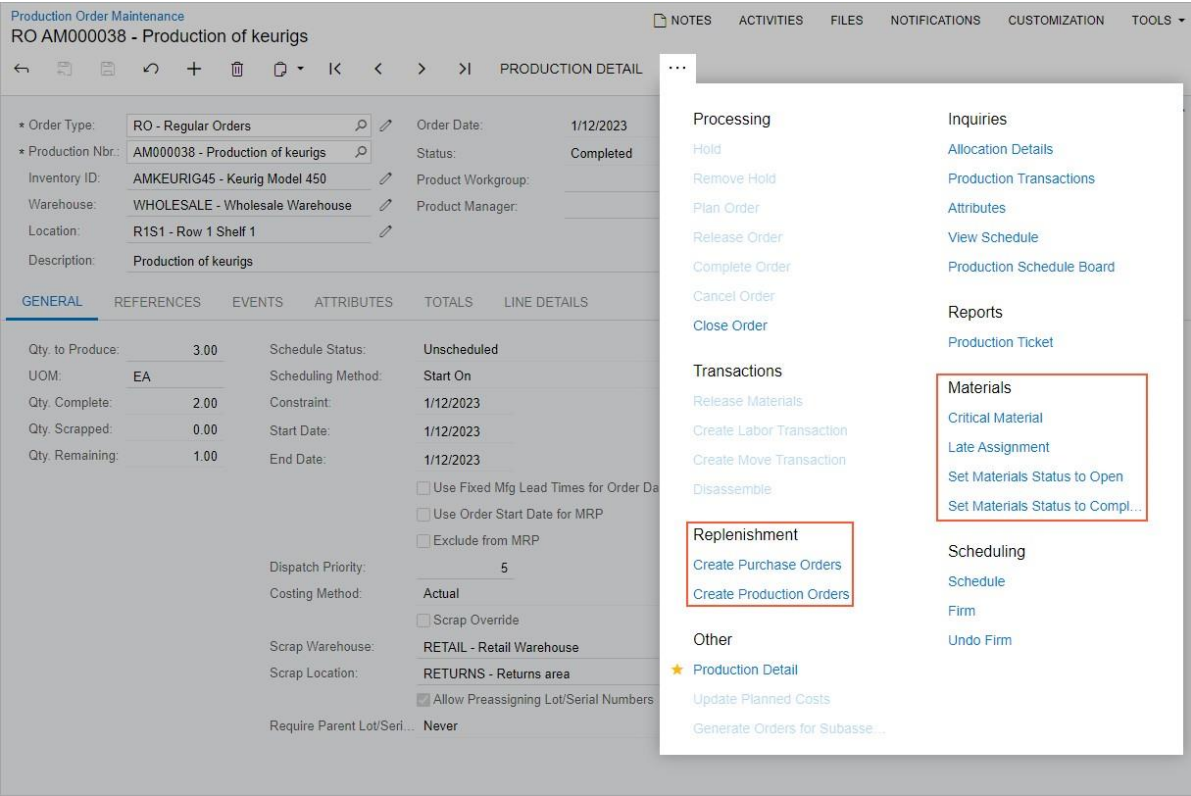


Figure: The More menu of the Production Order Maintenance form

Additional Information

For information about allocation of items to be produced and materials, see Production Processing: Item Availability and Allocation.

Enhanced Review of MRP History

In previous versions of MYOB Advanced Manufacturing Edition, a planning manager could only view the audit history for the most recent run of material requirements planning (MRP) by using the Regenerate MRP (AM505000) form.

In Version 2023.1, two new inquiry forms, MRP History (AM000016) and MRP Audit History (AM000017), have been implemented for the planning manager to view the history and details of previous MRP runs. These inquiry forms help the planning manager analyse the performance of MRP regeneration and identify if the process duration increased due to the number of records processed or if other factors caused perceived performance degradation, such as errors or setup issues.

New Inquiry Forms for MRP History Review

On the *MRP History* form, shown in the following screenshot, the planning manager can compare the numbers of records that the system processed during multiple previous MRP runs, including all records, generated exception messages, inventory items, and created planning orders. This comparison may help the planning manager to discover if the increase in the number of records caused the increase in the time of MRP generation.

Start Date	End Date	Start Time	End Time	Duration	Has Errors	Created By	MRP Detail Count	MRP First Pass Detail Count	MRP Detail Plan Count	MRP Exceptions Count	MRP Inventory Count	MRP Plan Count
1/17/2023	1/17/2023	12:08 AM	12:09 AM	0 h 01 m	<input type="checkbox"/>	admin	42	365	329	48	184	147
1/17/2023	1/17/2023	12:05 AM	12:05 AM	0 h 01 m	<input type="checkbox"/>	admin	42	362	326	45	184	147
1/17/2023	1/17/2023	12:02 AM	12:02 AM	0 h 01 m	<input type="checkbox"/>	admin	42	362	326	45	184	147

Figure: The MRP History form

On the *MRP Audit History* form, shown in the following screenshot, the planning manager can view details for all MRP runs. The manager can specify a date range to view only messages created within this range.

MRP Audit History CUSTOMIZATION ▾ TOOLS ▾

↻ ↶ ⏪ ⏩ ✖

Start Date: End Date:

Drag column header here to configure filter
🔍 📄 ⋮ 🔍

Created At	Created At (Time)	Message Type	Message	Has Errors	Created By
> 1/17/2023	12:08 AM	Started	MRP Engine Starting	<input type="checkbox"/>	admin
1/17/2023	12:08 AM	Information	No changes in low levels have been found. The max level is 3.	<input type="checkbox"/>	admin
1/17/2023	12:08 AM	Information	Processing First Pass	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	First Pass Completed	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Processing Items at Level 0	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 0: Adjustments Complete	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 0: Blowdown complete. 37 records have been processed.	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Processing Items at Level 1	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 1: Adjustments Complete	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 1: Blowdown complete. 5 records have been processed.	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Processing Items at Level 2	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 2: Adjustments Complete	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Processing Items at Level 3	<input type="checkbox"/>	admin
1/17/2023	12:09 AM	Information	Level 3: Adjustments Complete	<input type="checkbox"/>	admin

1-14 of 57 records
⏪ < of 5 pages > ⏩

Figure: The MRP Audit History form

If the manager wants to view only the messages of a particular MRP run, the manager clicks the link in the **Start Date** column of the needed row on the *MRP History* form. The system opens the *MRP Audit History* form with the audit history displayed on a separate tab.

The planning manager can also open the *MRP History* form from the Regenerate MRP (AM505000) form by clicking the new **History** button on the form toolbar (see in the following screenshot).

Regenerate MRP CUSTOMIZATION TOOLS ▾

PROCESS ↻ HISTORY

Last Completed At: 1/17/2023 12:05 AM
Last Completed By: admin

↻ | ⏪ | ⏩

Created At	Message
> 1/17/2023 12:08 AM	MRP Engine Starting
1/17/2023 12:08 AM	No changes in low levels have been found. The max level is 3.
1/17/2023 12:08 AM	Processing First Pass
1/17/2023 12:09 AM	First Pass Completed
1/17/2023 12:09 AM	Processing Items at Level 0
1/17/2023 12:09 AM	Level 0: Adjustments Complete
1/17/2023 12:09 AM	Level 0: Blowdown complete. 37 records have been processed.
1/17/2023 12:09 AM	Processing Items at Level 1
1/17/2023 12:09 AM	Level 1: Adjustments Complete
1/17/2023 12:09 AM	Level 1: Blowdown complete. 5 records have been processed.
1/17/2023 12:09 AM	Processing Items at Level 2
1/17/2023 12:09 AM	Level 2: Adjustments Complete
1/17/2023 12:09 AM	Processing Items at Level 3
1/17/2023 12:09 AM	Level 3: Adjustments Complete
1/17/2023 12:09 AM	Checking for Exceptions
1/17/2023 12:09 AM	Checking for exception complete
1/17/2023 12:09 AM	Creating the MRP plan
1/17/2023 12:09 AM	Cleanup
1/17/2023 12:09 AM	Completed [00:00:02.921]

|< < > >|

Figure: The new History button on the Regenerate MRP form

Additional Information

For information about material requirements planning, see Material Requirements Planning: General Information.

New Workflow Support on the Production Order Maintenance and Production Order Details Forms

In MYOB Advanced Manufacturing Edition 2023.1, the processing of production orders has been redesigned to use the improved workflow engine, which replaces the legacy workflow engine. The UI on the Production Order Maintenance (AM201500) and Production Order Details (AM209000) forms has been enhanced to support the functionality of the current workflow engine.

Note: Because the replacement of the workflow engine entails changes to data access classes (DACs) and business logic, it may affect custom generic inquiries, customisation projects, import and export scenarios, and API integrations. For the complete list of changes, see Release Notes for Developers for Version 2021 R1.

Changes in Production Order Workflow

On the Production Order Maintenance (AM201500) and Production Order Details (AM209000) forms, the **Hold** checkbox has been removed from the Summary area. Its functionality has been replaced by the *On Hold* status and the **Hold** and **Remove Hold** commands, which are displayed on the More menu of each form under the **Processing** category (see the following screenshots).

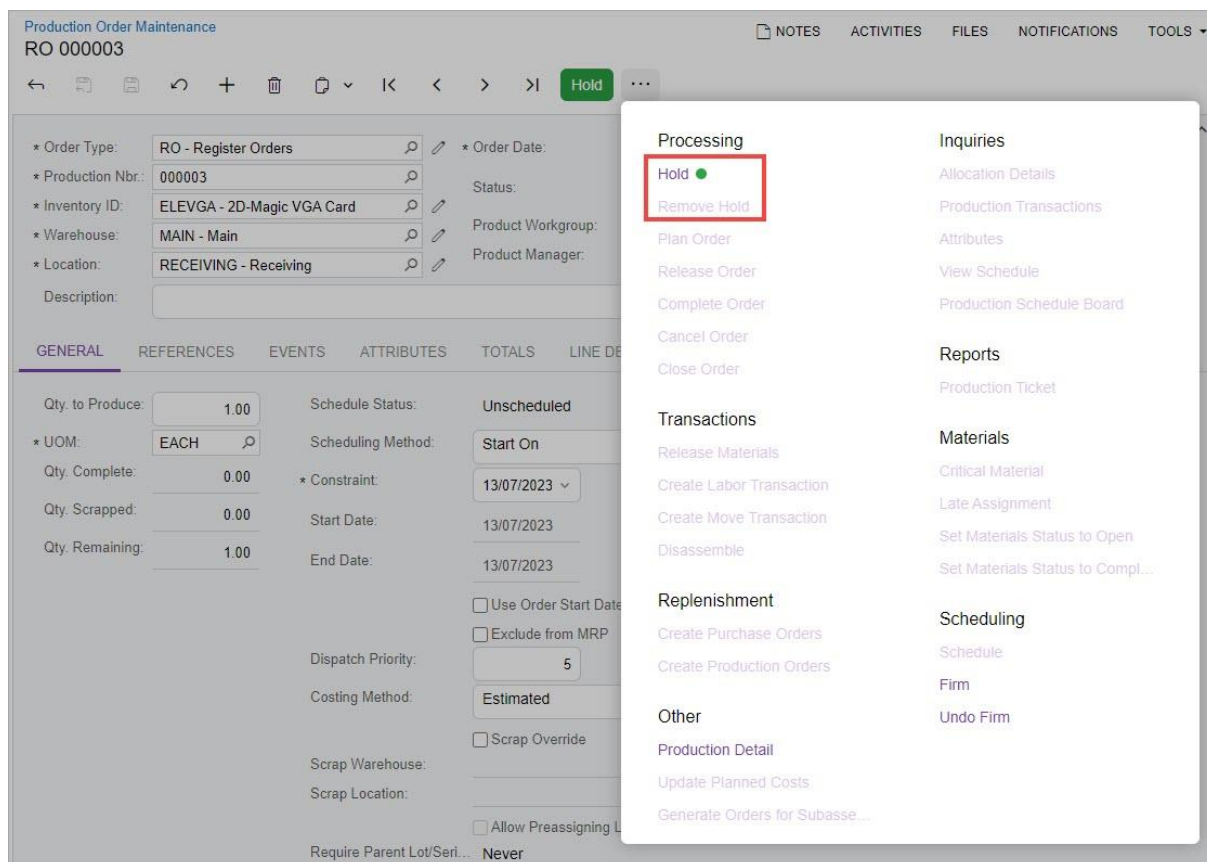


Figure: The More menu of the Production Order Maintenance form

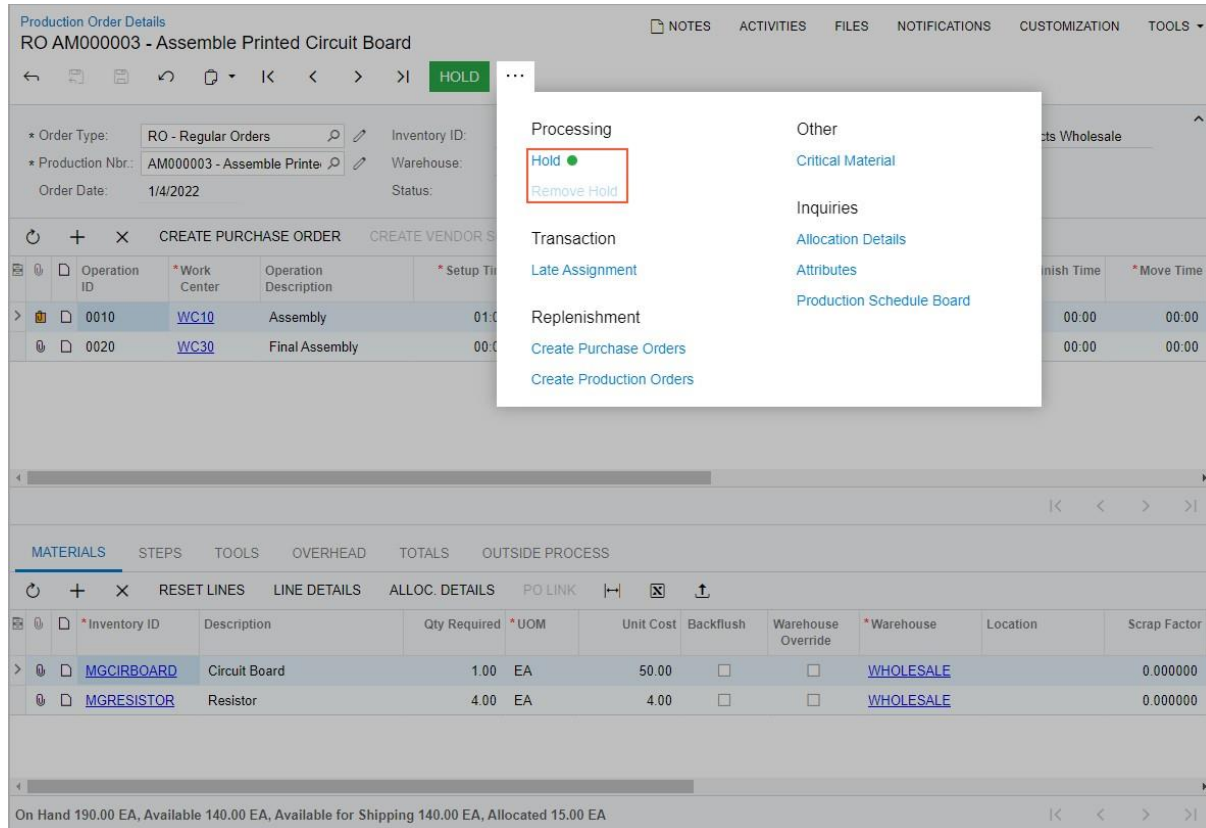


Figure: The More menu of the Production Order Details form

The **Hold** command is available on either of the forms when a production order with the *Planned*, *Released*, or *In Process* status is opened. The **Remove Hold** command is available only for a production order with the new *On Hold* status.

To make changes to a production order, a production manager does the following on the Production Order Maintenance or Production Order Details form (depending on the changes):

1. Opens the production order.
2. Clicks **Hold** on the More menu. The system changes the order's status to *On Hold*, which means that production transactions cannot be created for this order.
3. Makes the needed changes.
4. Clicks **Remove Hold**. The system changes the order's status to the one that the order had before it was put on hold.

Other UI Enhancements

On the Production Order Details (AM209000) form, the **Hold** button (which is equivalent to the **Hold** command) is displayed directly on the form toolbar for a production order that has any of the following statuses: *Planned*, *Released*, or *In Process*. For a production order with the *On Hold* status, the **Remove Hold** button (which is equivalent to the **Remove Hold** command) is displayed on the form toolbar.

On the Production Order Maintenance (AM201500) form, buttons representing the commands that are most relevant to the current status of the production order opened on the form are displayed directly on the form toolbar. See the following screenshot, which shows the **Remove Hold** button for a production order with the *On Hold* status.

The screenshot shows the 'Production Order Maintenance' form for 'RO 000003'. The toolbar at the top contains several icons and a 'Remove Hold' button, which is highlighted with a red box. Below the toolbar, the form fields are organized into two columns. The left column includes fields for Order Type, Production Nbr, Inventory ID, Warehouse, and Location. The right column includes fields for Order Date, Status, Product Workgroup, and Product Manager. The 'Status' field is set to 'On Hold' and is also highlighted with a red box. At the bottom of the form, there are tabs for 'GENERAL', 'REFERENCES', 'EVENTS', 'ATTRIBUTES', 'TOTALS', and 'LINE DETAILS'.

Figure: The Remove Hold button on the toolbar of the Production Order Maintenance form

The following table shows the commands that are also displayed as buttons on the form toolbar of the Production Order Maintenance form for each production order status.

Note: The information in the following table describes the out-of-the-field installation of the system. If the workflow has been customised, different buttons may appear based on the status of the production order.

Status	Button or Buttons
<i>On Hold</i>	Remove Hold
<i>Planned</i>	<ul style="list-style-type: none"> • Hold • Release Order
<i>Released</i>	<ul style="list-style-type: none"> • Hold • Create Move Transaction
<i>In Process</i>	<ul style="list-style-type: none"> • Hold • Create Move Transaction
<i>Completed</i>	No buttons equivalent to commands on the More menu
<i>Closed</i>	No buttons equivalent to commands on the More menu

Automation Changes

If the organisation uses automation steps, import scenarios, or export scenarios for the Production Order Maintenance (AM201500) or Production Order Details (AM209000) form (or both forms), customisers will need to redesign the automation of the processes related to the applicable forms by using the new workflow engine.

Existing workflows can be customised in the Customisation Project Editor (see [Workflow UI Guide](#)) or by extending graphs and workflows in the `PX.Objects.AM` namespace (see [Workflow API Guide](#)). Also, actions of the new workflows can be used through the contract-based API.

Side Panel Support for Specific Forms

In MYOB Advanced Manufacturing Edition 2023.1, a side panel has been added to multiple forms. A side panel is a navigation option where users can drill down to relevant details about any record they select on a 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.

Forms with Side Panels

The following screenshot shows the side panel for the Production Order Maintenance (AM201500) form. Notice that for the selected production order, the side panel has icons. The user can click any icon to view the corresponding tab.

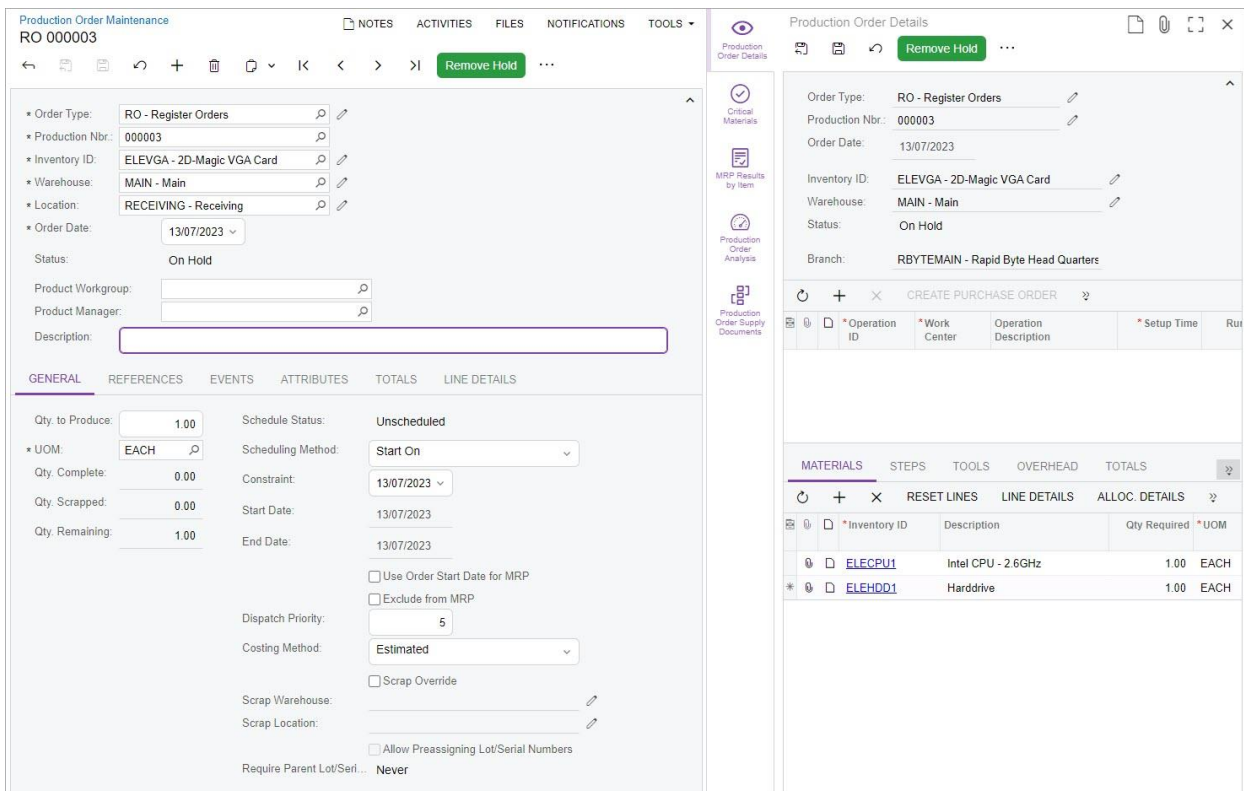


Figure: The side panel on the Production Order Maintenance form

The following table notes each form to which a side panel has been added, along with the tab or tabs on the side panel for this form. The tabs whose icons are displayed on the side panel may vary depending on the entity that is selected on the form; the **Description** column contains information about each tab.

Table: Forms with Side Panels

Form	Tab or Tabs of the Side Panel	Description
<i>Production Order Details (AM209000)</i>	<i>Production Order Maintenance (AM201500)</i>	Displays the form for the current production order.
	<i>Production Order Supply Documents (AM0026SP)</i>	<p>Displays the inquiry form that shows production orders for sub-assemblies and purchase orders that are linked to the current production order.</p> <p>This inquiry form is displayed only on the side panel and cannot be opened by using a search or work- spaces.</p>
	<i>Supplier Shipments by Production Order (AM3100SP)</i>	<p>Displays the inquiry form that shows supplier shipments with lines related to the current production order.</p> <p>This inquiry form is displayed only on the side panel and cannot be opened by using a search or work- spaces.</p>
	<i>Where Used in Production Orders (AM0027SP)</i>	<p>Displays the inquiry form that lists all production orders that use the same materials as the current production order uses.</p> <p>This inquiry form is displayed only on the side panel and cannot be opened by using a search or work- spaces.</p>
<i>Production Order Maintenance</i>	<i>Production Order Details</i>	Displays the form for the selected production order.
	<i>Critical Materials (AM401000)</i>	Displays the form and populates the list of materials with the materials of the current production order that are not

Form	Tab or Tabs of the Side Panel	Description
		available in stock.
	MRP Results by Item	<p>Displays the Detail Inquiry (AM404000) form with the inventory item and warehouse copied from the current production order.</p> <p>This tab is displayed only when the <i>Material Requirements Planning</i> feature is enabled on the Enable/Disable Features (CS100000) form</p>
	Project Tasks (PM302000)	<p>Displays the form with the project and project task copied from the current production order.</p> <p>This tab is displayed only when the <i>Projects</i> feature is enabled on the Enable/Disable Features form and the project and project task are specified on the References tab of the Production Order Maintenance form.</p>
	Production Order Supply Documents (AM0026SP)	<p>Displays the inquiry form that shows production orders for sub-assemblies and purchase orders that are linked to the current production order.</p> <p>This inquiry form is displayed only on the side panel and cannot be opened by using a search or workspaces.</p>
	Production Order Analysis (AM0042DB)	<p>Displays the dashboard with the information related to operations of the current production order.</p> <p>This dashboard is displayed only on the side panel and cannot be opened by using a search or workspaces.</p>

Form	Tab or Tabs of the Side Panel	Description
Estimate Operation (AM304000)	Estimate (AM303000)	Displays the form for the estimate ID copied from the current estimate operation.
Bill of Material (AM208000)	BOM Attributes (AM208500)	Displays the form for the current BOM ID.
	<i>Show Engineering Change Request (AM2100PL)</i>	<p>Displays the list of engineering change requests (ECRs) for which both of the following are true:</p> <ul style="list-style-type: none"> The ECR is linked to the current combination of the BOM ID and the revision. The ECR has the <i>On Hold</i>, <i>Pending Approval</i>, or <i>Approved</i> status. <p>This tab is displayed only when the <i>Engineering Change Control</i> feature is enabled on the Enable/Disable Features form.</p>
	<i>Show Engineering Change Order (AM2150PL)</i>	<p>Displays the list of engineering change orders (ECOs) for which both of the following are true:</p> <ul style="list-style-type: none"> The ECO is linked to the current combination of the BOM ID and the revision. The ECO has the <i>On Hold</i>, <i>Pending Approval</i>, or <i>Approved</i> status. <p>This tab is displayed only when the <i>Engineering Change Control</i> feature is enabled on the Enable/Disable Features form.</p>
MRP Display (AM400000)	Detail Inquiry	Displays the form for the stock item copied from the highlighted row.
MRP Exceptions (AM403000)	Detail Inquiry	Displays the form for the stock item copied from the highlighted row.

Additional Information

For details about side panels, see Side Panels on Forms.

Other Enhancements

In MYOB Advanced Manufacturing Edition 2023.1, multiple improvements to the UI and manufacturing management processes have been introduced, as described below.

Enhancements to the Where Used in BOM Form

On the Where Used in BOM (AM402000) form, the following enhancements have been introduced:

- In the Selection area, the following changes have been made:
 - The **Multi-Level** checkbox has been renamed to **Show Multilevel Results** for clarity (see Item 1 in the screenshot below). A production employee selects this checkbox if they want to display not only the immediate bill of material (BOM) that contains the component specified in the **Inventory ID** field of the Selection area but also bills of material of higher levels.
 - The **Warehouse** field has been renamed to **BOM Warehouse** for clarity (Item 2). If the production employee selects a warehouse in this field, the system displays in the table only parent BOMs assigned to this warehouse on the Bill of Material (AM208000) form.
 - The **Show Active BOMs Only** checkbox has been added (Item 3). A production employee can select this checkbox to view only active revisions of parent BOMs in the table.
- The following columns, which display information about the parent BOMs, have been added to the table or renamed (Item 4):
 - Parent Item Class:** The item class to which the item specified in the parent BOM belongs. In the previous versions of MYOB Advanced Manufacturing Edition, this column had the **Item Class** name. It was renamed because it duplicated the name of the column that displays the item class to which the component specified in the **Inventory ID** column belongs.
 - BOM Warehouse:** The warehouse specified in the parent BOM.
 - Revision Status:** The status of the parent BOM revision.
 - Revision Start Date:** The start date of the parent BOM revision.
 - Revision End Date:** The end date of the parent BOM revision.

Where Used in BOM CUSTOMIZATION TOOLS ▾

Inventory ID: **Show Multilevel Results** **Show Active BOMs Only**

Item Class:

REFRESH | ADJUST | EXPORT

Inventory ID	Level	Parent Inventory ID	Parent Item Class	BOM Warehouse	Revision Status	Revision Start Date	Revision End Date	Warehouse
MGCIRBOARD	1	MGPCB	MFGSUBASSY--	WHOLESALE	Active	8/11/2020		
MGCIRBOARD	2	AMKEURIG45	MFGFG--	WHOLESALE	Active	8/11/2020		WHOLESALE

Figure: The improvements to the Where Used in BOM form

Creation of Labor Transactions on the Production Order Maintenance Form

In previous versions of MYOB Advanced Manufacturing Edition, when a production employee wanted to create a labor transaction for a production order, the employee had to open the Labor (AM301000) form and specify the production order number and the operation number manually. Now on the Production Order Maintenance (AM201500) form, the employee can create a labor transaction by using the new **Create Labor Transaction** command on the More menu, shown in the following screenshot. When the employee clicks this command, the system creates a labor transaction for the first incomplete operation of the production order selected on the form and opens the transaction on the Labor form.

Additionally, in the More menu of the Production Order Maintenance form, the new **Transaction** category has been added (also shown in the screenshot). This category groups the commands that initiate the creation of production transactions or start other processes related to production transactions.

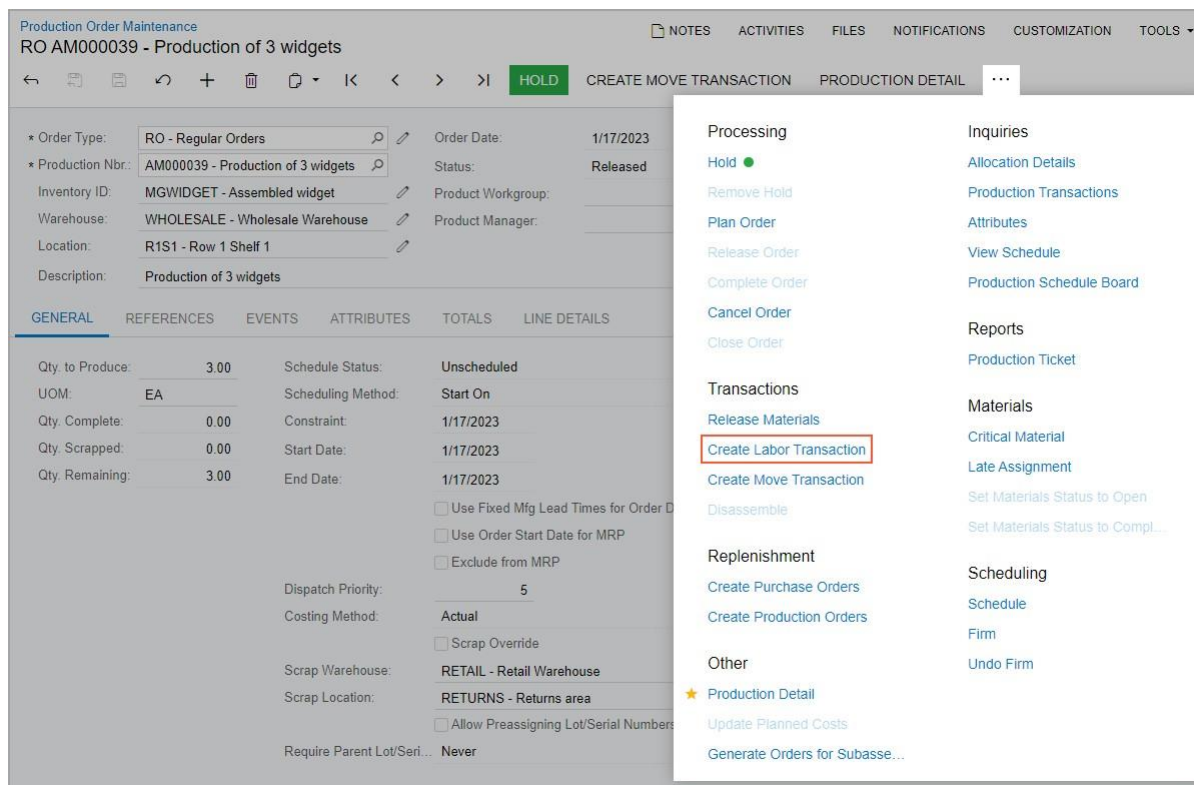


Figure: The More menu of the Production Order Maintenance form

Open Production Orders on the Production Order Maintenance List of Records

For user convenience, on the *Production Order Maintenance (AM2015PL)* list of records, the **Open** tab has been added (shown in the following screenshot). This tab displays production orders that have the *Planned, Released, or In Process* status.

Production Order Maintenance CUSTOMIZATION ▾ TOOLS ▾

Order Type: Warehouse:

ALL RECORDS **OPEN** PLANNED RELEASED IN PROCESS COMPLETED CLOSED CANCELLED »

Drag column header here to configure filter

Order Type	Production Nbr.	Inventory ID	Warehouse	Status	Start Date	End Date	Qty. to Produce
RO	AM000032	AMKEURIG45	WHOLESALE	Planned	3/22/2022	3/23/2022	50.00
RO	AM000031	AMKEURIG45	WHOLESALE	Planned	2/15/2022	2/18/2022	100.00
RO	AM000029	AMKEURIG45	WHOLESALE	Planned	2/10/2022	2/10/2022	3.00
RO	AM000023	AMCTOBAT	WHOLESALE	Planned	2/9/2022	2/9/2022	25.00
RO	AM000022	AMCTOBAT	WHOLESALE	Planned	2/4/2022	2/4/2022	50.00
RO	AM000021	AMDOORSH01	WHOLESALE	Planned	2/4/2022	2/4/2022	200.00
RO	AM000018	AMPIPECVR	WHOLESALE	Planned	2/11/2022	2/15/2022	100.00
RO	AM000016	MGPCB	WHOLESALE	Planned	2/4/2022	2/4/2022	50.00
RO	AM000013	MGBASE	WHOLESALE	Planned	2/4/2022	2/7/2022	100.00
RO	AM000012	MGRESVINLT	WHOLESALE	Planned	2/7/2022	2/7/2022	10.00
RO	AM000011	MGBASE	WHOLESALE	Planned	2/7/2022	2/8/2022	100.00
RO	AM000008	AMTOOLOSP	WHOLESALE	Planned	2/4/2022	2/7/2022	100.00
RO	AM000007	AMKEURIG45	WHOLESALE	Planned	2/10/2022	2/11/2022	30.00
RO	AM000003	MGPCB	WHOLESALE	In Process	2/7/2022	2/7/2022	15.00

1-14 of 14 records

Figure: The new Open tab on the Production Order Maintenance list of records

Platform

Archiving Old Documents

From year to year, MYOB Advanced customers create and store more and more database records of transactional documents, such as sales orders, shipments, and invoices. One document is stored in multiple database tables, and the volume of each of these tables grows fast. (For example, the data of a sales order is stored in many database tables, including `SOOrder`, `SOLine`, `SOLineSplit`, `SOOrderDiscountDetail`, `SOTaxTran`, `SOAdjust`, and `SOAddress`.) The number of records in these tables may affect the performance of data-searching operations.

Document Archival Functionality

In MYOB Advanced 2023.1, new functionality for archiving database records has been introduced. This functionality provides the ability to archive the documents that are older than the retention period specified on the new Archival Policy (SM200400) form and that are processed to completion (for example, a sales order that has the Completed status and all its lines are billed and closed or canceled).

The archival of documents improves the performance of daily use of MYOB Advanced because the archived records are not included in the results of database queries that are executed during regular user activity—that is, opening generic inquiries, lookup tables, tabs that load a list of records, and other operations. A user can still open the archived records in the system on their data entry forms by using a direct link from another document or by specifying the key values—that is, the order type and order number. In MYOB Advanced 2023.1, the archiving can be configured for only two entities: sales orders and shipments.

Note: The archiving mechanism is based on database partitioning. During the upgrade to MYOB Advanced 2023.1, the system automatically creates new partitions for sales order- and shipment-related tables in the existing database. Note that partitioning on the upgrade cannot be configured, and it will remove any existing partitions of the database from the upgraded tables.

A system administrator can configure the archival of entities on the *Archival Policy (SM200400)* form (shown in the following screenshot). On this form, the administrator can add the entity that would be archived and the retention period for it. On this form, the administrator can also specify the duration of the archival process.

Archival Policy

Archiving Process Duration (Hours):

Entity Name	Retention Period (Months)
Sales Order	12
Shipment	<input type="text" value="12"/>

Figure: The Archival Policy form

Once the system administrator has configured at least one entity that should be archived, they can open the new *Archive Documents (SM500400)* processing form (shown in the screenshot below) and review the list of dates and the number of documents that are ready to be archived on these dates. The archiving process may take a lot of time, and during this process, the performance of data entry forms can be affected. Setting the duration time of the archiving process on the *Archival Policy* form can help the system administrator adjust the process to the company's working schedule (for example, the archival can be performed at night and last five hours). That is, the system administrator can specify a time when users are not likely to interact with the system.

Archive Documents

Archiving Process Duration (Hours):

Selected	Ready-to-Archive Date	All Documents	Shipment	Sales Order
<input type="checkbox"/>	26/02/2021	72	34	38
<input type="checkbox"/>	5/03/2021	1	0	1

Figure: The Archive Documents form

The results of the execution of the archival process can be reviewed on the new *Document Archival History (SM400400)* form (shown in the following screenshot), where the system shows the execution date, duration of the execution, number of the processed documents, and other execution details.

Document Archival History TOOLS ▾

↶

EXECUTION DATE

From:

To:

Executions				Execution Details				
Execution Date	Duration	Executed By	All Documents	Ready-to-Archive Date	Duration	All Documents	Shipment	Sales Order
> 7/07/2023 6:20 PM	0:00:00	matthew....	1	> 5/03/2021	0:00:00	1	0	1

Figure: The Document Archival History form

The ability to archive documents and extract these documents from the archive manually has been added to the Sales Orders (SO301000) and Shipments (SO302000) data entry forms. If the archival settings have been configured for the corresponding entity on the *Archival Policy (SM200400)* form, the new **Archive** (shown in the screenshot below) or **Extract** button becomes available on the form toolbar of the data entry form.

The new buttons are mutually exclusive. When the user clicks **Archive**, the system archives the document if it meets the archival criteria—that is, if the document is older than the retention period specified on the *Archival Policy* form and has been processed to completion. If the user opens an archived document, they can extract it from the archive by clicking **Extract** on the form toolbar.

Sales Orders

IN 001907 - Nautilus Bar SABL

← 📄 📄 ↶ + 🗑️ **📄** 📄 ▾ ⏪ < > ⏩ ...

* Order Type: Customer: CUST000010 - Nautilus Bar SABL

Order Nbr.: Location: MAIN - Primary Location

Figure: The Archive button on the Sales Orders form

The archived documents do not appear in the document lookup tables of data entry forms or in lists of records. Also, the user cannot open these documents by clicking buttons to navigate between records on the form toolbar of data entry forms.

If the user opens the archived document by using a direct link from another document or by specifying the key values on a data entry form, most of the boxes, buttons, and actions are disabled for this document. Archived sales orders can be copied, printed, and extracted from the archive. Archived shipments can only be extracted from the archive. The archived document is not operable, and the user can only view it for reference. To make the document operable again, the user needs to extract it from the archive.

By default, archived documents are excluded from the results of all generic inquiries and reports. The user can select the new **Show Archived Records** checkbox in the Summary area of an inquiry form or select the *Print* or *Only* option in the new **Archived Records** field on the **Print and Email Settings** tab of a report form to include archived documents in the results of the generic inquiry or report.

Note: The inclusion of archived documents in the results of a generic inquiry or report can affect the performance of the selected operation.

The **ArchivedRecords** property has also been added to the **Behaviour** section of the **Properties** pane in the Report Designer (shown in the following screenshot). In this field, the user can specify the default value for the **Archived Records** field in a report of the Report Designer.

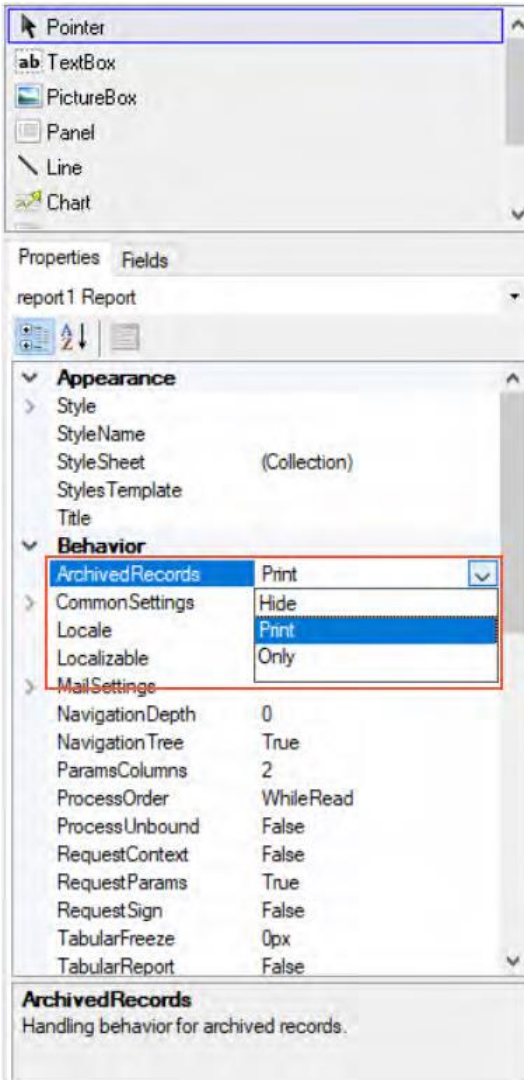


Figure: The ArchivedRecords property

Platform: Deprecation of Automation Steps

In MYOB Advanced 2023.1, the previously provided automation steps and automation definitions have been removed. Customisers used these on the Automation Steps (SM205000) and Automation Definitions (SM205010) forms, respectively.

For the following forms, automation steps are no longer available:

- Production Order Maintenance (AM201500)
- Engineering Change Request (AM210000)
- Engineering Change Order (AM215000)
- Supplier Shipments (AM310000)
- Synchronise Cards (CA206000)
- Cash Transactions (CA304000)
- Marketing Campaigns (CR202000)
- Customer Contracts (CT301000)
- Fixed Assets (FA303000)
- Journal Transactions (GL301000)
- Wiki (SM202005)
- System Email Accounts (SM204002)
- Email Templates (SM204003)
- <Scenario Name> (WZ201500)

In MYOB Advanced 2023.1, although automation steps will not work for the forms listed above, they will still work for custom forms (that is, for forms created by customisers from scratch).

Starting in MYOB Advanced 2023 R2, the automation step functionality will be deprecated, and the Automation Definitions and Automation Steps forms will be unavailable.

Automation Changes

Customisations that use automation steps for the forms mentioned above will no longer work. Customisers will need to redesign the automation of the processes by using the workflow engine.

Existing workflows can be customised in the Customisation Project Editor (see [Workflow UI Guide](#)) or by extending graphs and workflows (see [Workflow API Guide](#)).

Resetting Access Rights for Roles

In previous versions of MYOB Advanced, after a customiser published a customisation project, the system reset the access rights for a screen to *Not Set* for roles that had the *Not Set* access rights in the customisation project, as well as for roles that were not added to the customisation project.

In MYOB Advanced 2023.1, the customiser can select whether to reset the access rights for roles that are not added to the customisation project.

To support this functionality, the following changes have been introduced on the Access Rights page of the Customisation Project Editor:

- The Search field (see Item 1 in the following screenshot) and the **Last Modified On** column (Item 2) have been added to the **Add Access Rights for Screen** dialog field. (The customiser opens this dialog field by clicking **Add New Record** on the page toolbar.)

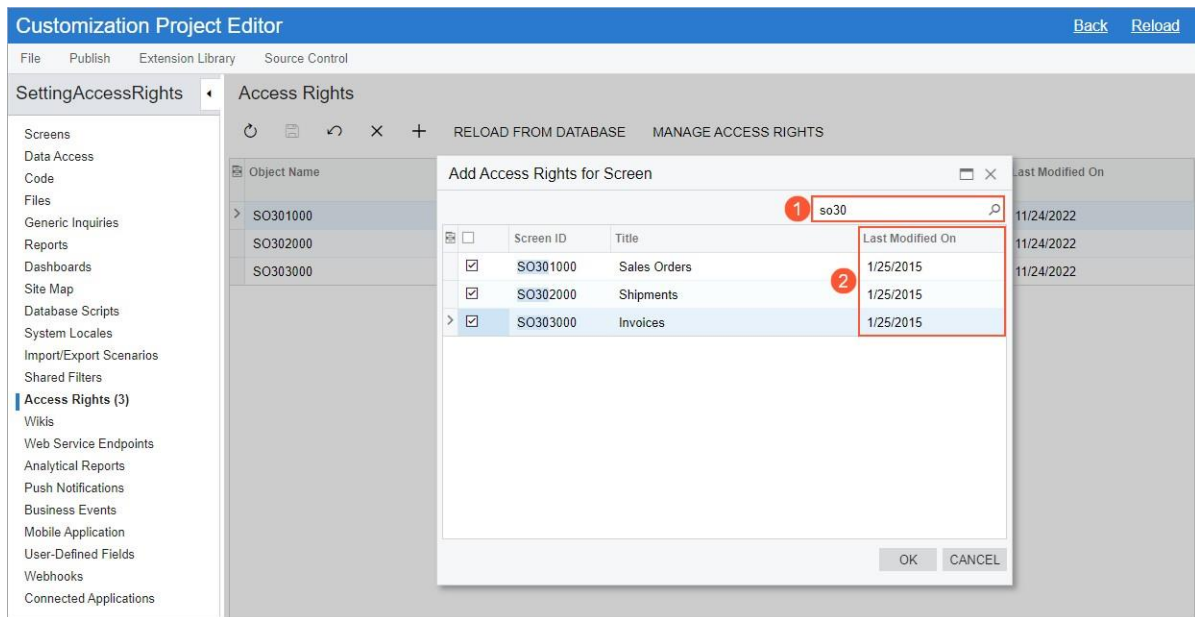


Figure: The updated Add Access Rights for Screen dialog field

- The **Reset Permissions** column with a checkbox has been added to the table on the page (see the following screenshot).

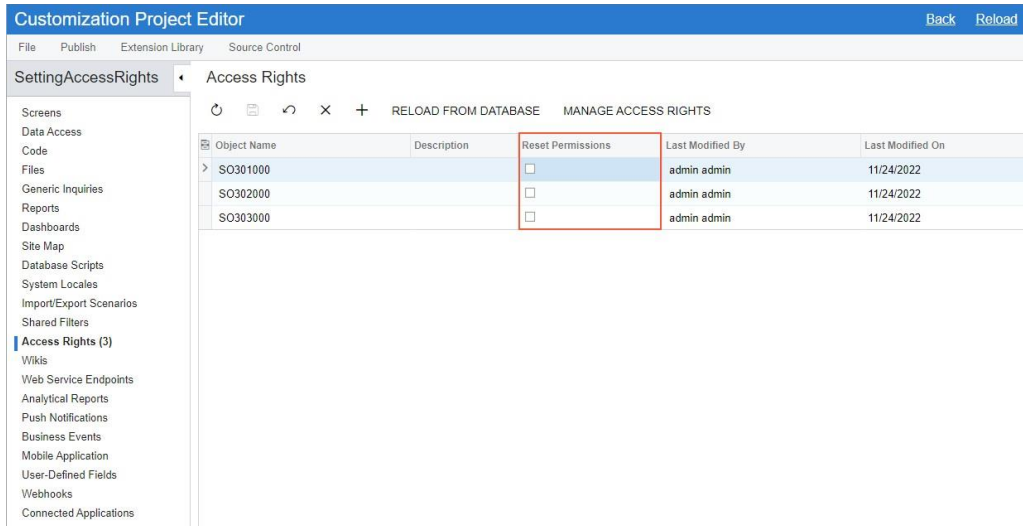


Figure: The Reset Permissions column

The following examples explain in detail how these changes are processed by the system.

Usage Example 1

Suppose that the customiser has an MYOB Advanced instance in which the customiser sets the following access rights for the Sales Orders (SO301000) form on the Access Rights by Screen (SM201020) form.

User Role	Access Rights
AP Admin	Edit
AR Admin	Revoked
CA Admin	Not Set

Further suppose that the customiser adds the access rights (the ScreenWithRights items) for the Sales Orders form (which is the screen with the SO303000 ID) to a customisation project and exports this project.

On another instance of MYOB Advanced, the customiser imports the customisation project and makes changes by performing the following general steps:

1. On the User Roles (SM201005) form, creates a role named MR Admin.
2. On the Access Rights by Screen form, specifies the following access rights for the Sales Orders (SO301000) form.

User Role	Access Rights
AP Admin	Delete
AR Admin	View Only

User Role	Access Rights
CA Admin	Edit
MR Admin	Delete

3. Opens the imported customisation project.
4. In the table on the Access Rights page, selects the **Reset Permissions** checkbox. The system displays a warning for the added item (see the following screenshot).

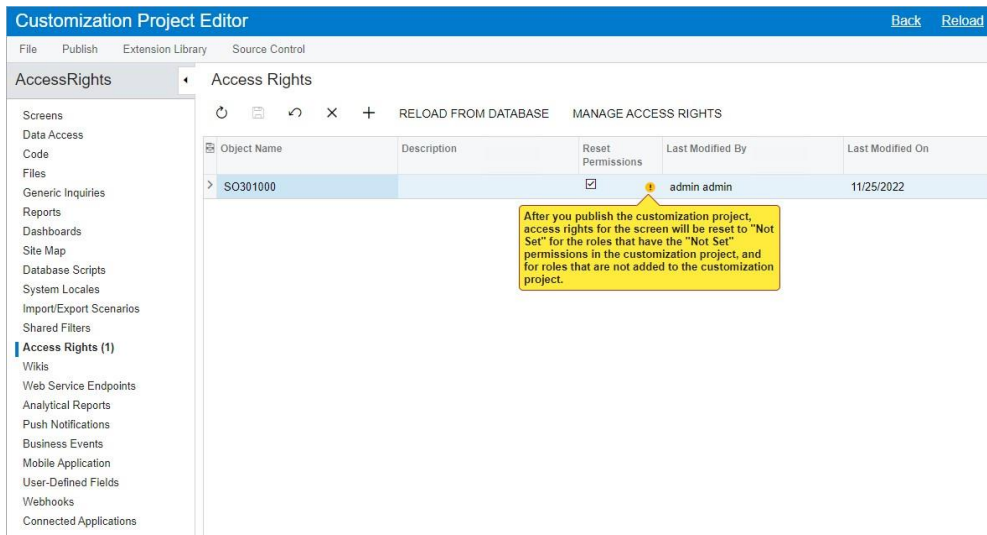


Figure: The warning about resetting access rights

5. Publishes the customisation project.
6. On the Access Rights by Screen (SM201020) form, makes sure that the system has updated the access rights for the Sales Orders (SO301000) form to the following.

User Role	Access Rights
AP Admin	Edit
AR Admin	Revoked
CA Admin	Not Set
MR Admin	Not Set

The system has reset the access rights for roles included in the customisation project, as well as for roles that were not included in it. Notice that the access rights for the *MR Admin* role have changed from *Delete* to *Not Set*, and that the access rights for the *AP Admin*, *AR Admin*, and *CA Admin* roles have changed to those specified in the customisation project.

Usage Example 2

Suppose that the customiser has an MYOB Advanced instance in which the customiser sets the following access rights for the Sales Orders (SO301000) form on the Access Rights by Screen (SM201020) form.

User Role	Access Rights
AP Admin	Edit
AR Admin	Revoked
CA Admin	Not Set

Further suppose that the customiser adds the access rights for the Sales Orders form to a customisation project and exports this project. On another instance of MYOB Advanced, the customiser imports the customisation project and makes changes by performing the following general steps:

1. On the User Roles (SM201005) form, creates a role named MR Admin.
2. On the Access Rights by Screen (SM201020) form, specifies the following access rights for the Sales Orders (SO301000) form.

User Role	Access Rights
AP Admin	Delete
AR Admin	View Only
CA Admin	Edit
MR Admin	Delete

3. Opens the imported customisation project, and on the Access Rights page, clears the **Reset Permissions** checkbox for the *SO301000* screen.
4. Publishes the customisation project.
5. On the Access Rights by Screen (SM201020) form, makes sure that the system has updated the access rights for the Sales Orders (SO301000) form to the following.

User Role	Access Rights
AP Admin	Edit
AR Admin	Revoked
CA Admin	Edit

User Role	Access Rights
<i>MR Admin</i>	<i>Delete</i>

The system has not changed the access rights for roles that were not included in the customisation project; notice that the *MR Admin* role has retained the *Delete* access rights.

Note: For customisation projects created in previous versions of MYOB Advanced, the **Reset Permissions** checkbox is selected by default, and the system resets the access rights for roles that have not been added to these projects.

Publication of Multiple Projects with the Same ScreenWithRights Items

If the customiser publishes multiple customisation projects that contain the same *ScreenWithRights* items, the system performs the following actions:

- If a level is specified for each of the projects, merges the projects, adds to the merged project the *ScreenWithRights* items from the project with the highest level, and displays a warning that the *ScreenWithRights* items from other projects will be ignored
- If the projects have the same level or no level is specified for at least one of the projects, does not publish the projects and displays an error

Specifying the User Inactivity Timeout from the UI

In MYOB Advanced 2023.1, a system administrator can specify the user inactivity timeout value from the user interface. Previously, the timeout value could be specified only by editing one of the configuration files of the MYOB Advanced instance, as described in [To Configure the Session Timeout](#) in the in-product help.

Specification of the User Inactivity Timeout

In the **Timeout Settings** section of the Security Preferences (SM201060) form, multiple new elements were added: the **Use WebConfig Value** checkbox and the **User Inactivity Timeout (Hours)** field (see the following screenshot).

The screenshot shows the 'Security Preferences' form for 'Configure Azure AD'. The 'TIMEOUT SETTINGS' section is highlighted with a red box. It contains the following elements:

- Use WebConfig Value
- User Inactivity Timeout: 4 h

Other sections visible in the form include:

- ACCOUNT LOCKOUT POLICY:** Lock Account After: 3 Unsuccessful Login Attempts; Lock Account for: 60 Minutes; Reset Lockout Counter After: 50 Minutes.
- MODERN UI:** Menu Editor Role: Administrator.
- AUDIT:** Keep Audit History for: 99 Months.
- Checkboxes:** Login, Login Failed, Logout, Screen Accessed, Session Expired, Licence Exceeded, Send Email Success, Send Email Error, OData Refresh, Customization Published.

Figure: The Security Preferences form

To update the user inactivity timeout value in the **User Inactivity Timeout (Hours)** field, the system administrator first clears the **Use WebConfig Value** checkbox. Then the system administrator specifies the new value in the **User Inactivity Timeout (Hours)** field and clicks **Save** on the form toolbar.

Note: Changes to the timeout value will be applied to all tenants of the instance.

The **User Inactivity Timeout (Hours)** field has the following options: 1, 2, 3, 5, and 8 hours. To specify a different value, the system administrator needs to update the timeout value in the `web.config` file and ensure that the **Use WebConfig Value** checkbox is selected. For instructions on how to update the timeout value in the `web.config` file, see [To Configure the Session Timeout](#) in the in-product help.

Projects and Construction

Improvements in Tracking Project-Specific Inventory

In MYOB Advanced 2023.1, a number of changes has been introduced to project-specific inventory tracking, as described in the following sections of this topic.

Deprecated Initialisation Process

In previous versions of MYOB Advanced, after enabling the *Project-Specific Inventory* feature on the Enable/Disable Features (CS100000) form, an administrative user had to perform a stock initialisation procedure to prepare the system for tracking project-specific inventory. The user did this by clicking **Initialise Stock** on the form toolbar of the Recalculate Project Balances (PM504000) form.

Now, due to improvements in the database tables that are used for storing inventory and cost center information, there is no need to initialise the stock. The **Initialise Stock** button has been removed from the form toolbar of the Recalculate Project Balances form.

Redesigned Inventory Tracking by Project Quantity

For the projects with the *Track by Project Quantity* inventory tracking mode specified in the **Inventory Tracking** field on the **Summary** tab of the Projects (PM301000) form, the system no longer tracks project-specific inventory costs by warehouse locations. Now for these projects, a single cost layer holds the costs that have been recorded for the same inventory item with the same project budget key, even if the item has been received to different warehouse locations of the same warehouse. This is because the `INCostStatus` database table, which stores the cost center data, no longer stores the `LocationID` attribute. For each inventory item being received for the project, the system tracks only the project budget key and the warehouse.

Note: To utilise a scenario in which the system tracks costs for the projects with the *Track by Project Quantity* inventory tracking mode by warehouse locations, a user should select the **Cost Separately** checkbox for the needed warehouse locations on the **Locations** tab of the Warehouses (IN204000) form.

Availability Information

On the Receipts (IN301000), Issues (IN302000), Adjustments (IN303000), and Transfers (IN304000) forms, the system displays the item availability data of the selected line at the bottom of the screen. The way the system shows item availability for the line now depends on the value in the **Cost Layer Type** column on the **Details** tab.

For each of the quantities, the system shows one value (as shown in the screenshot below for the Receipts form) if the following is true for the line:

- The cost layer type is *Normal*, and a line has a warehouse location that is linked to a project with the *Track by Location* inventory tracking mode specified in the **Inventory Tracking** field on the **Summary** tab of the Projects (PM301000) form. Each quantity is calculated based on the items received to this location for this project and the items received to this location with a non-project code.

Projects and Construction

- The cost layer type is *Normal*, and a line is not linked to any project (that is, the line has the non-project code specified). Each quantity is calculated based on the items received to this location with a non-project code.

Receipts
000290

Reference Nbr.: 000290 Transfer Nbr.: Total Qty.: 3,680.00
 Status: Released External Ref.: Total Cost: 442,520.00
 Date: 27/10/2020 Description:
 Post Period: 04-2021

DETAILS FINANCIAL MANUFACTURING

LINE DETAILS ADD ITEMS

UOM	Unit Cost	Ext. Cost	Lot/Serial Nbr.	Expiration Date	Reason Code	Cost Layer Type	Project
EACH	25.00	25,000.00				Normal	X
EACH	9.00	9,000.00				Normal	X
EACH	6.00	6,000.00				Normal	X
EACH	634.20	380,520.00				Normal	X
EACH	275.00	22,000.00	<SPLIT>			Normal	X

On Hand 1,260.00 EACH, Available 1,260.00 EACH, Available for Shipping 1,260.00 EACH, Available for Issue 1,260.00 EACH

Figure: Availability information that is not project specific

For each of the quantities, the system shows two values (separated by a slash) if the following is true for the line:

- The cost layer type is *Normal* and a line has a warehouse location that is linked to a project that has the *Track by Project Quantity* inventory tracking mode specified in the **Inventory Tracking** field on the **Summary** tab of the Projects form. The quantities are calculated as follows:
 - The first value shows the available quantity of items in the selected warehouse location related to this particular project and project task.
 - The second value shows the quantity of free stock items and project-specific items stored in this warehouse location.

Receipts
New Record

Reference Nbr.: <NEW> Transfer Nbr.: Total Qty.: 1.00
 Status: Balanced External Ref.: Total Cost: 289.21
 Date: 10/07/2023 Description:
 Post Period: 01-2023

DETAILS FINANCIAL MANUFACTURING

LINE DETAILS ADD ITEMS

Branch	Inventory ID	Warehouse	Location	Quantity	UOM	Unit Cost	Ext. Cost	Lot/Serial Nbr.	Expiration Date	Reason Code	Cost Layer Type	Project
RBYTEMAIN	ELE32LED	MAIN	RECEIVING	1.00	EACH	289.21	289.21				Normal	PR300076

On Hand 107.00 EACH, Available 107.00 EACH, Available for Shipping 107.00 EACH, Available for Issue 107.00 EACH

Figure: Project-specific availability information

Projects and Construction

- The cost layer type is *Project* and a line is linked to a project that has the *Track by Project Quantity and Cost* inventory tracking mode specified in the **Inventory Tracking** field on the **Summary** tab of the Projects form. The quantities are calculated as follows:
 - The first value shows the available quantity of items in the selected cost layer related to this particular project and project task.
 - The second value shows the quantity of free stock items and project-specific items stored in the warehouse location that is specified in the line.

The screenshot shows the 'Receipts New Record' form. At the top, there are navigation icons and a 'Release' button. Below this, there are fields for 'Reference Nbr.' (set to '<NEW>'), 'Transfer Nbr.', 'Total Qty.' (1.00), 'Status' (Balanced), 'External Ref.', 'Total Cost' (289.21), 'Date' (10/07/2023), and 'Post Period' (01-2023). There is also a 'Description' field. Below these fields are tabs for 'DETAILS', 'FINANCIAL', and 'MANUFACTURING'. The 'DETAILS' tab is active, showing a table with columns: Branch, Inventory ID, Warehouse, Location, Quantity, UOM, Unit Cost, Ext. Cost, Lot/Serial Nbr., Expiration Date, Reason Code, Cost Layer Type, and Project. A single row is visible with the following values: RBYTEMAIN, ELE32LED, MAIN, RECEIVING, 1.00, EACH, 289.21, 289.21, Project, PR300076. Below the table, a summary line is highlighted with a red box: 'On Hand 107.00 EACH, Available 107.00 EACH, Available for Shipping 107.00 EACH, Available for Issue 107.00 EACH'.

Figure: Availability information specific for a project with cost layers

Upgrade Notes

The database tables related to the project-specific inventory have been redesigned. For the full list of the changes, and the details about the upgrade procedure see the Release Notes for Developers 2023.1 document.

Improved Lien Waiver Functionality

In MYOB Advanced 2023.1, the functionality related to compliance tracking has been reworked to simplify the use of lien waivers. Also, support has been added for a number of additional user scenarios related to lien waiver processing. See the following sections of this topic for a detailed description.

UI Changes and Workflow Improvements

On the **Lien Waiver Settings** tab of the Compliance Preferences (CL301000) form, the following UI changes have been made:

- New **Calculate Amount By** boxes have been added to both the **Conditional Lien Waivers** section and the **Unconditional Lien Waivers** section. These settings specify how the system will aggregate the payment amounts and prepare separate lien waivers for each group of payments. The following options are available in the field:
 - *Commitment, Project, Project Task*
 - *Commitment, Project* (default)
 - *Project, Project Task*
 - *Project*The option selected in each section defines the level of tracking for auto-generated lien waivers of the conditional or unconditional type. When a lien waiver is generated automatically, the system groups the payment amounts to each lien waiver based on the option selected in the **Calculate Amount By** field of the section.
- New **Generate for AP Documents Not Linked to Commitments** checkboxes have been added to both the **Conditional Lien Waivers** section and the **Unconditional Lien Waivers** section. If this checkbox is selected in a section, the system generates the corresponding type of the lien waivers without links to related commitments based on the option selected in the **Calculate Amount By** field of the section.
- The **Final Lien Waiver Amount** boxes have been removed from both the **Conditional Lien Waivers** section and the **Unconditional Lien Waivers** section.
- The **Outstanding Lien Waivers** section has been renamed to **Actions for Outstanding Lien Waivers**, and its settings have been changed as follows:
 - The **Warn of Outstanding Lien Waivers During AP Bill Entry** checkbox has been renamed to **Warn Users During AP Bill Entry**.
 - The **Warn of Outstanding Lien Waivers When Selecting AP Bill for Payment** checkbox has been renamed to **Warn Users During Bill Selection for Payment**.
 - The **Stop Payment of AP Bill When There Are Outstanding Lien Waivers** checkbox has been renamed to **Prevent AP Bill Payment**.

The following screenshot shows the redesigned **Lien Waiver Settings** tab of the Compliance Preferences form.

Figure: Lien waiver settings on the Compliance Preferences form

Also, on the Cheques and Payments (AP302000) form, the **Set as Final** button has been added on the table toolbar of the **Compliance** tab. A user clicks this button to mark a lien waiver as a final lien waiver.

For more information about processing lien waivers, see Lien Waivers: General Information.

Lien Waivers for Payments for Multiple Bills

A payment created on the Cheques and Payments (AP302000) or Prepare Payments (AP503000) form may include multiple bills related to different projects, project tasks, and commitments. The system automatically generates conditional and unconditional lien waivers for these bills based on the option selected in the **Calculate Amount By** field in the corresponding section on the **Lien Waiver Settings** tab of the Compliance Preferences (CL301000) form.

The created lien waiver or lien waivers are then shown for the payment on the **Compliance** tab of the Cheques and Payments form. A user can review the bills processed during the generation of a particular lien waiver by clicking **Line Details** on the **Compliance** tab of the Cheques and Payments form. In the **Line Details** dialog field, which opens, the system shows the list of bills with their currencies and paid amounts.

Lien Waivers for Joint Payee Bills

On the Cheques and Payments (AP302000) and Prepare Payments (AP503000) forms, lien waivers for joint payee bills are now supported. For a joint payee bill, the system creates a payment for the main supplier and payments for joint payees. The system automatically generates lien waivers for these payments by using the general rules of lien waiver generation. A user can print each lien waiver generated for a joint payment by using the following report forms:

- Conditional Progress Lien Waiver (CL642001) (formerly named Cond Waiver - Progress Pymt)
- Conditional Final Lien Waiver (CL642003) (formerly named Cond Waiver - Final Pymt)
- Unconditional Progress Lien Waiver (CL642002) (formerly named Uncond Waiver - Progress Pymt)
- Unconditional Final Lien Waiver (CL642004) (formerly named Uncond Waiver - Final Pymt)

Printing of Manual Lien Waivers

The system now supports the printing of lien waivers that are not linked to payments. A user can manually add a lien waiver on the **Compliance** tab of the Bills and Adjustments (AP301000) form for a bill that has not been paid yet.

Then the user opens this lien waiver by using the appropriate report form (which depends on the type of the lien waiver) and prints the generated report.

Improved Lien Waiver Validation During Mass-Processing of Payments

The process of mass-preparing payments and validating manual and outstanding lien waivers has been reworked.

On the Prepare Payments (AP503000) form, the system now generates a payment, regardless of the results of the lien waiver validation, if an AP bill has a manual lien waiver or an outstanding lien waiver linked to the corresponding supplier. Also, the system now validates the outstanding lien waivers when a user takes a payment off hold on the Cheques and Payments (AP302000) form. If the validation fails for an outstanding lien waiver, the system creates a payment with the *On Hold* status, regardless of the state of the **Hold Document on Entry** checkbox on the Accounts Payable Preferences (AP101000) form.

If the bill has a linked manual lien waiver, the system prepares the payment for it, considering the following conditions:

- If a manual lien waiver has the **Link to Payment** checkbox selected on the **Compliance** tab of the Bills and Adjustments (AP301000) form, and the lien waiver amount equals the bill amount of the linked bill, this bill or bill line is excluded from automatic lien waiver generation.
- If a manual lien waiver has the **Link to Payment** checkbox cleared, this lien waiver is also excluded from automatic lien waiver generation and the manual lien waiver is not created.

Migration Mode for Pro Forma Invoices

In previous versions of MYOB Advanced, users were not able to manually create pro forma invoices. As a result, there was no ability to migrate historical data for pro forma invoice from a legacy system. Starting MYOB Advanced 2023.1, migration mode has been introduced in the project accounting functional area. A user can now turn on migration mode and import pro forma invoices with their balances, original amounts, and dates without affecting the general ledger. Also, the user can link these pro forma invoices to the corresponding AR documents.

Creation of Pro Forma Invoices in Migration Mode

To provide the ability to activate migration mode for pro forma invoices, the **Activate Migration Mode** checkbox has been added to the **General Settings** section on the **General** tab of the Projects Preferences (PM101000) form, as shown in the following screenshot.

Projects Preferences

📄 ↺

GENERAL
MAILING & PRINTING
APPROVAL

NUMBERING SEQUENCE

* Transaction Numbering Sequence:	PMTRAN - PM Transaction Numbering 🔍 ✎
* Batch Numbering Sequence:	BATCH - GL Batch 🔍 ✎
* Pro Forma Numbering Sequence:	PROFORMA - PM Pro Forma Invoice Numbering 🔍 ✎
* Change Order Numbering Sequence:	CHANGEORD - PM Change Order Numbering 🔍 ✎
* Change Request Numbering Sequence:	CHANGERST - PM Change Request Numbering 🔍 ✎
* Quote Numbering Sequence:	PMQUOTE - Quotes in Project 🔍 ✎
* Progress Worksheet Numbering Sequence:	PROGRESSWS - Progress Worksheet 🔍 ✎

GENERAL SETTINGS

* Non-Project Code:	<input type="text" value="X"/>
* Empty Item Code:	<input type="text" value="<N/A>"/>
* Empty Item UOM:	<input type="text" value="HOUR"/> 🔍 ✎
Default Change Order Class:	<input type="text"/> 🔍 ✎
Default Quote Template:	<input type="text"/> 🔍 ✎
* Billing Cut-off Date:	<input type="text" value="Include Trans. created on billing date"/> ▼
Validate T&M Revenue Budget Limits:	<input type="text" value="Validate"/> ▼
Revenue Budget Update:	<input type="text" value="Summary"/> ▼
Cost Budget Update:	<input type="text" value="Summary"/> ▼
Budget Control:	<input type="text" value="Do Not Control"/> ▼

Automatically Post on Release
 Automatically Release Allocations
 Internal Cost Commitment Tracking
 Calculate Project-Specific Taxes

Activate Migration Mode

Figure: The new Activate Migration Mode checkbox

With migration mode activated, a user can manually enter pro forma invoices on the Pro Forma Invoices (PM307000) form. On the form toolbar, the **Add New Record** button becomes available (as shown in the following screenshot) if the **Activate Migration Mode** checkbox is selected on the Projects Preferences (PM101000) form.

Projects and Construction

Pro Forma Invoices
000053 - WIP - Software Implementation

Remove Hold Print AIA Report ...

Reference Nbr.: 000053 Project: PR00000084 - WIP - Software Implement Progress Billing Total: 0.00
 Status: On Hold Customer: CUST000004 - Alphabetland School Cen Time and Material Total: 13,560.00
 * Invoice Date: 31/12/2020 * Location: MAIN - Primary Location Tax Total: 1,356.00
 * Post Period: 06-2021 * Currency: AUD 1.00 VIEW BASE Invoice Total: 14,916.00
 Customer Ord... Currency Rate for ... AUD Retention Total: 0.00
 Application Nbr.: Amount Due: 14,916.00
 Description: WIP Project Billing

PROGRESS BILLING TIME AND MATERIAL TAXES FINANCIAL APPROVALS ADDRESSES

Figure: Manual creation of a pro forma invoice

On the **Progress Billing** tab of the Pro Forma Invoices form, the **Load Lines** button has been added. By clicking the button, the user can load progress billing lines from the project budget (that is, all the revenue budget lines with the project tasks that are assigned the progress billing rule).

To indicate that a pro forma invoice has been migrated, the system selects the **Migrated** checkbox on the **Financial** tab of the Pro Forma Invoices (PM307000) form (as shown in the following screenshot).

Pro Forma Invoices
000051 - WIP - Software Implementation

Remove Hold Print AIA Report ...

Reference Nbr.: 000051 Project: PR00000081 - WIP - Software Implement Progress Billing Total: 0.00
 Status: On Hold Customer: CUST000098 - QRT financial service Time and Material Total: -144,020.00
 * Invoice Date: 31/12/2023 * Location: MAIN - Primary Location Tax Total: -14,402.00
 * Post Period: 06-2023 * Currency: AUD 1.00 VIEW BASE Invoice Total: -158,422.00
 Customer Ord... Currency Rate for ... AUD Retention Total: 0.00
 Application Nbr.: Amount Due: -158,422.00
 Description: WIP Project Billing

PROGRESS BILLING TIME AND MATERIAL TAXES FINANCIAL APPROVALS ADDRESSES

INVOICE SETTINGS PREVIOUS REVISIONS

AR Doc. Type: AR Ref. Nbr.:
 * Branch: RBYTEMMAIN - Rapid Byte Head Quar
 Customer Tax Zone: DOMESTIC - Domestic
 Terms: 30THMONTH - 30th of Month
 Due Date: 30/01/2021
 Cash Discount Date: 30/01/2021

OTHER INFO Migrated

Revisior	Invoice Total	Retention Total	Tax Total	AR Doc. Type	AR Ref. Nbr.

Figure: Selection of the Migrated checkbox for the pro forma invoice

Projects and Construction

If needed, the user can link the created pro forma invoice with the corresponding AR document created on the Invoices and Memos (AR301000) form. To do this, the user selects the type of the financial document to be linked in the **AR Doc Type** field and the reference number of the document in the **AR Ref. Nbr.** field, as shown in the following screenshot.

Pro Forma Invoices
ERP Implementation Fixed Price - Software Implementation

Reference Nbr.: 000017 * Project: PR00000002 - ERP Implementation Fi
 Status: Closed Customer: CUST000097 - Quay Technology
 * Invoice Date: 1/01/2023 * Location: MAIN - Primary Location
 * Post Period: 07-2023 * Currency: AUD 1.00
 Description: Progress Bill for the Project

Progress Billing Total: 0.00
 Time and Material Total: 0.00
 Tax Total: 0.00
 Invoice Total: 0.00
 Retention Total: 0.00
 Amount Due: 0.00

INVOICE SETTINGS

AR Doc. Type: Invoice
 AR Ref. Nbr.: 000836
 * Branch: RBYTEMAIN - Rapid Byte Head Quar
 Customer Tax Zone: DOMESTIC - Domestic
 Terms:
 Due Date:
 Cash Discount Date:

Figure: AR invoice manually linked to the pro forma invoice

After the pro forma invoice is released, on the **Invoices** tab of the Projects (PM301000) form, the system shows a line with the pro forma invoice and the corresponding AR document (if one was specified) for the corresponding project, as shown in the following screenshot.

Projects
PR00000002 - ERP Implementation Fixed Price - Software Implementation

Actual Income: 26,000.00
 Actual Expenses: 20,000.00
 Margin: 6,000.00 (23.08%)

Pro Forma Date	Pro Forma Reference Nbr.	Application Nbr.	Description	Status	Invoice Total	Pro Forma Currency	AR Doc. Type	AR Reference Nbr.	AR Doc. Date	AR Doc. Description
1/01/2023	000017		Progress Bill for the Project	Closed	26,000.00	AUD	Invoice	000836	1/01/2023	Progress Bill for the Project
							Invoice	001138	31/03/2020	Progress Bill for the Project

Figure: The migrated document on the Projects form

Also, the user can now manually create a project transaction on the Project Transactions (PM304000) form and manually link it with the corresponding AR document. To do this, the user specifies the type of the AR

document in the **Orig. Doc. Type** field in the Summary area of the form and the reference number of the document in the **Orig. Doc. Nbr.** field (see the following screenshot).

The screenshot displays the 'Project Transactions' form for 'AR - Progress Bill for the Project'. The 'Orig. Doc. Type' field is set to 'Invoice' and the 'Orig. Doc. Nbr.' field is set to '000836', both highlighted with a red box. The 'Module' is 'AR', 'Ref. Number' is '<NEW>', and 'Status' is 'Balanced'. The description is 'Progress Bill for the Project'. Summary statistics show 'Total Quantity: 0.00', 'Total Billable Quantity: 0.00', and 'Total Amount: 0.00'. Below the summary, there are tabs for 'DETAILS' and 'COMPLIANCE'. A table below shows a single row with columns for Branch, Project, Project Task, Cost Code, Account Group, Employee, Customer/Supplier, and Location. The row contains: RBYTEMAIN, PR00000002, 0000, and a search icon.

Figure: Migrated project transaction with a link to AR document

Predefined Import Scenarios

New predefined import scenarios have been implemented to simplify the migration of financial data from third-party software to MYOB Advanced. The following import scenarios are now available on the Import Scenarios (SM206025) and Import by Scenario (SM206036) forms:

- *ACU Import Proforma* for importing pro forma invoices to the Pro Forma Invoices (PM307000) form
- *ACU Import Project Income* for importing revenue project transactions to the Project Transactions (PM304000) form

By using these scenarios, the user now can perform import of initial pro forma balances for projects from the legacy systems. Both scenarios should be used in migration mode.

For each of the predefined import scenarios, a data template is provided. The user performing the import can download the template, populate it with the data to be migrated to MYOB Advanced, and then use the prepared file on the Import by Scenario form with the corresponding import scenario.

For more information, see Predefined Import Scenarios for Migrating Financial Data.

Mobile App Enhancements

Previously, in the MYOB Advanced mobile app, a user could not work with the progress worksheets that are available in MYOB Advanced Construction Edition. In MYOB Advanced 2023.1, the new *Progress Worksheet* mobile screen has been introduced in the MYOB Advanced mobile app.

In the MYOB Advanced mobile app connected to an instance of MYOB Advanced 2023.1, the user can now view, create, and update progress worksheets by using this screen. Also, the user can now view progress worksheets related to daily field reports from the *Daily Field Reports* mobile screen.

Progress Worksheets in the Mobile App

The **Progress Worksheets** menu item is now available in the **Projects** workspace, as shown in the following screenshot.

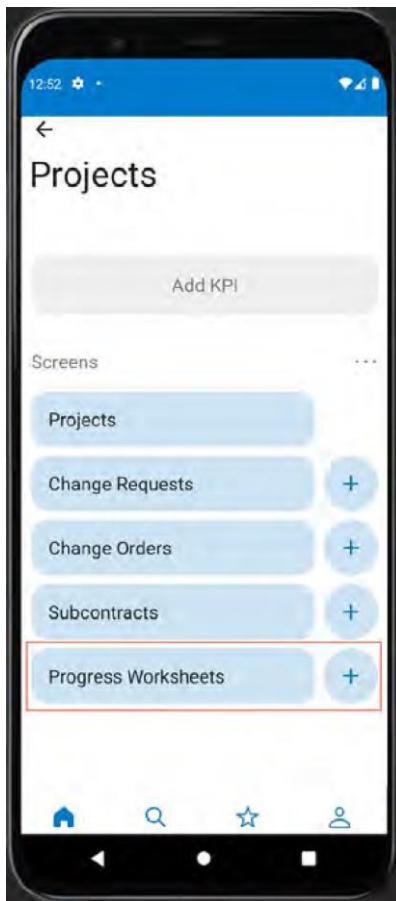


Figure: Progress Worksheets menu item in the mobile app

When a user opens the **Project Management** workspace and taps **Progress Worksheets**, the system opens the *Progress Worksheets* screen, which lists the existing progress worksheets (see the screenshot below). For each progress worksheet, the system shows the following information:

- The progress worksheet ID
- The date
- The description

- The status

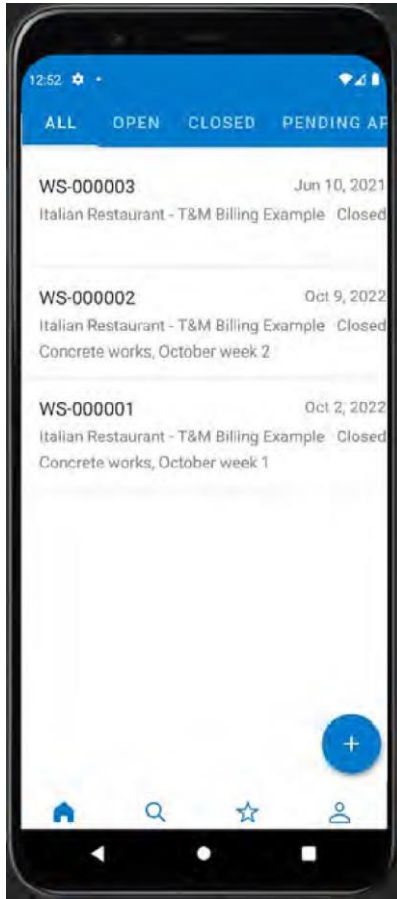


Figure: The list of progress worksheets

On the *Progress Worksheets* screen, the user can tap a record tile to open a progress worksheet and view its settings (see the following screenshot), or create a new progress worksheet by tapping the Add button in the bottom of the screen.



Figure: Progress worksheet summary information

While viewing a progress worksheet, the user can tap **Details** to review the list of lines of this progress worksheet (see the following screenshot). Also, the user can tap a particular line to view complete information about this line.



Figure: Lines of a progress worksheet

The user can tap the following to view additional information for the progress worksheet:

- **Notes:** To view the list of notes linked to the progress worksheet.
- **Approvals:** To view the list of approvals related to the progress worksheet.

If approvals are configured for progress worksheets, the user can also approve or reject progress worksheets in the mobile app.

Progress Worksheets Linked to Daily Field Reports

While a user is viewing a daily field report on the *Daily Field Reports* screen (see the following screenshot), the user can tap **Progress Worksheets** to open the list of progress worksheets linked to the daily field report.

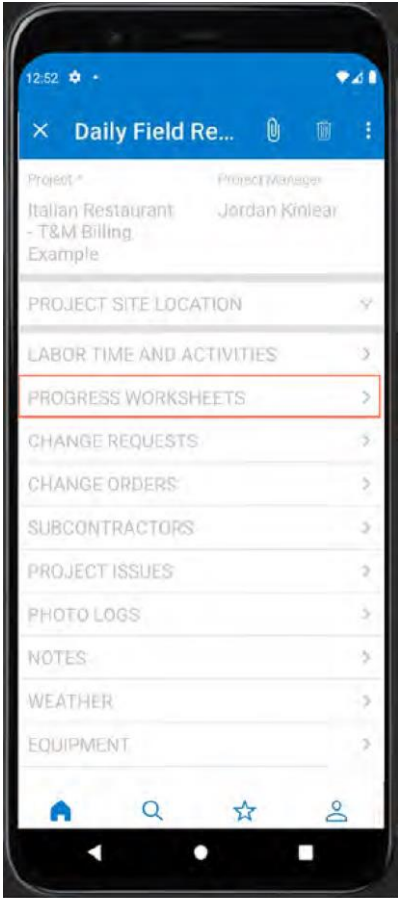


Figure: Review of progress worksheets linked to a daily field report

Enhanced Joint Payment Functionality

In previous versions of MYOB Advanced, when preparing payments for joint payee bills, users had to manually specify all amounts to be paid to the main supplier and joint payees. Also, the users were not able to pay joint payments from the retainage amount.

Starting MYOB Advanced 2023.1, the joint payment process has been revised and enhanced. The system now automatically specifies the maximum available balances for the payment lines at the moment of payment as the amounts to be paid for the main supplier and joint payees. Multiple changes have been made to the user interface to streamline the process of preparing joint payments to suppliers. Also, the workflow of mass-processing joint payments has been improved.

User Interface Changes

The following user interface changes have been introduced:

- In the Summary area, on the Cheques and Payments (AP302000) form, the **Joint Payee Name** field has been added.
- On the **Documents to Apply** tab on the Cheques and Payments (AP302000) form, the **Add Joint Payee** button has been added.
- In the **Documents to Pay** table on the Prepare Payments (AP503000) form, the **Joint Payee Name**, **Joint Amount Owed**, and **Joint Balance** columns have been added.
- The **Indicate Amounts to Pay** dialog field, which previously appeared when a user clicked the **Pay** button on the Bills and Adjustments (AP301000) form, has been removed.
- On the Cheques and Payments form, the **Joint Payees** tab, the **Reload Joint Payees** button, the **Joint Cheque** checkbox, the **Supplier Payment Amount** field, and the **Joint Payment Amount** field have been removed.
- On the Prepare Payments form, the **Add Joint Amounts** button had been removed.

Simplified Joint Payment Workflow

When a user opens a joint payee bill on the Bills and Adjustments (AP301000) form and clicks **Pay** on the form toolbar, the system splits the bill into multiple lines, with separate lines for joint payments and for the payments to be made to the main supplier. The lines to be paid are then shown on the Prepare Payments (AP503000) form.

Note: Alternatively, the user can create a payment directly from the Prepare Payments form. To do this, the user specifies the selection criteria in the Selection area of the form to view the bill lines to be paid to the main supplier and to joint payees.

On the **Documents to Pay** tab of the Prepare Payments form, the joint payee bill is now shown as a set of lines for payment, with a separate line for each joint payee (shown in the following screenshot) and for the main supplier.

Projects and Construction

Prepare Payments TOOLS ▾

↶ Process Process All ↷

* Branch: RBYTEMAIN - Rapid Byte Head Quar Supplier Class:
 * Payment Meth...: CHEQUE Supplier:
 * Cash Account: 100016 - AU WBC Bank Corp Account Project:
 Payment Date: 6/03/2023 Pay Date Within 3 Days
 * Post Period: 09-2023 Due Date Within 3 Days
 Currency: AUD 1.00 VIEW BASE Prompt Payment Disc. Expire... 3 Days
 Always Take Prompt Paymen...

GL Balance: 0.00
 Available Bala...: 7,343,923.02
 Selection Total: 5,917.16
 Number of Ro...: 1

DOCUMENTS TO PAY EXCEPTIONS

↶ + × | ☒ All Records ▾ ▽

<input type="checkbox"/>	Document Type	*Reference Nbr.	Supplier ID	Line Nbr.	Supplier Name	Joint Payee Name	Joint Amount Owed	Inv
<input checked="" type="checkbox"/>	Bill	000445	VSFP000002	0	Munich Electronics	Glowworm Lighting	450.00	
<input checked="" type="checkbox"/>	Bill	000445	VSFP000002	1	Munich Electronics	Tinker Gadgets	600.00	

Figure: Joint payee lines of a bill

For each line, the system automatically specifies the value in the **Amount Paid** column, which is the maximum available balance of the line at the moment of payment (see the following screenshot). The system distributes the maximum available payment amount among all joint payee lines; the remaining payment amount is then distributed among the main supplier lines. If needed, a user can adjust the amounts to be paid both for main supplier lines and for joint payee lines.

Prepare Payments TOOLS ▾

Process Process All ↻

* Branch: RBYTEMAIN - Rapid Byte Head Quar
 * Payment Meth... CHEQUE
 * Cash Account: 100016 - AU WBC Bank Corp Account
 Payment Date: 6/03/2020
 * Post Period: 09-2020
 Currency: AUD 1.00 VIEW BASE

Supplier Class:
 Supplier:
 Project:

Pay Date Within 3 Days
 Due Date Within 3 Days
 Prompt Payment Disc. Expire... 3 Days
 Always Take Prompt Paymen...

GL Balance: 0.00
 Available Bala... 7,343,923.02
 Selection Total: 5,917.16
 Number of Ro... 1

DOCUMENTS TO PAY EXCEPTIONS

Document Type	Reference Nbr.	Supplier ID	Line Nbr.	Supplier Name	Amount Paid	Joint Payee Name	Joint Amount Owed	Inventory
<input checked="" type="checkbox"/> Bill	000445	VSFP000002	0	Munich Electronics	450.00	Glowworm Lighting	450.00	
<input checked="" type="checkbox"/> Bill	000445	VSFP000002	1	Munich Electronics	600.00	Tinker Gadgets	600.00	

Figure: Automatically specified payment amount

After the user selects the lines to be paid and clicks the **Process** button on the form toolbar (or **Process All** if all lines should be paid), the system creates joint payments and shows them on the Process Payments / Print Cheques (AP505000) form if the cheques require printing. After the prepared payments are printed, the user releases these payments on the Release Payments (AP505200) form.

On the Cheques and Payments (AP302000) form, the user can review the prepared payments. For the payment to the main supplier, the **Joint Payee Name** field in the Summary area is empty. For a joint payment, the name of the joint payee is displayed in this field. (See the following screenshots.)

Cheques And Payments
 Payment 000184 - Munich Electronics

NOTES ACTIVITIES FILES TOOLS ▾

← ↻ + - ↻ < > > | Void ...

Type: Payment
 Reference Nbr.: 000184
 Status: Closed
 Post Date: 6/03/2020
 Post Period: 09-2020
 Payment Ref.: 000446

Supplier: VSFP000002 - Munich Electronics
 Location: MAIN - Primary Location
 Joint Payee N...
 Payment Meth... CHEQUE
 Cash Account: 100016 - AU WBC Bank Corp Account HK
 Currency: AUD 1.00 VIEW BASE
 Description:

Payment Amount: 5,917.16
 Unapplied Balance: 0.00
 Application Amount: 0.00
 Finance Charges: 0.00

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE CHARGES COMPLIANCE

REVERSE APPLICATION

Branch	Batch Number	Doc. Type	Reference Nbr.	TPAR	Line Nbr.	Inventory ID	Project	Project Task
RBYTEMAIN	004829	Bill	000445		0			

Figure: The payment prepared for the main supplier

Cheques And Payments
Payment 000184 - Munich Electronics

NOTES ACTIVITIES FILES TOOLS

← ↻ + 🗑️ 📄 ↩️ Void ...

Type:	Payment	Supplier:	VSFP000002 - Munich Electronics	Payment Amount:	5,917.16
Reference Nbr.:	000184	Location:	MAIN - Primary Location	Unapplied Balance:	0.00
Status:	Closed	Joint Payee N.:	Tinker Gadgets	Application Amount:	0.00
Post Date:	6/03/2023	Payment Meth.:	CHEQUE	Finance Charges:	0.00
Post Period:	09-2023	Cash Account:	100016 - AU WBC Bank Corp Account HC		
Payment Ref.:	000446	Currency:	AUD 1.00 VIEW BASE		
		Description:			

DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE CHARGES COMPLIANCE

REVERSE APPLICATION

Branch	Batch Number	Doc. Type	Reference Nbr.	TPAR	Line Nbr.	Inventory ID	Project	Project Task
RBYTEMAIN	004829	Bill	000445	<input type="checkbox"/>	0			

Figure: The payment prepared for the joint payee

For more information about processing payments to joint payees, see [Joint Payments: General Information](#).

Grouping of Payments During Mass-Processing

When a user mass-processes multiple joint payments, the system aggregates joint payment lines to a single payment document if the same internal supplier is specified in these lines. An internal supplier is one that is defined internally (in the system) on the Suppliers (AP303000) form.

If a joint payee is an external supplier (that is, external to the system, with no corresponding record on the Suppliers form), lines with this supplier cannot be aggregated to a single joint cheque. Instead, separate joint cheques will be created for each payment line with this supplier.

Manual Payment of Joint Payee Bills

The user can also create a payment for bills with joint payees directly on the Cheques and Payments (AP302000) form. On this form, the user first creates a payment to the main supplier and then clicks the **Add Joint Payee** button on the table toolbar of the **Documents to Apply** tab. In the **Select Joint Payee** dialog field, which opens (see the following screenshot), the user selects the line or lines to be paid for the joint payee supplier, and clicks **Add & Close** to add these lines to the bill.

Figure: Manual creation of the joint payment

Joint Payees Paid from a Retainage Amount

Now it is also possible to pay to joint payments from a retainage amount. The system validates the values in the **Joint Amount Owed** column on the Bills and Adjustments (AP301000) form and checks whether the **Joint Amount Owed** of each joint payee line is less than or equal to the sum of the original bill balance and the retainage amount for this line.

Note: Unreleased payments, previous joint payments, and the cash discount reduce the amount available for payment.

Upgrade Notes

During an upgrade to MYOB Advanced 2023.1, the system will create a new line in the `JointPayee` database table for a main supplier of each existing AP bill that has the **Joint Payees** checkbox selected in the Summary area of the Bills and Adjustments (AP301000) form. The following values are specified in this line:

- $CuryJointAmountOwed = Cury\ OriginalBillAmount - Sum(Cury\ Joint\ Amount\ Owed)$
- $JointAmountOwed = OriginalBillAmount - sum(Joint\ Amount\ Owed)$
- $CuryJointAmountOwed = Cury\ OriginalBillAmount - Cury\ BillBalance - Sum(CuryJointAmountPaid)$
- $JointAmountPaid = OriginalBillAmount - BillBalance - Sum(JointAmountPaid)$
- $CuryJointBalance = CuryJointAmountOwed - CuryJointAmountOwed$
- $JointBalance = JointAmountOwed - JointAmountOwed$

New Productivity Report for Progress Worksheets

In the construction industry, project managers and site foremen often need to review the progress of a project up to a particular date. MYOB Advanced Construction Edition 2023.1 introduces the ability to prepare a progress report that is based on the released progress worksheets for a project.

The New Project Progress Report

If the *Construction* feature is enabled on the Enable/Disable Features (CS100000) form, the new Project Progress Report (PM657000) is now available in the system. This report collects information for a specified project for the progress worksheets that have the *Closed* status and that were prepared for this project during the period the user specifies.

On the Project Progress Report report form, the user can specify the following report parameters:

- **Project** (required): The project for which the user needs to analyse the current progress.
- **Start Date**: The date starting from which the system will collect information from the progress worksheets for the specified project. If this field is empty, the system will collect information from all the progress worksheets for the specified project starting from the earliest progress worksheet document.
- **End Date**: The end date of the date range for which the system will collect information from the progress worksheets for the specified project. By default, the current business date is specified.

The following screenshot shows the ready-to-print report.

Project Progress Report

Page: 1 of 1
Date: 10/31/2022 6:18 AM
User: Jordan Kinlear

Company: Revision Two Products
Project: CSTRREST-Italian Restaurant - T&M Billing
Project Manager: Example - Jordan Kinlear

Start Date: 10/2/2022
End Date: 10/31/2022
Last Progress Date: 10/9/2022

Project Address: 240 California Street
San Francisco CA 94111
United States of America

Project Task	Cost Code	Account Group	Description	UOM	Total Budgeted Qty.	Current Period Completed Qty.	Total Completed Qty.	Total Remaining Qty.	Current Period Completed %	Total Completed %
03	03-100	LABOR	Concrete- Forming	HOUR	30.00	22.00	22.00	8.00	73.33 %	73.33 %
		MATERIAL	Concrete- Forming	LF	1,500.00	800.00	800.00	700.00	53.33 %	53.33 %
	03-200	LABOR	Concrete- Reinforcing	HOUR	60.00	19.00	19.00	21.00	38.00 %	38.00 %
	03-300	LABOR	Concrete- CIP Slabs	HOUR	40.00	29.00	29.00	11.00	72.50 %	72.50 %
Project Progress									66.29 %	69.29 %

Figure: The ready-to-print Project Progress Report

The user can also prepare a project progress report based on a particular progress worksheet. To do this, the user opens the progress worksheet on the Progress Worksheets (PM303000) form and clicks **Print Project Progress Report** on the More menu. The generated report shows the current progress for the selected project up to the date that is specified in the selected progress worksheet.

The report adds up the progress worksheet data for each cost budget line and shows the progress information for the project in the following columns:

- **Total Budgeted Qty.:** The **Revised Budgeted Quantity** that is specified in the corresponding cost budget line of the project on the **Cost Budget** tab of the Projects (PM301000) form.
- **Current Period Completed Qty.:** The total quantity of items for the cost budget line that were used (or installed) during the current financial period.
- **Total Completed Qty.:** The total quantity of items for the cost budget line that were used (or installed) within the date range specified in the report parameters.

- **Total Remaining Qty.:** The remaining value available for the cost budget line, which is calculated as the Total Budgeted Qty. minus the Total Completed Qty.
- **Current Period Completed %:** The project completion progress for the current financial period.
- **Total Completed %:** The project completion progress for the period specified in the report.

For more information about tracking project progress by units with progress worksheets, see Unit Tracking in Projects: General Information.

Enhancements in Daily Field Reports

If the *Construction Project Management* feature is enabled on the Enable/Disable Features (CS100000) form, the new **Progress Worksheets** section is now available as a part of the printable version of the daily field report, which is prepared on the Daily Field Report Form (PJ644000). (See the following screenshot.) The section shows the progress worksheet lines related to the daily field report, which are the lines on the **Progress Worksheets** tab of the Daily Field Report (PJ304000) form.

DAILY FIELD REPORT										Company	Revision Two Products	Page	1 of 2	
Project	Italian Restaurant - T&M Billing Example			Project ID	CSTRREST			Project Address	2510 Market Street, SF		User	admin admin	Date	1/12/2023 4:34 AM
Date of DFR	6/10/2021			DFR ID	DFR-000003									
Day	Thursday			Status	Completed									
Project Manager	KINLEAR/JOR-Jordan Kinlear			Created By	admin-admin admin									
WEATHER														
Time Observed (%)	Cloudiness	Sky	Temperature (°F)	Temperature Perceived	Humidity (%)	Rain/Snow Precipitation (in)	Precipitation Description	Wind (mph)	Wind Description	Site Condition	Delay	Description	Last Modified By	Last Modification Date
3:24 PM	95	Overcast	60.00	Cool		0.00	None		Calm	Dry	No	Overcast, cool day	admin-admin admin	8/10/2020 8:25 AM
LABOR TIME & ACTIVITIES														
Employee	Earning Type	Project Task	Cost Code	Time	Time Spent	Billable Time	Description	Last Modified By	Last Modification Date					
EP00000006-Todd Bloom	RG	01	01-313	9:00 AM	03:00	00:00	GENERAL	admin-admin admin	8/10/2020 8:22 AM					
PROGRESS WORKSHEETS														
Worksheet Nbr.	Project Task ID	Cost Code	Account Group	Description	UOM	Completed Qty.	Total Completed Qty.	Total Budgeted Qty.						
WS-000003	03	03-100	LABOR	Concrete- Forming	HOUR	2.00	2.00	30.00						
WS-000003	03	03-100	MATERIAL	Concrete- Forming	LF	2.00	2.00	1,500.00						
WS-000003	03	03-200	LABOR	Concrete- Reinforcing	HOUR	2.00	2.00	50.00						
WS-000003	03	03-300	LABOR	Concrete- CIP Slabs	HOUR	2.00	2.00	40.00						
CHANGE REQUESTS														
Reference Nbr.	Change Date	Ext.Ref.Nbr	Description	Status	Cost Total	Line Total	Markup Total	Price Total	Last Modified By	Last Modification Date				
000004	6/5/2021		Lobby logo tile needs to	On Hold	2,460.00	3,714.60	0.00	3,714.60	admin-admin admin	8/9/2020 5:22 PM				
SUBCONTRACTORS														
Vendor	Vendor Name	Project Task	Cost Code	Number of Workers	Arrived	Departed	Working Hours	Working Hours Total	Description	Last Modified By	Last Modification Date			
KKDESIGN	Karena Kelli	09	09-912	2	9:00 AM	4:00 PM	07:00	14:00	FINISHES	admin-admin admin	8/10/2020 8:23 AM			
PROJECT ISSUES														
Project Issue ID	Summary	Status	Priority	Project Task	Project Issue Type	Last Modified By	Last Modification Date							
IS-000013	Lobby floor tile logo wrong design	Open	High		Architectural	admin-admin admin	8/9/2020 3:24 PM							
PHOTO LOGS														
Photo Log ID	Status	Date	Project Task	Description	Created By	Last Modified By	Last Modification Date							
PL-000002	N/A	3/17/2021		Site Photo	admin-admin admin	admin-admin admin	8/10/2020 7:21 AM							

Figure: Progress worksheet information in the printed daily field report

Improved Design for Project and Construction Reports and Inquiries

In MYOB Advanced 2023.1, multiple reports related to project accounting and construction have been redesigned to improve their readability and provide a unified design. After careful analysis, the reports have been extended to present new data that is significant in different business scenarios. Also, additional report parameters have been introduced in the reports to give users the ability to filter the report's results on the fly.

Similarly, multiple inquiries related to project accounting and construction have been analysed and redesigned.

List of Updated Reports and Inquiries

The following reports have been improved:

- Project Balance (PM621000)
- Project Profitability (PM624000)
- Project Profit Analysis (PM656000)
- Project Performance (PM654000)
- Project Cost Budget Status (PM655000)
- Projects (PM631000)
- Project Tasks (PM632000)
- Employee Hours (PM622000)
- Projects Pending Billing (PM706300), formerly named Project Billing
- Project Transactions (PM633000), formerly named Project Transaction Register
- Project Cost History (PM706230), formerly named Project Cost Transaction History
- Project Budget Forecast by Month (PJ629600)
- Subcontract Summary (SC610500)
- Subcontract Details (SC611000), formerly named Subcontract Details by Supplier
- Subcontract Audit (SC644000)
- Subcontract Payment (SC647000)
- Project WIP (PM651500), formerly named Project WIP With Date Range
- Project WIP Detail (PM652500), formerly named Project WIP Detail With Date Range
- Construction Bonding Report (PM650500)
- Project Transaction Details (PM401000)
- Commitments (PM306000)
- Potential Project Budget Overruns (PM404000), formerly named Project Budget Overruns
- Project Summary (PMGI0025)
- Pro Forma Invoice Correction History (PMGI0030)
- Budget Details (PMGI0010)
- Budget Summary by Account Group (PMPV0010)

The following reports and inquiries have been deprecated:

- Employee Hours by Project and Task (PM623000)
- Subcontract Audit Detail (SC646000)
- Project WIP (PM651000)
- Project WIP Detail (PM652000)

Note: Customers who are currently using customised versions of the listed reports will not be affected by the upgrade to 2023.1. To make it possible for users to review and use the updated version of a report, a system administrator has to activate the default version of the report on the **Report Versions** tab of the corresponding report form.

- Project Transaction Inquiry (PMGI0035)

Note: Customers who are currently using customised versions of the inquiry will not be affected by the upgrade to 2023.1. If a customer has modified this inquiry, it will be kept during the MYOB Advanced upgrade and will be available after the upgrade.

For a detailed list of the changes to each report or inquiry, see the following sections of this topic.

Project Balance (PM621000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the **Report Format** field has been added as a required parameter. A user can now select which report format the system uses when generating the report: *Detailed* (default) or *Summary*.
- The **Include Potential CO to the Revised Bucket** checkbox has been renamed to **Include Potential CO Values in Revised Values**.
- In the generated report, the order of the report grouping sections has been changed. Now the sections are shown in the following order: **Income, Expense, Margin, Asset, and Liability**.
- The layout has been unified, and a number of design enhancements have been made.

Project Profitability (PM624000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project** field has been added. In this field, the user can select a project with only the *Active* or *Completed* status.
- On the **Report Parameters** tab, the new **Customer** field has been added.
- In the generated report, the **Project Manager** column now shows employee names instead of employee IDs.
- In the generated report, the **Customer** column now shows customer names instead of customer IDs.
- In the generated report, the **Profit Margin %** column has been added. The column shows the project margin percentage, which is calculated as project margin divided by the project income.
- The layout has been unified, and a number of design enhancements have been made.

Project Profit Analysis (PM656000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project Manager** field has been added.
- On the **Report Parameters** tab, the new **Customer** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- In the generated report, the **Estimate** column has been renamed to **Costs**.
- In the generated report, the **Estimated Changes** label has been renamed to **CO Estimate**.

Projects and Construction

- In the generated report, the following data has been added:
- **Billed to Date:** This amount is calculated as the sum of amounts values in the **Actual Amount** column of the **Revenue Budget** tab of the Projects (PM301000) form.
- **Actual Cost:** This value is calculated as the sum of the values in the **Actual Amount** column of the **Cost Budget** tab of the Projects (PM301000) form.
- **Current Profit:** This value is calculated as **Billed to Date** minus **Actual Cost**.
- **Current Markup:** This value is calculated as **Current Profit** divided by **Actual Cost**.
- **CO Profit:** This value is calculated as **Change Orders** minus **CO Estimate**.
- **CO Markup:** This value is calculated as **CO Profit** divided by **CO Estimate**.
- **Contract Billed %:** This value is calculated as **Billed to Date** divided by **Revised Contract**.
- **Estimate Used %:** This value is calculated as **Actual Amount** divided by **Revised Estimate**.
- The layout has been unified, and a number of design enhancements have been made.

Project Performance (PM654000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project Manager** field has been added.
- On the **Report Parameters** tab, the new **Customer** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- In the generated report, the **Column Markup** column has been renamed to **Performance**.
- In the generated report, the **Project Costs** label has been renamed to **Actual Costs**.
- The layout has been unified, and a number of design enhancements have been made.

Project Cost Budget Status (PM655000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project Manager** field has been added.
- On the **Report Parameters** tab, the new **Customer** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- In the generated report, the **Committed Amount** column has been renamed to **Revised Committed Amount**.
- In the generated report, the **Project Costs** label has been renamed to **Actual Costs**.
- In the generated report, the order of the **Revised Committed Amount** and **Committed Open Amount** columns has been changed.
- The layout has been unified, and a number of design enhancements have been made.

Projects (PM631000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- On the **Report Parameters** tab of the report form, the **Customer ID** field has been renamed to **Customer**.
- In the generated report, the **Project Manager** and **End Date** columns have been added.
- The layout has been unified, and a number of design enhancements have been made.

Project Tasks (PM632000) Report

The following changes have been made to this report:

- On the **Report Parameters** tab of the report form, the new **Project** field has been added.
- On the **Report Parameters** tab, the new **Project Manager** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- On the **Report Parameters** tab of the report form, the **Customer ID** field has been renamed to **Customer**.
- In the generated report, the new **End Date** column has been added.
- The layout has been unified, and a number of design enhancements have been made.

Employee Hours (PM622000) Report

The following changes have been made to the report:

- On the **Report Parameters** tab, the new **Group Results** field has been added as a required parameter. In this field, the user can select the way the report's results should be grouped. The user selects *By Project* to view the hours that employees have spent on each project, or *By Employee* to view the hours that employees have spent on different project tasks at the employee level of detail.
- On the **Report Parameters** tab of the report form, the new **Employee** field has been added.
- In the generated report, the new **Earning Type** column has been added.
- In the generated report, the asterisk symbol (*) is now used to indicate the values that include unreleased time activities.
- The layout has been unified, and a number of design enhancements have been made.

Employee Hours by Project and Task (PM623000) Report

The report has been deprecated. To view the information in this report, a user now runs the Employee Hours (PM622000) report with the **Group Results** parameter set to *By Employee*.

Projects Pending Billing (PM706300) Report

The report has been renamed from *Project Billing* to *Projects Pending Billing*. The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the new **Show Active Projects Only** checkbox has been added.
- In the generated report, the new **Next Billing Date** column has been added. The column shows the next billing date for all projects except for the projects billed on demand. For the projects billed on demand, *On Demand* is shown in this column.

Note: The projects billed on demand are those that have *On Demand* specified as the **Billing Period** on the Summary tab of the Projects (PM301000) form.

- In the generated report, the **Project Manager** column now shows employee names instead of employee IDs.
- The layout has been unified, and a number of design enhancements have been made.

Project Transactions (PM633000) Report

The report has been renamed from *Project Transaction Register* to *Project Transactions*. The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the **Project** field now is an optional parameter.
- On the **Report Parameters** tab of the report form, the new **Project Manager** field has been added.
- On the **Report Parameters** tab, the new **Customer** field has been added.
- On the **Report Parameters** tab, the new **Show Active Projects Only** checkbox has been added.
- In the generated report, the **Employee** column now shows employee names instead of employee IDs.
- In the generated report, the **Task** column has been renamed to **Project Task**.
- In the generated report, the **Ref. Nbr.** column has been renamed to **Source**.
- The layout has been unified, and a number of design enhancements have been made.

Project Cost Transaction History (PM706230) Report

The report has been renamed from *Project Cost Transaction History* to *Project Cost History*. The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the **Report Format** field has been added as a required parameter. A user can now select which report format the system uses when generating the report: *All Costs* (default) or *Only Billable Costs*. The report in the *All Costs* format shows only transactions with account groups of the *Expense* type and includes both billable and non-billable transactions. The report in the *Only Billable Costs* includes billable transactions only; in this report format, a user could review the unit cost calculated based on the billable quantity.
- In the generated report, the following report elements have been renamed to improve the report's readability:
 - Tran. Number to Ref. Number
 - Cost Amount to Amount
 - ID to Supplier ID
 - Cost Type to Item Type
- In the generated report, the asterisk symbol (*) is now used to indicate the values that include unreleased project transactions.
- The layout has been unified, and a number of design enhancements have been made.

Project Budget Forecast by Month (PJ629600) Report

The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the **Type** field has been renamed to **Budget Type**.
- In the generated report, the header with the **Project Task, Account Group, Inventory ID, Cost Code, and Description** elements has been moved to the left side to enhance the report's readability.
- In the generated report, the **Pre Period** column has been renamed to **Before Period**.
- The layout has been unified, and a number of design enhancements have been made.

Subcontract Summary (SC610500) Report

The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the new **Group Results** field has been added as a required parameter. In this field, the user can select the way the report's results should be grouped: *By Project* (default) or *By Supplier*.
- On the **Report Parameters** tab, the **Project** field has been added.
- On the **Report Parameters** tab, the **Show Open Subcontracts Only** checkbox has been added.
- In the generated report, the **Line Type**, **Subitem**, and **Warehouse** columns have been removed to simplify the report's layout.
- The layout has been unified, and a number of design enhancements have been made.

Subcontract Details by Supplier (SC611000) Report

The report has been renamed from *Subcontract Details by Supplier* to *Subcontract Details*. The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the new **Group Results** field has been added as a required parameter. In this field, the user can select the way the report's results should be grouped: *By Project* or *By Supplier* (default).
- On the **Report Parameters** tab, the new **Project** field has been added.
- On the **Report Parameters** tab, the new **Show Open Subcontracts Only** checkbox has been added.
- The layout has been unified, and a number of design enhancements have been made.

Subcontract Audit (SC644000) Report

The following changes have been made to the report:

- On the **Report Parameters** tab of the report form, the **Report Format** field has been added as a required parameter. The user can select which report format the system uses when generating the report: *Detailed* or *Summary* (default).
- The summary area of the report has been restructured.
- In the generated report, the new **Payments** section has been added. This section shows the details of payments that are related to the documents that are listed in the **Invoices** section of the report.
- In the generated report, the new **Paid to Date** field has been added in the summary area of the report.
- In the generated report, the sections that have no data are now hidden.
- In the generated report, the following report elements have been renamed to improve the report's readability:
 - The **ORDER#** column has been renamed to **Order Nbr.**
 - The **INVOICE#** column has been renamed to **Invoice Nbr.**
 - The **SUPPLIER/DESCRIPTION** column has been renamed to **Supplier**.
 - The Total Invoiced to Date column has been renamed to Total Billed to Date.
 - The **Invoiced to Date** column has been renamed to **Billed to Date**.
 - The **RETAINAGE UNRELEASED** column has been renamed to Unreleased Retainage.
 - The **Subcontract** column has been renamed to **Amount**.

- The **Change** column has been renamed to **Amount**.
- The **New Subcontract** label has been renamed to **Revised Subcontract**.
- The **Balance on Subcontract** column has been renamed to **Subcontract Balance**.
- The **Original Subcontract** column has been renamed to **Budgeted Subcontract**.
- The **New Subcontract** column has been renamed to **Revised Subcontract**.
- The **Remaining Subcontract** column has been renamed to **Unbilled Subcontract**.
- The layout has been unified, and a number of design enhancements have been made.

Subcontract Audit Details (SC646000) Report

The report has been deprecated. To view the information in this report, a user now runs the Subcontract Audit (SC644000) report with the **Report Format** parameter set to *Detailed*.

Subcontract Payment (SC647000) Report

The following changes have been made to the generated report:

- The report now includes all payment lines, regardless of whether the **Pay by Line** checkbox is selected or cleared in the payment document on the Cheques and Payments (AP302000) form.
- The report now shows the details of the retainage documents next to the details of the AP bills to which these retainage documents correspond.
- The **Doc. Date** column has been added.
- The **Retainage Amount** column has been added.
- The following report boxes have been renamed to improve the report's readability:
 - The **Approved Variations** field has been renamed to **Approved Change Orders**.
 - The **Previously certified** field has been renamed to **Previously Certified**.
 - The **Job No** field has been renamed to **Job Nbr**.
 - The **Doc Date** field has been renamed to **Doc. Date**.
 - The **Less: Previous Payments** field has been renamed to **Less Previous Payments**.
 - The **Net Certified this Payment** field has been renamed to **Net Certified This Payment**.
- In the generated report, the footer note has been removed. Instead, an empty field has been added. A customiser or report designer can add custom text by using the MYOB Advanced Report Designer.
- The layout has been unified, and a number of design enhancements have been made.

Project WIP (PM651000) Report

The report has been deprecated. To view the information in this report, a user now specifies the period for which the report will be prepared on the **Report Parameters** tab of the *Project WIP (PM651500)* report form and runs the report.

Project WIP Detail (PM652000) Report

The report has been deprecated. To view the information in this report, a user now specifies the period for which the report will be prepared on the **Report Parameters** tab of the *Project WIP Detail (PM652500)* report form and runs the report.

Project WIP (PM651500) Report

The report has been renamed from *Project WIP With Date Range* to *Project WIP*. The following changes have been made to the report:

- The report is now available if the *Projects* group of features is enabled on the Enable/Disable Features (CS100000) form.
- On the **Report Parameters** tab of the report form, the parameters have been changed as follows:
 - The **Company** and **Branch** boxes have been replaced with the **Company/Branch** field.
 - The **As of Date** field has been removed.
 - The **Include Potential CO Amounts in Revised Amounts** checkbox has been added. The user can select whether to include the change orders that have the *Open* status in the revised amounts (if the checkbox is selected) or exclude them (if the checkbox is cleared).
 - The **Planned Cost Estimation** field has been added as a required parameter. The user can specify which of the following the system should use to calculate report values: cost projections, or the revised budgeted amounts of the cost budget lines (the default option).
 - The **Actuals to Period** field has been added. The user can specify the period through which the system will calculate the **Period Billings** and **Billings to Period** values in the generated report.
- In the generated report, the **Project Currency** column has been added.
- In the generated report, the values in the **Period Billings** and **Billings to Period** columns are now calculated based on the data from the project transactions that are related to AR invoices. The calculations do not include project transactions with an account group of the *Income* type that are not related to AR invoices.
- The layout has been unified, and a number of design enhancements have been made.

Project WIP Detail (PM652500) Report

The report has been renamed from *Project WIP Detail With Date Range* to *Project WIP Detail*. The following changes have been made to the report:

- The report is now available if the *Projects* group of features is enabled on the Enable/Disable Features (CS100000) form.
- On the **Report Parameters** tab of the report form, the parameters have been changed as follows:
 - The **Company** and **Branch** boxes have been replaced with the **Company/Branch** field.
 - The **As of Date** field has been removed.
 - The **Level of Details** field has been added as a required parameter. The user can specify the level of detail at which the report is prepared: by cost codes (default), by account groups, or by both.
 - The **Status** field has been removed.
 - The **Planned Cost Estimation** field has been added as a required parameter. The user can specify which of the following the system should use to calculate report values: cost projections, or the revised budgeted amounts of the cost budget lines (the default option).
 - The **Actuals to Period** field has been added. The user can specify the period through which the system will calculate the **Period Billings** and **Billings to Period** values in the generated report.
- In the generated report, the **Project Currency** column has been added.
- In the generated report, the values in the **Period Billings** and **Billings to Period** columns are now calculated based on the data from the project transactions that are related to AR invoices. The

calculations do not include project transactions with an account group of the *Income* type that are not related to AR invoices.

- The **Include Potential CO Amounts in Revised Amounts** checkbox has been added. The user can select whether to include the change orders that have the *Open* status in the revised amounts (if the checkbox is selected) or exclude them (if the checkbox is cleared).
- The layout has been unified, and a number of design enhancements have been made.

Construction Bonding Report (PM650500)

The following changes have been made to the generated report:

- On the **Report Parameters** tab of the report form, the parameters have been changed as follows:
 - The **Company** and **Branch** boxes have been replaced with the **Company/Branch** field.
 - The **As of Date** field has been removed.
 - The **As of Period** field has been added. The user can specify the period based on which the system will filter the projects to be included in the report. (The report includes only the projects with a start date earlier than or within the specified **As of Period**.)
- The **Cost At Complete** column has been renamed to **Cost At Completion**. The **Cost to Complete** and **Cost at Completion** columns are included in the report if the report is generated with the **Use Cost Projections** checkbox cleared. Otherwise, if the checkbox is selected, the **Projected Cost to Complete** and **Projected Cost at Completion** columns are included in the report instead.
- The layout has been unified, and a number of design enhancements have been made.

Project Transaction Details (PM401000) Form

The following changes have been made to the form:

- In the Selection area of the form, the following form elements have been renamed:
 - From to Start Date
 - **To to End Date**
 - Show only Allocation Transactions to Show Only Allocation Transactions
 - Tran. ID to Ref. Number
- The **Cost Transactions** tab has been added. On this tab, a user can review the project transactions that are related to only account groups of the *Expense* type.
- A number of design enhancements have been made to the layout of the inquiry form.

Commitments (PM306000) Form

The following changes have been made to the form:

- In the Selection area of the form, the elements have been changed as follows:
 - The **Supplier** and **Project Manager** boxes have been added to give the user the ability to narrow the records by these criteria.
 - The **Revised Committed Quantity** field has been renamed to **Revised Qty**.
 - The **Revised Committed Amount** field has been renamed to **Revised Amt**.
 - The **Committed Open Quantity** field has been renamed to **Open Qty**.
 - The **Committed Open Amount** field has been renamed to **Open Amt**.
 - The **Committed Received Quantity** field has been renamed to **Received Qty**.
 - The **Committed Invoiced Quantity** field has been renamed to **Invoiced Qty**.

- The **Committed Invoiced Amount** field has been renamed to **Invoiced Amt.**
- In the table, the following columns have been added to provide more details about commitments:
 - **Supplier:** The supplier ID specified in the commitment document.
 - **Supplier Name:** The name of the supplier specified in the commitment document. The supplier name is specified for the supplier record in the **Account Name** field on the **General** tab of the Suppliers (AP303000) form.
 - **Project Description:** The project description specified in the Summary area of the Projects (PM301000) form.
 - **Project Manager:** The project manager of the project specified in the commitment document. (The project manager is specified on the **Summary** tab of the Projects form.)
 - **Owner:** The owner of the commitment document. The owner is specified in the Summary area of the Purchase Orders (PO301000) form (if the commitment is based on a purchase order) or the Subcontracts (SC301000) form (if the commitment is based on a subcontract).
- In the table, the purchase order type is now shown in the **Related Document Type** column.
- The **Cost Commitments** tab was removed because it was redundant and showed the same information as the **All Records** tab presented.
- A number of design enhancements have been made to the layout of the inquiry form.

Potential Project Budget Overruns (PM404000) Form

This form (previously titled *Project Budget Overruns*) has the following changes:

- In the Selection area of the form, the following form elements have been renamed:
 - From to Start Date
 - To to End Date
- In the table, the following columns have been added:
 - **Project Description:** The description of the project.
 - **Transaction Description:** The description of the project transaction.
- A number of design enhancements have been made to the layout of the inquiry form.

Project Summary (PMGI0025) Form

The following changes have been made to the form:

- In the Selection area, the **Project Manager** field has been added to give the user the ability to narrow records based on the specified manager.
- In the table, the following changes have been made:
 - The Original Contract column has been renamed to Original Budgeted Amount.
 - The Approved Contract Changes column has been renamed to Budgeted CO Amount.
 - The Revised Contract column has been renamed to Revised Budgeted Amount.
 - The Revenue to Date column has been renamed to Billed to Date.
 - The Project Manager column has been added to show the project manager of the project. The project manager is specified on the Summary tab of the Projects (PM301000) form.
 - The Project Currency column has been added to show the currency of the project. The project currency is specified on the Summary tab of the Projects (PM301000) form.
 - The redundant hyperlinks have been removed from the Description column.
- A number of design enhancements have been made to the layout of the inquiry form.

Pro Forma Invoice Correction History (PMGI0030) Form

The following changes have been made to the form:

- In the table, the following columns have been added:
 - **Currency**: The currency of the pro forma invoice.
 - **Quantity to Invoice**: The quantity to bill the customer.
- The redundant hyperlinks have been removed from the **Project Task**, **Account Group**, **Cost Code**, and **Inventory ID** columns.
- A number of design enhancements have been made to the layout of the inquiry form.

Budget Details (PMGI0010) Form

The form has been changed as follows:

- In the table, the following changes have been made:
 - The **Project Currency** column has been added to show the currency of the project.
 - The **Cost Code** column has been added to show the cost code specified in the budget line.
 - The **Task ID** column has been renamed to **Project Task**.
 - The **Description** column that is located after the **Project ID** column has been renamed to **Project Description**.
 - The **Description** column that is located after the **Type** column has been renamed to **Line Description**.
- A number of design enhancements have been made to the layout of the inquiry form.

Budget Summary by Account Group (PMPV0010) Form

The **Variance Amount** column has been hidden from the default pivot view because the values in this column are not useful on the budget summary level and are not applicable to revenues.

Project Transaction Inquiry (PMGI0035) Form

The *Project Transaction Inquiry (PMGI0035)* form has been removed from the system.

Other Improvements

In MYOB Advanced 2023.1, multiple improvements to the project accounting and construction have been introduced, as described in the sections below.

Improvements to the Cost Projections Form

To make cost projections easier to use and more informative, new informational columns (**Projected Variance Quantity** and **Projected Variance Cost**) have been added to the **Details** tab of the Cost Projection (PM305000) form, as shown in the following screenshot.

The screenshot displays the 'Cost Projection' form for 'ITALIAN2 1 - Italian restaurant (Denver Avenue)'. It includes a summary section with 'TOTALS BY REVISION' and 'TOTALS BY PROJECT'. Below this is a 'DETAILS' tab with a table of cost projection lines. The table has the following columns: Cost Task, Description, UOM, Budgeted Quantity, Budgeted Cost, Actual + Committed Open Quantity, Actual + Committed Open Cost, Quantity to Complete, Cost to Complete, Projected Quantity to Complete, Projected Cost to Complete, Projected Quantity at Completion, Projected Cost at Completion, Projected Variance Quantity, and Projected Variance Cost. The last two columns are highlighted with a red box.

Cost Task	Description	UOM	Budgeted Quantity	Budgeted Cost	Actual + Committed Open Quantity	Actual + Committed Open Cost	Quantity to Complete	Cost to Complete	Projected Quantity to Complete	Projected Cost to Complete	Projected Quantity at Completion	Projected Cost at Completion	Projected Variance Quantity	Projected Variance Cost
03	Concrete	EA	16,411.00	113,990.00	110.00	106,517.00	16,301.00	7,473.00	16.73	16,200.00	126.73	122,717.00	-16,284.27	8,727.00
04	Masonry		0.00	71,250.00	0.00	45,000.00	0.00	26,250.00	0.00	23,500.00	0.00	68,500.00	0.00	-2,750.00

Figure: New columns on the Cost Projections form

The **Projected Variance Quantity** for each line reflects the difference between the **Projected Quantity at Completion** and **Budgeted Quantity**. The **Projected Variance Cost** is calculated as the difference between the **Projected Cost at Completion** and **Budgeted Cost**. A user can manually enter values in these columns, or the system will calculate them automatically after the user changes any value in another column of a cost projection line.

Also, in the Summary area of the Cost Projection form, a new **Totals by Project** section with the project profitability information has been added (see the following screenshot). The boxes in this section show the initially budgeted project revenue, the cost, the profit and the projected cost impact on the project results.

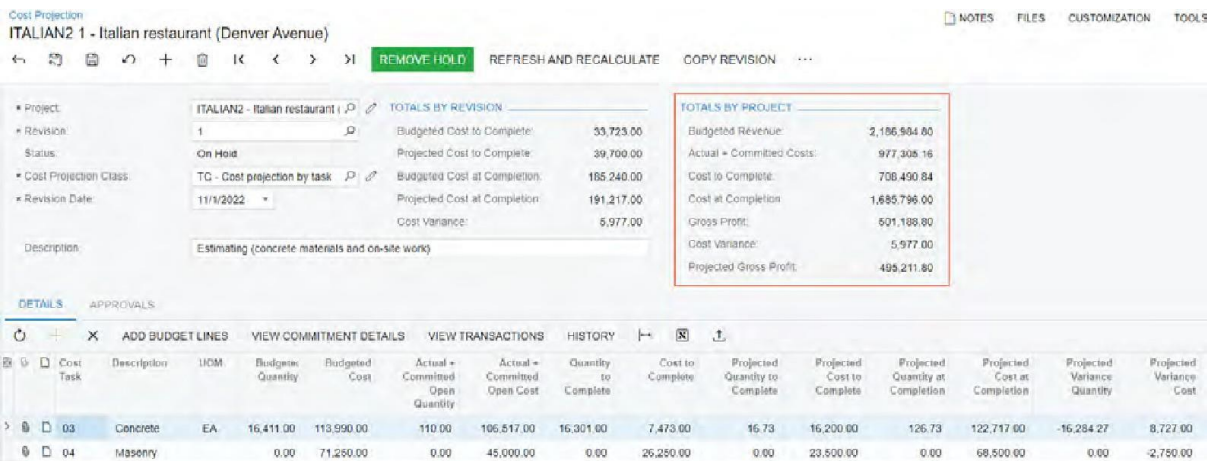


Figure: Cost projection total by project

Also, on the More menu of the Cost Projection form, the Project WIP command has been added. By clicking this command, the user opens the Project WIP (PM651500) report for the project specified in the cost projection.

For more information about using cost projections for projects, see Project Cost Projections: General Information.

Ability to Specify the Date and Financial Period in Allocation Reversal Transactions

In previous versions of MYOB Advanced, when a user was running an allocation rule, the system inserted the current business date as the date of the allocation reversal transaction. On the Allocation Rules (PM207500) form, there was no ability to select which date should be specified in the allocation reversal transaction.

To address the issue, the **Use Reversal Date from Original Transaction** checkbox has been added on the **Allocation Settings** tab of the Allocation Rules form. Also, the form layout has been reorganised to group the settings related to transaction reversal in a separate section, **Transaction Reversal** (see the following screenshot).

To use the date and financial period of the original allocation transaction that is being reversed, the user needs to select the **Use Reversal Date from Original Transaction** checkbox. If the checkbox is cleared (which is the default state), the system uses the current business date and the financial period to which this date belongs.

The screenshot shows the 'Allocation Rules' form for 'TMWIP - Time and Material with WIP'. The 'TRANSACTION REVERSAL' section is highlighted with a red box. It contains the following settings:

- Reverse Allocation: On AR Invoice Release (dropdown menu)
- Use Reversal Date from Original Transaction

Other visible settings include:

- TRANSACTION OPTIONS:
 - Post Transaction to GL
 - Create Transaction with Zero Qty.
 - Create Transaction with Zero Amount
 - Allocate Non-Billable Transactions
 - Can Be Used as a Source in Another Allocation
- TRANSACTION BRANCH:
 - Branch: Use Source (dropdown menu)

Figure: Transaction reversal settings on the Allocation Rules form

Enhancements in Specifying Project-Related Information in Payments

In previous versions of MYOB Advanced, on the **Documents to Apply** tab of the Cheques and Payments (AP302000) form, the system did not automatically fill in the project-related columns (**Project**, **Project Task**, **Inventory ID**, and **Cost Code**) in document lines if the **Require Single Project per Document** checkbox was selected on the Accounts Payable Preferences (AP101000) form. It is a common scenario in the construction industry for all lines of a particular AP bill to be linked with the same project, which a user specifies for that bill. In MYOB Advanced 2023.1, this scenario has been supported.

Now if the **Require Single Project per Document** checkbox is selected on the Accounts Payable Preferences (AP101000) form, the system automatically populates the project-related settings in document lines on the **Documents to Apply** tab of the Cheques and Payments (AP302000) form if the bill listed in the line is related to a particular project.

Improved Configuration of an Approval Map

In previous versions of MYOB Advanced, a user was not able to specify the reasons for approval and rejection for change requests and daily field reports. Now when a user configures an approval map on the Approval Maps (EP205015) form and the entity type is *Daily Field Report* or *Change Requests*, the **Reason for Approval** and **Reason for Rejection** boxes are available in the **Reason Settings** section on the **Rule Actions** tab of this form.

Ability to Specify the Tax Category for Commitments in Change Orders

In previous versions of MYOB Advanced, a user was not able to assign a tax category in the lines on the **Commitments** tab of the Change Orders (PM308000) form. Because the user could not edit the tax category in purchase orders and subcontracts created on release of the change order, the lines with an empty inventory item had empty tax category and the user was not able to correct this.

Projects and Construction

In MYOB Advanced 2023.1, the **Tax Category** column has been added on the **Commitments** tab of the Change Orders (PM308000) form. For each line on the tab, this column shows the tax category to be specified in the line or lines of the corresponding purchase order or subcontract. By default, it is tax category defined for the non-stock or stock item specified in the commitment line of the change order. If the line has no inventory item, the tax category is empty by default. The user can override the tax category in the lines that have the *New Document* or *New Line* status specified in the **Status** column.

Enhancements in Substantiated Billing Reports

In previous versions of MYOB Advanced, the Substantiated Billing (PM650000) and Substantiated Billing - Consolidated (PM650050) reports included project transactions related to accounts payable bills only.

Starting MYOB Advanced 2023.1, the substantiated billing reports show amounts of project transactions that are related to debit and credit adjustments, as well as to AP bills.

System Administration

Deletion of Snapshots and Tenants in Batches

In previous versions of MYOB Advanced, the process of deleting snapshots or tenants took some time and affected the performance of the database server. These performance issues sometimes caused interruptions to user activities. Also, during the deletion of a tenant, MYOB Advanced recommended switching on maintenance mode to prevent users from accessing the system, which also caused some delays in user activities.

In MYOB Advanced 2023.1, the process of deleting snapshots and tenants has been improved to address the possible performance issues and interruptions to user activities. The system deletes tenants and snapshots in batches, instead of deleting all the data in one operation.

Changes to the Existing Forms and a New Processing Form

On the Tenants (SM203520) form, the **Delete** button is now unavailable on the form toolbar (see Item 1 on the following screenshot) and on the table toolbar of the **Snapshots** tab (Item 2). The system displays an informational message for these buttons that explains how to proceed with the deletion process (Item 3).

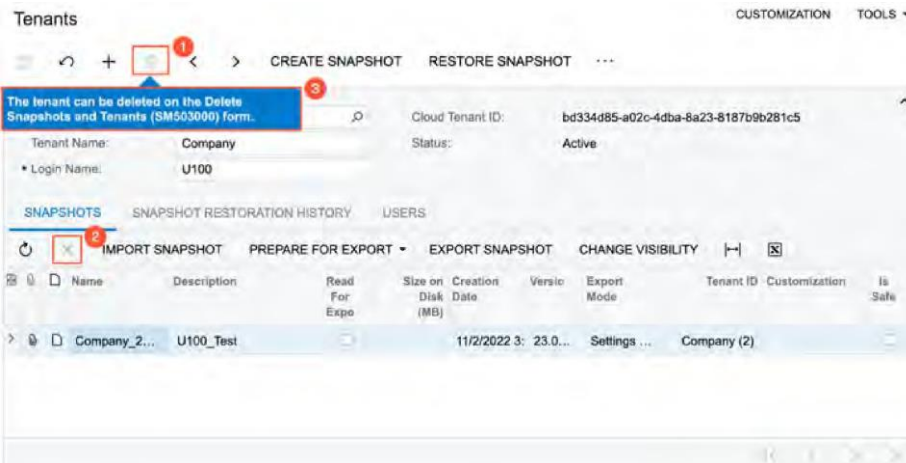


Figure: The unavailable Delete buttons on the Tenants form.

The new *Delete Snapshots and Tenants (SM503000)* processing form has been introduced (see the following snapshot). A system administrator can initiate the deletion of snapshots, orphaned snapshots, and tenants through the UI only by using the new form.

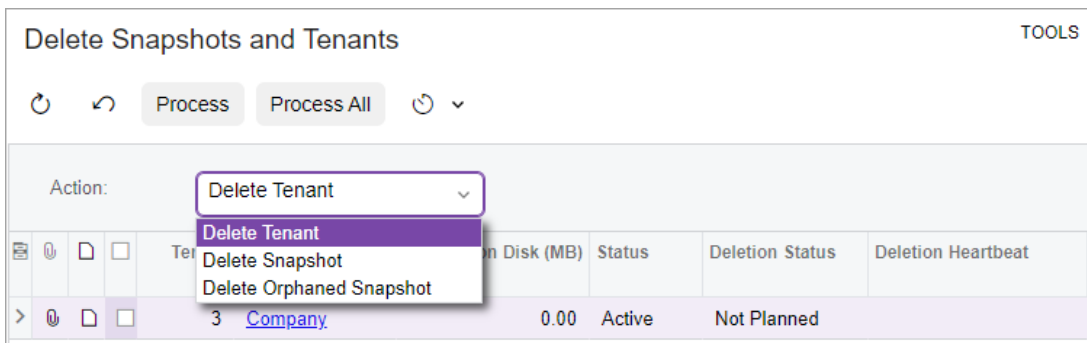


Figure: The new Delete Snapshots and Tenants (SM503000) form

The set of columns on the form depends on the option selected in the **Action** field, which is *Delete Tenant*, *Delete Snapshot*, or *Delete Orphaned Snapshot*. Regardless of the option selected, the following columns are displayed in the table so that the system administrator can review this information related to the deletion process:

- **Deletion Status:** The current deletion status, which can be one of the following:
 - *Not Planned:* The deletion process has not been initiated for the record.
 - *Planned:* The record was marked for deletion, but the process has not been started yet.
 - *Started:* The deletion process was started for the record but has not been completed.
- **Deletion Progress:** The name of the table that is being deleted at the moment. If the deletion was interrupted, the system would display the name of the table that was being deleted when the interruption occurred.
- **Deletion Heartbeat:** The time of the last database query.

The other columns provide additional information that is specific to the object being deleted.

Deletion of Snapshots

If the *Delete Snapshot* or *Delete Orphaned Snapshot* option is selected in the **Action** field of the *Delete Snapshots and Tenants (SM503000)* processing form, the system displays the available snapshots in the table. A system administrator can review the snapshot details and initiate the deletion of one snapshot or multiple snapshots by clicking **Process All** or selecting the unlabelled checkbox for each snapshot to be processed and clicking **Process**.

When the system administrator has initiated the deletion process, the system does the following for each snapshot marked for deletion:

1. Changes the **Deletion Status** to *Planned* and hides the snapshot from the **Snapshots** tab of the *Tenants (SM203520)* form.
2. Changes the **Deletion Status** to *Started* and starts the deletion of the snapshot in batches.

Deletion of Tenants

If the *Delete Tenant* option is selected in the **Action** field of the *Delete Snapshots and Tenants (SM503000)* processing form, the system displays the available tenants in the table. A system administrator can review tenant details and initiate deletion of one or multiply tenants by using the standard functionality of the processing forms.

When the system administrator has initiated the deletion process, the system does the following for each tenant marked for deletion:

1. Changes the **Deletion Status** to *Planned*. With this status, the tenant is locked for sign-in and is not available for selection on the *Tenants (SM203520)* form.
2. If the tenant has snapshots, deletes the snapshots of the tenant according to the procedure.
3. After snapshots have been deleted, changes the **Deletion Status** to *Started* and starts the deletion of the tenant in batches.

Enhancements to Business Events Triggered by Action

In previous versions of MYOB Advanced, it was possible to create business events triggered by changes occurred on data entry forms.

In MYOB Advanced 2023.1, an ability to create a business event triggered by an existing action on a data entry form has been added.

Creation of a Business Event

Creation of a business event triggered by an action of a data entry form is not much different from the standard process. The only difference is that the user needs to select an action in the **Action Name** field that will trigger the business event. All actions defined in the code or in the workflow for the primary DAC of the selected form are available for selection in the **Action Name** field (see the following screenshot).

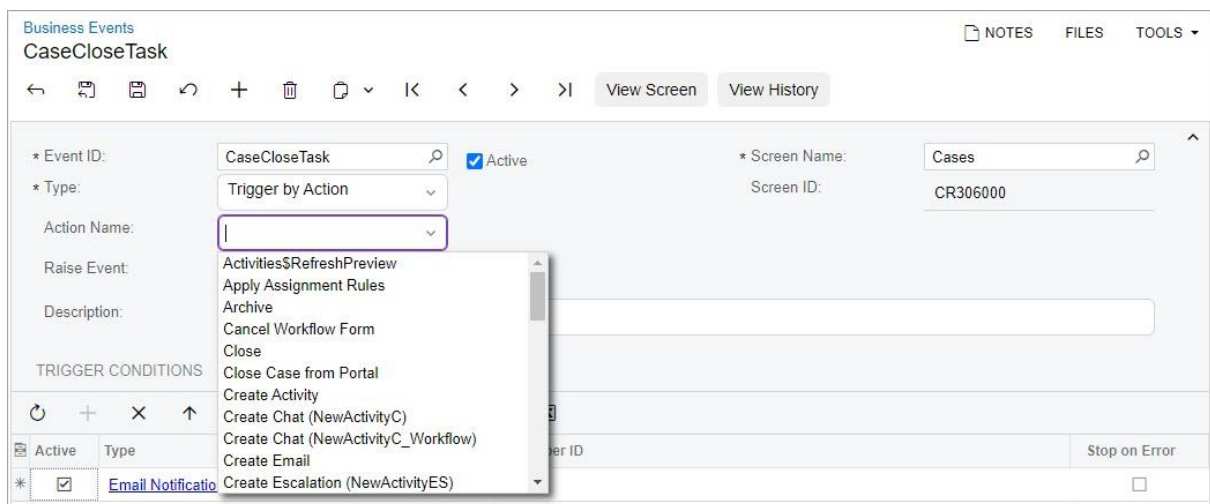


Figure: The list of actions available for the Cases form

With the action selected, the user then can create needed subscribers or link existing ones on the **Subscribers** tab.

Also, the user can specify additional conditions on the **Trigger Conditions** tab if needed. If additional conditions are specified, the system will execute subscribers if the action has been triggered and conditions has been met. Please note, the **Operation** column is not available for condition creation in this case.

Execution of a Business Event

For the business events triggered by an action on a data entry form, the system starts processing of the business events after all the workflow steps defined for the clicked action are completed. That is, transition by action is done and all the affected fields are updated.

Changes to the Business Events Dialog Field

The following changes have been introduced to the **Business Events** dialog field that can be accessed from the **Tools** menu on the form title bar.

System Administration

The **Create Business Event** button has been moved to the new **Configuration** tab (see Item 1 on the following screenshot). The new **History** tab is available if at least one business event has been configured for the form (Item 2).

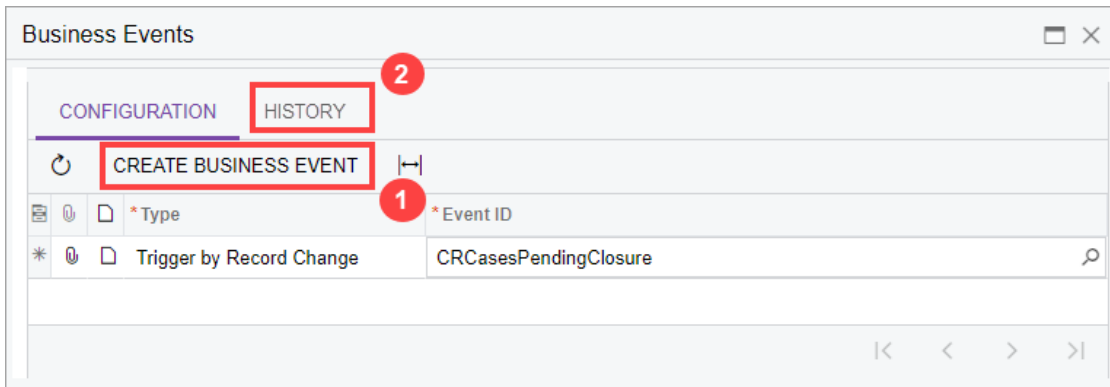


Figure: Changes to the Business Events dialog field

The **History** tab displays processing details for the business events triggered by action for a document currently selected on the form.

New Subscriber for Business Events

In previous versions of MYOB Advanced, it was possible to execute multiple import scenarios for business events based on generic inquiries. For business events based on data entry forms, there was no such possibility. Also, the configuration of an import scenario can take a significant amount of time and requires advanced knowledge of the system. In most cases, it is sufficient to execute one action when a business event is triggered and the configuration of an import scenario would involve excessive effort.

MYOB Advanced 2023.1 introduces the ability to configure an action execution as a subscriber for a business event.

Configuration of an Action Execution as a Subscriber

On the Business Events (SM302050) form, the new **Action Execution** command has been added to the **Create Subscriber** menu on the **Subscribers** tab, as shown in the following screenshot.

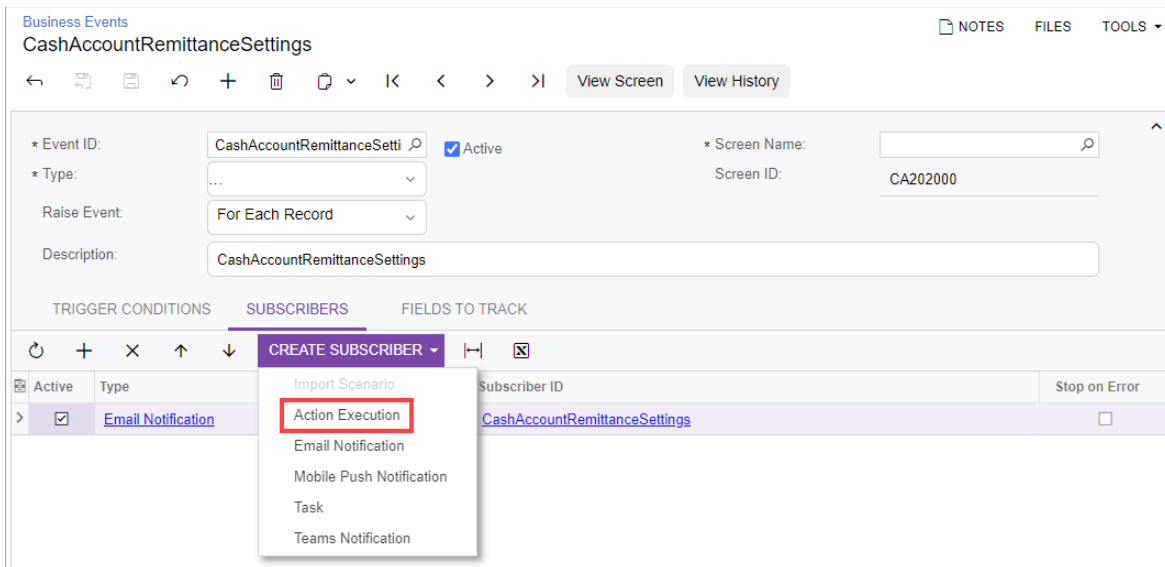


Figure: The new Action Execution subscriber

When a user clicks **Create Subscriber > Action Execution**, the system opens the Action Executions (SM204007) form in a pop-up window. First, the user specifies the data entry form in the **Action Screen ID** field. Then in the **Action Name** field, the user selects the action that the system should execute when the business event is triggered (see Item 1 in the following screenshot). All actions defined in the code or in the workflow for the primary DAC of the selected form are available for selection in this field.

On the **Keys** tab of the form, the system displays the list of key fields that are required to identify a record for which the system will execute the action on the selected data entry form (Item 2). The system will execute the action for the record. The values for these keys will be provided by the data source (inquiry or data entry form) specified for the business event, which is shown in the **Event Screen ID** field of the form (Item 3).

Action Executions [NOTES] [FILES] [TOOLS]

Subscriber ID: <NEW> * Event Screen ID: CA.20.20.00 **3**

* Subscriber Name: CashAccountForecast

* Action Screen ID: CA.20.20.00 - Cash Accounts **1**

* Action Name: Cash Flow Forecast

KEYS | FIELD VALUES | EXECUTED BY EVENTS

Screen Key Field	From Schema	*Value
Cash Account	<input checked="" type="checkbox"/>	100016 2

Figure: Specification of key fields for the subscriber

Next, on the **Field Values** tab, the user specifies the key fields and their values that are required for the action execution, as the following screenshot shows.

Action Executions [NOTES] [FILES] [TOOLS]

Subscriber ID: <NEW> * Event Screen ID: CA.20.20.00

* Subscriber Name: CashAccountForecast

* Action Screen ID: CA.20.20.00 - Cash Accounts

* Action Name: Cash Flow Forecast

KEYS | **FIELD VALUES** | EXECUTED BY EVENTS

*Object Name	*Field	From Schema	Value
Cash Account Summary	Cash Account	<input checked="" type="checkbox"/>	100016

Figure: Specification of key fields required for the action

When all the needed settings are specified, the user saves the configured action execution and closes the pop-up window. The system displays the configured subscriber on the **Subscribers** tab of the Business Events form for the business event, as shown in the following screenshot.

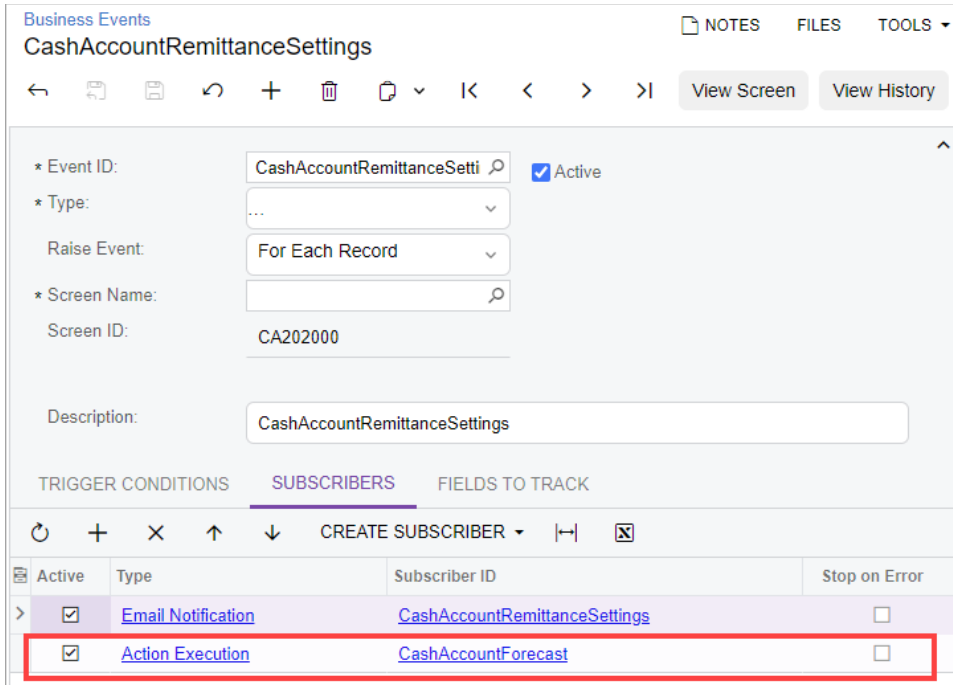


Figure: The configured subscriber on the Subscribers tab

Processing of an Action Execution as Subscriber

When the business event occurs and the system processes the subscriber of the *Action Execution* type, the system passes the values of key fields to the data entry form specified for the subscriber to identify the record for which the action should be executed. For this record, the system passes the values specified on the **Field Values** tab of the Action Executions (SM204007) form for the subscriber and executes the action. The system generates the business event for each record that satisfies the conditions, regardless of the value specified in the **Raise Event** field of the Business Events (SM302050) form for the business event.

If the action has been executed successfully, the system considers the subscriber to be successfully processed and adds a record on the Business Event History (SM502030) form. If any error has occurred during the processing of the subscriber, the system displays the error on the Business Event History form for the business event.

Improvements to the Trace Page

In MYOB Advanced 2023.1, multiple improvements (described in the following sections) have been made to the Trace page. This page opens when an administrator clicks **Tools > Trace** on the title bar of an MYOB Advanced form.

The updated page is shown in the following screenshot.

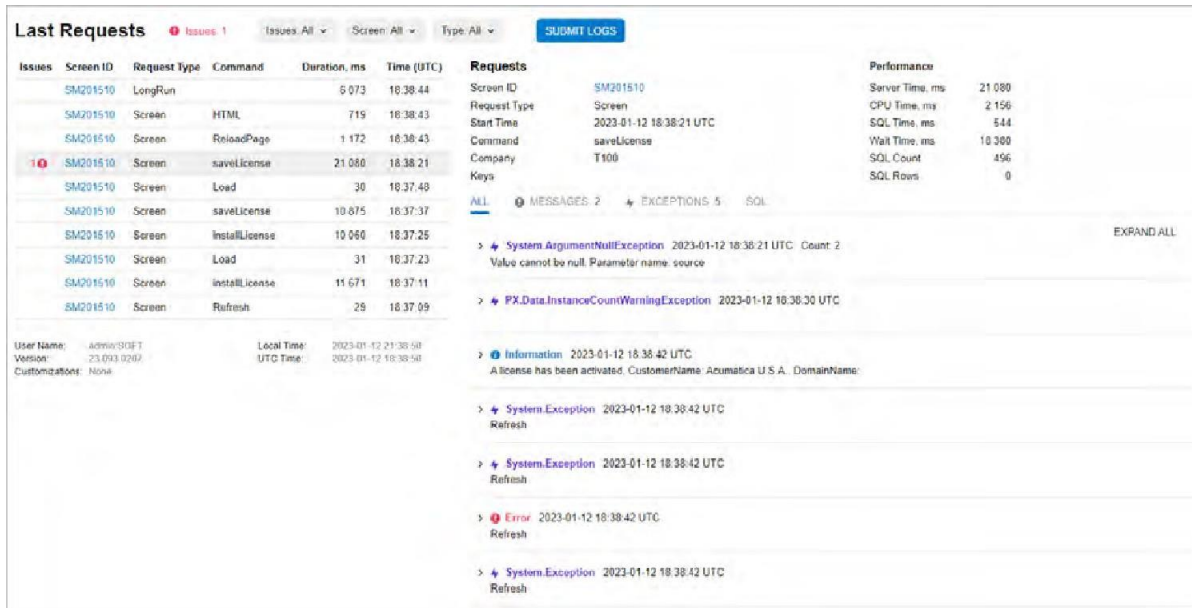


Figure: The updated Trace page

Changes to the Header

The header now contains an issue counter (see Item 1 in the following screenshot) and three filters (Item 2).

The screenshot displays the 'Last Requests' interface. At the top, there is a header with 'Last Requests' and a red 'Issues' counter showing '1'. Below this are filters for 'Issues: All', 'Screen: All', and 'Type: All', along with a 'SUBMIT LOGS' button. The main area contains a table of requests with columns for 'Issues', 'Screen ID', 'Request Type', 'Command', 'Duration, ms', and 'Time (UTC)'. The table lists several requests, including 'Delete', 'Cancel', 'Refresh', 'DropDown', 'LongRun', 'HTML', 'ReloadPage', 'CopyPaste@', and 'UploadFile'. To the right of the table, there is a 'Requests' section showing details for a specific request (Screen ID: SM206015), including 'Request Type', 'Start Time', 'Command', 'Company', and 'Keys'. Below this is a 'Performance' section with metrics like 'Server Time, ms', 'CPU Time, ms', 'SQL Time, ms', 'Wait Time, ms', 'SQL Count', and 'SQL Rows'. At the bottom, there is a 'Stack Trace' section for a 'PX.Data.PXException' error, which includes a detailed list of method calls and a 'Show more' link.

Figure: The header with an issue counter and filters

By using the issue counter, the administrator can track the number of issues (that is, errors and warnings). If there are no issues, the counter is not displayed. The number of exceptions is not displayed.

An administrator uses the filters to display specific types of records in all parts of the page as follows:

- **Issues:** Shows all records or only records with issues
- **Screens:** Shows records for all forms or a specific form
- **Type:** Shows all requests or requests of a particular type

Changes to the Last Requests Table

The Last Requests table contains the **Issues** column, which displays the number of issues for the form in the request in the row (see the following screenshot).

The screenshot displays the 'Last Requests' table with the following data:

Issues	Screen ID	Request Type	Command	Duration, ms	Time (UTC)
1	SM206015	Screen	Delete	368	12:28:09
	SM206015	Screen	Cancel	383	12:28:05
	SM206015	Screen	Refresh	89	12:28:04
	SM206015	Screen	DropDown	50	12:27:58
	-/m/evn...	LongRun		19,332	12:27:54
	SM206025	Screen	HTML	2,238	12:27:54
	SM206025	Screen	ReloadPage	1,991	12:27:54
	SM206025	Screen	CopyPaste@	428	12:27:47
5	-/pages/...	Screen	UploadFile	124	12:27:47
	SM206025	Screen	CopyPaste@	35	12:27:41

The detailed view for the first request (SM206015) shows the following performance metrics:

Request Type	Performance
Screen	Server Time, ms: 368
Screen	CPU Time, ms: 296
Delete	SQL Time, ms: 64
Delete	Wait Time, ms: 7
T100	SQL Count: 29
NamesImport/Export Customers	SQL Rows: 27

The stack trace for the exception is as follows:

```

at PX.Data.PXFirstChanceExceptionLogger.ProfilerFirstChanceException(Object o, FirstChanceExceptionEventArgs args)
at PX.App.SVPProviderUser.SVPProvider.RemoveDeletingPXCACHE.Delete(PX.CacheDeletingEventArgs e)
at PX.Data.PXCACHE.OnRowDeleting(Object item, Boolean externalCall)
at PX.Data.PXCACHE.Delete(Object data, Boolean bypassInterceptor)
at PX.Data.PXCACHE.Delete(HandlerId, Boolean externalCall)
at PX.Data.PXCACHE.Delete(HandlerId, Boolean externalCall)
at PX.Web.UI.PXBaseDataSource.TryExecutePendingCommand(String viewName, String[] sortColumns, Boolean[] descending, Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint, Boolean includeStagesBeforeKeyPress, Boolean includeStagesAfterKeyPress)
at PX.Web.UI.PXBaseDataSource.ExecuteSelect(String viewName, DataSourceSelectArguments arguments, PXDataSourceSelectArguments arguments)
at PX.Web.UI.PXDataSourceView.Select(DataSourceSelectArguments arguments, PXDataSourceSelectArguments arguments)
at PX.Web.UI.PXFormDataProvider.DataBind()
at PX.Web.UI.PXCallbackManager.CollectDataControls(Dictionary`2 controlsDic, List`1 controlsList)
at PX.Web.UI.PXCallbackManager.RenderClientData(PXCallbackResultMethod resultMethod, XmlWriter writer)
at PX.Web.UI.PXCallbackManager.GetCallbackResultInternal(PXCallbackResultMethod resultMethod)
at PX.Web.UI.PXCallbackManager.GetCallbackResult(PXCallbackResultMethod resultMethod)
at System.Web.UI.Page.RenderCallback()
at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint, Boolean includeStagesBeforeKeyPress, Boolean includeStagesAfterKeyPress)
at System.Web.UI.Page.ProcessRequest(HttpContext context)
    
```

Figure: The Last Requests table

If there are no issues, the column is hidden.

Changes to the Table with Logged Information

The table with logged information contains the **All** tab, which displays all records from the **Messages** and **Exceptions** tabs for a particular request (see Item 1 in the screenshot below), and the **Expand All** button (Item 2), which toggles with the **Collapse All** button.

For long messages, only the first 20 rows are displayed; the administrator can view the entire message by clicking **Show More** (Item 3).

To copy a particular message, the administrator clicks the **Clipboard** button to the left of the needed message (Item 4). Alternatively, the administrator presses Ctrl+A or clicks the text three times to select it.

The screenshot displays the 'Last Requests' interface. On the left, a table lists recent requests with columns for Issues, Screen ID, Request Type, Command, Duration, and Time (UTC). A red indicator shows 6 issues. The right side shows a detailed view for a specific request (SM206015) with a 'Performance' table and a 'Stack Trace' for a 'PX.Data.PXException'.

Issues	Screen ID	Request Type	Command	Duration, ms	Time (UTC)
1	SM206015	Screen	Delete	368	12:28:09
	SM206015	Screen	Cancel	363	12:28:05
	SM206015	Screen	Refresh	88	12:28:04
	SM206015	Screen	DropDown	59	12:27:58
	~/m/vean...	LangRun		19 332	12:27:54
	SM206025	Screen	HTML	2 238	12:27:54
	SM206026	Screen	ReloadPage	1 991	12:27:54
	SM206025	Screen	CopyPaste@	426	12:27:47
5	~/page/s...	Screen	UploadFile	124	12:27:47
	SM206025	Screen	CopyPaste@	35	12:27:41

Request	Performance
Screen ID: SM206015	Server Time, ms: 368
Request Type: Screen	CPU Time, ms: 296
Start Time: 2023-01-16 12:28:09 UTC	SQL Time, ms: 64
Command: Delete	Wait Time, ms: 7
Company: T100	SQL Count: 29
Keys: Name=Import/Export Customers	SQL Rows: 27


```

Stack Trace:
at PX.Data.PXFirstChanceExceptionLogger.ProfilerFirstChanceException(Object o, FirstChanceExceptionEventArgs args)
at PX.Api.SYProviderMaint.SYProvider_RowDeleting(PXCache sender, PXRowDeletingEventArgs e)
at PX.Data.PXCache.DeleteRowDeleting(Object item, Boolean externalCall)
at PX.Data.PXCache.Delete(Object data, Boolean bypassInterceptor)
at PX.Data.PXDelete`1.<Handler>d__3.MoveNext()
at PX.Data.PXAction`1.<Press>d__38.MoveNext()
at PX.Web.UI.PXBaseDataSource`1.ExecutePendingCommand(String viewName, String[] sortColumns, Boolean[] descending, C
at PX.Web.UI.PXBaseDataSource`1.ExecuteSelect(String viewName, DataSourceSelectArguments arguments, PXDSSelectArgum
at PX.Web.UI.PXDataSource`1.ExecuteSelect(String viewName, DataSourceSelectArguments arguments, PXDSSelectArguments p
at PX.Web.UI.PXDataSourceView.Select(DataSourceSelectArguments arguments, PXDSSelectArguments swarguments, DataSo
at PX.Web.UI.PXFormDataProvider.DataBind()
at PX.Web.UI.PXCallbackManager.CollectDataControls(Dictionary`2 controlsDic, List`1 controlsList)
at PX.Web.UI.PXCallbackManager.RenderClientData(PXCallbackResultMethod resultMethod, XmlWriter writer)
at PX.Web.UI.PXCallbackManager.GetCallbackResultInternal(PXCallbackResultMethod resultMethod)
at PX.Web.UI.PXCallbackManager.GetCallbackResult(PXCallbackResultMethod resultMethod)
at System.Web.UI.Page.RenderCallback()
at System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint)
at System.Web.UI.Page.ProcessRequest(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint)
at System.Web.UI.Page.ProcessRequest(HttpContext context)
    
```

Figure: The table with logged information

Using Past Data From Entities with Configured Business Events in Notification Templates

In MYOB Advanced 2023.1, email, mobile, and task templates have been updated to support the use of past data from the previous state of the entities with configured business events in fields other than the body of the message. The previous value of a field can be used in notification templates if the data field is specified on the **Fields to Track** tab of the Business Events (SM302050) form for the business event.

For business events created for generic inquiry forms, users can select data from the previous state of the entity for which the business event was configured in the following boxes:

- In the **To**, **CC**, **BCC**, and **Subject** boxes of the Email Templates (SM204003) form for email templates
- In the **To** and **Title** boxes of the Mobile Notifications (SM204004) form for mobile push notification templates
- In the **To** field of the form Mobile Notifications (SM204004) for mobile SMS notification templates
- In the **Owner** and **Summary** boxes of the Project Template Tasks (PM208010) form for task templates

For business events created for data entry forms, users can select data from the previous state of the entity for which the business event was configured in the following boxes:

- In the **Subject** field of the Email Templates form for email templates
- In the **Title** field of the Mobile Notifications form for mobile push notification templates
- In the **Summary** field Project Template Tasks (PM208010) for task templates

Using Past Business Event Data in an Email Notification Template

A user can use past business event data in the **Subject** field of the Email Templates form for an email notification template for an existing business event. To do this, the user opens the Business Events (SM302050) form and selects the event to update. Then on the **Subscribers** tab (see Item 1 in the following screenshot), the user clicks **Create Subscriber** (Item 2) and then **Email Notification** (Item 3).

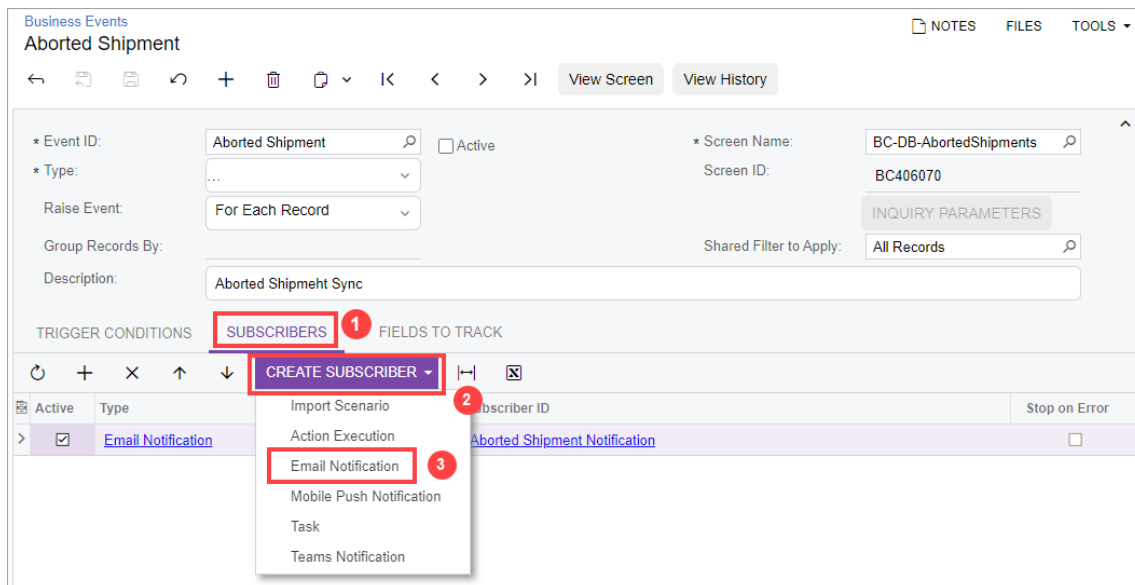
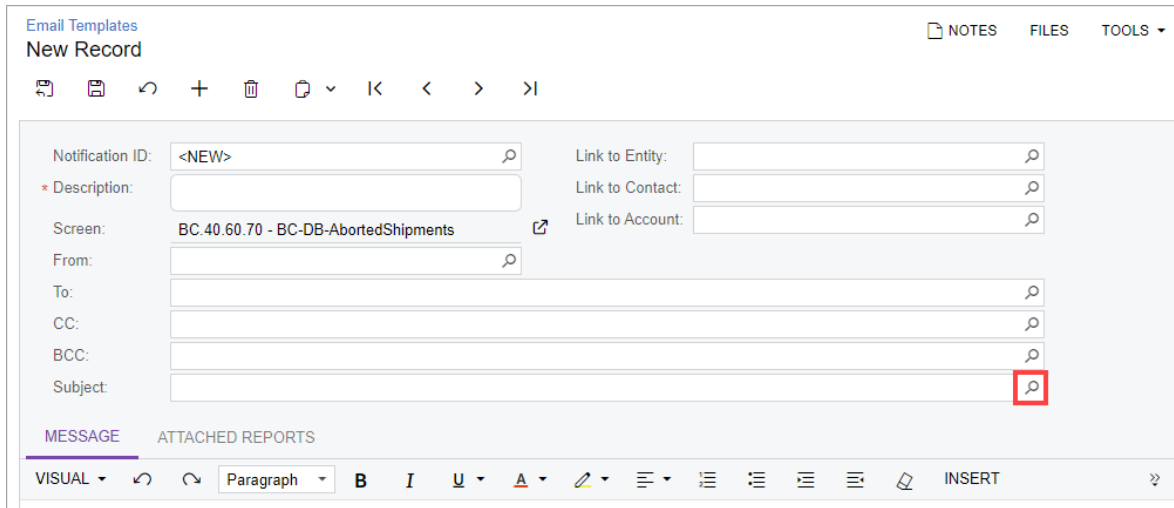


Figure: The Subscribers tab of the Business Events form

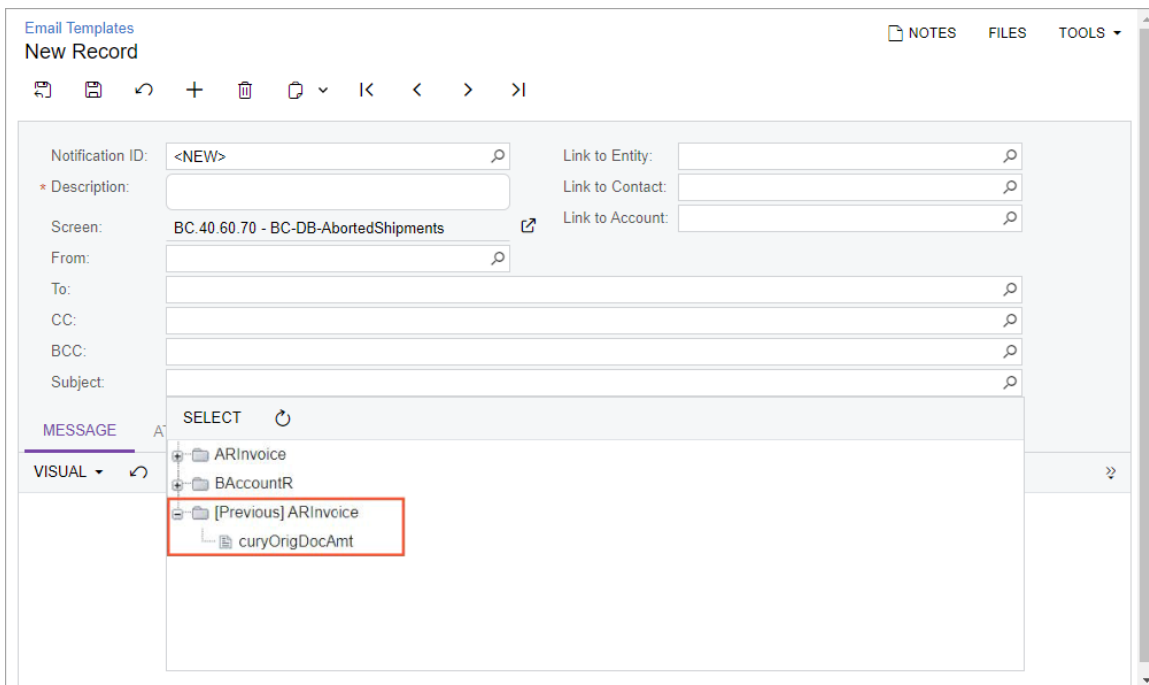
On the Email Templates form, which opens, the user clicks the magnifier button in the **Subject** field (see the following screenshot).



The screenshot shows the 'Email Templates' form in a 'New Record' state. The form includes fields for Notification ID (set to '<NEW>'), Description, Screen (set to 'BC.40.60.70 - BC-DB-AbortedShipments'), From, To, CC, BCC, and Subject. Each field has a magnifier icon. The Subject field's magnifier icon is highlighted with a red box. Below the form is a rich text editor with a toolbar containing options like Paragraph, Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, and Insert.

Figure: The Email Notifications form

In the lookup table, the user selects the data from the previous state of the business event to use in the **Subject** field of the Email Templates form for the email template (see the following screenshot).



This screenshot shows the same 'Email Templates' form, but with a lookup table open over the Subject field. The lookup table has a 'SELECT' button and a refresh icon. It displays a list of data items: 'ARInvoice', 'BAccountR', '[Previous] ARInvoice', and 'curyOrigDocAmt'. The '[Previous] ARInvoice' item is highlighted with a red box, indicating it is the selected data for the Subject field.

Figure: Example of data available for use in the Subject field

The user then finishes configuring the email template, as described in Email Templates.

Usability

Improved Delivery of Built-In Infotips

In previous versions of MYOB Advanced, context-sensitive Help infotips were introduced to give users an explanation of a UI element right on the spot. An infotip was a small pop-up window that described the UI element the user was hovering over.

The delivery of infotips in pop-up windows was confusing and inconvenient for the users for various reasons. In MYOB Advanced 2023.1, the way of delivery has been changed to improve the usability of the functionality. Also, infotip coverage has been greatly increased throughout the system. For example, by popular request, infotips have been added to the Enable/Disable Features (CS100000) form.

Infotip Delivery

A user can view infotips for boxes, checkboxes, and option buttons that appear on the tabs and in the areas of most MYOB Advanced forms, as well as for the columns of tables on forms. (See the *Infotip Limitations* section of this topic for details.) Users access the infotips for table columns slightly differently than they access the infotips for other elements, but in both cases, the infotip for an element is accessed by clicking a small question mark icon.

When a user hovers over the label of a field, checkbox, or option button for 0.5 seconds, the system displays the question mark icon next to the element, as the following screenshot shows.

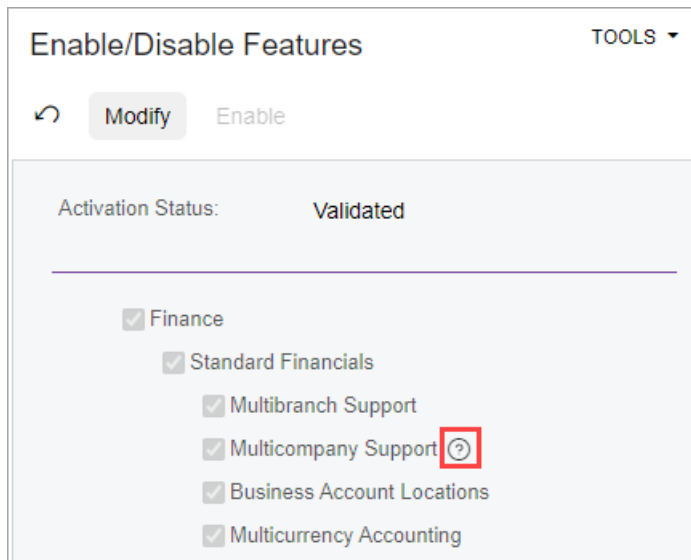


Figure: The question mark icon displayed next to the element

To view the infotip of a column of a table that appears on a form, the user first clicks the header of the table column. The question mark icon is displayed in the bottom left corner of the Sorting and Filtering Settings dialog field, which opens, as shown in the following screenshot.

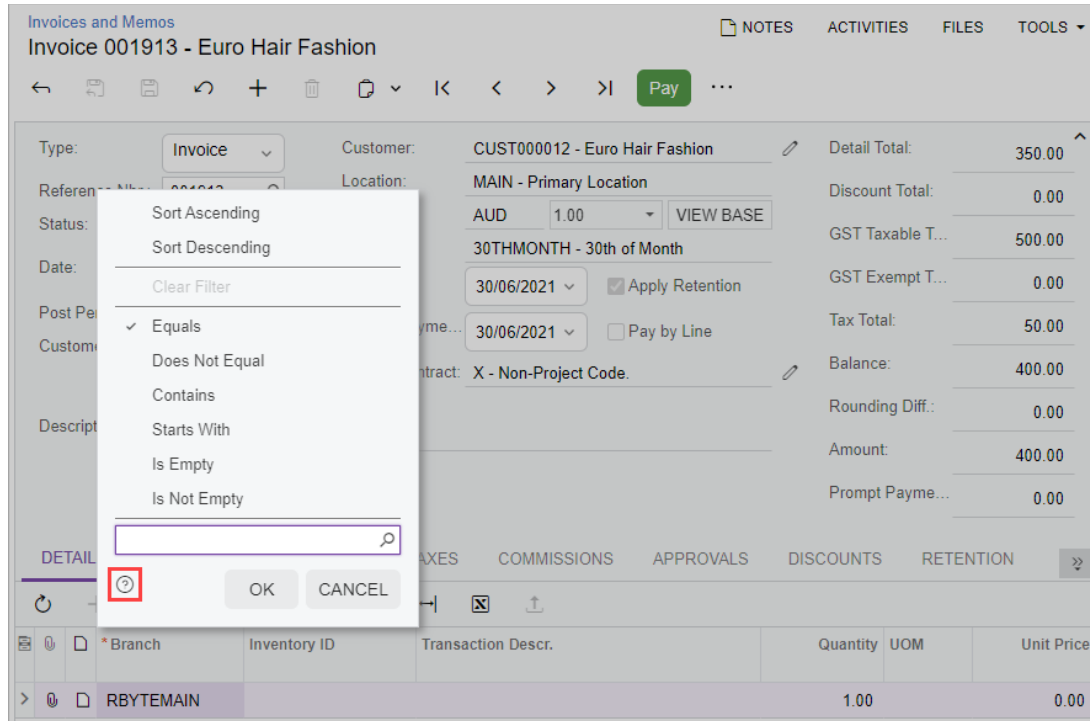


Figure: The question mark icon in the Sorting and Filtering Settings dialog field

The user clicks the question mark icon, and the system opens the infotip: a pane that partially overlaps the working area of the screen and contains the element's complete description. (See the screenshot below.)

If the user clicks the arrow in upper left corner of the pane (see Item 1 in the following screenshot), the system opens the Help menu for the form, which has a list of the links of the wiki articles that contain information regarding the form's functionality. For details about the Help menu, see Help.

At the bottom of the pane, there is a link to the complete reference topic for the form (Item 2). If the user clicks the link, the system opens the corresponding help topic in a new browser tab.

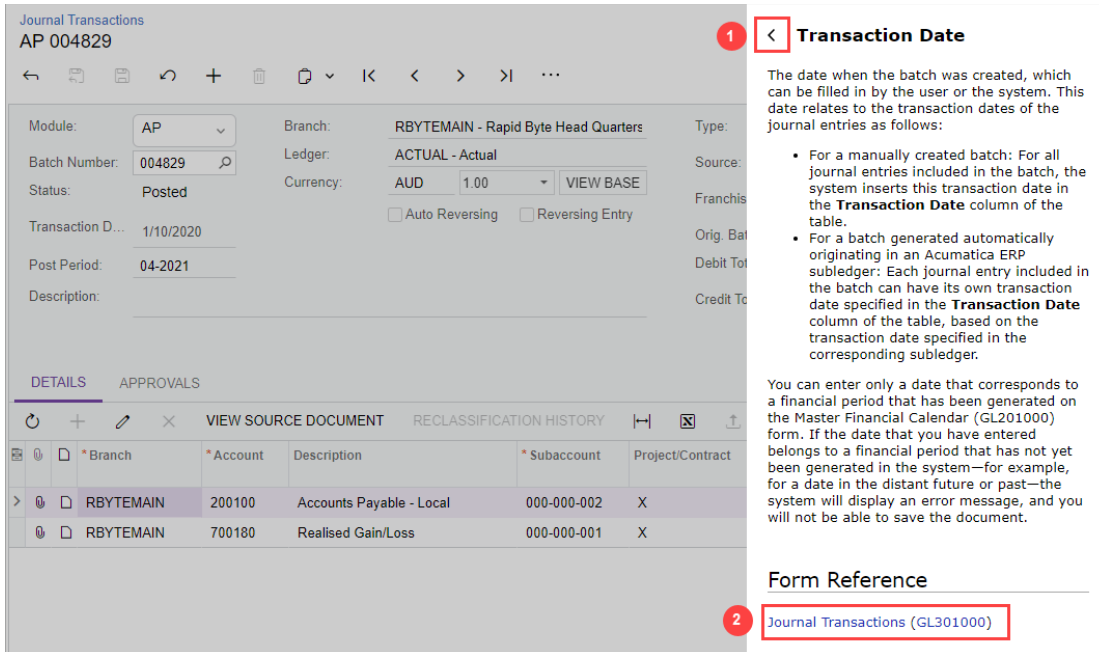


Figure: The element description on the panel

To close the pane (or the Help menu, if the user has switched to the menu) and return to the form, the user clicks anywhere on the form.

Other Changes Related to the Infotips

The configuration of displaying infotips that was available on the User Profile (SM203010) form has been dropped from the product. The question mark icon is displayed for all users, regardless of their access rights, when they hover over the label of a UI element or open the Sorting and Filtering Settings dialog field for a column header.

For the users who can open the **Element Properties** dialog field for an element, the element's description is no longer shown in the **Description** field. (That is, the field has been removed from the dialog field.)

Infotip Limitations

In MYOB Advanced 2023.1, infotips are not shown for the following elements:

- The names of tabs on a form
- Elements on the form title bar, form toolbar, and table toolbar
- Commands displayed on the More menu
- Dialog boxes or elements within them

Also, infotips are not supported for MYOB Advanced generic inquiry forms, report forms, or ARM reports.

Application Code

Performance Improvements

In previous versions of MYOB Advanced, the overall performance of the product was affected by cache extensions that were used by processes of the services functional area integrated with other functional areas. These cache extensions stored the data in separate extension tables, causing unnecessary joins that increased the complexity of the queries used in the system, which slowed the performance of the application.

In MYOB Advanced 2023.1, the performance of the product has been improved by moving the columns from the extension tables used by the services functional area to their parent tables that belong to other features or functional areas. More than 100 database columns across 19 extension tables have been moved to their parent table. The `SOID` column has been deleted from the `FSxPMTIMEActivity` table.

Upgrade Procedure

Due to the implemented changes, the extension tables have become obsolete. As a result, developers should revise all customisations, reports, and generic inquiries that were created in the customisation projects and that contain references to the extension tables related to services (that is, tables with the `FS` prefix).

Moved Tables

The following table lists all the columns that have been moved to a different table, specifying the name of the original table and the name of the destination table.

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
<code>SDEnabled</code>	No	<code>FSxSupplier</code>	<code>Supplier</code>
<code>IsDriver</code>	No	<code>FSxEPEmployee</code>	<code>EPEmployee</code>
<code>SDEnabled</code>	No		
<code>BillCustomerID</code>	No	<code>FSxCustomer</code>	<code>Customer</code>
<code>BillingCycleID</code>	No		
<code>BillLocationID</code>	No		
<code>BillShipmentSource</code>	No		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
DefaultBillingCustomerSource	No		
RequireCustomerSignature	No		
SendInvoicesTo	No		
BillCustomerID	No	FSxCustomerClass	CustomerClass
DefaultBillingCycleID	Yes (used to be FSxCustomerClass.DefaultBillingCycleID)		
BillLocationID	No		
BillShipmentSource	No		
DefaultBillingCustomerSource	No		
RequireCustomerSignature	No		
SendInvoicesTo	No		
SrvOrdType	No	FSxAPTran	APTran
ServiceOrderRefNbr	No		
ServiceOrderLineNbr	No		
AppointmentRefNbr	No		
AppointmentLineNbr	No		
RelatedDocNoteID	No		
RelatedEntityType	No		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
SrvOrdType	No	FSxINTran	INTran
ServiceOrderRefNbr	No		
ServiceOrderLineNbr	No		
AppointmentRefNbr	No		
AppointmentLineNbr	No		
SrvOrdType	No	FSxSOLine	SOLine
ServiceOrderRefNbr	No		
ServiceOrderLineNbr	No		
AppointmentRefNbr	No		
AppointmentLineNbr	No		
ServiceContractRefNbr	No		
ServiceContractPeriodID	No		
Comment	No		
EquipmentAction	No		
SMEquipmentID	No		
NewEquipmentLineNbr	No		
ComponentID	No		
EquipmentComponentLineNbr	No		
EquipmentItemClass	No		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
SDPosted	No		
SDSelected	No		
AssignedEmpID	No	FSxSOOrder	SOOrder
Installed	No		
SDEnabled	No		
SLAETA	No		
SLAETAUTC	No		
ServiceOrderRefNbr	No		
SrvOrdType	No		
Installed	No	FSxSOShipment	SOShipment
AssignedEmpID	No	FSxCRCCase	CRCCase
BranchLocationID	No		
ProblemID	No		
SDEnabled	No		
ServiceOrderRefNbr	Yes (used to be FSxCRCCase.SOID)		
SrvOrdType	No		
BranchLocationID	No	FSxCROppportunity	CROppportunity
SDEnabled	No		
ServiceOrderRefNbr	Yes (used to be FSxCROppportunity.SOID)		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
SrvOrdType	No		
BillingRule	No	FSxCROpportunityProducts	CROpportunityProducts
EstimatedDuration	No		
SupplierLocationID	No		
SDEnabled	No	FSxEPosition	EPosition
AllowSchedule	No	FSxEquipment	EPEquipment
BranchID	No		
BranchLocationID	No		
EmployeeID	No		
RoomID	No		
SiteID	No		
CompanyWarrantyType	Yes (used to be FSxEquipmentModel.CompanyWarrantyType)	FSxEquipmentModel	InventoryItem
CompanyWarrantyValue	Yes (used to be FSxEquipmentModel.CompanyWarrantyValue)		
EQEnabled	No		
EquipmentItemClass	No		
EquipmentTypeID	No		
ManufacturerID	No		
ManufacturerModelID	No		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
ModelType	No		
SupplierWarrantyType	No		
SupplierWarrantyValue	No		
ActionType	No	FSxService	
BillingRule	No		
DfltEarningType	No		
EstimatedDuration	No		
IsTravellItem	No		
SDEnabled	No		
DefaultHasWarranty	Yes (previously FSxEquipmentModelTemplate.DfltHasWarranty)	FSxEquipmentModelTemplate	INItemClass
DefaultModelType	Yes (previously FSxEquipmentModelTemplate.DfltModelType)		
EQEnabled	No		
EquipmentItemClass	No		
DefaultBillingRule	Yes (previously FSxServiceClass.DfltBillingRule)	FSxServiceClass	
RequireRoute	No		
OldAppEmpID	No	FSxPMTTimeActivity	PMTTimeActivity
AppointmentCustomerID	No		
AppointmentID	No		

Application Code

DB Column Name	Renamed?	Previous FS Extension Table (Obsolete)	Current Table (Parent Table)
LogLineNbr	No		
ServiceID	No		
SOID (this column was deleted)	N/A		
EnableFSIntegration	No	FSxSOOrderType	SOOrderType
AskForSrvOrdTypeInCalendars	No	FSxUserPreferences	UserPreferences
DfltBranchLocationID	No		
DfltSrvOrdType	No		
Distance	No		
Interval	No		
TrackLocation	No		

Update of RecordComesFirst Property of PXDBTimeStamp Attribute

In MYOB Advanced2023.1, the `RecordComesFirst` property of `PXDBTimeStampAttribute` has been set to `true` for the following DACs of the Finance functional area:

- `APQuickCheck`, `APInvoice`, `APPayment`, and `APRegister` in the `PX.Objects.AP` namespace
- `ARCashSale`, `ARInvoice`, `ARPayment`, and `ARRegister` in the `PX.Objects.AR` namespace
- `Batch` in the `PX.Objects.GL` namespace

With this change, the record's own timestamp is preferred over the other timestamps (such as the graph timestamp and the timestamp that is stored in the `PXTimeStampScope.Persisted` collection of the current operation that is performed in a separate thread). Thus, when a single document is updated from multiple graphs, the record can be updated safely in the database without any data inconsistency issues.

Commerce Connector

API Changes

In MYOB Advanced 2023.1, multiple changes have been made in the API of the MYOB Advanced Commerce Framework. Developers who have created commerce connectors for previous versions of MYOB Advanced need to update the code of the connectors, as described in this topic.

Modified IProcessor Interface

The following methods have been added to the `IProcessor` interface:

```
List<(string fieldName, string fieldValue)> GetExternCustomFieldList(
    BcEntity entity, ExternCustomFieldInfo customFieldInfo);
```

The system uses this method to obtain the list of external fields and their values. This list is displayed in the **External Field** column on the **Export Mapping** tab and the **External Field / Value** column on the **Import Mapping** tab of the Entities (BC202000) form.

- ```
void ValidateExternCustomField(BcEntity entity, ExternCustomFieldInfo
 customFieldInfo,
 string sourceObject, string sourceField, string targetObject,
 string targetField, EntityOperationType direction);
```

The system uses this method to validate the custom field name or its value.

The signatures of the corresponding methods of the `<BCProcessorBase<TGraph, TEntityBucket, TPrimaryMapped>` abstract class have been modified accordingly. If these methods are implemented in custom processor classes, the developer needs to modify these implementations.

# Commerce Connector

## Availability of Custom Connectors in the Licence

In MYOB Advanced 2023.1, the new *Custom Connectors* feature (in the **Retail Commerce** group of features under **Third Party Integrations**) is available on the Enable/Disable Features (CS100000) form, as shown in the following screenshot.

The screenshot shows the 'Enable/Disable Features' form. At the top, there are tabs for 'Modify' and 'Enable'. Below this, a list of features is displayed with checkboxes. The 'Custom Connectors' checkbox is highlighted with a red box, indicating it is currently disabled. Other features like 'Two-Factor Authentication', 'Google and Microsoft SSO', and 'Third Party Integrations' are checked. The 'Retail Commerce' group is expanded, showing 'BigCommerce Connector', 'Shopify Connector', 'Shopify and Shopify POS Connector', 'Custom Connectors', and 'B2B Entities'. The 'Shipping Carrier Integration' group is also expanded, showing 'FedEx', 'UPS', and 'Stamps.com'.

*Figure: The Custom Connectors feature*

Custom connectors can be developed by using the MYOB Advanced Commerce Framework, as described in [Implementing a Connector for an E-Commerce System](#). A user can view the type of the connector in the **Connector** column in the table on the Entities (BC202000) form.

If no licence is applied to the instance, the user can work with up to five stores of each custom connector type on this instance.

If the *Custom Connectors* feature is not enabled on the Enable/Disable Features form of a licensed instance, no stores of custom commerce connector types can be used on this instance. If this feature is enabled, up to five stores of each custom connector type can be used on this instance. If more than five stores of a custom connector type are needed on the instance, the developer of the custom connector can contact MYOB to convert the custom connector to a licensed connector, which gives users the ability to work with any number of stores.

# Customisation

## Retrieval of a Customisation Package Through the Web API

---

In MYOB Advanced, a developer can use the web API for manipulating customisation projects from code, such as for deploying customisation packages to local and remote instances of MYOB Advanced.

In MYOB Advanced 2023.1, this web API has been expanded. Now the developer can also retrieve the content of a customisation project from the database of an MYOB Advanced instance by using the web API. The developer may need to automate the retrieval of a customisation package from the development environment for testing it in the testing environment.

### Retrieval of a Customisation Package

To retrieve the content of a customisation project from the database of an MYOB Advanced instance, the developer uses the `POST` HTTP method and the following URL.

```
POST http(s)://<MYOB Advanced Instance URL>/CustomizationApi/getProject
```

In the `projectName` field of the request body, the developer specifies the name of the customisation project whose contents should be obtained. The developer can also specify (in the `IsAutoResolveConflicts` field of the request body) whether the system should automatically update the customisation project in the database with the changes from the file system if any files of the customisation project have been modified in the file system.

In the response body of a successful request, the system returns the customisation package in Base64 format. The `HasConflicts` field indicates whether the files of the customisation project were modified in the file system before the customisation package was obtained.

For details about the retrieval of a customisation package through the web API, see [Customisation Web API: getProject](#). For more information about the web API, see [Customisation Web API: General Information](#).

### Example of Request

The following request shows an example of retrieval of the contents of the *PhoneRepairShop* customisation project with all the changes that are available in the file system.

```
POST /<MYOB Advanced Instance URL>/CustomizationApi/GetProject HTTP/1.1
Host: localhost

Accept: application/json
Content-Type: application/json
Content-Length: 79

{
 "IsAutoResolveConflicts": true,
 "projectName": "PhoneRepairShop"
}
```

If the response is *200 OK*, it contains the body, which is shown in the following example.

```
{
 "projectContentBase64": "UESDBBQAAAAIAApRnlWbF8u...",
 "hasConflicts": false,
 "log": []
}
```

## Support of Events Triggered by Field Changes in the UI

In previous versions of MYOB Advanced, developers could use events that were triggered by changes in the fields. Starting in MYOB Advanced 2023.1, customisers can create, view, and modify these events in the Customisation Project Editor.

### Changes to the Event Handler Properties Dialog Field

The customiser works with the event handlers in the **Event Handler Properties** dialog field. This dialog field opens when the customiser clicks **Add New** on the page toolbar of the Event Handlers page, or clicks the link in the table on the same page.

In this dialog field, the **Event Type** field has been added (see Item 1 in the following screenshot). In this field, the customiser selects the type of event handler: *Triggered from Code* or *Triggered by Field Change*. If the customiser selects *Triggered from Code*, they need to specify the settings of the event in the **Event Source** and the **Event Name** boxes. If the customiser selects *Triggered by Field Change*, the **Field Name** field becomes available (Item 2). In this field, the customiser selects the checkboxes for the field or fields whose modification should trigger the event (Item 3).

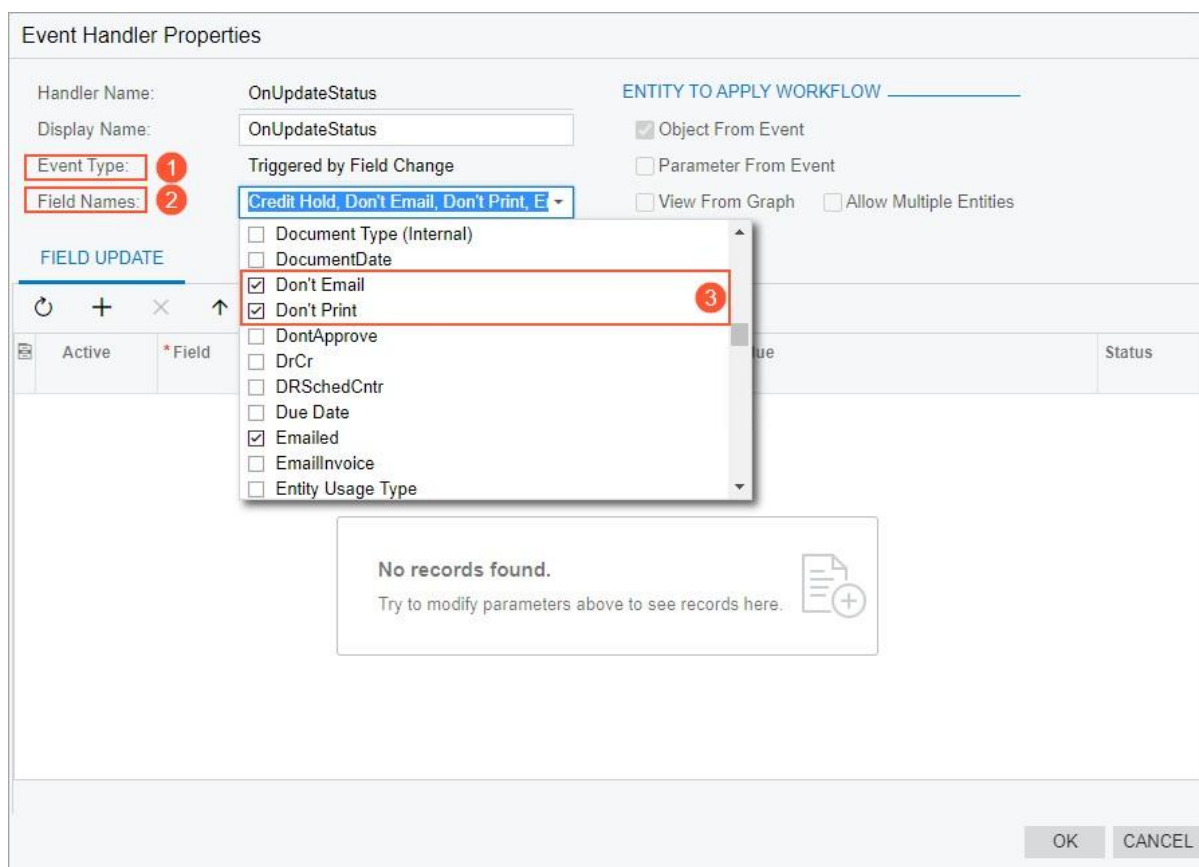


Figure: The new elements in the Event Properties dialog field

This functionality is supported for the fields of only the primary DACs. The customiser can specify the same fields for multiple event handlers.

For details, see [Configuring Event Handlers](#).



## Changes to the Event Handlers Page

The table on the Event Handlers page of the Customisation Project Editor now contains the **Event Name/Field Name** column, as shown in the following screenshot. This column contains the name of the fields (for events triggered by changes in the fields) or the name of the event (for events triggered from code).

| Handler Name                      | Display Name      | Event Type                | Event Source                          | Event Name/Field Names                         | Status    |
|-----------------------------------|-------------------|---------------------------|---------------------------------------|------------------------------------------------|-----------|
| <a href="#">OnCancelDocument</a>  | OnCancelDocument  | Triggered from Code       | PX.Objects.AR.ARInvoice+Events        | CancelDocument                                 | Inherited |
| <a href="#">OnCloseDocument</a>   | OnCloseDocument   | Triggered from Code       | PX.Objects.AR.ARInvoice+Events        | CloseDocument                                  | Inherited |
| <a href="#">OnConfirmSchedule</a> | OnConfirmSchedule | Triggered from Code       | PX.Objects.AR.ARRegister+Events       | ConfirmSchedule                                | Inherited |
| <a href="#">OnOpenDocument</a>    | OnOpenDocument    | Triggered from Code       | PX.Objects.AR.ARInvoice+Events        | OpenDocument                                   | Inherited |
| <a href="#">OnReleaseDocument</a> | OnReleaseDocument | Triggered from Code       | PX.Objects.AR.ARInvoice+Events        | ReleaseDocument                                | Inherited |
| <a href="#">OnUpdateStatus</a>    | OnUpdateStatus    | Triggered by Field Change | @PX.Objects.AR.ARInvoicePropertyChart | Credit Hold, Don't Email, Don't Print, Emailed | Inherited |
| <a href="#">OnVoidDocument</a>    | OnVoidDocument    | Triggered from Code       | PX.Objects.AR.ARInvoice+Events        | VoidDocument                                   | Inherited |
| <a href="#">OnVoidSchedule</a>    | OnVoidSchedule    | Triggered from Code       | PX.Objects.AR.ARRegister+Events       | VoidSchedule                                   | Inherited |

Figure: The Event Name/Field Name column on the Event Handlers page

# Developer Documentation

## New Topics

---

In MYOB Advanced 2023.1, a developer can find new and reworked information on the following subjects.

### DAC Overview

The DAC Reference guide, which contained reference information about data access classes (DACs) and overview topics about the DACs of particular functional areas of MYOB Advanced, is no longer available. The overview topics are now available in the new DAC Overview guide.

For detailed descriptions of DACs and DAC fields, look for the needed DAC in the DAC Schema Browser. (For details about the DAC Schema Browser, see [Data from Multiple DACs: DAC Schema Browser](#).)

### Creation of Custom SMS Providers

In MYOB Advanced, a user can register a short message service (SMS) account from which the system will send text notifications. The Twilio and Amazon SMS providers are available by default. A developer can also define and register a custom SMS provider, as described in [Adding a Custom SMS Provider](#).

### Webhooks in Commerce Connectors

Real-time import is now described in the commerce connector documentation. A developer can find more information in [Real-Time Synchronisation Through Webhooks and Push Notifications and To Implement Webhooks for a Commerce Connector](#).

### Cache Mapping

A developer can find information about how MYOB Advanced Framework maps data access class (DAC) types to graph caches and how to modify the default mapping in [Cache Mapping](#).

### New and Updated Examples in the Integration Development Guide

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

- `Bill`
  - [Approve a Bill](#)
- `DeductionBenefitCode`
  - [Create a Deduction Code](#)
- `EarningTypeCode`
  - [Create an Earning Type Code](#)
- `EmployeePayrollClass`
  - [Create an Employee Payroll Class](#)
- `EmployeePayrollSettings`
  - [Update the Employee Payroll Settings](#)
  - [Update Work Locations in the Employee Payroll Settings](#)
  - [Specify Employment Records in the Employee Payroll Settings](#)
- `InventoryIssue`
  - [Release an Inventory Issue](#)

- `InventoryQuantityAvailable`
  - Retrieve the Available Quantity of an Inventory Item
- `PayGroup`
  - Create a Pay Group
- `Payment`
  - Create an Accounts Receivable Payment for an Invoice and a Sales Order
  - Release an Accounts Receivable Payment
- `PaymentMethod`
  - Create a Payment Method
- `PayPeriod`
  - Create a Pay Period Schedule
- `PayrollBatch`
  - Create a Payroll Batch
- `PayrollUnionLocal`
  - Create a Union
- `PayrollWCCCode`
  - Create a Workers' Compensation Class Code
- `PTOBank`
  - Create a PTO Bank
- `SalesInvoice`
  - Release a Sales Invoice
- `SalesOrder`
  - Apply Discounts to a Sales Order
  - Create a Sales Order with Tax Parameters Overridden
  - Create a Sales Order with Allocations
  - Retrieve a List of Sales Orders in Batches
  - Update the Detail Lines of a Sales Order
- `StockItem`
  - Add a Note to a Stock Item
  - Retrieve the Attachments of a Stock Item
  - Retrieve the List of Modified Stock Items
- `WorkCalendar`
  - Create a Work Calendar
- `WorkLocation`
  - Create a Work Location

### New Use Cases Section in the Customisation Guide

A new section, Use Cases, has been introduced in the Customisation Guide. This section provides examples of the customisation of the application code of MYOB Advanced. Currently, the section provides the following topics:

- Calculating Field Values (with PXFormula)
- Adding a Field from Another DAC
- Displaying a Custom DAC in MYOB Advanced Search
- Generating an Excel from Code

# Integration Development

## New API for Webhooks

---

MYOB Advanced 2023.1 introduces the new webhook API, which supports .Net Core.

### Implementation of Webhooks with the New Interface

To configure the system to process data from an external application in MYOB Advanced with webhooks, a developer needs to perform the following general steps:

1. Create an implementation class that processes the requests from the external application. This class must implement the new `PX.Api.Webhooks.IWebhookHandler` interface, which has one method with the following signature.

```
Task HandleAsync(WebhookContext context, CancellationToken cancellation);
```

**Note:** The `PX.Api.Webhooks.IWebhookHandler` interface is available in the `PX.Api.Webhooks.Abstractions.dll` assembly.

2. Register the webhook that is processed by the implementation class on the Webhooks (SM304000) form of MYOB Advanced.
3. Copy the URL that is generated during the registration of the implementation class, and then specify this URL in the external application so that it sends requests to this URL.
4. Test the processing of the requests. For details about the changes in the responses and logging, see [Changes to Webhook Responses](#) and [Changes to Webhook History](#) below.
5. Optional: Include the webhook implementation in a customisation project.

For more information about the configuration of webhooks and an example of implementation, see [Configuring Webhooks](#) in the documentation.

### Changes to Webhook Responses

In MYOB Advanced 2023.1, if an error occurs during the processing of a webhook, the error is returned in JSON format, no matter which `Accept` header is submitted in the request.

### Changes to Webhook History

On the **Request History** tab of the Webhooks (SM304000) form, the developer can review the webhook processing history. In MYOB Advanced 2023.1, if the system can determine the encoding of the request body, the system tries to read the body as a string in this encoding and use the result for logging. (The system determines the encoding based on the `charset` parameter in the `Content-Type` header. If there's no `charset` parameter, the system tries to use the default encoding for the media type in `Content-Type`.)

### Support of the Legacy Webhook Interface

If webhooks were configured on a site with a previous version of MYOB Advanced and the site has been updated to MYOB Advanced 2023.1, the webhooks continue working.

**Note:** In MYOB Advanced 2023 R2, the legacy webhook API (which includes `PX.Data.Webhooks.IWebhookHandler`) will be removed.

# Platform API

## Fluent BQL in Formulas

---

In MYOB Advanced 2023.1, a developer can use new fluent business query language (BQL) operators in `PXFormula` attributes instead of `PX.Data.Parent<TField>` and `PX.Data.Selector<KeyField, ForeignOperand>`. The developer can also use fluent BQL to retrieve the value of a field from the setup record (that is, a record from a data access class that is used in a `PXSetup<Table>` data view). The following sections show examples of the use of the new fluent BQL operators for the retrieval of field values in `PXFormula`.

### Field from the Parent Record

In the query of the `PXFormula` attribute, the developer can use the `FromParent` operator to obtain the value of a field from the parent record.

For example, suppose that in a previous version, the developer wrote the following query in `PXFormula` with traditional BQL.

```
[PXFormula (typeof (Where<Parent<SOShipment.shipmentType>,
 Equal<SOShipmentType.transfer>>)))]
```

To use the `Parent` operator in fluent BQL, the developer could wrap the operator in the `Use<>.As [Type]` operator, as the following code shows.

```
[PXFormula (typeof (Use<Parent<SOShipment.shipmentType>>.AsString.
 IsEqual<SOShipmentType.transfer>)))]
```

In MYOB Advanced 2023.1, the developer can simplify the code in fluent BQL, as shown below.

```
[PXFormula(typeof(SOShipment.shipmentType.FromParent. IsEqual<SOShipmentType.transfer>)))]
```

### Field from the Record Referenced by the PXSelector Attribute

In the query of the `PXFormula` attribute, the developer can use the `FromSelectorOf` operator to obtain the value of a field from the record that is referenced by the `PXSelector` attribute.

For example, suppose that in a previous version, the developer used traditional BQL to write the following query in `PXFormula`.

```
[PXFormula (typeof (Where<Selector<shipmentNbr, SOShipment.shipmentType>,
 Equal<SOShipmentType.transfer>>)))]
```

In fluent BQL, the `Selector` operator could be used as follows.

```
[PXFormula (typeof (Use<Selector<shipmentNbr, SOShipment.shipmentType>>.AsString.
 IsEqual<SOShipmentType.transfer>)))]
```

Now the developer can rewrite this code with fluent BQL in a simplified way, as shown in the following code.

```
[PXFormula(typeof(SOShipment.shipmentType.FromSelectorOf<shipmentNbr>.IsEqual<SOShipmentType.transfer>))]
```

### Field from the Setup Record

In the query of the `PXFormula` attribute, the developer can use the `FromSetup` operator to obtain the value of the field from the setup record, as the following code shows.

```
[PXFormula(typeof(SOSetup.autoReleaseIN.FromSetup.IsEqual<True>))]
```

# Web Services

## Operation with Archived Records

---

MYOB Advanced 2023.1 introduces the ability to make records archived (see Platform: Archiving Old Documents). By default, these archived records are hidden. To work with archived records by using the contract-based REST API or OData Version 4, in a request, a developer must specify the `PX-ApiArchive` HTTP header with the *SHOW* value.

For example, the following OData 4 request retrieves both archived and non-archived shipments that were created after January 1, 2022.

```
GET /<MYOB Advanced instance name>/ODataV4/PX_Objects_SO_SOShipment?
 $filter=ShipDate gt 2022-01-01T00:00:00%2b03:00&$select=ShipmentNbr,ShipDate
 HTTP/1.1

Host: localhost
PX-ApiArchive: SHOW
```

If the `PX-ApiArchive` HTTP header is not specified, only non-archived shipments are retrieved.



## Retrieval of Values of Multilingual Fields in Available Languages

---

In MYOB Advanced 2023.1, a developer can use the OData Version 3 interface and the OData Version 4 interface to retrieve the values of multilingual fields in any of the languages configured in the system.

### Retrieval of Multilingual Fields

If an entity has multilingual fields, the developer can obtain the values of these fields in any available language. The developer can do this in either of the following ways:

- By using the `Accept-Language` HTTP header and specifying the desired locale as its value
- By using the `locale` URL parameter and specifying the desired locale as its value

If both the `Accept-Language` HTTP header and the `locale` URL parameter are used, the locale specified in the `locale` URL parameter is taken into account.

The following sample URL retrieves the `AACOMPUT01` inventory item with French values of multilingual fields by using the OData Version 4 interface:

`https://localhost/MYOBAdvanced/ODatav4/PX_Objects_IN_InventoryItem?locale=fr-FR&$filter=InventoryCD eq 'AACOMPUT01'`. The use of the following request has the same effect.

```
GET /MYOBAdvanced/ODatav4/PX_Objects_IN_InventoryItem?$filter=InventoryCD eq 'AACOMPUT01'
HTTP/1.1
Host: localhost
Accept-Language: fr-FR
```

The following sample URL retrieves the `AACOMPUT01` inventory item with French values of multilingual fields by using the OData Version 3 interface and the `IN-StockItem` generic inquiry (which was exposed via OData before the URL was used): `https://localhost/MYOBAdvanced/OData/IN-StockItem?locale=fr-FR&$filter=InventoryID eq 'AACOMPUT01'&$format=json`.

## Specification of Values of Multilingual Fields in Particular Languages

In MYOB Advanced 2023.1, a developer can use the contract-based REST API to specify the values of multilingual fields in any of the languages configured in the system. If only some of the configured languages are used in a request, the field values in other languages remain unchanged.

### Language in Which Values of Multilingual Fields Are Specified

In MYOB Advanced 2023.1, for multilingual fields, the `value` field contains the value in the default language. (In previous versions, the field held the value in the current language.) This is true whether or not the value was specified with the `Translations` field.

### Example of the Specification of Values of a Multilingual Field

Suppose that at least three languages (English, French, and Russian) are configured in the instance. The following example demonstrates how to specify the description of the stock item with the `8ecd4ca7-30d1-ec11-839d-085bd61190bc` ID in English, French, and Russian.

```
PUT ?$expand=Translations HTTP/1.1
Host: [<MYOB Advanced instance URL>]/entity/Default/22.200.001/StockItem
Accept: application/json
Content-Type: application/json

{
 "id": "8ecd4ca7-30d1-ec11-839d-085bd61190bc",
 ...
 "Description" : {
 "value": "new description in English",
 "Translations": {
 "fr": "nouvelle description en français",
 "ru": "новое описание на русском языке"
 }
 }
}
```

### Usage Notes

The developer specifies the values of multilingual fields by using the `Translations` field, or in the `value` field in the following format:

[{`language_code1`:`value1`}, {`language_code2`:`value2`}, ...]. The developer cannot use both approaches simultaneously.

The `value` field contains the value in the default language. If the developer specifies a value in the corresponding `Translations/<default_language>` field, this value must be the same as the one in the `value` field; otherwise, an error will be generated when the request is executed.